

**ST. PETERSBURG CITY COUNCIL**

**Meeting of January 17, 2019**

**Consent Agenda**

**TO:** The Honorable Charles Gerdes, Chair, and Members of City Council

**SUBJECT:** A resolution approving the Control Estimate in an amount not to exceed of \$5,547,803.43 submitted by Air Mechanical & Service Corp (AMSCO) for construction phase services for the City Hall HVAC Upgrades Project; authorizing the Mayor or his designee to execute the First Amendment to the Construction Manager Contract between the City of St. Petersburg, Florida and AMSCO dated August 25, 2017, to incorporate the above referenced Control Estimate into such contract and modify other necessary provisions; authorizing the City Attorney's office to make non-substantive changes to the First Amendment; approving a transfer in the amount of \$1,446,000 from the General Fund (0001) to the General Capital Improvement Fund (3001), approving a supplemental appropriation in the amount of \$1,446,000 from the increase in the unappropriated balance of the General Capital Improvement Fund (3001) resulting from the above transfer to the MOB Repairs and Improvements Project (Engineering No. 16229-119; Oracle No. 14607); and providing an effective date.

**EXPLANATION:** On August 3, 2017 City Council approved a Construction Manager Contract ("CM Contract") with Air Mechanical & Service Corp (AMSCO) for preconstruction and construction services for the City Hall HVAC Upgrades project.

The scope of work includes the full replacement of the existing fan coil systems in City Hall with a new central station, variable air volume, air handler units. Also included in the scope is the removal of asbestos, the replacement of the existing roofing and the addition of a solar panel system with structural supports.

Additional scope includes replacing the carpet in offices with carpet tiles, the painting of the corridor walls, replacing light fixtures with LED fixtures, replacing the Council Chamber wall paper, refurbishing seat cushions and frames, installing low-E tint to all existing windows and installing a partition in Conference Room 200.

Control Estimates are construction cost estimates and each estimate package includes a CM allowance. AMSCO shall prepare bid packages and solicit quotes for various scopes of work included in each control estimate package. Once bids are received, any unused savings from final bid pricing will be allocated to the balance in the CM's Contingency for the City's authorization prior to release. Any savings in the CM Contingency reverts to the City.

**RECOMMENDATION:** Administration recommends City Council approve the attached resolution approving a Control Estimate in an amount not to exceed of \$5,547,803.43 submitted by Air Mechanical & Service Corp (AMSCO) for construction phase services for the City Hall HVAC Upgrades Project; authorizing the Mayor or his designee to execute the First Amendment to the Construction Manager Contract between the City of St. Petersburg, Florida and AMSCO dated August 25, 2017, to incorporate the above referenced Control Estimate into such contract and modify other necessary provisions; authorizing the City Attorney's office to make non-substantive changes to the First Amendment; approving a transfer in the amount of \$1,446,000 from the General Fund (0001) to the General Capital Improvement Fund (3001), approving a supplemental appropriation in the amount of \$1,446,000 from the increase in the unappropriated balance of the General Capital Improvement Fund (3001) resulting from the above transfer to the MOB Repairs and Improvements Project (Engineering No. 16229-119; Oracle No. 14607); and providing an effective date.

**COST/FUNDING/ASSESSMENT INFORMATION:** The FY19 Adopted budget included a transfer of \$10,325,662 from the General Fund into the Downtown Redevelopment District Trust Fund (1105). Subsequent to the budget adoption, the city entered into the First Amendment to the Amended and Restated Interlocal Agreement with Pinellas County with respect to the Intown TIF. One portion of this amended and restated agreement provided that the percentage contribution of annual incremental revenue from both the city and the county to the Intown TIF trust fund be reduced from 95% to 75%. The reduction from 95% to 75% resulted in a decrease in the amount of General Fund transfer or savings of \$2,173,824 (see table below). This resolution provides for a transfer in the amount of \$1,446,000 from the unappropriated balance in the General Fund (0001), resulting from reduced contribution level, to the General Capital Improvement Fund (3001), and approval of a supplemental appropriation in the amount of \$1,446,000 from the increase in the unappropriated balance of the General Capital Improvement Fund (3001) resulting from the above transfer to the MOB Repairs and Improvements Project (Engineering No. 16229-119; Oracle No. 14607). The remaining balance of approximately \$727,824 will remain the General Fund for future appropriation.

Fiscal Year 2019						
General Fund Contribution to Fund 1105						
Downtown Redevelopment District (Intown CRA)						
	Amount in FY19 Adopted Budget	First Amendment to The Amended and Restated Interlocal Agreement w/ Pinellas County	Difference	Amount Used for City Hall project	Balance	
General Fund Transfer	\$10,325,662	\$8,151,838	\$2,173,824	\$1,446,000	\$727,824	

**ATTACHMENTS:** Resolution  
Control Estimate

**APPROVALS:**



Administrative



Budget

**RESOLUTION NO. 2019-\_\_**

**A RESOLUTION APPROVING THE CONTROL ESTIMATE IN AN AMOUNT NOT TO EXCEED OF \$5,547,803.43 SUBMITTED BY AIR MECHANICAL & SERVICE CORP (AMSCO) FOR CONSTRUCTION PHASE SERVICES FOR THE CITY HALL HVAC UPGRADES PROJECT; AUTHORIZING THE MAYOR OR HIS DESIGNEE TO EXECUTE THE FIRST AMENDMENT TO THE CONSTRUCTION MANAGER CONTRACT BETWEEN THE CITY OF ST. PETERSBURG, FLORIDA AND AMSCO DATED AUGUST 25, 2017, TO INCORPORATE THE ABOVE REFERENCED CONTROL ESTIMATE INTO SUCH CONTRACT AND MODIFY OTHER NECESSARY PROVISIONS; AUTHORIZING THE CITY ATTORNEY'S OFFICE TO MAKE NON-SUBSTANTIVE CHANGES TO THE FIRST AMENDMENT; APPROVING A TRANSFER IN THE AMOUNT OF \$1,446,000 FROM THE GENERAL FUND (0001) TO THE GENERAL CAPITAL IMPROVEMENT FUND (3001); APPROVING A SUPPLEMENTAL APPROPRIATION IN THE AMOUNT OF \$1,446,000 FROM THE INCREASE IN THE UNAPPROPRIATED BALANCE OF THE GENERAL CAPITAL IMPROVEMENT FUND (3001) RESULTING FROM THE ABOVE TRANSFER TO THE MOB REPAIRS AND IMPROVEMENTS PROJECT (ENGINEERING NO. 16229-119; ORACLE NO. 14607); AND PROVIDING AN EFFECTIVE DATE.**

