

SCOPE OF WORK

Intensive-Level Architectural Survey

Ocean City Historic District
Ocean City, Cape May County, N.J.

PROJECT NO. P1164-00

STATE OF NEW JERSEY

Honorable Chris Christie, Governor
Honorable Kim Guadagno, Lt. Governor

DEPARTMENT OF THE TREASURY

Ford M. Scudder, Treasurer



DIVISION OF PROPERTY MANAGEMENT AND CONSTRUCTION

Christopher Chianese, Director

Date: August 30, 2017

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I. OBJECTIVE

The objective of this project is to conduct an Intensive-Level Architectural Survey of approximately 300 properties in and surrounding the NJ & National Register listed and locally designated historic districts in Ocean City, NJ.

II. CONSULTANT QUALIFICATIONS

A. CONSULTANT & SUB-CONSULTANT PRE-QUALIFICATIONS

The Consultant shall be a firm pre-qualified with the Division of Property Management & Construction (DPMC) in the following discipline(s):

- **P050 Historic Preservation Consultant**

The Consultant shall employ at a minimum the services of an Architectural Historian qualified in accordance with the National Park Service *Professional Qualification Standards*, as well as, **any and all** other Architectural, Engineering and Specialty Disciplines necessary to complete the project as described in this Scope of Work (SOW).

III. PROJECT BUDGET

A. CURRENT WORKING ESTIMATE (CWE)

The Current Working Estimate (CWE) for this project is \$50,000.

The CWE is the Client Agency's financial budget based on this project Scope of Work and shall not be exceeded during the design and construction phases of the project unless DPMC approves the change in Scope of Work through a Contract amendment.

C. CONSULTANT'S FEES

The current working estimate for this project ***shall not*** be used as a basis for the Consultant's fees. The Consultant's fees shall be based on the information contained in this Scope of Work document and the observations made and/or the additional information received during the pre-proposal meeting.

IV. PROJECT SCHEDULE

A. SCOPE OF WORK SCHEDULE

The following schedule identifies the estimated design and construction phases for this project and the estimated durations.

PROJECT PHASE	ESTIMATED DURATION (Weeks)
1. Kick-off Meeting	1
2. Background Research/Fieldwork	8
3. Submission of 1 st Round of Draft Product (100 Survey Forms)	6
4. Submission of 2 nd Round of Draft Product (100 Survey Forms)	6
5. Submission of 3 rd Round of Draft Product (100 Survey Forms)	6
6. Submission of Complete Draft Including Historical Narrative Report & Survey Forms	6
7. Submission of Final Product	6

B. CONSULTANT'S PROPOSED SCHEDULE

The Consultant shall submit a project bar chart schedule with their technical proposal that is similar in format and detail to the schedule depicted in **Exhibit 'A'**. The bar chart schedule developed by the Consultant shall reflect their recommended project phases, phase activities, activity durations.

The Consultant shall estimate the duration of the project Close-Out Phase based on the anticipated time required to complete each deliverable identified in Section XIV of this document entitled "Contract Deliverables - Project Close-Out Phase" and include this information in the bar chart schedule submitted.

A written narrative shall also be included with the technical proposal explaining the schedule submitted and the reasons why and how it can be completed in the time frame proposed by the Consultant.

This schedule and narrative will be reviewed by the Consultant Selection Committee as part of the evaluation process and will be assigned a score commensurate with clarity and comprehensiveness of the submission.

C. CONSULTANT SCHEDULE

Based on the Notice to Proceed, Consultant shall update their approved schedule and shall distribute it at the kickoff meeting. Note that this schedule shall be submitted in both paper format and on compact disk in a format compatible with *Microsoft Project*. This schedule will be binding for the Consultant's activities and will include the start and completion dates for each activity. The Consultant and Project Team members shall use this schedule to ensure that all milestone dates are being met for the project. The Consultant shall update the schedule to reflect performance periodically (minimally at each phase) for the Project Team review and approval. Any recommendations for deviations from the approved schedule must be explained in detail as to the causes for the deviation(s) and impact to the schedule.

