**Transcript**

August 1, 2025, 5:00PM

 **Deakins, Nancy (DES)** started transcription

 **Jansen, Janet (DES)** 0:04 Slide 1
It is 10:00.
Good morning, everyone.
Welcome as you enter here. We're gonna wait a couple minutes to make sure everybody gets in.

 **Ifie, Tony (DES)** 0:19 Slide 1
What?

 **Yarbrough, William (DES)** 0:36 Slide 1
It looks like there's at least one AI note taker that's active.

 **Jansen, Janet (DES)** 0:41 Slide 1
Please remove whoever has the AI note taker at this time.
We cannot allow that within the state at this time. Thank you.
Good morning.
We'll be starting in a minute.
Let everyone get in.
We are recording this session.
Let's slow down the number of people entering. So good morning.
Yes, a few more coming.
We will send out the links for recording.
We'll talk about that in a bit. Thank you.
Good morning.
We have 120 people here in the building right now. That's fabulous.
And a happy Friday and happy start of August to everyone.
I am Janet Jansen.
I'm a program manager for Enas part of DES. If you have any of the chat note taking in this time, please turn that off.
Right now we can.
We're not allowed to utilize that within state government at this time.
**Slide 2**

So. So we're gonna start some of the housekeeping items here please mute.
I am being unmuted or being muted as we try to mute everyone going in. Please mute yourself.
Please write any questions in the chat and we'll take questions at the end of the presentation.
So in the chat, if you could write your name, your company, and your e-mail, that would be much appreciated.
We are recording this and we will talk about when we can send that out.
We have your emails here so we can send it out to everyone that is here and.
You can share.
Share this with other people on your team and we have a mix of we have our state on call consultants which we went through, but we also have a number of on call consultants that we have done a separate selections for some of.
The you can go to the next slide please.

**Slide 3**
Great. So we're gonna start with who we are and we'll go through this working with FPS agreement documents proposal.
Project administration and questions at the end.

**Slide 4**
So beyond the state on call that we just put through, we also have ones that were selected through separate particular college or state agency on call.
So it's a mix of folks here right now.
Some of them are both lists.
Congratulations. So this is our chart of facility of professional services.
And we are a division of DES Department of Enterprise Services.
So the four main teams, we got a little over 100 people on our teams.
We have LCM.
That is the Legislative campus modernization.
They are working on New House and Pritchard and some O'Brien projects on the campus.
They are wonderful new structures, but all of those contracts are in place and those will. Those projects are scheduled, I believe, to be completed by the end of 2026 at this time.
Planning and project delivery takes care of the capital campus Enas.
We have 5 teams under the team that I lead.
That's the majority of the projects here and then energy we have that does ESCO contracts. They do not utilize statewide on call consultants at this time.
Next slide please, Ariel.

**Slide 5**
We are the public works authority for many state agencies. Not all the major universities have their own school districts.
Thousands of school districts.
They all have their own and other larger state agencies.
Department of Transportation. So we do quite a few, but not everybody in the state and the code that we're, the RCW we're under is 431945.
So all these other agencies that have their own separate public works authority have different rules.
So where do we talking about how we're handling public works contracts just for us and the clients that we are assigned by RCW at this time?

**Slide 6**
The different teams we have, so Oliver Woo leads with along with Majid, the PPD team on the Capitol campus.
Lots going on there.
There's nine project managers.
There's a few other buildings within Thurston County that DES owns, and there's lots of opportunities for minor works projects and small works projects at this time.
Next slide.

**Slide 7**
Enas, we have over 30 project managers and we do have the three main apms here, Ariel, Chris and Nancy are with us today and our largest client are thirty few thirty few 34 community and Technical College campuses across the state.
We are one of the states with the largest system.
It's pretty amazing and it does.
It's a huge piece of.
The the growth of economic growth.
Growth and business growth taking care of the citizens of Washington.

**Slide 8**
Also working that projects we work on is State Patrol.
Dva and a few of the other states, so separate from that, but just as important is Aaron's young team. Aaron Young's team with he's not here today. He has seven project managers with the Department of Corrections and 12 project managers with DSHS.
Next slide.

**Slide 9**
We do some work with the military.
We oversee the projects that the Washington State Military Department also utilize.
Next slide.

**Slide 10**
Our contracts team, Alyssa North is here.
She has 14 amazing staff and they are what really keeps us running here. A lot of the details of particulars, but you'll be working with the CSS that are part of Alisa's team and we're very appreciative. All work that they do with us.