**WHEREAS**, the City of St. Petersburg, Florida ("City") and Air Mechanical & Service Corp. ("AMSCO") executed a Construction Manager Contract on August 25, 2017, for AMSCO to provide preconstruction and construction phase services for the City Hall HVAC Upgrades Project ("Project"); and

**WHEREAS**, following execution of the contract, the City authorized AMSCO to provide preconstruction phase services in an amount not to exceed \$33,911; and

**WHEREAS**, in accordance with the requirements set forth in the contract, AMSCO has submitted the Control Estimate in an amount not to exceed \$5,547,803.43 for construction phase services for the Project; and

**WHEREAS**, funding for the construction phase services will be available after (i) a transfer in the amount of \$1,446,000 from the General Fund (0001) to the General Capital Improvement Fund (3001) and (ii) a supplemental appropriation in the amount of \$1,446,000 from the increase in the unappropriated balance of the General Capital Improvement Fund (3001) resulting from the above transfer to the MOB Repairs and Improvements Project.

**NOW, THEREFORE, BE IT RESOLVED** by the City Council of the City of St. Petersburg, Florida that the Control Estimate in an amount not to exceed of \$5,547,803.43 submitted by Air Mechanical & Service Corp (AMSCO) for construction phase services for the City Hall HVAC Upgrades Project is hereby approved.

**BE IT FURTHER RESOLVED** that the Mayor or his designee is authorized to execute the First Amendment to the Construction Manager Contract between the City of St. Petersburg, Florida and AMSCO dated August 25, 2017, to incorporate the above referenced Control Estimate into such contract and modify other necessary provisions.

**BE IT FURTHER RESOLVED** that the City Attorney's Office is authorized to make non-substantive changes to the First Amendment.

**BE IT FURTHER RESOLVED** that there is hereby approved the following transfer for FY19:

<u>General Fund (0001)</u>	
General Capital Improvement Fund (3001)	\$1,446,000

**BE IT FURTHER RESOLVED** that there is hereby approved from the increase in the unappropriated balance of the General Capital Improvement Fund (3001) resulting from the above transfer, the following supplemental appropriation for FY19:

<u>General Capital Improvement Fund (3001)</u>	
MOB Repairs and Improvement Project (14607)	\$1,446,000

This resolution shall become effective immediately upon its adoption.

APPROVALS:

  
\_\_\_\_\_  
City Attorney (designee) 00421638

  
\_\_\_\_\_  
Administration

  
\_\_\_\_\_  
Budget

Exhibit A - Control Estimate



**PROJECT MANAGEMENT PLAN  
UPGRADE - HVAC EQUIPMENT AND ROOFING REPLACEMENT  
FOR ST. PETE CITY HALL**

**AIR MECHANICAL & SERVICE CORP  
4311 WEST IDA STREET  
TAMPA, FL 33614**

**DECEMBER 30, 2018**





## VERSION HISTORY

### *Procedure for Revisions*

*The parties requesting the revision will issue a written request to the CM stating the proposed change(s) and the reason(s) for the changes. City of St. Pete, A/E and the CM will review each request. If the proposed revision(s) is approved, the CM will issue the change(s) to all recipients of the manual. A published revision will include:*

- A cover memo describing how and where to place the revision in the manual (revision instructions);*
- A new cover page with revised date;*
- A revised Table of Contents, if required;*
- The revised pages of text with revision number and revision date placed at the bottom of the page; and*
- A side-bar in the right hand margin of the page for changes to the text.*

Version #	Implemented By	Revision Date	Approved By	Approval Date	Reason
1.0	<i>Aaron Donton</i>	<i>November 30, 2017</i>	<i>&lt;name&gt;</i>	<i>&lt;mm/dd/yy&gt;</i>	<i>&lt;reason&gt;</i>
2.0	Aaron Donton	January 29, 2018			Incorporation of Approved Design Schedule, Roofing Scope, Costs & Updates
3.0	Aaron Donton	February 23, 2018			Incorporation of 75% Roofing Docs, 30% HVAC Replacement Docs, Cost Risks, Estimate & Updates
4.0	Aaron Donton	September 18, 2018			Incorporation of 75% Roofing Docs, 75% HVAC Replacement Docs, Cost Risks, Estimate, Updates & Project Sponsor Change
5.0	Aaron Donton	December 21, 2018			Incorporation of 100% Roofing Docs, 100% HVAC Replacement Docs, Cost Risks, Estimate, Updates & Project Sponsor Change
6.0	Aaron Donton	December 30, 2018			Updates in accordance with Project Sponsor comments to Schedule and Control Estimate

**AMSCO Version: 12/21/18**



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## INTRODUCTION

Exhibit A of the AIA Document A134 - 2009 requires that the CM for this project prepare and implement a Project Management Plan (herein known as the PMP or the “Project Management Plan”). The CM (Construction Manager), A/E firms and The City of St. Petersburg have prepared this PMP that provides a framework for the management of the HVAC Equipment Replacement for City Hall project. This PMP defines the details of project management during the preliminary engineering phase of project development, and also provides the framework for managing the subsequent final design, construction, procurement, testing and startup, and revenue service phases. This document outlines the management philosophy, goals and objectives, and organizational structure; defines the responsibilities and roles of project participants; identifies the interactions among project staff and consultants; and specifies the general procedures and management tools that will be implemented to ensure effective project management and successful project completion.