V. PROJECT SITE LOCATION & TEAM MEMBERS

A. PROJECT SITE ADDRESS

The location of the project site is:

Ocean City, Cape May County, New Jersey

See **Exhibit 'B'** for the project site map.

B. PROJECT TEAM MEMBER DIRECTORY

The following are the names, addresses, and phone numbers of the Project Team members.

1. DPMC Representative:

Name:	<u>Edward Mulvan, Administrator</u>
Address:	<u>DEP/Natural & Historic Resources</u>
	<u>Office of Resource Development</u>
	<u>501 East State Street, 4th Floor</u>
	<u>Mail Code 502-04A, P.O. Box 420</u>
	<u>Trenton, NJ 08625-0420</u>
Phone No:	<u>(609) 984-3819</u>
E-Mail No:	<u>edward.mulvan@dep.nj.gov</u>

2. Client Agency Representative:

Name: Jonathan Kinney, Historic Preservation Specialist
Address: DEP. Historic Preservation Office
501 East State Street, 4th Floor
Trenton, NJ 08625
Phone No: (609) 984-0141
E-Mail No: jonathan.kinney@dep.nj.gov

VI. PROJECT DEFINITION

A. BACKGROUND

The State of New Jersey, Department of Environmental Protection, Natural & Historic Resources Group, Historic Preservation Office is soliciting Proposals for an Intensive-Level Architectural Survey of approximately 300 properties within and adjacent to the New Jersey and National Register listed and locally designated historic districts in Ocean City, Cape May County, New Jersey.

The goal of the survey is to provide a much-needed update to the existing information on properties within the districts and to help Ocean City's planning board, zoning board of adjustment, and historic preservation commission to make informed land use decisions regarding properties in the district and to amend the district boundary, if appropriate. An updated survey will enhance the capacity of the local preservation program and will support the work of the Historic Preservation Office and the local historic preservation commission.

The survey shall be conducted in accordance with the New Jersey Guidelines for Architectural Survey. The survey data will be gathered using a database application provided by the HPO and mapping will be based on GIS data. The results of the survey shall be compiled in a report that presents intensive-level research, eligibility findings, and summarizes the overall survey effort.

Information generated from this Intensive-level Architectural Survey will enable the Ocean City Planning Board, Zoning Board of Adjustment and Historic Preservation Commission to make informed land use decisions in accordance with the municipal Master Plan, local ordinances, and the Municipal Land Use Law. It will also assist the Ocean City Historic Preservation Commission in making reasonable, consistent and justifiable decisions.

B. FUNCTIONAL DESCRIPTION OF OCEAN CITY

Existing survey documentation dates from 1990 (the survey) and 2003 (the National Register nomination). Generally, based on the rapid pace of change statewide, the HPO recommends revisiting surveys after about 10 years. Ocean City has certainly experienced much change since the existing documentation was created – across the spectrum from restorations to complete redevelopment. For these reasons, the HPO recommends that a new intensive-level architectural survey in Ocean City be undertaken.

Ocean City has demonstrated their local commitment to historic preservation and has been designated as a Certified Local Government by the National Park Service. The local historic preservation commission faces dual challenges in sustaining their resources. Ocean City is located in a dynamic coastal environment, regularly experiencing flooding and storm events. Ocean City is also a vibrant coastal resort and is consequently a dynamic architectural environment. A better understanding of the historic resources that make up the historic district, and a better understanding of the district's current boundaries, will enhance the City's local historic preservation program and their abilities to prepare for, and recover from, future storm events. It will also help to support the work of the local historic preservation commission and the Historic Preservation Office.

VII. CONSULTANT RESPONSIBILITIES

A. REQUIREMENTS

1. General:

The Consultant shall employ at a minimum the services of an Architectural Historian qualified in accordance with the National Park Service *Professional Qualification Standards*, to produce an intensive-level architectural survey of approximately 300 historic resources. Surveyed resources will be documented individually and as part of an historic district.

