

Concept Designer Scope of Work and Deliverables

Under project execution model: Two-Stage D&B with Concept Designer

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1.0 Statement of Work

1.1 Objectives

The present document specifies requirements, deliverables, and scope of work to be included in the Tenderer proposal document in order to correspond to Roche design expectations for the project.

1.2 General Scope

The Tenderer agrees to and is obligated to deliver Interior Design (ID) services for the Concept Design+ project phase, including but not limited to planning, conceptual design, basis of design specifications; and participate in an advisory role during SD, DD, construction administration and post construction.

The Tenderer will execute the aforementioned phases, cognizant of and adhering to principles of Quality, Time, Cost, Operation & Function, Governance & Conformance, and Compliant to Statutory Requirements.

1.3 General Duties

The Tenderer design scope includes but is not limited to the following:

1. Take into consideration Roche's requirements such as [Our Spaces](#) - Roche Guide of the Built Environment, Roche local design guidelines (if applicable), Workplace Strategy Report
2. Review, and comply with Roche Fit-out Performance Specifications. Take into consideration Landlord's requirements such as tenant handbook, fit-out guidelines, existing conditions and building constraints, etc.
3. Evaluate and consider site conditions based on provided information and imagery to ensure coordination with proposed design.
4. Employ sustainable design practices and ensure compliance with Roche sustainability requirements.
5. Provide layout, concept, and conceptual basis of design specifications. The Tenderer shall allow for multiple revisions based on client feedback.
6. Provide progress documents for review and comment by Roche throughout the design phase
7. Consider acoustic, structural, MEP and facility operations integrity and incorporate into the solution, including but not limited to: maintenance, longevity, ceilings accessibility. Advise on any necessary requirement of acoustic, structural, MEP and facility to accommodate the completion of design.
8. Provide tender documents including, but not limited to: Layout including furniture and equipment, Concept diagrams, Conceptual Material Selections, Conceptual basis of design for Furniture selections.
9. Participate in the tender process including tender interviews, tender queries and clarifications, technical evaluation and recommendation for D&B Contractor, and other relevant vendor selection steps.
10. Provide and review Value Engineering options when needed.
11. Attend all project meetings and workshops during Concept+ and Layout Design phase, and key meetings and calls during further phases of the project.
12. Provide support to all Project team briefings, stakeholders interface, etc. when needed.
13. Present to Roche and gain approval for each of the design deliverables:
 - a. Concept & Layout Presentation
 - b. Concept Design Tender package

14. Provide a furniture reuse schedule and plan diagram identifying placement of existing furniture.
15. Provide a review of the furniture tender package Evaluate vendor RFP returns and provide comments and recommendations on furniture selections.
16. If the design of the Security, Audio Visual (AV) and IT systems is out of the scope of this Tenderer, the Tenderer shall allow for all necessary provisions, coordination, interfacing to support these systems. The Tenderer shall be responsible for the Concept Design Package being in coordination with the aforementioned systems to ensure consistency in design.
17. Presentation quality 3D renderings shall be included as a part of the basic services.
18. Coordinate with the project team in all phases of design to ensure targeted project budgets are achieved.
19. Provide design review of Schematic Design, Developed Design, and Construction Documentation, comment on variations throughout the project.
20. Provide design review of the Furniture tender returns and advise on alignment with Furniture Basis of Design
21. For requests outside of the vendor's scope of services, or variations to scope already completed and approved, the vendor shall submit a request for additional services including cost and time required. Roche approval must be received prior to proceeding with work.
22. Review and comment on the as-built drawings provided by the D&B Contractor
23. Advise the D&B Contractor on professional photographic documentation of the completed project according to [Roche Guidelines for Project Photography](#). Review proposed photo angles and settings to be documented.

2.0 Scope of Work - Phasing Description

2.1 Concept Design+

2.1a *Concept Design+ & Layout*

1. Kick-off workshop with the User, set up goals and objectives, considering Roche design philosophy and workplace strategy.
2. Review and finalize Design Brief / Performance Specifications.
3. Review the base building design, provisions/conditions, and advise matters which may have technical and/or statutory constraints to the project. Propose mitigations.
4. Review potential FF&E and other items to be reused.
5. Develop (2) Design Concepts to guide planning and overall design approach.. The concepts are to be reflected in the following: Concept statement plus any relevant reference imagery to illustrate each overarching idea.