In addition to serving as a clarifying guide for all project participants, **this document will serve as** a basis for measuring and assessing the project’s performance and consistency with the Plan. As the project advances into preliminary engineering, CM, A/E firms with the support of City of St. Pete, will provide the necessary resources and expertise to allow for proper and effective management of this project. As design and construction work advances and additional procedures are developed, the plan will be updated as needed and appropriate. The development of the PMP will be an evolving process: the PMP will be updated and revised as needed. Per City of St. Pete guidance and A/E Firms, revisions to the PMP will include periodic updates to the plan, especially related to estimates, schedules, recommendations regarding constructability, construction logic, maintenance, phasing and comparisons to achieve budget compliance. At a minimum, the PMP will be updated prior to advancing into the Final Design and Construction phases. The CM will be responsible for the maintenance of and subsequent revisions to the PMP as part of the preliminary engineering phase, with the support of the A/E firms and City of St. Pete.

## PROJECT MANAGEMENT APPROACH

The Area Manager, Gus Garza and the Project Manager, Aaron Donton, has the overall authority and responsibility for managing and executing this project according to this Project Plan and its Subsidiary Management Plans. The project superintendent has the overall authority on site during construction for managing man power, sub-contractors, schedule adherence, project scope, quality verification, safety and overall construction. The project team will consist of personnel from the Construction Management (CM) group, A/E group, Sponsor (Owners) group, and Sub-contractor group’s. The project manager will work with all resources to perform project planning. All project and subsidiary management plans will be reviewed and approved by the project sponsor. All funding decisions will also be made by the project sponsor. Any delegation of approval authority to the project manager should be done in writing and be signed by both the project sponsor and project manager.



The project team will be a matrix in that team members from each organization continue to report to their organizational management throughout the duration of the project. The project manager is responsible for communicating with organizational managers on the progress and performance of each project resource.

## PROJECT SCOPE

The scope of AMSCO's City Hall HVAC Equipment Replacement project includes the planning, design, development, testing, and transition of the City Hall HVAC Equipment Replacement. This replacement scope is in accordance with the City of St. Pete's selection of **OPTION 2B:** in the Engineering Matrix Basis of Design Report. Replacement of existing fan coil systems with new central station, variable air volume, air handler units. New VAV box terminal units would be installed at existing fan coil unit location. Provide new chilled water piping for cooling and new hot water piping for heating. Hot water heating would be provided for 100% outside air handler units and electric heating would be provided for new VAV box terminal units. Also included in this scope is replacement of the existing roofing and the addition of a solar panel system with structural supports. In addition the owner has requested that the following scope items are included; carpet in office replaced with carpet tiles, Corridor walls are painted, floors are stripped and waxed, existing 2x4, 1x4 and 2x2 light fixtures are replaced with LED fixtures, Council Chamber Wall paper is replaced, Council Chamber seat cushions and frames are refurbished, existing windows have low E tint installed, and a new wall constructed in Room 242 to separate the Conference Room from the Kitchen. The scope of this project also includes completion of all documentation, manuals, and training required for the owner to properly maintain and operate the facility. Project completion will occur when the project is 100% operational on the new HVAC system and controls as described above.

Included with scope above is the scope of AMSCO's City Hall Roofing Replacement project includes the planning, design, development, testing, and transition of the City Hall Roofing Replacement. This replacement scope is in accordance with the City of St. Pete's design team Renker Eich Park Architects, Master Consulting Engineers, and Engineering Matrix design documents. Roofing replacement consist of thermoplastic polyolefin (TPO) roofing system - Remove and Dispose of existing Built-up roof system down to existing wood roof deck, replace with new Thermoplastic Polyolefin (TPO) Roofing System on the North and south Wings of City Hall. (Approx. 8,500 sq.ft. total), clay tile roof system - Remove and Dispose of existing clay tile roof systems, replace with new Clay Tile roof system on the Main Central Roof and the North and south Wings of City Hall (Mansard Locations). (Approx. 12,500 sq-ft total), Replace existing copper flashing with new copper flashing, New roof drains, secondary drain lines, and misc., roof-mounted solar PV array - North Wing location with structure enhancement.

All City Hall Roofing and HVAC Equipment Replacement project management work will be performed internally and no portion of this will be outsourced. The trades required for this project will be advertised for subcontractors to bid and then performed by the lowest qualified subcontractor. The subcontractor's bids and qualifications will be opened in the presence of the owner and reviewed and approved by the CM and owner.



## MILESTONE LIST

The below chart lists the major milestones for the City Hall HVAC Equipment Replacement Project. This chart is comprised only of major project milestones such as completion of a project phase or gate review. There may be smaller milestones which are not included on this chart but are included in the project schedule and WBS. If there are any scheduling delays which may impact a milestone or delivery date, the project manager must be notified immediately so proactive measures may be taken to mitigate slips in dates. Any approved changes to these milestones or dates will be communicated to the project team by the project manager.

Indicated schedule is based on 100% Unoccupied building approach.