**Slide 11**
And a map that's going to be very difficult for you to read, but this shows the locations of all those community colleges.
Yes, there's a lot in Western Washington.
But also very significant portions of work that happen in Eastern Washington and we know we do do a separate.
Selection for architects in the eastern, Central and Eastern Washington. It's hard to think of Yakima as eastern 'cause. It's not.
It's right in the middle here.
Next slide.

**Slide 12**
So you went through a selection process for the state on call and you met a lot of those people that were on those selection teams for that.
That's fabulous. And congratulations. You're here to add other information that can be shared with the other project managers that you did not meet at your interview.
You what you can do is create a one page PDF for about your project and this is a reference document that other yes.
PMS will talk and ask about which firms, but also this is an easy way for you to show what your firm does and the submitting that to Ryan Grimes and Ryan Grimes was the main person that you worked with in already getting on the selection of onto this.
For on for the state on call.
So that's very important for you to do.
Next slide.

**Slide 13**
Terrific. I'm going to turn this over to Ariel.
Thank you so much for being here today and whether you've been an on call consultant before or you're new to to this welcome. We're very glad you're here.
Thank you.

 **Birtley, Ariel (DES)** 9:36
**Slide 14**

Good morning, everyone.
So first we're going to go through a few slides working with FPS facility, professional services.
So we're going to start at the top with project workflow and go through really briefly an overview of how this works. So in an ideal world, we start out with the Des PM and the client agency meet and discuss all of their projects.
This typically begins at the beginning of the biennium, where they have received their their funding and go through the projects and confirm scope, schedule budget at that point, then the client agency would submit a PWR project work request to DES and then the PM will reach out to.
One of you the on call consultants and ask you to provide a proposal for the work.
So then after we receive the proposal for services.
We would then go into the agreement.
And sign the contract so that this is just a really brief overview of how this works.
The project workflow.

**Slide 15**
And next the next slide is to talk about on call delivery methods and project types.
So we have three primary delivery methods that many of you are probably familiar with.
The most common one is design bid build and that is probably the most extensive.
Where we have see the most documentation for drawing specifications and items like that. Then we also do at times have support for JOC contracts and small works contracts, but often.
The the documentation and background for that is not as extensive. Different project types that we are anticipating utilizing your services for are we, as you all know, we have a number of infrastructure projects.
And that can be sewer line storm water.
And.
Various site work.
We also have roofing renovations.
This should say HVAC.
Electrical upgrades, ADA elevators, building envelope support to major projects, and then at times we also have renovations.
So.

**Slide 16**
Next is roles, responsibilities and communications we have.
The hold on one second.
I'm sorry, I had some some background noise so.
We have rolls, responsibilities and communications, so we have the DES project manager and they are the prime point of contact with the consultant and client agency.
And they are the ones that provide all the direction to the consultant and the contractor.
And are pretty much running the project, so all communications need to go through the DES project manager. We have client agency representative.
They defined the project scope, the funding and the schedule, and then we have the consultant and they oversee the design and construction administration. They need to ensure that they design within the project budget and schedule.
And all communications again go through the DES PM and client.
And then the final note is no work is to start.
Until we have a signed agreement or amendment.

**Slide 17**
So next slide is AES responsibilities or architect engineer responsibilities and this is just a very general overview of the basic responsibilities we have that you at all times need to design within the Mac and also the schedule.
You're responsible for the cost estimate and the schedule at each design phase, so that's at schematic design, design, development and construction document phase.
You need to coordinate all permits with all authorities, all agencies having jurisdiction, so all permits, whether that be CPA or basically all requirements. We also work with DAH and we do work with the tribes.
That's more on the client, but it's just important that everybody be aware of the different agencies that are needing to be worked with.
Worked with on these projects.
In terms of design meetings, you would chair all design meetings with the stakeholders and we we request that we have design meetings once a week, even on the smaller projects and BI weekly at the absolute minimum. It just helps to have frequent meetings to keep communications going.
During construction, you would chair construction meetings and distribute minutes really for all for all meetings. It's.
Expected and anticipated that you would have minutes meeting minutes when you go to site site visits, we'll talk about it a little bit later, but we're also expecting to have field notes from from the site visits and then it goes review contractor change orders.
Obviously you're responsible for change orders, field authorizations, RFI's, and we'll go through that in a little more detail later on.
In the presentation and then contractors time.
Extension requests.
**Slide 18**

So now I'm going to turn it over to Sarah to discuss.
B2 Gino and Sarah Erdman is our interim B2G now and diversity expert.