The survey must be conducted in accordance with the HPO *Guidelines for Architectural Survey* (Guidelines). The survey data will be gathered using a database application provided by the HPO and mapping will be based on GIS data. The results of the survey shall be compiled in a report that presents intensive-level research, eligibility findings, and summarizes the overall survey effort.

2. Intensive-Level Survey Documentation:

The following products shall be produced as part of the survey effort. The Consultant shall conduct an Intensive-level Survey consisting of:

Survey Forms

- Preparation of HPO approved forms for a minimum of 300 historic resources. The description field should have three paragraphs. The first paragraph should be an architectural description of the building. This description should identify whether the building has been elevated or otherwise altered for flood protection. The second paragraph should be a brief narrative history of the building. The third paragraph should include a recommendation of individual eligibility as well as contributing or non-contributing status of the building in the historic district – and must include a persuasive and well-reasoned rationale for these recommendations. **All forms must be submitted in electronic and hard copy. The electronic copy must be submitted as a Microsoft Access database in the data-structure provided by the HPO. The hard copy inventory forms will be generated from the database.**
- Preparation of attachments and eligibility worksheets for those properties identified as potentially individually eligible.
- Assessment of “key-contributing” (i.e. individually eligible), “contributing” and “non-contributing” status for all properties surveyed, as they relate to the Ocean City Historic District.

Photography

- Survey photography shall include at least one digital color photograph of the entire principal elevation or view for every historic property in the intensive-level survey (this photograph shall appear on the Base Survey Form for the subject property).
- Additional photographs, which clearly contribute to an understanding of the property’s significance, are strongly recommended. These photographs shall appear on continuation sheets following the survey form for the subject property.
- Survey photographs shall be submitted as color digital images in JPEG format with a minimum pixel array of 1200 by 1800 (approximately 4” by 6” at 300dpi).

GIS Mapping

- GIS Mapping must be based on existing digital parcel maps, or an HPO approved alternate, such as Global Positioning System (GPS) data.
- Digital submissions must include separate ArcView shapefiles in the data structure provided by the HPO:
 - a. Historic District boundaries (polygons). Where the Historic District boundary coincides with a municipal boundary, the Historic District Boundary must overlay the municipal boundary exactly.
 - b. Property locations (points).
- Geospatial metadata sufficient to satisfy the metadata reporting requirements of the NJDEP Mapping and Digital Data Standards (2013) available online at http://nj.gov/dep/gis/assets/NJDEP_GIS_Spatial_Data_Standards_2013.pdf
- **All digital data shall be submitted on CD-ROM in the formats referenced above.**
- The GIS data shall serve as the basis for creating the 2" x 3" location map for each surveyed property. The location map shall be saved as a digital image in JPEG format that will be included on the hard copy survey forms.

3. Intensive-Level Survey Report:

The Consultant shall prepare an intensive-level survey report in accordance with Section 3.5 of the Guidelines for Architectural Survey. The report shall be comprised of at least 30 pages of text (12pt type in a single spaced format), not including survey forms, maps, photos and illustrations. The final report must be submitted to the HPO in both electronic and hard copy. The electronic copy must be submitted on CD or DVD as a Microsoft Word document and as a PDF.

The report will include the following sections: title page, abstract, table of contents, list of illustrations, introduction, background research including historic overview and contexts, research design, descriptions of architectural survey, interpretations and conclusions, recommendations. It will be illustrated with current and historic photographs and maps. It will be accompanied by a bibliography. Appendices will include resumes of project personnel, the scope of work and accepted proposal, and survey forms. Particular emphasis will be placed on the appropriate period of significance for the historic district. The report shall also include specific analysis of the impact of elevations, and any other adaptations for climate change, on the character and integrity of the historic district.

4. Deliverables:

For purposes of this Grant Agreement the Consultant shall produce two (2) hard copies of all survey products defined above. The HPO and Ocean City shall each receive one (1) complete hard copy set of the completed survey products and an electronic copy, submitted on a CD or DVD as both a Microsoft Word document and PDF, in accordance with the grant Schedule. See Section X below for further details.