Milestone	Description	Date
Provide Project Management Plan	Submit PMP to the city for review and approval.	11/30/2017
CM Initial Report	Initial evaluation report of proposed design option 2B	1/29/2018
NTP	Notice to Proceed	1/1/2018
Kick Off Meeting	A/E to Schedule & Facilitate	02/05/2018
Complete Requirements Gathering	All requirements for City Hall HVAC Equipment Replacement must be determined to base design upon	01/30/2018
Complete 30% Design & Review Roofing	30% Complete Design Documents, Review, Budget Estimate, and Value Analysis Report (VAR)	01/22/2018 02/05/2018
Complete 30% Design & Review HVAC	30% Complete Design Documents, Review, Budget Estimate, and Value Analysis Report (VAR)	02/12/2018 02/26/2018
Complete 75% Design Documents Roofing	75% Complete Design Documents, Review, Budget Estimate, and Value Analysis Report (VAR)	02/12/2018 02/26/2018
Complete 75% Design Documents HVAC	75% Complete Design Documents, Review, Budget Estimate, and Value Analysis Report (VAR)	03/26/2018 04/09/2018
Complete 100% Design Documents Roofing	100% Complete Design Documents, Review, Final Estimate, and Value Analysis Report (VAR)	09/24/2018 11/15/2018
Complete 100% Design Documents HVAC	100% Complete Design Documents, Review, Final Estimate, and Value Analysis Report (VAR)	09/24/2018 11/15/2018
Permit Roofing	Submit 100% Design Documents for permitting	10/15/2018
Permit HVAC	Submit 100% Design Documents for permitting	10/15/2018
Control Estimate	Provide Control Estimate for Project	12/19/2018
Advertise and Bid Project	Bid project for Roofing subcontractors	01/07/2019
Advertise and Bid Project	Bid project for HVAC / Electrical subcontractors	01/07/2019
Review bids Roofing	Review bids and select Sub-contractors	02/20/2019
Review bids HVAC / Electrical	Review bids and select Sub-contractors	02/20/2019



Preconstruction & Mobilization Roofing	Preconstruction services, site preparation and construction start	05/06/2019
Preconstruction & Mobilization HVAC	Preconstruction services, site preparation and construction start	05/06/2019
Construction Phase Completion Roofing	Complete Construction Based on Owner turning over entire building	12/03/2019
Construction Phase Completion HVAC	Complete Construction Based on Owner turning over entire building	12/03/2019
Owner Move In	Owner to move furniture and staff back in. Punch list on going at this time as well.	12/09/2019
Project Closeout	Complete Punch List, as-builts and close project	02/02/2020
Project Closeout	Complete Punch List, as-builts and close project	02/02/2020

## SCHEDULE BASELINE AND WORK BREAKDOWN STRUCTURE

The WBS for the City Hall HVAC Equipment Replacement Project is comprised of work packages which do not exceed 60 hours of work but are at least 4 hours of work. Work packages were developed through close collaboration among project team members and stakeholders with input from functional managers and research from past projects.

The WBS Dictionary defines all work packages for the City Hall HVAC Equipment Replacement Project. These definitions include all tasks, resources, and deliverables. Every work package in the WBS is defined in the WBS Dictionary and will aid in resource planning, task completion, and ensuring deliverables meet project requirements.

The City Hall HVAC Equipment Replacement Project schedule was derived from the WBS and Project Charter with input from all project team members. The schedule was completed, reviewed by the Project Sponsor, and approved and base-lined. The schedule will be maintained as a MS Project Gantt Chart by the City Hall HVAC Equipment Replacement Project Manager. Any proposed changes to the schedule will follow AMSCO's change control process. If established boundary controls may be exceeded, a change request will be submitted to the Project Manager. The Project Manager and team will determine the impact of the change on the schedule, cost, resources, scope, and risks. If it is determined that the impacts will exceed the boundary conditions, then the change will be forwarded to the Project Sponsor for review and approval. The City Hall HVAC Equipment Replacement boundary conditions are:

- CPI less than 0.8 or greater than 1.2
- SPI less than 0.8 or greater than 1.2

If the change is approved by the Project Sponsor, then it will be implemented by the Project Manager who will update the schedule and all documentation and communicate the change to all stakeholders in accordance with the Change Control Process.

The Project Schedule Baseline and Work Breakdown Structure are provided in Appendix A, Project Schedule and Appendix B, Work Breakdown Structure.

## **CHANGE MANAGEMENT PLAN (TRACKING CHANGE REPORT, TCR)**

The following steps comprise AMSCO's organization change control process for all projects and will be utilized on the City Hall HVAC Equipment Replacement project:

Step #1: Identify the need for a change (Any Team Member or Stakeholder)

Requestor will submit a completed AMSCO change request form to the project manager

Step #2: Log change in the change request register (Project Manager)

The project manager will maintain a log of all change requests for the duration of the project

Step #3: Conduct an evaluation of the change (Project Manager, Project Team, Requestor)

The project manager will conduct an evaluation of the impact of the change to cost, risk, schedule, and scope

Step #4: Submit change request to (A/E & Owner)

The project manager will submit the change request and analysis to the A/E & Owner for review

Step #5: A/E & Owner decision

The A/E & Owner will discuss the proposed change and decide whether or not it will be approved based on all submitted information

Step #6: Implement change (Project Manager)

If a change is approved by the A/E & Owner, the project manager will update and re-baseline project documentation as necessary as well as ensure any changes are communicated to the team and stakeholders

Any team member or stakeholder may submit a change request for the City Hall HVAC Equipment Replacement Project. The City Hall HVAC Equipment Replacement Project Sponsor will chair any changes to project scope, cost, or schedule must meet his or her approval. All change requests will be logged in the Tracking Change Report Document by the Project Manager and tracked through to completion whether approved or not.

## **COMMUNICATIONS MANAGEMENT PLAN**

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication requirements change. This plan identifies and defines the roles of City Hall HVAC Equipment Replacement project team members as they pertain to communications. It also includes a communications matrix which maps the communication requirements of this project, and communication conduct for meetings and other forms of communication. A project team directory is also included to provide contact information for all stakeholders directly involved in the project.

The Project Manager will take the lead role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix below. The

Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it, and to whom to communicate.

