

foxleyarchitecture

**EXHAUSTIVE SCOPE OF SERVICES
For**

**Scope Clarification:
Basic/Standard/Comprehensive**

PHASE 1: PREDESIGN AND PROGRAMMING (Hourly / Estimated)

PHASE 2: SITE ANALYSIS (Hourly / Estimated)

PHASE 3: SCHEMATIC DESIGN AND DOCUMENTATION

PHASE 4: DESIGN DEVELOPMENT AND DOCUMENTATION

PHASE 5: CONSTRUCTION DOCUMENTS: WORKING DRAWINGS/ SPECIFICATIONS

PHASE 6: CONSTRUCTION BID ADMINISTRATION (Hourly / Estimated)

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION (Hourly / Estimated)

PHASE 8: POST-CONSTRUCTION ADMINISTRATION (Hourly / Estimated)

PHASE 1: PREDESIGN -- PREDESIGN AND PROGRAMMING

FEASIBILITY AND FINANCIAL ANALYSIS

BASIC SERVICES

- _ Estimate the project's probable construction cost per square foot compared to similar projects

STANDARD SERVICES Includes the above listed services plus:

- _ Legal and regulatory considerations such as:
 - _ Variances required
 - _ Special permits
- _ Time schedule estimates such as for:
 - _ Permit process
 - _ Financing/fundraising

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Estimate probable operating costs
- _ Research and analysis of special financial possibilities such as:
 - _ Historical preservation grant or facade easement
- _ Comparative first costs and maintenance costs of used/recycled/ new construction materials

SCOPE OF SERVICES A-3 PROGRAMMING BASIC SERVICES

- _ Obtain the client's list of exterior and interior space needs
- _ Review client's survey and property easements, restrictions, set-backs, heights and parking limits
- _ Estimate room sizes and create diagrammatic or schematic building plans

STANDARD SERVICES Includes the above *listed* services plus:

- _ Obtain from the client, or help the client create a detailed list of building functions, occupancies, and spaces
- _ Obtain the client's list of equipment and furnishings
- _ Obtain the client's building construction and operating cost estimates
- _ Conduct basic client needs survey
- _ Identify overall occupancy and specific departmental and room occupancies
- _ Verify the accuracy of the client's occupancy and spatial estimates and review discrepancies
- _ Obtain lists such as:
 - _ Building rooms and types of relationships to other rooms
 - _ Equipment and equipment functions
 - _ Required or optional provisions for phased construction and future additions
- _ Identify property building line limitations to estimate ground level building area
- _ Verify site zoning or other restrictions on building height and review ambiguities in regulations
- _ Provide preliminary building code and fire code search
- _ Identify orientation and limiting site considerations
- _ Identify options of numbers of building stories and total height based on estimated floor plan areas and overall occupancy
- _ List special exterior and interior lighting, art, landscaping, and energy features desired by client
- _ Estimate size(s) of core area(s) required for such as: Mechanical services Electrical chases
- _ Estimate structural spans required to suit room spatial needs
- _ Identify options of structural systems
- _ Identify options of building configuration based on functions, occupancies, site limitations, orientation, height, spans, and structural system
- _ Identify options of construction systems suited to the likely building configuration and structural system
- _ Identify building cladding and fenestration suited to construction, structural, functional, and cost considerations
- _ Identify interior partitioning, flooring, and ceiling systems suited to construction, structural, functional, and cost considerations
- _ Estimate construction and site development costs
- _ Create two to three optional diagrammatic/schematic building plans based on foregoing information

PROGRAMMING continued

COMPREHENSIVE SERVICES Includes the previously listed services plus:

- _ Conduct detailed client and user needs surveys including in person interviews
- _ Establish criteria for ranking importance of room functions and relationships
- _ Create a Departmental Spatial Interaction Matrix (list of departments that shows their relationship to other departments)
- _ Create room-by-room spatial interaction diagrams showing all room relationships Identify numerical ratings of the importance of relationships of each room to other rooms
- _ Make link and node diagrams to show departmental and room relationships identified in the matrices
- _ Make bubble diagrams showing spaces with relationships flagged with their importance rankings
- _ Restructure bubble diagrams until link crossovers (plan conflicts) are eliminated
- _ Create diagrammatic/schematic building plans based on matrices and spatial interaction weightings
- _ Create two to six optional diagrammatic/schematic building plans based on foregoing information

PHASE 2: SITE ANALYSIS

ENVIRONMENTAL IMPACT REPORT

BASIC SERVICES

- _ Environmental Impact Report EIR if required by governing agencies

STANDARD SERVICES Includes the above listed services plus:

- _ EIR with explanatory data and collaborative information
- _ Coordinate consultant data and testimony on Environmental Impact
- _ Analysis of needs of recipients for targeted text and data
- _ Decide the structure and focus of the report:
- _ General and varied environmental issues / Non-focused Focused / Issue Oriented

COMPREHENSIVE SERVICES Includes the above listed services plus: _ Report on details of project evaluations:

- _ Aesthetic enhancement
 - _ Neighborhood or local upgrading
 - _ Economic enhancement
 - _ Land use improvements
 - _ Upgrading of neighboring or local properties
 - _ Traffic flow and parking improvement
 - _ Air quality protection or improvement
 - _ Water quality protection or improvement
 - _ Improved surface water flow
 - _ Improved ground water flow
 - _ Earth slide and erosion prevention
 - _ Animal life preservation or enhancement
 - _ Plant life protection or enhancement
 - _ Historical preservation
 - _ Archaeological protection
 - _ Safety enhancement
 - _ Noise abatement
 - _ Glare and reflectance prevention
 - _ Natural resources development
 - _ Neighborhood or local security and emergency facilities _ Health and recreation enhancement
 - _ Local ethnic values recognition
-
- _ Follow LEED standards for sitework planning
 - _ Decide and check environmental impact considerations during project planning and construction phases such as:
 - _ Multi-phase construction
 - _ Relocation of tenants or owners during construction

PHASE 3: SCHEMATIC DESIGN AND DOCUMENTATION

DESIGN PROCESS AND DISCIPLINES COORDINATION

BASIC SERVICES

- _ Prepare plans and notes to guide consultants' preliminary work
- _ Reach preliminary agreement with consultants on specific appropriate structural, construction, mechanical, and other building systems

STANDARD SERVICES Includes the above listed services plus:

- _ Create or obtain lists of special building equipment and fixtures required by the client that may affect consultants' work, and distribute the lists to the appropriate consultants
- _ Review architectural schematic diagrams, while in process, with structural, mechanical, electrical, and other consultants
- _ Confirm that the selected engineering and construction systems are compatible with one another
- _ Obtain estimates of spatial requirements for appurtenances and engineered systems
- _ Coordinate engineering schematic building diagrams
- _ Decide or confirm a structural module with the engineer _ Decide or confirm the interior partitioning module
- _ Plan the disposition of major spaces as per the spatial diagrams generated from the program review with the client
- _ Plan the disposition of minor or sub-departmental spaces within the planned larger spaces and obtain preliminary approvals from the users and/or client
- _ Confirm the client's construction budget and verify agreement between stated program needs and the budget
- _ Provide architectural base sheet schematics and require consultants to do their work on compatible Cad layers
- _ Establish Cad layering and sheet numbering protocols coordinated with CSI Master Format standards
- _ Prepare project operations manual and checklists format

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Hold formal cross-coordination meeting with all primary engineering consultants as participants to review program requirements and recommended structural and mechanical systems
- _ Require all consultants to do their schematics following the same scale, format, and drawing positioning as the architectural drawings
- _ Conduct one or more group meetings to allow consultants to compare their work with one another (work should be compared in layers with overlay transparencies)
- _ Establish Intranet and Extranet communication system for project participants

PHASE 3: SCHEMATIC DESIGN AND DOCUMENTATION

ARCHITECTURAL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Confirm and update the building program's stated functional, occupancy and spatial requirements with the client
- _ Prepare the architectural Schematic Design drawings such as:
 - _ Site Plan
 - _ floor Plan(s)
 - _ Exterior Elevation(s) (primary view)
 - _ Drawings in sketch, diagrammatic form

STANDARD SERVICES Includes the above *listed services plus:*

- _ Reconfirm the sources and accuracy of the budget, program, and legal requirements
- _ If there are changes in the design staff between the Pre-design / Programming phase and Schematic Design, confirm coordination of all new data with previous data
- _ Prepare architectural Schematic Design drawings in addition to those listed above such as:
 - _ Circulation diagrams
 - _ Site orientation diagrams
 - _ Most drawings in sketch form, informal, mounting optional
 - _ Compare schematic plans, sections and elevations with the program
 - _ Review schematic plans, sections, and elevations for rough construction cost estimates and compare with the budget
 - _ Compare schematic plans, sections and elevations with code and regulatory requirements
 - _ Schematic (sketch) study or massing models.

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Prepare architectural Schematic Design drawings in addition to those listed above, such as:
 - Roof Plan
 - Interior Elevations
 - Wall Sections
 - Design Details
- _ Provide detailed study or massing models of site and building drawings mounted or otherwise prepared for formal presentation
- _ Provide computer graphic modeling and/or animation.