 **Erdmann, Sarah (DES)** 16:00
**Slide 18**

Thank you, Ariel.
I don't know about expert, but absolutely here to help and my kids have some sort of karaoke going on upstairs. So I'm hopeful that you don't hear any background noise as I'm speaking this morning.
So good morning. As Ariel said, my name is Sarah Erdman and I am serving as the interim Public works business diversity manager. It is a mouthful for sure.
So just quick background, the purpose of the business diversity team.
Is to ensure that all businesses can compete fairly for DES public works opportunities.
So what do we do?
We design programs and strategies to facilitate that outcome, which at the end of the day really results in more competition.
It deepens DES pipeline of businesses that that help us complete projects like all of you and ultimately it helps support vibrant economy for all Washingtonians.
So part of the work that we do in the business diversity.
Team is we have implemented the B2G now system and so that includes tracking all of our subcontractor and sub consultant spending.
With and and so all of our sub consultant spending and that includes small and diverse businesses, but we do track it all and we use the public works diversity tracking and management system AKA UMM, we've branded that as as umm. We've branded that name as the B2.
G now system.
Some of you may already be familiar with B2G now, because many other public agencies use it like Sound Transit and wash dot.
But if you're not, we're going to talk just a little bit about it today.
So it is web-based making it super easy for you all. You should be able to use it from your mobile device if you need to use it from your computer your tablets.
But it's really designed to collect payment information.
And that helps us track.
Timely or prompt payment as well, which is a huge value of DES's.
The system, just as a reminder, is not optional.
Use you do.
You are obligated to use the B2G now system to report payments and it is a condition of your agreement with DES.
There's some specific tasks that you'll need to do on a monthly basis and some coordination with any sub consultants that you might bring on, and then you'll also work directly with your.
For Project manager as well as myself.
So B2G now, if you're not familiar with the system, you'll see the link on the. On this slide we have a fact sheet that can help, but there's also some live and recorded trainings.
B2G now offers and they have a great manual, so if you need any help navigating the system, my contact information is on this page as of September 1st, we hope to have a team member joining.
That will be the true expert of the B2G now system, and they will be designing some additional training for you all in an orientation.
So stay tuned for that.
And again, you have my contact information at the bottom here.
So if you're not familiar with B2G now, you just want some help in actually creating an account. Please reach out to me and I'm happy to walk you through it.
Thank you all so much for being here.
It's nice to meet you and and again looking forward to working with you.

 **Birtley, Ariel (DES)** 19:32
**Slide 19**

Thank you, Sarah. OK.
So next we're going to go through agreement documents.

**Slide 20**
So we already went through putting together your your proposal and and that the flow chart showing so once you have your proposal then you receive your agreement and we worked very closely with contracts.
They are the ones that sends out all of these agreements and make sure that everything is signed and in place.
And so this is the the DES agreement contract is.
That first kind of order in the pyramid of a part of the contracts, so it starts with this DES agreement and all of the information should be in, in there that you would follow throughout the project.
Typically we also attach to that your proposal.
So then your proposal for each project becomes.
A part of this agreement.
So that's why it's really important when you're putting your proposal together.
That you go through the scope in detail.
You discuss your deliverables in detail.
You have your, your budget and all of your fees outlined.
Your site visits everything and your schedule, so we're looking for basically in the proposal how you plan to manage the project and we also want to see any, any consultants that will be a part of the proposal.
So all of that wraps up and becomes a part of the overall contract.
The other.
The other item is the conditions of the agreement and that is part and parcel also of this of your DES agreement contract and those of you that have been on the on call previously should be very familiar with the conditions of the agreement.
A very important part of the conditions of the agreement is attachment A, and that is all of the project deliverables. And then fifth, we have instructions to architects and engineers. So this.
This document as well becomes a part of the contract and I'm going to going to go through them in more detail on the next slide.

**Slide 21**
So conditions of the agreement.
List all of the let's see 13 different, 13 different categories and goes through in a lot of detail. The requirements for managing these projects.
So it goes through your owner's responsibilities and then it the most important part is that it outlines basic services versus.
Additional services.
So we we get basic services from office for financial management.
They outline what basic services are, so it's very important to review this document so that you understand what is required under.
Under basic services and then so that you understand additional services.
So basic services are all of your. Your fees are based on the Mac for that project and then we have for projects under $1,000,000. We do negotiate fees.
So that is what the conditions of the agreement is.

**Slide 22**

And then let's see next, we have instructions for architects and engineers, and this this document goes into more detail about what is required for each stage and of the project.
So it goes through purpose and DES authority planning and design construction documents.
Construction administration and then project completion and close out.
So those are all the documents that tie into your contract and that you're basically held accountable for throughout the time period of each project.
**Slide 23**

And next, we're going to go through proposal requirements and Nancy will discuss that.