Communication Type	Description	Frequency	Format	Participants/ Distribution	Deliverable	Owner
Weekly Status Report	Email summary of project status	Weekly	Email	Project Sponsor, Team and Stakeholders	Status Report	Project Manager
Weekly Project Team Meeting	Meeting to review action register and status	Weekly	In Person / Email	Project Team	Updated Action Register	Project Manager
Project Monthly Review (PMR)	Present metrics and status to team and sponsor	Monthly	In Person / Email	Project Sponsor, Team, and Stakeholders	Status and Metric Presentation	Project Manager
Project Gate Reviews	Present closeout of project phases and kickoff next phase	As Needed	In Person / Email	Project Sponsor, Team and Stakeholders	Phase completion report and phase kickoff	Project Manager
Technical Design Review	Review of any technical designs or work associated with the project	As Needed	In Person / Email	Project Sponsor, Team and Stakeholders	Technical Design Package	Project Manager

Project team directory for all communications is:

Name	Title	E mail	Office Phone	Cell Phone
Jay Lund, AIA	Project Sponsor	<a href="mailto:jay.lund@stpete.org">jay.lund@stpete.org</a>	727-892-5342	
Neil Connelly	General Manager	<a href="mailto:neil@amsco-ac.com">neil@amsco-ac.com</a>	813-875-0782	813-363-2482
Gus Garza	Area Manager	<a href="mailto:gus@amsco-ac.com">gus@amsco-ac.com</a>	813-875-0782	813-363-2330
Aaron Donton	Project Manager	<a href="mailto:aaron@amsco-ac.com">aaron@amsco-ac.com</a>	813-875-0782	813-323-2301
Ron Courchene	Superintendent	<a href="mailto:ron@amsco-ac.com">ron@amsco-ac.com</a>	813-875-0782	813-363-2467
TBD	Superintendent	<u>TBD</u>	TBD	TBD
Richard Headland, AIA	Project Architect	<a href="mailto:rheadland@reparch.com">rheadland@reparch.com</a>	727-821-2986	727-212-8730
Greg Bowen, P.E.	Mechanical Engineer	<a href="mailto:gregb@engmtx.com">gregb@engmtx.com</a>	727-673-4656	

Communications Conduct:

Meetings:

The Project Manager will distribute a meeting agenda at least 2 days prior to any scheduled meeting and all participants are expected to review the agenda prior to the meeting. During all project meetings the timekeeper will ensure that the group adheres to the times stated in the agenda and the recorder will take all notes for distribution to the team upon completion of the meeting. It is imperative that all participants arrive to each meeting on time and all cell phones

and blackberries should be turned off or set to vibrate mode to minimize distractions. Meeting minutes will be distributed no later than 24 hours after each meeting is completed.

#### Email:

All email pertaining to the City Hall HVAC Equipment Replacement Project should be professional, free of errors, and provide brief communication. Email should be distributed to the correct project participants in accordance with the communication matrix above based on its content. All attachments should be in one of the organization's standard software suite programs and adhere to established company formats. If the email is to bring an issue forward then it should discuss what the issue is, provide a brief background on the issue, and provide a recommendation to correct the issue. The Project Manager should be included on any email pertaining to the City Hall HVAC Equipment Replacement Project.

#### Informal Communications:

While informal communication is a part of every project and is necessary for successful project completion, any issues, concerns, or updates that arise from informal discussion between team members must be communicated to the Project Manager, so the appropriate action may be taken.

### **COST MANAGEMENT PLAN**

The Project Manager will be responsible for managing and reporting on the project's cost throughout the duration of the project. The Project Manager will present and review the project's cost performance during the monthly project status meeting. Using earned value calculations, the Project Manager is responsible for accounting for cost deviations and presenting the Project Sponsor with options for getting the project back on budget. All budget authority and decisions, to include budget changes, reside with the City Hall HVAC Equipment Replacement Project Sponsor.

For the City Hall HVAC Equipment Replacement Project, control accounts will be created at the fourth level of the WBS which is where all costs and performance will be managed and tracked. Financial performance of the City Hall HVAC Equipment Replacement Project will be measured through earned value calculations pertaining to the project's cost accounts. Work started on work packages will grant that work package with 50% credit; whereas, the remaining 50% is credited upon completion of all work defined in that work package. Costs may be rounded to the nearest dollar and work hours rounded to the nearest whole hour.

Cost and Schedule Performance Index (CPI and SPI respectively) will be reported on a monthly basis by the Project Manager to the Project Sponsor. Variances of 10% or +/- 0.1 in the cost and schedule performance indexes will change the status of the cost to yellow or cautionary. These will be reported and if it's determined that there is no or minimal impact on the project's cost or schedule baseline then there may be no action required. Cost variances of 20%, or +/- 0.2 in the cost and schedule performance indexes will change the status of the cost to red or critical. These will be reported and require corrective action from the Project Manager in order to bring the cost and/or schedule performance indexes back in line with the allowable variance. Any corrective

actions will require a project change request and be must approved by the CCB before it can be implemented.

Earned value calculations will be compiled by the Project Manager and reported at the monthly project status meeting. If there are indications that these values will approach or reach the critical stage before a subsequent meeting, the Project Manager will communicate this to the Project Sponsor immediately.

## **PROCUREMENT MANAGEMENT PLAN**

The Project Manager will provide oversight and management for all procurement activities under this project. Any procurement actions must be approved by the Project Sponsor.

While this project requires minimal or no procurement, in the event procurement is required, the Project Manager will work with the project team to identify all items or services to be procured for the successful completion of the project. The Project Manager will then ensure these procurements are reviewed by the Program Management Office (PMO) and presented to the contracts and purchasing groups. The contracts and purchasing groups will review the procurement actions, determine whether it is advantageous to make or buy the items or resource required services internally, and begin the vendor selection, purchasing and the contracting process.

