**SOW Template for**

**Value Engineering Study**

(version date: 8/12/20)

**INSTRUCTIONS**

This template provides the basic information required in the Value Engineering Study portion of the SOW. To complete this portion of the SOW, add the necessary detail for each project in blue highlighted areas below. The information contained in ***Yellow-highlighted bold italics*** text provides some guidance as to where additional detail should be added to the SOW.

**General Instructions for SOW Template:**

* Yellow highlight indicates instructions or notes that are deleted before finalizing the SOW for a WOC/Contract.
* Blue highlight indicates fields or provision that need to be reviewed and updated with project-specific information/requirements.
* Quantities. When entering quantities, the best practice is to use only the Arabic numeral and not spell out the numeral followed by the digit in parenthesis; i.e. - “3 weeks after NTP”.
* Delete text of any tasks that do not apply to the Project and label as “RESERVED” next to the task title. Contingency tasks that do not apply to a given Project can be deleted without marking as “RESERVED”, provided task numbering is revised if necessary.
* Send suggested revisions/updates to Kim Rice, OPO Technical Development Coordinator.

**Delete instructions throughout the document before executing Contract/WOC or amendment as follows:**

* From the “Edit” menu (or “Editing” menu on the “Home” ribbon) select “Replace”;
* With cursor in the “Find what” field, click “More” button, then “Format” then “Font” , then in the font field select “Arial” text ;
* Leave the “Replace with” field blank;
* **Click “Replace All”. This will delete all yellow highlighted text.]**

**TASK X VALUE ENGINEERING STUDY**

***(Insert specific workshop durations and/or number of disciplines, after consulting with Agency VE/Project Risk Engineering. Otherwise, the following must be included without any additions, deletions or revisions)***

Agency will conduct a Project Value Engineering (“VE”) study prior to completion of DAP. The VE study includes a 5 day VE workshop that follows the 6 phases (Information, Function Analysis, Creative, Evaluation, Development and Presentation) of SAVE International’s standard VE Job Plan. The VE Workshop will be facilitated by a Certified Value Specialist “(CVS)” who is certified by SAVE International.

Agency will supply the required discipline subject matter experts and CVS facilitator necessary to form the VE team for the Project VE workshop. The VE kick-off and workshop meetings will be held at Agency’s offices in Region XX.

**Task X.1 Pre-VE Workshop**

At the end of Project initiation, Consultant shall coordinate with APM and Agency VE/Project Risk Engineer to determine the dates of the VE workshop.

No less than 14 calendar days prior to the VE workshop, Consultant shall coordinate with the Agency VE/Project Risk Engineer and CVS to provide Project information (e.g. plans, specifications, schedule, estimate, risk analysis, and other project documents typically produced during project development) as needed to allow the VE team to review the Project in preparation for VE workshop.

Consultant’s discipline leads shall participate in this process to provide background information to the CVS.

**Deliverables and Schedule:**

* Project information as requested by Agency and CVS necessary for VE workshop (No less than 14 calendar days prior to the VE workshop)

**Task X.2 VE Workshop**

Up to 6 (as determined by Agency) Consultant discipline leads responsible for the preliminary engineering and design of the Project, including but not limited to: bridge and structures, roadway, traffic, storm-water, geotechnical, and environmental, shall attend and participate in the VE workshop kick-off meeting, led by the CVS, to present the design to the VE team members. Following the VE workshop kick-off meeting, Consultant shall lead a Project site visit meeting, attended by Agency’s CVS and VE team, to identity existing conditions, strategies, and solutions. Both of these activities shall occur during the Information Phase of the VE workshop.

During the Function Analysis, Creative, Evaluation, and Development phases of the VE workshop, Consultant, and the selected Consultant’s PM and discipline leads who presented during the Information Phase, must be available to Agency’s CVS and VE team by phone for discussion and input.

During the Presentation Phase, up to 6 (as determined by Agency) Consultant discipline leads, including but not limited to: bridge and structures, roadway, traffic, storm-water, geotechnical, and environmental, shall attend and participate in the VE recommendations presentation meeting led by Agency’s CVS.

**Deliverables (per schedule provided under Pre-VE Workshop task):**

* Participation and presentation of design at VE workshop kick-off meeting; Project site visit.
* Phone consultation by PM and discipline leads as needed.
* Attendance and participation at VE recommendations presentation meeting led by Agency’s CVS.

**Task X.3 VE Report**

Agency’s CVS will prepare and submit a draft VE report to Agency and Consultant for review. Consultant shall (and Agency) provide draft review comments to CVS within 14 calendar days. Agency’s CVS will provide a final VE report based on comments received from Agency’s and Consultant’s review of the draft VE report.

**Deliverables and schedule:**

* Review and comments of Draft VE report (electronic copy – PDF) delivered to Agency and CVS 14 calendar after VE workshop

**Task X.4 VE Implementation Meeting**

Consultant shall schedule a VE implementation meeting within 6 weeks of submission of the final VE report. The meeting must include Agency VE/Project Risk Engineer, technical review staff and Consultant discipline leads. This meeting is to discuss and document the implementation disposition of VE recommendations identified in the final VE report. Following the conclusion of this meeting, Consultant shall prepare a VE recommendation implementation plan that identifies the disposition of each VE recommendation as accepted, conditionally accepted, or rejected.

**Deliverables and Schedule**:

* Implementation plan that includes disposition of the VE recommendations (electronic copy – PDF and 6 hard copies) delivered to the Agency 14 days after the implementation meeting