

**NEW COMMERCIAL GROUND-UP CHECKLIST
PROMPTS FOR OWNER/ARCHITECT
DISCUSSION, CONTRACT CLARIFICATION**

This is a sample set of items needed /issues to address to expedite and narrow professional fee proposal define scope and responsibilities. For an exhaustive list Professional services (basic, standard and comprehensive) can be provided.

- I. Pre-design general data and info needed.
 - A. General design approach.
 - B. Total project budget.
 - C. Budget for professional fees, platting etc.
 - D. Property address, Acreage, Municipality,HOA, ETJ and/or County determination.
 - E. Expected Schedule with mile stones including ground break and occupancy dates.
 - F. Desired approvals schedule SD/DD/CD/Move in.
 - G. Owner's billing address, Title of ownership/Property close date.
 - H. Site plan or property survey including topographical information and tree survey.
 - I. Overall project budget; construction budget and soft costs budget.
 - J. Applicable variance(s) needed.
 - K. Civil engineering required/detention
 - L. Environmental Phase 1/2 testing.
 - M. As-built documents.
 - N. Proposed Plan(s) if available.
 - O. Total estimated Square footage:conditioned space, Covered, and double height.
 - P. Occupancy type(s), e.g. B business/A-2 assembly/ A-1 Storage/ Mixed/ R-1
 - Q. Potential changes to scope of work:
 - 1. Contract administration option ;timecard basis.
 - 2. Establish number duration and schedule of meetings
 - 3. Client revisions/Material selections.
 - R. Soils test/report available for foundation design - Establish responsible team member
 - S. Asbestos survey letter for any existing construction.
 - T. Written project program w/ objective and subjective wants/needs, Room names list, Net and Gross SF tally.
 - U. Special features /needs/ requirements/finishes.

V. Determine Extent of built ins, millwork and special finish areas.

W. Required consultant and engineer contracts.

1. Civil detention evaluation.
2. Structural Engineer required to design foundation and frame and windstorm.
3. MEP Mechanical Electrical Plumbing engineer contracting: Energy compliance form by engineer should be included in fee.
4. List of expected consultants:
 - a) Interior design
 - b) Lighting.
 - c) Acoustical.
 - d) Fountain/Aquarium.
 - e) Landscape Architect.
 - f) Audio visual./IT
 - g) Security

II. SD - Schematic Design

A. Site:

1. Location of nearest fire connections/hydrants/Flow test required.
2. fire department connection location(s)
3. Accessible access to/from site; sidewalks and curb ramps.
4. Confirm configuration/location of HC parking/ramps
5. How many covered parking spaces are required, open or off street spaces?
6. What is the building Plumbing fixture count reserved; Need to purchase water /wastewater capacity. Apply at SD approval.
7. All utilities located. ID Exist power service and proposed.
8. IBC existing/new Occupancy type(s), Construction type(s),
9. Desired # on occupancy load signage.
10. Determine any buildings or structures to remain.
11. Determine building(s) to sprinklered and type.
12. Confirm configuration/location of owner access and construction access.
13. Equipment to be included reused/relocated, interior selections by owner or consultant(s).
14. List of items to be included or provided by owner.

III. DD - Design development

- A. Parking spaces are assigned by lease or open parking
- B. Identify dedicated circuit locations for special equipment.
- C. Locate all floor finish transitions.
- D. New door hardware schedule required/Existing provided.
- E. Running Square footage of sub areas/total/lease to to be documented on drawings at each phase needed?
- F. Sound attenuation ratings locations required.

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- G. RCP 2X4 or 2X2, Determine if any ceiling in Mechanical room(s).
- H. Column line IDs assigned by architect.
- I. Confirm desired typical elements
 - 1. Mow skirt/slope from slab/landscape edge determination.
 - 2. Ceiling ht.(s) and doors heights.
 - 3. Windows typical window sizes, operation and any special tint, etc..
- J. Mechanical data:
 - 1. Conventional HVAC units or identify special HVAC needs.
 - 2. Special conditions: exhaust/heat loads.
- K. Electrical data:
 - 1. Inclusion and coordination of electrical load calculations
 - 2. Minimal convenience outlets one per ea. new wall in rooms.
- L. Plumbing data:
 - 1. Plumbing fixture count Existing/Proposed.
 - 2. Any future plumbing leave outs/slab voids in the space for future connection(s)
 - 3. In-line water heaters or conventional water heaters (50/75GAL).
- IV. CD - Construction documents
 - 1. Data and phone/data outlets are to be located by owner.
 - 2. ID needed Mock up(s)
 - 3. Permit application initiated by owner or contractor; Owner Letter for designated expediter to pull permits if needed.
 - 4. Hardware schedule required provided by consultant.
 - 5. Mechanical issues:
 - a) Duct runs designed economically: duct board in lieu of sheet metal where possible, Flex duct up to 6' from diffuser.
- V. CA - Contract administration
 - A. Owner Letter for designated Expediter to pull permits
 - B. Approval of Mock up(s)
 - C. Architect will Provide CAD Backgrounds to any consultants or subcontractor. e.g interior designer or fire sprinkler sub.
 - D. Post construction as-built documentation is additional services estimated at issuance of C.O..
 - E.
- VI. Issues affecting scope of services and final professional fee:
 - A. Architect Reports to a single owner representative or committee.
 - B. Architect contracts all consultants or owner contracts some or all other consultants.
 - C. Architect is presumed to have final design intent authority on all construction work in place and changes to work.
 - D. Contractor and Owner are obligated to consult with Architect on any variance from approved design documents.
 - E. Hardware schedule specifications required or by owner?

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- F. Separate Finish plan schedule/ special codes/indications/equipment?
- G. Energy compliance forms required per Municipality?
- H. Any adjacent occupancies and footprint areas?
- I. Equipment/fixtures to be included or budgeted, selections by who?
- J. Any Items to be included and provided by owner?
- K. Any plumbing leave out stub out or slab void in the space for future connectivity.
- L. Lease work billed separately: Square footage of total lease to go on drawings? (match lease or calculate precisely?)
- M. Inline water heaters, rain water collection design/ LEED cert.s
- N. Permit application initiated by owner expeditor or contractor.
- O. Plumbing count to date/proposed matrix required?
- P. Power usage to date/proposed matrix.
- Q. Roof top equipment; Structural letter from structural engineer. HVAC units are placed at interior column line, over beams.
- R. Typically documents do not show system furniture or equipment layouts on backgrounds for permits. Furniture plans and specifications are additional services.
- S. Special mounting ht.s or critical plan dimensions.
- T. Verify if specific sound attenuation ratings and where required.
- U. "IBC" Verify Codes adopted, with Municipal Addendums, (2015 at date of writing).
- V. Health department review is required for food sale or service.
- W. List required of items to be stored in any storage area per City format.
- X. Negotiated bid with single contractor, or out for multiple bids process.
- Y. Extended phasing of the project scope.