

BART Agreement Number: 6M8178

Approval Date: 05/26/26

Work Plan No. A.08-01 MW -12 CM Services

Scope:

Specific duties and responsibilities for the Resident Engineer shall include, but not be limited to, the following:

- a) Serves as the District Representative and is responsible for the administration and monitoring of the Contract until the final project closeout is complete.
- b) Serves as the Subject Matter Expert and routinely interact with numerous outside Agencies and internal departments including, but not limited to, the Office of the General Counsel, the Procurement Department, the Office of Civil Rights, and the Office of External Affairs.
- c) Expected to provide field verification, be responsible and in charge and conduct general field visits during the life of the contract. The frequency of these visits will be based on a case-by-case basis or as determined by the district.
- d) Directly responsible for overall construction project management to include construction permitting, utilities, traffic, planning, organizing, monitoring and directing of all construction work activities and resources necessary to complete project within budget, scope, schedule, and quality requirements.

- e) Provides contract coordination between other contracts working within the same BART Operating System.
- f) Reviews and responds to Contractor's submittals, Requests for Information (RFI)s, and letters, and maintains project files with the utilization of District approved software.
- g) Reviews Contractor submittals for adequacy and accuracy in accordance with the Contract Documents.
- h) Strictly follows CM's QA Audit Checklist to prepare and monitor the project in progress.
- i) Prepares written documents (i.e. correspondences, proposals, reports, performance evaluations and other construction documents).
- j) Schedules and conducts weekly progress meetings and prepares meeting summaries.
- k) Manages and provides technical support to field issues.
- l) Initiates and evaluates design and field engineering changes during construction.
- m) Evaluates Contractor's suggestions for minor changes to contract requirements.
- n) Reviews Notice of Potential Claims (NOPCs), provides recommendations, and resolves disputes with the Contractor, through the Change Notice/Change Order process if necessary.
- o) Processes and reviews Change Notices and Change Orders by preparing engineering designs, specifications, costs, independent quantity estimates, and tracking contingency balances associated with necessary changes to the Contract Documents.
- p) Negotiates protested Change Notices with Contractor for further processing of Change Order.
- q) Implements and ensures that District approved quality Assurance Program is successfully executed.
- r) Inspects and reviews project to monitor compliance with the Contract Documents including building and safety codes, Stormwater Pollution Prevention Plan (SWPPP) requirements, environmental documents and other regulations.
- s) Reviews material testing data.
- t) Make field measurements of completed items of work;
- u) Inspects construction at substantial and final completion states;
- v) Tracks construction progress, activities, and use of approved materials and equipment for verification of Contractor's Payment Applications;
- w) Reviews and processes monthly progress payments;
- x) Reviews Contractor's progress schedules and documents construction progress through daily reports, project status reporting, and project scheduling;
- y) Manages, prepares and approves daily supervision and inspection reports;
- z) Assures M&E receives as-builts and O&M Manuals prior to Final acceptance of work;

- aa) Ensures Contractor's personnel obtains the appropriate BART ID, security badges, and RWP-40-hour training if required and returns BART issued IDs, security badges, and District materials upon completion of or separation from the project;
- bb) Coordinates Contractor's access to site with the appropriate stakeholders;
- cc) Other tasks as directed by the District.
- dd) Analysis of Contractor claims and set up claim resolution meetings with Contractor, Contract Management and Legal;
- ee) Review Contractor schedules;
- ff) Track allocation requests;
- gg) Support field inspections;
- hh) Routes documents through DocuSign for approval and signatures (RFIs, changes, submittals, etc.);

Specific duties and responsibilities for the Office Engineer shall include, but not be limited to, the following:

- a) Provides procedural, administrative support to Resident Engineer and Project Staff;
- b) Reserves/schedules conference rooms and attends weekly progress status meetings with the Contractor;
- c) Supports the preparation of progress meeting agendas and minutes;
- d) Receives documents from the Contractor and processes incoming/outgoing correspondences, transmittals, submittals, RFIs, changes, etc.;
- e) Keeps Submittal and RFI Logs updated;
- f) Tracks status of documents (submittals, RFIs, changes, etc.) to ensure timely response and keeps Resident Engineer informed of status;
- g) Uploads the signed Inspector Daily Reports (IDRs) in the approved District software;
- h) Assists Inspectors with files and database system information, when needed;
- i) Assists Project Manager and Resident Engineer with Change Notices and Change Orders;
- j) Assists in the review of Contractor's cost proposals and processing of invoices;
- k) Evaluates, processes and routes Contractor's monthly invoices for approval;
- l) Reviews and submits Pay Apps;
- m) Tracks Contractor's invoices to ensure timely payment;
- n) Updates repository (correspondence, transmittals, RFI Log, Submittal Log, etc.);
- o) Maintains records of paper files and hardcopies of contract documents;
- p) Processes requests for Contractor's badges and clearances and assists with on-boarding of new staff;
- q) Performs other tasks as directed by the Program Manager/Resident Engineer and/or the District.
- r) Tracks RFIs, responses and metrics;
- s) Tracks Project submittals, responses and, if necessary, reviews the submittals;

- t) Processes and/or assists in the making and processing of Track Allocation Requests, and attends at meetings;
- u) Manages and monitors Document control and provides editorial support;

Specific duties and responsibilities for the Inspector shall include, but not be limited to, the following:

- a) Performs field engineering services overseeing on-going construction as directed by the Resident Engineer;
- b) Keeps and maintains daily reports documenting observations, labor, equipment and issues encountered in the Contractor's performance of the work;
- c) Reviews approved contract submittals, contract specifications, and contract drawings, and field verifies and documents construction of approved facilities, materials and equipment per contract specifications and drawings;
- d) Takes and catalogues photographs of work in progress or problems encountered on the construction site;
- e) When directed, collects and maintains Force Account Records for additional work as directed by the Resident Engineer;
- f) Periodically examines Contractor QC and QA records to assure Contractor records are complete and current;
- g) Assists in the documentation of Change Notices/Change Orders, including justifications and estimates;
- h) When requested, assists in the review of Claims and Potential Claims;
- i) Other tasks as directed by the Resident Engineer and/or the District.
- j) Performs QC/QA Verifications of Material/Specifications/Drawings;
- k) Performs verification of quantities for monthly payment;
- l) Maintains records and resolution of Non-Conformance Reports; when applicable;
- m) Serves and discharges the duties of an or District's Representative if required and preparation of associated reports;
- n) Routes documents through DocuSign for approval and signatures;

Specific duties and responsibilities for the Scheduler shall include, but not be limited to, the following:

- a) Provides scheduling assistance to the Resident Engineer from start through final project closeout;
- b) Develops project schedules for BART;
- c) Attends project progress and/or claim resolution meeting if requested by the Resident Engineer;
- d) Reviews and approves Contractor's construction schedules;
- e) Prepares schedule and claims estimates due to contract or field issues;
- f) Prepares time impact evaluations and assists the Resident Engineer to resolve claims;

- g) Routes documents through DocuSign for approval and signatures;
- h) Performs other work as assigned by the Resident Engineer and/or the District.

Specific duties and responsibilities for the Geotechnical engineer shall include, but not be limited to, the following:

- a) Document Review – Review the contractor’s geotechnical submittals, quality control plans, and testing procedures for compliance with project specifications and approved design criteria.
- b) Coordination – Attend pre-construction and progress meetings to coordinate observation activities and clarify responsibilities between the contractor’s geotechnical engineer and the Owner.
- c) Observation of Construction Activities – Periodically observe key operations, including site clearing, slope benching, placement and compaction of fills/embankments, soil-nails installation, and construction of drainage features.
- d) Verification Testing – Review contractor testing results and perform independent spot checks to confirm compaction, material suitability, and soil reuse compliance.
- e) Resolution of Field Issues – Provide recommendations for differing site conditions, unsuitable materials, or deviations from approved procedures.
- f) Documentation and Reporting – Prepare concise field observation reports for each visit and a final summary report documenting compliance and any deficiencies.
- g) Quality Assurance – Serve as the Owner’s technical representative to ensure geotechnical work meets design intent, contract documents, and applicable standards.

Prime: WSP

Subconsultant	Amount
Dabri	\$ 397,613

Total Work Plan Value: \$ 1,239,248