 **Deakins, Nancy (DES)** 23:45
Great. So if you can move to the next slide.

**Slide 24**
Yeah, first.
Yeah, I'm Nancy Deakins, assistant program manager for engineering and architectural services and the OR proposal requirements. We we start off with a pre proposal conference.
Where the client will get together the client, consultant and the Des PM.
To go over.
The scope, schedule and budget for everybody have that common understanding.
And to review.
The DES Public works process.
And some of the key.
Key documents that that Ariel.
Went through like the conditions and the instructions.
AES and review the agreement deliverables.
For basic and additional services, and we'll go into that a little bit more as well as expectations for the fee proposals.
So next slide.

**Slide 25**
Now, this one's this one's a little small, but it's it's it's just to be an example.
So this is as part of the pre proposal conference.
We want to make sure that that there's a review of attachment a so that the team is identifying and documenting which deliverables for each phase of the project.
So this is this example like for site work.
If if there are, if there's any demolition or site utilities, what kinds of things need to be identified in the schematic phase design, development and construction document phases? And so you should go through each one of those and identify what what's basic services.
What's additional services and then that's attached to?
The agreement.
Now we're hoping that that.
There's a lot more discussion about this document and that that it actually is attached to the agreements.
We haven't haven't been regularly doing that and but want to incorporate that. So it's it's clear.
Clear understanding and communication and expectations for the deliverables.
And a good good reference.
Thing for each phase as well to go back through so.
**Slide 26**

Alright. And then the proposal requirements.
You wanna make sure you have the project description and any work to be performed by the prime and any sub consultants as part of your scope the schedule.
You'll need to provide the entire schedule for the project, even if it's estimated at the time and.
Best guess and updating that throughout each phase the deliverables like I said, attachment A is very important to go through.
And then what?
The fees you want to break down all the costs.
For the project, the level of effort matrix showing who's doing what, and hourly rates for each phase.
And this that's important even for those projects that are that are fee based fee schedule based.
Just just to keep track of.
If there, if there's more time spent on on certain aspects, so and then you wanna include reimbursable expenses and travel.
As well as sub consultants, proposals should be attached to your proposal with the same level of effort back up to it.
Next slide.

**Slide 27**
So the fee requirements you want to identify basic and additional services. And as Ariel said Max that are under $1,000,000 in negotiated Max over $1,000,000 use cofm fee schedule for basic services. And so you want to itemize things out.
And so they're the hourly rates did.
Did increase with the new OFM fee guidelines effective July 1st.
And I probably could've had a slide on that, but we're extremely happy that that we're we're trying to catch up with the market on on having allowable rates.
I think principles are up to 350 and then others are are at 2:50 so.
It's it's a great, great time.
That it's increased so.
Gary only took ten years.
**Slide 28**

Sure. OK. But we're we're happy that OFM finally changed those, so we could, we could have ours as well.
So next, oh, you got this basic services. Thank you.
Yeah, for basic services you want to make sure review, review reviews are are big in our.
In our our theme here.
So design and review.
Permitting is is expected. The coordination with HJS cost estimating is part of basic services.
At each phase, even if you use and a consultant outside of your firm, it's considered part of basic services fees.
Let's see.
And then let's see.
And then the schedule again.
Providing design and construction schedule and including the owner review time so so.
So you don't the you don't get a sign off on.
A design phase like schematic design phase, you don't get approval of that until the owner has reviewed that so that you can't.
You can't have on your schedule that you've moved on to, that you're moving on to.
To design development phase before you have that review, so include the owner review time within each phase.
Within your schedule.
So that's that's really important.
And then bid document preparation.
I think there's there's more on that in a bit.
But we do have our own general conditions DESS general conditions, instructions to bidders, and we have template Division One documents that you that you're expected to use.
And then we have D as reviews, reviews and then bidding support.
You're expected to come to the attend the pre bid walkthrough and answer questions in the addenda as part of the basic services.
And then with construction administration.
Lead the the meetings and and provide minutes.
And do punch list fact checks.
And review of Asbuilt and then a warranty walkthrough.
All part of basic and then the next slide is additional services.
**Slide 29**

And so you want to define each of those.
In in your proposal.
And with the description and.
So there's a bit here.
How and why? How or why it might exceed basic services?
So if the if you have basic services fees and then that might be tied to.
The fee schedule.
You might.
You might be proposing enhanced construction administration.
If you're, if you don't think the basic service is covers that construction administration.
Effort appropriately and and explain that so that so that we all and the clients understand that when we're when we're reviewing your proposal again level of effort you wanna include that and.
Yeah. So specialty consultants, I'm not really sure.
Doesn't necessarily equate to additional service, and that's probably. I mean they're because there are some aspects that are part of the design and not.
Like like cost estimating.
Is not an additional service but, but there is a list.
In both our conditions of the agreement.
And in the OFMV guidelines, it talks about the different specialty consultants that are allowable as extra as additional services.
And good for a discussion, at least to to identify what's needed on the project and.
And what what you're proposing so?
In that sense.