Allow for a minimum of (2) revisions based on client feedback. One concept to be selected by Roche Project Team and Corporate Architect for further development

6. Layout plan based on the selected concept and WPS zoning approach. Allow for iterations and revisions - a minimum of (2) major revisions, plus (3) additional minor modifications. Plans must include numeric tables and metrics to illustrate alignment with Space Program (Workplace Strategy Report):
 - a. Total UFA (usable floor area)
 - b. List and quantity of space types (required and achieved) based on the Space Program.
 - c. Quantity of work seats & quantity of alternative work seats
 - d. UFA / SOU (simultaneous office user) ratio
 - e. Percentage of Enclosed WFA (work floor area) to Open WFA
7. Concept Design+ Presentation Package: including final selected design concept, and layout plus:

- a. Graphic materials and 2D visuals, such as reference images, sketches, etc.
- b. 3-D visuals, such as renderings and axonometric drawings, illustrating key spaces and areas planned to have specialty features. Represent space geometry, architectural elements, millwork, and material selections; including but not limited to: open office, reception, pantry/café, meeting room, break-out space, etc. A minimum of (5) and additional as necessary to illustrate the design.
- c. Materiality Concept: based on the selected overarching Design Concept, including conceptual basis of design selections for materials and finishes (manufacturer data not required) by space type.
- d. A layout overlay color diagram illustrating material application strategy for walls, flooring, etc.
- e. Design of feature millwork elements and details deemed necessary for maintaining design integrity.
- f. Lighting Concept, including conceptual fixture references by space type.
- g. Ceiling layout diagram showing ceiling types allocation.
- h. Furniture Concept and conceptual basis of design product references by space type, including conceptual finishes intent.
- i. Proposal and considerations for reuse of existing furniture, products, and architectural elements.
- j. Greenery Concept with placement strategy and plant typologies.

Provide revisions based on client feedback. The Concept Design+ package must receive full approval of the scope in order to complete the CD phase.

8. Ensure Concept Design compliance with design brief, WPS, Roche performance fit-out specifications, including acoustic performance of proposed design, and Roche directives.
9. Ensure Concept Design Compliance with “Our Spaces” - Roche Guide to the Built Environment
10. Basis of Design narrative and supporting layout overlay diagrams to illustrate allocation of key elements and conceptual design intent for flooring, wall finishes, partitions/doors, millwork, ceilings,, power distribution, and FF&E
11. Conceptual Basis of Design specifications for architectural elements and products, materials, finishes, lighting, greenery, and accessories - illustrating intent, manufacturer data not required
12. Conceptual Basis of Design schedule of furniture selections.
13. Concept Design + & Layout Phase shall provide sufficient information for design concepts in order for Roche global and local stakeholders to make an informed decision and select clear direction for the subsequent phases.

2.1b Tender Documentation & Participation

1. Concept Design tender documentation to consist of the approved Layout and Concept Design+ presentation package, BOD narrative and diagrams
2. Review and advise on design capability and technical capability of D&B bidders.
3. Clarify technical queries by D&B bidders.
4. Participate in tender evaluation and recommendation of D&B bidders

2.2 Schematic Design

1. Kick-off workshop with the client team, TPM, and Design & Build Contractor to review Concept Design+ package and set goals and objectives for the upcoming phases.
2. Throughout the SD phase, conduct reviews (assume total of 3) evaluating alignment with the approved Concept Design; provide feedback on the design progress, any revisions to the layout, and final SD deliverables, including the Schematic Design presentation. Reviews shall address all design related topics and deliverables, including but not limited to: drawings,

renderings, specifications, specialty details, millwork, ceilings, material and finishes, equipment, lighting, furniture, greenery. The final review to be completed prior to Roche SD review and endorsement.

3. When requested, participate in project meetings (assume total of 3).
4. Participate in furniture tender returns evaluations, review for alignment of proposed furniture items with approved Basis of Design.
5. Review vendor's furniture specifications and drawings to ensure alignment with concept design and intended functionality; confirm material and finish selections.
6. Participate in Schematic Design cost evaluation and value engineering and support the D&B Contractor and TPM as needed with clarifying scope and design intent during these activities.

2.3 Developed Design

1. Throughout the DD phase, conduct reviews (assume total of 3) evaluating alignment with the approved Concept Design; provide feedback on the design progress and final DD deliverables. Reviews shall address all design related topics and deliverables, including but not limited to: drawings, renderings, specifications, specialty details, millwork, ceilings, material and finishes, equipment, lighting, furniture, greenery. The final review to be completed prior to Roche DD review and endorsement.
2. When requested, participate in project meetings (assume total of 3).

2.4 Construction Administration

1. When requested, participate in project meetings (assume total of 3)
2. Throughout the CA phase, conduct reviews (assume total of 3) of site progress, based on photos and D&B reports, evaluating alignment with the approved design; provide feedback.

2.5 Post Construction

1. Review as-built documents (drawings, manuals, etc.) submitted. Advise inadequacies and correction actions.
2. Participate in preparation for professional photography documenting the project upon completion: review the final D&B report and project photos, advise on photographer selection, provide recommendations on preferred locations for images, photo angles, and settings. Ensure photography is executed in accordance with [Roche Guidelines for Project Photography](#).