In the event a procurement becomes necessary, the Project Manager will be responsible for management any selected vendor or external resource. The Project Manager will also measure performance as it relates to the vendor providing necessary goods and/or services and communicate this to the purchasing and contracts groups.

## **PROJECT SCOPE MANAGEMENT PLAN**

Scope management for the City Hall HVAC Equipment Replacement Project will be the sole responsibility of the Project Manager. The scope for this project is defined by the Scope Statement, Work Breakdown Structure (WBS) and WBS Dictionary. The Project Manager, Sponsor, and Stakeholders will establish and approve documentation for measuring project scope which includes deliverable quality checklists and work performance measurements.

Proposed scope changes may be initiated by the Project Manager, Stakeholders or any member of the project team. All change requests will be submitted to the Project Manager who will then evaluate the requested scope change. Upon acceptance of the scope change request the Project Manager will submit the scope change request to the Project Sponsor for acceptance. Upon approval of scope changes by the Project Sponsor the Project Manager will update all project documents and communicate the scope change to all stakeholders. Based on feedback and input from the Project Manager and Stakeholders, the Project Sponsor is responsible for the acceptance of the final project deliverables and project scope.

The Project Sponsor is responsible for formally accepting the project's final deliverable. This acceptance will be based on a review of all project documentation, testing results, and completion of all tasks/work packages and product functionality.

## **SCHEDULE MANAGEMENT PLAN**

Project schedules for the City Hall HVAC Equipment Replacement Project will be created using MS Project 2007 or later starting with the deliverables identified in the project's Work Breakdown Structure (WBS). Activity definition will identify the specific work packages which must be performed to complete each deliverable. Activity sequencing will be used to determine the order of work packages and assign relationships between project activities. Activity duration estimating will be used to calculate the number of work periods required to complete work packages. Resource estimating will be used to assign resources to work packages in order to complete schedule development.

Once a preliminary schedule has been developed, it will be reviewed by the project team and any resources tentatively assigned to project tasks. The project team and resources must agree to the proposed work package assignments, durations, and schedule. Once this is achieved the project sponsor will review and approve the schedule and it will then be base lined.

In accordance with AMSCO's organizational standard, the following will be designated as milestones for all project schedules:

- Completion of scope statement and WBS/WBS Dictionary
- Base lined project schedule
- Approval of final project budget
- Project kick-off
- Approval of roles and responsibilities
- Requirements definition approval
- Completion of data mapping/inventory
- Project implementation
- Acceptance of final deliverables

Roles and responsibilities for schedule development are as follows:

The project manager will be responsible for facilitating work package definition, sequencing, and estimating duration and resources with the project team. The project manager will also create the project schedule using MS Project 2007 and validate the schedule with the project team, stakeholders, and the project sponsor. The project manager will obtain schedule approval from the project sponsor and baseline the schedule.

The project team is responsible for participating in work package definition, sequencing, duration, and resource estimating. The project team will also review and validate the proposed schedule and perform assigned activities once the schedule is approved.

The project sponsor will participate in reviews of the proposed schedule and approve the final schedule before it is base lined.

The project stakeholders will participate in reviews of the proposed schedule and assist in its validation.

## **QUALITY MANAGEMENT PLAN**

All members of the City Hall HVAC Equipment Replacement Project team will play a role in quality management. It is imperative that the team ensures that work is completed at an adequate level of quality from individual work packages to the final project deliverable. The following are the quality roles and responsibilities for the City Hall HVAC Equipment Replacement Project:

The Project Sponsor is responsible for approving all quality standards for the City Hall HVAC Equipment Replacement Project. The Project Sponsor will review all project tasks and deliverables to ensure compliance with established and approved quality standards. Additionally, the Project Sponsor will sign off on the final acceptance of the project deliverable.

The Project Manager is responsible for quality management throughout the duration of the project. The Project Manager is responsible for implementing the Quality Management Plan and ensuring all tasks, processes, and documentation are compliant with the plan. The Project Manager will work with the project's quality specialists to establish acceptable quality standards. The Project Manager is also responsible for communicating and tracking all quality standards to the project team and stakeholders.

The Quality Specialists are responsible for working with the Project Manager to develop and implement the Quality Management Plan. Quality Specialists will recommend tools and methodologies for tracking quality and standards to establish acceptable quality levels. The Quality Specialists will create and maintain Quality Control and Assurance Logs throughout the project.

The remaining member of the project team, as well as the stakeholders will be responsible for assisting the Project Manager and Quality Specialists in the establishment of acceptable quality standards. They will also work to ensure that all quality standards are met and communicate any concerns regarding quality to the Project Manager.

Quality control for the City Hall HVAC Equipment Replacement Project will utilize tools and methodologies for ensuring that all project deliverables comply with approved quality standards. To meet deliverable requirements and expectations, we must implement a formal process in which quality standards are measured and accepted. The Project Manager will ensure all quality standards and quality control activities are met throughout the project. The Quality Specialists will assist the Project Manager in verifying that all quality standards are met for each deliverable. If any changes are proposed and approved by the Project Sponsor and A/E, the Project Manager is responsible for communicating the changes to the project team and updating all project plans and documentation.

Quality assurance for the City Hall HVAC Equipment Replacement Project will ensure that all processes used in the completion of the project meet acceptable quality standards. These process standards are in place to maximize project efficiency and minimize waste. For each process used throughout the project, the Project Manager will track and measure quality against the approved standards with the assistance of the Quality Specialists and ensure all quality standards are met. If any changes are proposed and approved by the Project Sponsor and A/E, the Project Manager is responsible for communicating the changes to the project team and updating all project plans and documentation.