And I'm going to hand it off to Chris Gizzy for project administration.

 **Gizzi, Chris (DES)** 33:45
**Slide 30**

All right.
Thanks Nancy.
Like Nancy and Ariel, I am another assistant program manager.
With Enas, we'll go on to the first slide here.

**Slide 31**
So design phases as design professionals, you're all familiar with the different schematic design and development, design, development, construction documents, phases. I will say that many of our projects will follow this typical arc of through the design process.
In some cases, we may find that it doesn't necessarily make sense to have each of these steps, and we may need.
Or may be appropriate based on the scope of work.
To combine those, that's a kind of conversation that you want to have while you are developing your proposal with your client and with the project manager to make sure that the the process is the right fit for the project.
But if you're doing a a design, for example for tenant improvements, especially for a client that has a concept in mind but they don't necessarily.
Have a really clear path to what that design needs to be.
You may need to go through all of these different steps.
I will say that no matter what the design process is, the importance is making sure that we meet the clients needs, we meet their scope, their schedule and their budget. Next slide please.

**Slide 32**
So throughout the design phase, most of these are again, you know, just general expectations that we anticipate most of you will adhere to being being professional, having regular design meetings and ensuring that you have all of the required deliverables relative to attachment a.
Again, if the design process can be reduced.
That's a discussion about what deliverables may or may not be necessary for that particular project.
Project.
We do expect to see cost estimates and schedule throughout the design process.
The overseeing value engineering and constructibility for minor works projects that would be going through on call, that's something that's really part of the process that you're delivering.
We're not going to necessarily be engaging with an outside constructibility and value engineering team.
Of course, there will be review comments.
Throughout the process that we'll want to make sure that get incorporated or at least addressed through that that process and we want to make sure that both DES and the client agency do provide approval before we move from one phase to the next. And then of course with.
All the these projects, it's absolutely critical that we get the local permitting process.
Completed and any other relevant permitting that.
Is, you know, specific to the project, like for example Department of Health going through the fire, Marshall L and I, permitting for example, next slide please.
**Slide 33**

So I just talked about permitting.
DHP could be.
That's the Department of Archaeology.
And forgetting the acronym, this is the thank you Nancy.

 **Jansen, Janet (DES)** 37:12
**Slide 33**

Historic preservation.

 **Gizzi, Chris (DES)** 37:14
**Slide 33**

So this would be relevant if you are disturbing any soil on a project or if you were working in a historic building, we would be working directly with the AHP on those projects.
Again, utility locates the.
It seems pretty obvious, but we wanna do that as much as possible. Often the historic documentation that we have of our clients facilities may be limited or inaccurate, so it's really critical to make sure that we follow through on this asbestos and hazardous material studies are are often.
Necessary. We have a lot of buildings that were built in that time period.
We wanna make sure that any project that we do that we have full documentation.
Disclose to the contractor what they'll be dealing with.
Sometimes there are things that we don't know about that will turn up through the project, but ideally we've identified any potential risks up front and conducted the testing before we even put the bid documents out.
We've already talked a little bit about preparing the bid documents and ensuring that the bid documents align with the schedule and budget for our clients.
As far as finalizing the documents.
It's important to work with all parties to make sure that all of the different pieces that need to be there are there, and we do ask that we allow at least 10 days for review before the project is expected to go out for advertisement. This is really import.
There's a number of different people within our organization that need to review these documents to ensure that all the pieces are there.
And.
Allow time for any adjustments.
That need to happen to the documents or updates.
There we typically will have a pre bid walkthrough. We actually have a standard agenda for that.
That's an opportunity to meet with the potential bidders to walk through the site to look at the different things that are going to be happening on site, discuss access, discuss any security requirements and it's an opportunity for the contractors to see the kinds of conditions that they're going.
To be working in and raise questions about scope that we will.
Address through addendum, which is the next bullet on here and with our bidding process, we want to make sure that we respond to any questions in an addendum.
So all of the contractors are getting the same information.
The questions may come through direct e-mail to the project manager to you as a design firm or through the bonfire or Euna application that the bidding is hosted on.
We want to make sure that we gather all of those questions and address.
Them properly through addendum and then once the bids come in, we'll expect that you will review the bids with us and the client agency to ensure that the the bids make sense and in some cases we may have additional responsibility criteria to look at.
Next slide please.