B. PROJECT COMMENCEMENT

A meeting shall be scheduled with the Consultant and the Project Team members at the commencement of the project to obtain and/or coordinate the following information:

1. Project Directory:

Develop a project directory that identifies the name and phone number of key designated representatives who may be contacted during the phases of this project.

2. Site Access:

Develop procedures to access the project site and provide the names and phone numbers of approved escorts when needed. Obtain copies of special security and policy procedures that must be followed.

3. Project Coordination:

Review and become familiar with any current and/or future projects at the site that may impact the scheduling requirements of this project.

4. Existing Documentation:

Copies of the following documents will be provided to each Consulting firm at the pre-proposal meeting to assist in the bidding process.

- New Jersey and National Register of Historic Places Nomination for the Ocean City Residential Historic District
- Local Historic District Designation – Ocean City
- Existing Survey Data on file at the Historic Preservation Office

Review these documents and any additional information that may be provided at a later date such as reports, studies, surveys, equipment manuals, as-built drawings, etc. The State does not attest to the accuracy of the information provided and accepts no responsibility for the consequences of

errors by the use of any information and material contained in the documentation provided. It shall be the responsibility of the Consultant to verify the contents and assume full responsibility for any determination or conclusion drawn from the material used. If the information provided is insufficient, the Consultant shall take the appropriate actions necessary to obtain the additional information required.

All original documentation shall be returned to the provider at the completion of the project.

5. Scope of Work:

Review the administration responsibilities and the submission requirements identified in this Scope of Work with the Project Team members. Items such as: contract deliverables, special sequencing requirements, special hours based on Client Agency programs or building occupancy, security needs, weather restrictions, and coordination with other project activities at the site shall be addressed.

6. Project Schedule:

Review and update the project schedule with the Project Team members.

C. MEETINGS & PRESENTATIONS

1. Meetings:

Conduct the appropriate number of review meetings with the Project Team members during each phase of the project so they may determine if the project meets their requirements, question any aspect of the contract deliverables, and make changes where appropriate. The Consultant shall describe the philosophy and process used in the development of the criteria and the various alternatives considered to meet the project objectives. Selected studies, sketches, cost estimates, schedules, and other relevant information shall be presented to support the solutions proposed. Special considerations shall also be addressed such as: site access limitations, schedule requirements, security restrictions, etc.

It shall also be the responsibility of the Consultant to arrange and require all critical Sub-Consultants to be in attendance at the review meetings.

Record the minutes of each meeting and distribute within seven (7) calendar days to all attendees and those persons specified to be on the distribution list by the Project Manager.

2. Presentations:

The minimum number of presentations required for each phase of this project is identified below for reference:

Background Research/Fieldwork: One (1) oral presentation at phase completion.

Submission of 1st Round of Draft Product: One (1) oral presentation at phase completion.

Submission of 2nd Round of Draft Product: One (1) oral presentation at phase completion.

Submission of 3rd Round of Draft Product: One (1) oral presentation at phase completion.

Submission of Complete Including Historical Narrative Report & Survey Forms: One (1) oral presentation at phase completion.

Submission of Final Product: One (1) oral presentation at phase completion.

VIII. GENERAL REQUIREMENTS

A. SCOPE CHANGES

The Consultant must request any changes to this Scope of Work in writing. An approved DPMC 9d Consultant Amendment Request form reflecting authorized scope changes must be received by the Consultant prior to undertaking any additional work. The DPMC 9d form must be approved and signed by the Director of DPMC and written authorization issued from the Project Manager prior to any work being performed by the Consultant. Any work performed without the executed DPMC 9d form is done at the Consultant's own financial risk.

PROJECT NAME: Intensive-Level Architectural Survey
PROJECT LOCATION: Ocean City Historic District
PROJECT NO: P1164-00
DATE: August 30, 2017

IX. SOW SIGNATURE APPROVAL SHEET

This Scope of Work shall not be considered a valid document unless all signatures appear in each designated area below.