## **RISK MANAGEMENT PLAN**

The approach for managing risks for the City Hall HVAC Equipment Replacement Project includes a methodical process by which the project team identifies, scores, and ranks the various risks. Every effort will be made to proactively identify risks ahead of time in order to implement a mitigation strategy from the project's onset. The most likely and highest impact risks were added to the project schedule to ensure that the assigned risk managers take the necessary steps to implement the mitigation response at the appropriate time during the schedule. Risk managers will provide status updates on their assigned risks in the bi-weekly project team meetings, but only when the meetings include their risk's planned timeframe.

Upon the completion of the project, during the closing process, the project manager will analyze each risk as well as the risk management process. Based on this analysis, the project manager will identify any improvements that can be made to the risk management process for future projects. These improvements will be captured as part of the lessons learned knowledge base.

## **RISK REGISTER**

The Risk Register for this project is provided in Appendix C, Risk Register.

## **STAFFING MANAGEMENT PLAN**

The City Hall HVAC Equipment Replacement Project will consist of a matrix structure with support from various internal organizations. All work will be performed internally. Staffing requirements for the City Hall HVAC Equipment Replacement Project include the following:

CM Area Manager (1 position) – responsible for all management for the City Hall HVAC Equipment Replacement Project. The Area Manager is responsible for overall planning, creating, and/or managing all work activities, variances, tracking, reporting, communication, performance evaluations, staffing, and internal coordination with functional managers.

CM Project Manager (1 position) – responsible for all management for the City Hall HVAC Equipment Replacement Project. The Project Manager is responsible for planning, creating,



and/or managing all work activities, variances, tracking, reporting, communication, performance evaluations, and internal coordination with functional managers.

CM Superintendent (1 position) – responsible for oversight of all construction tasks for the City Hall HVAC Equipment Replacement Project as well as ensuring functionality is compliant with quality standards. Responsible for working with the Project Manager to create work packages, manage risk, manage schedule, identify requirements, staffing, and create reports.

The Project Manager will negotiate with all necessary AMSCO functional managers in order to identify and assign resources for the City Hall HVAC Equipment Replacement Project. All resources must be approved by the appropriate functional manager before the resource may begin any project work. The project team will not be co-located for this project and all resources will remain in their current workspace.

### Control Estimate

The cost model for the City Hall HVAC Equipment Replacement project includes all budgeted costs for the successful completion of the project. Costs indicated below are based on the Unoccupied approach.

Project Phase	Budgeted Total	Comments
General Conditions	\$ 277,704.48	Includes work hours for all project team members for planning project, dumpsters, portlets, permitting, crane, lull, Supervision, Temporary Labor, Floor Protection & storage containers / office trailer.
Construction Roofing	\$ 474,309.70	Includes all materials and labor hours for Construction of City Hall Roofing Replacement
Alternate 1 - 1 Square of 1x6 Roof Deck	\$ 750.00 per square	Added cost for replacement of bad roof decking.
Electrical, Solar Panel & Structural Supports	\$ 232,455.25	Includes all required labor and materials for installation of the solar panel system and structural supports.
Hurricane Strapping	\$ 57,500.00	Material & Labor to install hurricane straps on existing wood joist. Includes removal of batt insulation and reinstallation to allow for hurricane straps to be installed.
Scaffolding Roofing	\$ 116,200.00	Includes all labor and material to furnish scaffolding on all sides of the building with Spanish tile to protect public and workers.



St. Pete City Hall Upgrade - HVAC Equipment and Roofing Replacement  
**Project Management Plan**  
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Roof Drains & Piping	\$ 9,198.30	Includes all labor and material to furnish and install the roof drains and piping as indicated on permit documents.
Construction HVAC	\$ 2,445,702.63	Includes all required scope for Construction of City Hall HVAC Equipment Replacement dumpsters, portlets, permitting, crane, lull, & storage containers / office trailer.
Additional Scope Items		
Carpet Tiles	\$ 172,490.00	New carpet tiles in offices
Paint Corridor Walls	\$ 10,598.00	Paint Corridor Walls Only
Floor Waxing	\$ 16,155.10	Strip & Wax Floors Only
LED Light Fixtures	\$ 150,171.32	Replacement of 2x4, 2x2 & 1x4 Only
Council Chambers Wall Paper	\$ 15,042.00	Recessed Wall Areas Only
Council Chambers Seating	\$ 32,856.00	Re-upholster Cushions
Council Chambers Seating Frames	\$ 9,000.00	Re-Finish Frames with Powder Coat
Low E Window Tint	\$ 50,400.00	Install low E window tint on all windows
Construct Wall Room 242	\$ 5,015.00	
Controls	\$ 358,114.00	Building Automation Controls
Commissioning	\$ 00,000.00	This was eliminated under VE measures.
Testing Adjusting and Balancing	\$ 54,000.00	Includes all work hours for Testing Adjusting & Balancing of City Hall HVAC Equipment Replacement
CM Contingency	\$ 462,290.35	10% of Construction Costs
Hard Costs (Asbestos Abatement)	\$ 000.00	Abatement of existing ceiling and ductwork insulation. Costs carried by City and Not Included in Control Estimate
CM Fees	\$ 285,251.05	Construction Manager Fees
Bond Costs	\$ 55,350.15	Costs for Performance Payment Bond
Total Project Cost	\$ 5,547,803.43	Includes all Owner, Roofing, Solar Panel, Structural and HVAC scope Costs.



## QUALITY BASELINE

The City Hall HVAC Equipment Replacement Project must meet the quality standards established in the quality baseline. The quality baseline is the baseline which provides the acceptable quality levels of the City Hall HVAC Equipment Replacement Project. The HVAC systems must meet or exceed the quality baseline values in order to achieve success.

Item	Acceptable Level	Comments
System Performance Verified by Test and Balance & Engineer	At least 90% of total air or water flow and capacities listed	
Commissioning Verification in accordance code requirements only	Commissioning Check lists and Performance Checks pass	
Occupant Comfort and Space Conditions are Achieved	Occupants are Comfortable and space temperature is 75 degrees at 50% relative humidity	
Building spaces are damage free and clean	No visual damage and spaces are ready for occupants to return	

The City Hall Roofing Replacement Project must meet the quality standards established in the quality baseline. The quality baseline is the baseline which provides the acceptable quality levels of the City Hall Roofing Replacement Project. The roofing & solar systems must meet or exceed the quality baseline values in order to achieve success.