**Slide 34**
So bidding document requirements.
Some of these documents will require a fair amount of review and editing. For example, our Division One documents are.
I wouldn't say they're really boilerplate.
They do require quite a bit of customization for the particular project, so that's something that as you are starting to work with DES, you're going to want to download those, become familiar with them.
And understand the the level of customization that you'll need to do for each individual project. Many of these other documents listed here are more boilerplate documents that we need to make sure get included into the project manual in the right sequence where the contractors expect to see them.
Some of these other documents are.
More, more just fundamental documents.
That don't necessarily get put into the bid documents, but are important for us to ensure that we've got the correct information.
An example of that is the liquidated damages checklist, which is a form that we work with the client with you and DES project management to ensure that any liquidated damages are calculated and taken into account. All the potential impacts that they could have on the project.
Some of these other documents may or may not be included. I mentioned responsibility criteria.
**Slide 35**

The earlier slide, that's something that we sometimes include, but not always.
Construction administration.
Of course, we will have meetings throughout the construction administration period.
Typically that's going to be on an every other week basis, but depending on the nature of the project, it may change.
So for example, if we have a long lead item, there may be a period of time where we're only checking in periodically.
Until that long lead item is actually delivered to the site and then at that point we might ramp up to.
Weekly or biweekly meetings. Site visits follow a similar pattern.
Again, we want to make sure that the work is being complete and we want to make sure look at quality control throughout the process.
Invoicing is something that is of course, going to happen throughout the project.
They'll be invoicing both from you as a design firm and from the contractor.
And there's another side we'll we'll be touching on that momentarily.
Schedule is something we're going to want to touch on at every project meeting and definitely each month as we're going through the process of checking the invoice. If the schedule starts to drift, we need to make sure that we're on top of that. If change orders need to.
Be issued or to you know, work with the contractor to correct the schedule and bring it back into compliance with what we need it to be.
And of course I mentioned changes throughout the process.
We'll want to review the budget, make sure that we're staying on top of things and risk management.
It's obviously necessary to identify what potential risks are we may be facing as we go into the project and monitor those throughout the construction. Next slide, please.

**Slide 36**
So construction administration again, some of this is overlaps into previous slides about preparing documents, but we do when we have changes in the work, we have a change order proposal and a field authorization document that can come into play depending on the nature of the change typically we.
Like to do change order proposals because we get all the cost upfront.
In other cases where it's difficult to.
Quantify the scope.
We may use a field authorization.
Also, throughout the course of the project, there may be revisions to the drawings.
Something new comes up.
There may be a need for cost estimates and schedule review.
We of course expect that there is a log maintained of all the submittals and the status of those throughout the project.
Obviously, that's usually early in the project as we're getting the ramping up and getting all the submittals in.
This has maintained schedule values.
I would argue that really should be review of the schedule of values provided by the contractor, but maintain the progress schedule.
These are all really reviews that happen, so reviewing the schedules provided by the contractor reviewing the shop drawings, substitution request, etc.
Maintaining an RFI log, obviously very important to respond to the RF is in a timely manner and keep a log of that.
Sometimes RFI's will take on their own nature and become a change to the project, which of course leads to the next which maintain change order logs of all the FASCOPS and the changes that ultimately become true changes to the contract next.
Slide.

**Slide 37**
Close out expectations. So we typically try to schedule a close out meeting when we're about 75% complete.
I would argue that close out is an item that should be on every agenda because we want to keep reminding the contractor of the importance of preparing for that through the course of the project.
But when we get to the point where the contractor has completed the work and notifies us, then we will conduct.
A punch list.
Note any corrective items?
And then schedule a back check to review.
That coincides with substantial completion typically.
And we have a checklist that we go through to make sure that all of the documentation is in order and the work is completed as expected at that point. And then with the next slide, we'll go on to the final acceptance phase.
**Slide 38**

So final completion is when the work is fully completed.
And all of the punch list items have been corrected by the contractor and then final acceptance. Again, this is a follow up document that pretty much closes out the contractor's phase of the work.
That document is something that, again, that's a checklist that we go back through to make sure that all of the different loose ends on the project have been tied up and the project is really ready to be completed.
Next slide please.

**Slide 39**
So just a general overview of the close out phase.
Here it's important that we have all of the field authorizations closed out and and completed before we can close the project.
We typically are not going to have lead prod submittals for a minor works project or a project that's going through on call.
But if you are for example.
A.
A discipline that may be working on larger projects that may be something that you'll be involved in.
The contractor will be providing as built documents for review. There's if the project has commissioning, we want to make sure that any post commissioning issues are resolved.
And any other requirements for the contractor. Contract documents are complete.
Next slide please.