The Client Agency approval signature on this page indicates that they have reviewed the design criteria and construction schedule described in this project Scope of Work and verifies that the work will not conflict with the existing or future construction activities of other projects at the site.

SOW PREPARED BY: James W. Wright 8/30/2017
JAMES WRIGHT, PROJECT MANAGER DATE
DPMC PROJECT PLANNING & INITIATION

SOW APPROVED BY: J. Mckenna 9/1/17
JAMES MCKENNA, MANAGER DATE
DPMC PROJECT PLANNING & INITIATION

SOW APPROVED BY: E. Mulvan 9/14/17
EDWARD MULVAN, ADMINISTRATOR DATE
DEP/ NATURAL & HISTORIC RESOURCES

SOW APPROVED BY: Jonathan Kinney 9/19/17
JONATHAN KINNEY, PRESERVATION SPECIALIST DATE
DEP/HISTORIC PRESERVATION OFFICE

SOW APPROVED BY: Richard Flodmand 9/28/17
RICHARD FLODMAND, DEPUTY DIRECTOR DATE
DIV PROPERTY MGT & CONSTRUCTION

X. CONTRACT DELIVERABLES

The following is a listing of Contract Deliverables that are required at the completion of each phase of this project. The Consultant shall refer to the DPMC publication entitled, "Procedures for Architects and Engineers," Volumes I and II, 2nd Edition, dated January, 1991 to obtain a more detailed description of some of the deliverables required for closeout listed below.

The numbering system for the Close-Out Phase used in this "Contract Deliverables" section of the scope of work corresponds to the numbering system used in the "Procedures for Architects and Engineers" manual and some may have been deleted if they do not apply to this project.

SUBMISSION OF 1st ROUND OF DRAFT PRODUCT

100 Survey Forms

SUBMISSION OF 2nd ROUND OF DRAFT PRODUCT

100 Survey Forms

SUBMISSION OF 3rd ROUND OF DRAFT PRODUCT

100 Survey Forms

SUBMISSION OF COMPLETE DRAFT

Historical Narrative Report & Survey Forms

SUBMISSION OF FINAL PRODUCT

For purposes of this Grant Agreement the Consultant shall produce two (2) hard copies of all survey products defined in this scope document. The HPO and Ocean City shall each receive one (1) complete hard copy set of the completed survey products and an electronic copy, submitted on a CD or DVD as both a Microsoft Word document and PDF, in accordance with the grant Schedule.

PROJECT CLOSE-OUT PHASE

11.1 Responsibilities: Plan, Schedule and Execute Close-Out Activities

11.2 Commencement: Initiate Close-Out w/DPMC 20A Project Close-Out Form

11.5 Determination of Substantial Completion

11.7 Initiation of Final Contract Acceptance Process

11.8 Submission of Close-Out Documentation

- 11.8.2 Letter of Contract Performance
- 11.8.3 Final Cost Analysis-Insurance Transfer DPMC 25
- 11.8.4 This Submission Checklist

11.9 Final Payment

- 11.9.1 Contractors Final Payment
- 11.9.2 A/E Invoice and Close-Out Forms for Final Payment

11.10 Final Performance Evaluation of the A/E and/or Contractors

11.12 Submission Forms

- Figure 11.2 Project Close-Out Documentation List DPMC 20A
- Figure 11.3-a Certificate of Substantial Completion DPMC 20D
- Figure 11.3-b Final Acceptance of Consultant Contract DPMC 20C
- Figure 11.5 Request for Contract Transition Close-Out DPMC 20X
- Figure 11.7 Final Contract Acceptance Form DPMC 20
- Figure 11.8.3-a Final Cost Analysis
- Figure 11.8.3-b Insurance Transfer Form DPMC 25
- Figure 11.8.4 Submission Checklist

XI. EXHIBITS

The attached exhibits in this section will include a sample project schedule, and any supporting documentation to assist the Consultant in the design of the project such as maps, drawings, photographs, floor plans, studies, reports, etc.