Item	Acceptable Level	Comments
Roofing system free of any defects, leaks and approved by Mfg. and Design team.	100% leak free and no defects	
Solar system installed and accepted by Mfg. & design team. Producing anticipated power output as indicated in design documents	System output is checked and verified. System free of any defects.	

## SPONSOR ACCEPTANCE

Approved by the Project Sponsor:

\_\_\_\_\_  
 Jay Lund, AIA  
 Engineering & Capital Improvements

Date: \_\_\_\_\_



**TRACKING CHANGE REPORT DOCUMENT (TCR)**  
**UPGRADE & REPLACEMENT OF HVAC EQUIPMENT**  
**FOR ST. PETE CITY HALL**

**AIR MECHANICAL & SERVICE CORP**  
**4311 WEST IDA STREET**  
**TAMPA, FL 33614**

**SEPTEMBER 18, 2018**





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## **INTRODUCTION**

This Tracking Change Report Document has been created by Air Mechanical & Service Corp (AMSCO) St. Petersburg City Hall HVAC Upgrade & Replacement Project Team to proactively identify, document, manage, and resolve risks throughout the project's lifecycle. This document will serve as a repository for recording, updating, and tracking changes to more easily communicate the identified changes and their statuses. The Tracking Change Report Document will be updated weekly or as a status changes. It will also be communicated to all stakeholders in accordance with the St. Petersburg City Hall HVAC Upgrade & Replacement Project's version control process (see Communications Management Plan).

## **EXPLANATION OF TRACKING CHANGE REPORT DOCUMENT CONTENTS**

This section will provide explanations for each section of the Tracking Change Report Document.

**Issue #:** Each issue will be sequentially numbered for reference and tracking purposes.

**Issue Description:** A description of each change to include what the potential impact will be and what part of the project or system will be affected.

**Issue Type:** Identify the type of change that has been identified. Change types are: Allowances, Sub-Back Charge, CM Contingency, Owner Special Allowance, RFI, Concealed Condition, Owner Change Request—those which fall outside of the organization. This categorization aids in assigning an issue owner.

**Identified By:** Provide the name(s) of the person/people who identified the change. This is helpful in the event more clarification is needed as the change is assigned or moves toward resolution.

**Date Identified:** Listing the date the change was identified aids in tracking the change and determining the amount of time the change is taking to get resolved.

**Issue Assigned To:** List the name of the person responsible for resolving the change. This person may or may not be the individual to implement a solution. However, this person is responsible for ensuring the change gets resolved.

**Targeted Resolution Date:** The target deadline for resolving the identified change.

**Priority:** Each change will be assigned a priority. This helps the team focus resources on the highest impact change when there are cost, time, or resource constraints.

**Status:** Each changes status will be updated throughout the resolution process. As this is a living document, each change's status should be updated as any changes occur.



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Date Resolved: This section will list the date the change is resolved.

Resolution Description: This section will describe what was done to resolve the identified change.

## **TRACKING CHANGE REPORT DOCUMENT**

Tracking Change Report Document can be seen on the following page.



**Tracking Change Report Document (TCR)**  
[www.amsco-ac.com](http://www.amsco-ac.com)

St. Petersburg City Hall HVAC Upgrade & Replacement Project										
Created By: A Donton		Last Update By: A. Donton								
Date Created: 01/29/2018		Last Revision Date:								
Change #	Change Description	Change Type (Allowances, Sub-Back Charge, CM Contingency, Owner Special Allowance, RFI, Concealed Condition, Owner Change Request, Schedule)	Identified By	Date Identified	Issue Assigned To	Targeted Resolution Date	Priority (High, Medium, Low)	Status	Date Resolved	Resolution Description
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## Tracking Change Request Form

Change Request	
<b>Project: UPGRADE &amp; REPLACEMENT OF HVAC EQUIPMENT &amp; ROOFING FOR ST. PETE CITY HALL</b>	<b>Date:</b>
<b>Change Requestor:</b>	<b>Change No:</b>
<b>Change Category (Check all that apply):</b>	
<input type="checkbox"/> Allowances <input type="checkbox"/> CM Contingency <input type="checkbox"/> Owner Special Allowance <input type="checkbox"/> RFI <input type="checkbox"/> Concealed Condition <input type="checkbox"/> Owner Change Request <input type="checkbox"/> Sub Back Charge <input type="checkbox"/> Schedule	
<b>Does this Change Affect (Check all that apply):</b>	
<input type="checkbox"/> Corrective Action <input type="checkbox"/> Preventative Action <input type="checkbox"/> Defect Repair <input type="checkbox"/> Updates <input type="checkbox"/> Other	
<b>Describe the Change Being Requested:</b>	
<b>Describe the Reason for the Change:</b>	
<b>Describe all Alternatives Considered:</b>	
<b>Describe any Technical Changes Required to Implement this Change:</b>	
<b>Describe Risks to be Considered for this Change:</b>	
<b>Estimate Resources and Costs Needed to Implement this Change:</b>	
<b>Describe the Implications to Quality:</b>	
<b>Disposition:</b>	
<input type="checkbox"/> Approve <input type="checkbox"/> Reject <input type="checkbox"/> Defer	
<b>Justification of Approval, Rejection, or Deferral:</b>	

Change Board Approval:		
Name	Signature	Date



## SPONSOR ACCEPTANCE

Approved by the Project Sponsor:

\_\_\_\_\_  
Jay Lund, AIA  
Engineering & Capital Improvements

Date: \_\_\_\_\_