**Slide 40**
Warranty is something that often falls off of the radar, but we want to make sure that you know you're aware of it and working with the client and the project manager to ensure that we schedule a back check, walk through the site to ensure that all of the.
Work that was completed is functioning as expected about 11 months after substantial completion.
That's like I said, it's something that often falls off the radar, but we want to make sure that we're following through on on all of our projects.
Next slide please.

**Slide 41**
Invoices. This is everybody's favorite. Of course, as an A&E firm, you're going to have invoices of your own.
It's very important that those get submitted on the proper A19 form. Des is not able to process invoices that are submitted on your own documentation. All needs to come in with the A 19.
Please include the project number in the format that you see here.
Typically it's a 25 dot dot dot.
Or 25 with three digits afterwards.
Bring that to the attention of your project manager.
Do not send it directly to the client. The project manager needs to review and sign off on it before the client can pay for the invoice.
And we typically ask that these come in once a month.
If you delay submittal, sometimes that does happen.
If there's if. If you're doing work intermittently through a project.
But it's best to try and make that a monthly ritual.
Essentially, contractor invoices.
Our our consultant agreement requirements that.
You actually review the contractor invoices to ensure that the work is completed and as expected.
As the professionals, you are the best ones to review that to make sure that things are that the work is completed accurately and functional and we have a very set time period.
Period in which if there is any work that's not seen in the field or if work is incorrect, that you send that back within a seven day period and in a sense reset the clock on the contractor's invoice.
Ultimately, when all the work that's shown on the invoice is accurate, sign off on that and then it goes on to the project manager and ultimately to the client for payment.
And there may be specific instructions relative to the client in terms of like cut off dates and other relevant information that needs to go to the project manager or to the contractor, and that wraps up my slides.

 **Jansen, Janet (DES)** 51:02
**Slide 42**

Great. Thank you, Chris and Nancy and Ariel. I've been looking at the chat and the main questions right now.
Will this presentation be sent out and it will.
So what other questions do you have?
We do have about 10 minutes. We can stay a little longer as needed here, so if you raise your hand or put a question in the chat, we can answer your questions.
We were that comprehensive. Awesome.
So.
Any updates on the A&E conditions of agreement?

 **Gizzi, Chris (DES)** 51:53
We are in the process of reviewing the conditions of the agreement right now it will probably be a month or two before an update is going to be ready to be published.

 **Jansen, Janet (DES)** 52:14
You mentioned there's a rate increase effective July 1.
Does this apply to existing contracts? It does not.
Those were already signed.

 **Deakins, Nancy (DES)** 52:38
I'm just.

 **Jansen, Janet (DES)** 52:38
You mentioned.

 **Deakins, Nancy (DES)** 52:39
I'm just thinking there might be some exceptions if you're moving into.

 **Jansen, Janet (DES)** 52:40
There.

 **Deakins, Nancy (DES)** 52:44
Another large phase or something?
That, that we we may consider changing.

 **Jansen, Janet (DES)** 52:50
If there isn't a contract for, yeah.

 **Deakins, Nancy (DES)** 52:51
Updating.

 **Gizzi, Chris (DES)** 52:58
An example of that may be if we have a project that was only funded for design.
And the construction administration or the the funding for construction has been delayed?
That would be an example where we would be revisiting the construction administration fees.

 **Jansen, Janet (DES)** 53:20
Right. But existing active contracts already were signed under the previous one, so.
Any other questions?
We're really glad so many people showed up today. Thank you.

 **Erdmann, Sarah (DES)** 53:49
Ah.
Janet, may I ask a question?
I I'm just curious for for the folks that are here who've not, who has not been on this on call before. Do we have any new folks?
Quite a few, OK.

 **Deakins, Nancy (DES)** 54:11
There are a lot.

 **Jansen, Janet (DES)** 54:14
Does will.

 **Erdmann, Sarah (DES)** 54:14
There are a lot OK.

 **Deakins, Nancy (DES)** 54:17
Mm-hmm.

 **Jansen, Janet (DES)** 54:17
Aid great.
There's a question here.
Will ENA's receive B2G now training?
So Sarah, can you answer that?

 **Erdmann, Sarah (DES)** 54:26
Great question.
We do currently have on the slides.
There's that fact sheet that has some really great information there.
Outside of that, B2G now offers live training and recorded training.
And then they have a manual.
So and then once we get our new staff person on early September, we will be developing a training that we can share with you all. But in the meantime, use the resources.
That we have and I put my contact information in the chat as well.
Happy to to reach out and help with any questions you all may have. And if you don't even have an account, please reach out to me because we can just get started there.

 **Gizzi, Chris (DES)** 55:12
There was a question, yeah, there was a question in the chat about how often we have presentations like this.
Typically we do one at the beginning of each biennium as we bring on the new on calls. So every two years is when how often that happens.