END OF SCOPE OF WORK

February 7, 1997
Rev.: January 29, 2002

Responsible Group Code Table

The codes below are used in the schedule field "GRP" that identifies the group responsible for the activity. The table consists of groups in the Division of Property Management & Construction (DPMC), as well as groups outside of the DPMC that have responsibility for specific activities on a project that could delay the project if not completed in the time specified. For reporting purposes, the groups within the DPMC have been defined to the supervisory level of management (i.e., third level of management, the level below the Associate Director) to identify the "functional group" responsible for the activity.

<u>CODE</u>	<u>DESCRIPTION</u>	<u>REPORTS TO ASSOCIATE DIRECTOR OF:</u>
CM	Contract Management Group	Contract Management
CA	Client Agency	N/A
CSP	Consultant Selection and Prequalification Group	Technical Services
A/E	Architect/Engineer	N/A
PR	Plan Review Group	Technical Services
CP	Construction Procurement	Planning & Administration
CON	Construction Contractor	N/A
FM	Financial Management Group	Planning & Administration
OEU	Office of Energy and Utility Management	N/A
PD	Project Development Group	Planning & Administration

EXHIBIT 'A'

Activity ID	Description	Rspn	Weeks
<PROJ>			
Design			
CV3001	Schedule/Conduct Pre-design/Project Kick-Off Mtg.	CM	
CV3020	Prepare Program Phase Submittal	AE	
CV3021	Distribute Program Submittal for Review	CM	
CV3027	Prepare & Submit Project Cost Analysis (DPMC-38)	CM	
CV3022	Review & Approve Program Submittal	CA	
CV3023	Review & Approve Program Submittal	PR	
CV3024	Review & Approve Program Submittal	CM	
CV3025	Consolidate & Return Program Submittal Comments	CM	
CV3030	Prepare Schematic Phase Submittal	AE	
CV3031	Distribute Schematic Submittal for Review	CM	
CV3037	Prepare & Submit Project Cost Analysis (DPMC-38)	CM	
CV3032	Review & Approve Schematic Submittal	CA	
CV3033	Review & Approve Schematic Submittal	PR	
CV3034	Review & Approve Schematic Submittal	CM	
CV3035	Consolidate & Return Schematic Submittal Comment	CM	
CV3040	Prepare Design Development Phase Submittal	AE	
CV3041	Distribute D. D. Submittal for Review	CM	
CV3047	Prepare & Submit Project Cost Analysis (DPMC-38)	CM	
CV3042	Review & Approve Design Development Submittal	CA	
CV3043	Review & Approve Design Development Submittal	PR	
CV3044	Review & Approve Design Development Submittal	CM	
CV3045	Consolidate & Return D.D. Submittal Comments	CM	
CV3050	Prepare Final Design Phase Submittal	AE	
CV3051	Distribute Final Design Submittal for Review	CM	
CV3052	Review & Approve Final Design Submittal	CA	
CV3053	Review & Approve Final Design Submittal	PR	
CV3054	Review Final Design Submit for Constructability	OCS	

Sheet 1 of 3

Bureau of Design & Construction Services
Routine Project

Exhibit "A"

DBCA - TEST

NOTE:
Refer to section "IV Project Schedule" of the
Scope of Work for contract phase durations.

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Activity ID	Description	Respn	Weeks
CV6014	Roughing Work Complete	CON	
CV6021	Interior Finishes Start	CON	
CV6022	Install Interior Finishes	CON	
CV6030	Contract Work to Substantial Completion	CON	
CV6031	Substantial Completion Declared	CM	
CV6075	Complete Deferred Punch List/Seasonal Activities	CON	
CV6079	Project Construction Complete	CM	
CV6080	Close Out Construction Contracts	CM	
CV6089	Construction Contracts Complete	CM	
CV6090	Close Out A/E Contract	CM	
CV6092	Project Completion Declared	CM	

DBCA - TEST

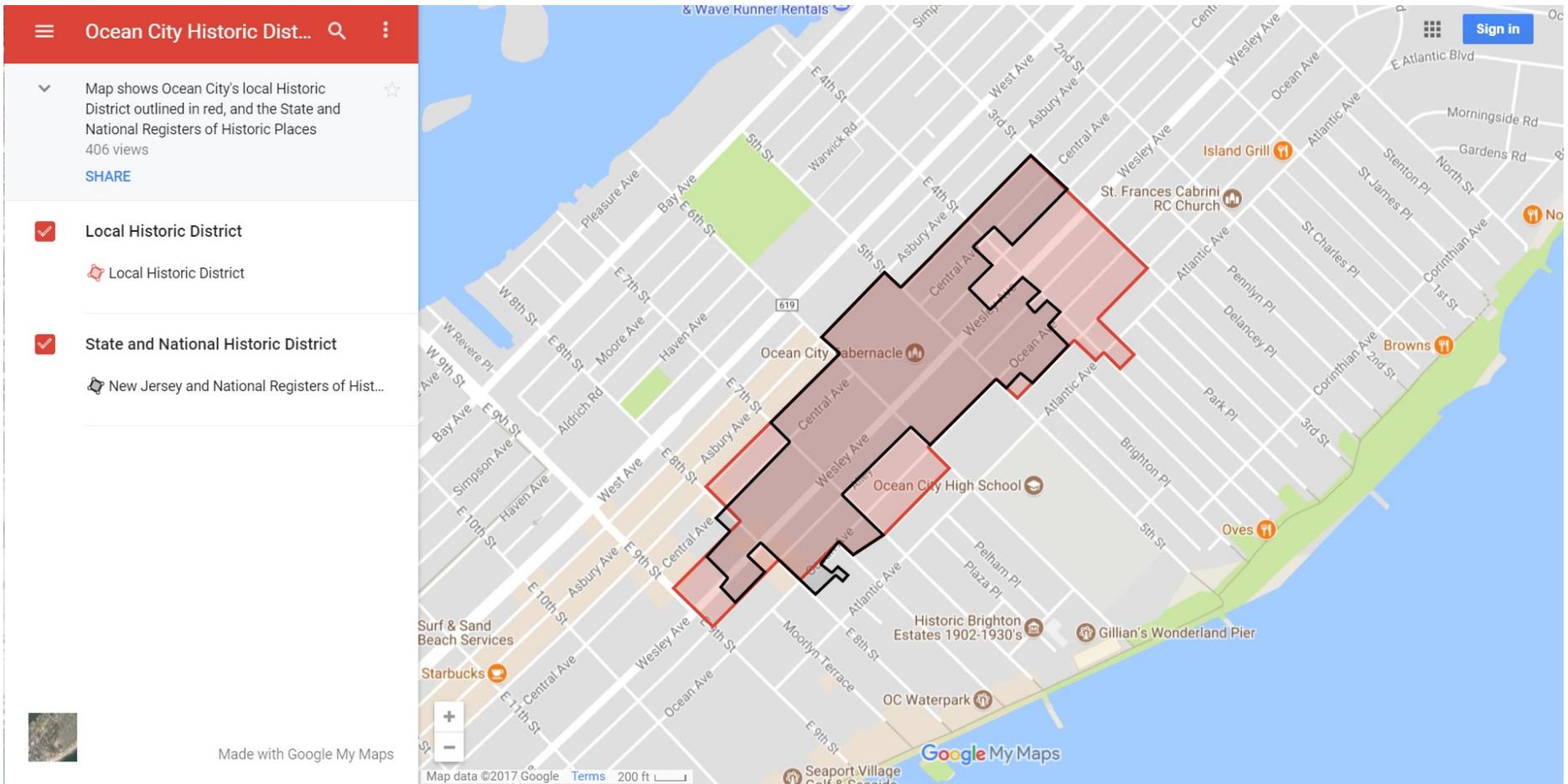
Sheet 3 of 3

Bureau of Design & Construction Services
Routine Project

Exhibit 'A'

NOTE:
Refer to section "IV Project Schedule" of the
Scope of Work for contract phase durations.

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Ocean City Historic District Map

EXHIBIT 'B'