 **Jansen, Janet (DES)** 55:28
So we'll save a copy of this recording.
Please work with your PM.
They should be able to provide.

 **Gizzi, Chris (DES)** 55:34
I'm seeing a couple hands up.

 **Jansen, Janet (DES)** 55:37
OK.
First one is Robin.
Can you?
You're welcome to unmute, Robin.

 **Kotulka, Robin (guest)** 55:47
Oh yeah, sorry I I just had my hand up.
I don't have a question.
I had my hand up for being new to the on call, so I apologize.

 **Birtley, Ariel (DES)** 55:54
Yeah.

 **Jansen, Janet (DES)** 55:54
Great. Thank you.

 **Gizzi, Chris (DES)** 55:55
Thank you.

 **Jansen, Janet (DES)** 55:57
Vincent, you have a question?
You took your hand down, Brad.

 **Vincent Ly (guest)** 56:00
Yeah, that was the same.

 **Jansen, Janet (DES)** 56:01
OK, Brad, from Integris you any question?

 **Birtley, Ariel (DES)** 56:02
OK.

 **Jansen, Janet (DES)** 56:11
We're going to assume it was the same as previous.
Jack. Nope. He took his hand down.
Brad.
Do you have a question for us?

 **Sam Schafer (guest)** 56:28
Thank you.

 **Jansen, Janet (DES)** 56:29
Is a question written.
I would be curious if there are plans to make changes to the B2G now platform.
Sarah, do you know anything about that?

 **Erdmann, Sarah (DES)** 56:40
Diane, can you share a little bit more?
Do you mean like process improvements? Are there some sticking points that might make the system easier for y'all to use?
Happy to hear, but no, OK.

 **Diane Vandewall (guest)** 56:51
I think both.
I think both the process and streamlining it for ease of use, it's a little clunky in certain areas, so it would, you know, I'm just wondering.

 **Erdmann, Sarah (DES)** 57:00
OK.
I'm always looking for ideas of ways that we can make it easier.
So Diane, I did put my contact information in.
Please reach out to me. I'd love to chat with some ideas or or just to share where where you find it to be clunky so we can pass those on to BTG now. That's great.

 **Diane Vandewall (guest)** 57:18
OK.

 **Gizzi, Chris (DES)** 57:36
Session.

 **Jansen, Janet (DES)** 57:37
Ken.

 **Saldanha, Sachin (MIL)** 57:39
Good morning, everyone.
Thanks again for this presentation.
It was helpful to touch up on some of the old stuff and see some changes. The on call roster. When would that be available online for us to use? For us, that have delegated authority on based on the threshold?

 **Wendleken, Gary (DES)** 58:00
OK.

 **Deakins, Nancy (DES)** 58:02
It should be available now.

 **Saldanha, Sachin (MIL)** 58:06
Maybe I have the whole link so I'll recheck it here in a bit. Thanks.

 **Deakins, Nancy (DES)** 58:06
And and.
Yeah. If if you don't see it, send me a send me a note and we can send it to you.

 **Jansen, Janet (DES)** 58:10
OK.

 **Saldanha, Sachin (MIL)** 58:16
Will do.

 **Deakins, Nancy (DES)** 58:17
But it should be online too.

 **Saldanha, Sachin (MIL)** 58:17
I may just need to.
Yeah, I may just need to update my link from where I where I had it last time. Thanks.

 **Gizzi, Chris (DES)** 58:37
All right, we're at the end of the hour here.

 **Jansen, Janet (DES)** 58:41
Thank you very much for everyone that attended today. We'll send this presentation out.

 **Deakins, Nancy (DES)** 58:42
Yeah.

 **Jansen, Janet (DES)** 58:46
Thank you and have a wonderful weekend.

 **Saldanha, Sachin (MIL)** 58:50
Thank you.

 **Lindsay Simmons (guest)** 58:50
Thank you.

 **RUhrich (guest)** 58:50
Thank you.

 **Birtley, Ariel (DES)** 58:50
Thank you everyone.

 **Jansen, Janet (DES)** 58:51
Thank you.

 **Albrecht, Courtney (DES)** 58:52
Thank you, job.

 **Deakins, Nancy (DES)** 58:52
Thank you everyone. Thank you.

 **Kotulka, Robin (guest)** 58:52
Thank you.

 **Jim Wasson (guest)** 58:52
Thank you.
You too.

 **Fiess, Justin E. (DOC)** 58:54
Thank you.

 **Yarbrough, William (DES)** 58:54
Thank you everyone.

 **Deakins, Nancy (DES)** stopped transcription