PHASE 3: SCHEMATIC DESIGN AND DOCUMENTATION

STRUCTURAL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Review and reach agreement with the structural engineer on the general Scope of Work
- _ Determine what structural schematic drawings are required and, if so, schedule completion dates

STANDARD SERVICES Includes the above listed services plus: _ Review and reach agreement with the structural engineer on the number and content of structural

Schematic Design documents such as:

- _ Design criteria
- _ Structural grid or system
- _ Confirm with the structural engineer that the proposed structural systems satisfy all legal requirements
- _ Obtain preliminary estimates of comparative construction costs of likely alternative systems

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Consult with specialist structural design engineers if contemplating any exceptional structural system
- _ Consult with specialist structural engineer if anticipating any exceptional problems regarding soil, construction, adjacent site conditions, etc.

PHASE 3: SCHEMATIC DESIGN AND DOCUMENTATION

MECHANICAL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Review and reach agreement with the mechanical engineer on Scope of Service
- _ Determine what mechanical schematic drawings are required and, if so, schedule completion dates
- _ Provide energy calculation analysis as required by law

STANDARD SERVICES Includes the above listed services plus: _ Review and reach agreement with the mechanical engineer on the number and content of mechanical

Schematic Design data:

- _ Design criteria such as:
 - _ Energy use and conservation
 - _ HVAC system type and standards
 - Preliminary equipment and materials schedules
 - _ Outline specifications
- _ Schedule completion dates for interim and final mechanical schematic drawings
- _ Obtain preliminary estimates for probable first costs of alternative mechanical system

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Acquire preliminary estimates of operating costs of alternative mechanical systems
- _ Coordinate detailed analysis for alternative energy systems_ Consult with specialist mechanical or environmental engineers regarding exceptional climate or environmental hazard considerations
- _ Share LEED coordination information with Mechanical Engineer

PHASE 3: SCHEMATIC DESIGN AND DOCUMENTATION

ELECTRICAL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Review and reach agreement with the electrical engineer on the general Scope of Service _ Determine if electrical schematic drawings are required and, if so, schedule completion dates.

STANDARD SERVICES Includes the above listed services plus:

- _ Review and reach agreement with the electrical engineer on the number and content of electrical schematic documents:
 - Schematic plans, sections, and notes to show such as:
 - _ Reflected ceiling lighting plans
 - _ Power and switching
 - _ Schedule completion dates for interim and final electrical Schematic Design documents
 - _ Check and confirm compliance of the proposed building's electrical system design with codes and utility company requirements
 - _ Obtain preliminary estimates for alternative electrical systems construction costs

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Consult with specialist electrical engineers for advanced electronic control and communications systems
- _ Coordinate and/or consult regarding highly specialized lighting fixtures and/or effects
- _ Share LEED accreditation coordination information with Electrical Engineer

PHASE 3: SCHEMATIC DESIGN AND DOCUMENTATION

CIVIL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Review required soils testing and applicable regulations
- _ Review and reach agreement with the civil engineer on the general Scope of Work
- _ Determine if civil engineering schematic drawings are required and, if so, schedule completion dates

STANDARD SERVICES Includes the above listed services plus:

- _ Confirm that results of previously requested site tests have been received and transmitted to the client, consultants, and the design team
- _ Identify additional tests that may be required, and update the Test Log and file
- _ Conduct civil, structural, landscaping, and architectural coordination and drawing cross_check meetings
- _ Review and reach agreement with the civil engineer on the number and content of civil engineering Schematic Design documents
- _ Site plan documents such as Utility systems, on site and off.
- _ Schedule completion dates for interim and final civil schematic documents
- _ Check and confirm compliance of site work and civil engineering design with codes and regulations
- _ Prepare preliminary estimates for probable civil engineering related construction costs

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Consult and coordinate design for exceptional foundation, site, and/or soil conditions
- _ Conduct formal cross-coordination meeting with civil and structural engineers and landscape architect to work out special design problems
- _ Acquire preliminary estimates of costs of alternative options for site work construction

PHASE 3: SCHEMATIC DESIGN AND DOCUMENTATION

LANDSCAPE DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Identify optional landscape features and sources of consulting and landscape contracting services
- _ Review whether preliminary design consultation is required with the landscape consultant
- _ Determine if landscape schematic drawings are required and, if so, schedule completion dates

STANDARD SERVICES Includes the above listed services plus:

- _ Review and reach agreement with the landscape consultant on the number and content of landscape design Schematic Design drawings and notes such as:
 - _ Design criteria
 - _ Preliminary plant and landscape planning
- _ Schedule completion dates for interim and final landscape Schematic Design documents _ Obtain preliminary estimates for probable landscaping development costs

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Conduct cross-coordination meetings for integrating landscape, civil, and architectural design
- _ Review site for primary existing landscape features to remain, modify, remove for storage, or eliminate
- _ Share LEED coordination information with Landscape Consultant

PHASE 3: SCHEMATIC DESIGN AND DOCUMENTATION

INTERIOR DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Identify optional Interior Design or Office Planning services and recommended sources of such service
- _ Review whether preliminary design consultation is required with an interior consultant
- _ Determine if Interior Design or Office Planning schematic drawings are required and, if so, schedule completion dates

STANDARD SERVICES Includes the above listed services plus:

- _ Schedule interior design and architectural coordination meetings
- _ Review and reach agreement with the interior consultant on the number and content of interior Schematic Design documents such as:
 - _ Preliminary interior partition landscaping
 - _ Preliminary furniture planning Materials and finishes
- _ Schedule completion dates for interim and final interior Schematic Design documents
- _ Obtain preliminary estimates for probable cost of interior design partitions and furnishings

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Conduct cross-coordination meetings for integrating interiors, lighting, and other relevant interior features
- _ Provide or coordinate preparation of interior design study models _ Share LEED coordination information with Interior Design consultant

PHASE 3: SCHEMATIC DESIGN AND DOCUMENTATION

MATERIALS RESEARCH AND SPECIFICATIONS

BASIC SERVICES

- _ Review and list client preferences in products, materials, and building systems
- _ Create a project products and materials file folder or binder

STANDARD SERVICES Includes the above listed services plus:

- _ Start a list of first choices and alternative choices in materials, finishes, etc.
- _ Start project outline specifications or contents list in coordination with schematic architectural drawings
- _ Review with consultants the extent of outline specifications required from them at this phase

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Investigation of unusual materials and material combinations that are contemplated for the project
- _ Design and mockup fabrication of new construction systems, unusual materials and new material or product combinations

ESTIMATING PROBABLE CONSTRUCTION COSTS

BASIC SERVICES

- _ Provide information on current costs of comparable projects

STANDARD SERVICES Includes the above listed services plus:

- _ Have all consultants prepare construction cost estimates for their phases of work
- _ Prepare a preliminary Estimate of Probable Construction Cost
(with clear statement that costs cannot be accurately predicted at this stage of work)

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Provide itemized outline of comparative costs of alternative materials and construction systems

PHASE 3: SCHEMATIC DESIGN AND DOCUMENTATION

PRESENTATIONS

All presentation and meeting time that is unpredictable in frequency, duration, extensions, and delays is presumed to be charged hourly as agreed by client and design firm.

BASIC SERVICES

- _ Participation in public agency meetings or loan application meetings
- _ Preparation and presentation of Schematic graphics as required for permits and financing _ Review and negotiation meetings as required for permits and financing
- _ Schematic design and presentation revisions as required for permits and financing

STANDARD SERVICES Includes the above listed services plus:

- _ Plan appropriate presentation media (usually informal at schematic stage, if more formal work is required, see PRESENTATIONS alternatives listed in the DESIGN DEVELOPMENT phase)
- _ Prepare for the client, presentations of optional design features and variations to compare and decide
- _ Prepare preliminary building floor area calculations, building volume, usable area ratios, and other numerical comparisons with program requirements
- _ Present the Schematic Design and cost data

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Prepare preliminary data on costs and availability of special equipment and furnishings
- _ Prepare the presentation materials in such a form as to maximize possible reuse in design development
- _ Publicity graphic arts services

PHASE 3: SCHEMATIC DESIGN AND DOCUMENTATION

POST PRESENTATIONS

BASIC SERVICES

- _ Identify changes in the Schematic Design required by the client
- _ Note any extended repercussions from design changes and review with the client any revisions of the Scope of Work
- _ Review with client any impact on probable construction cost resulting from requested design changes
- _ Review with the client any contradictions between requested design changes and the original design program or prior client/designer decisions
- _ Update approximate time and cost estimates for the remainder of design services

STANDARD SERVICES Includes the above listed services plus:

- _ Establish a schedule and completion dates for review of upcoming work in Design Development _
- _ Prepare operational checklist for the next phase: Design Development

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Extend Schematic Design process as necessary to secure permits and financing

PHASE 4: DESIGN DEVELOPMENT

DESIGN PROCESS AND DISCIPLINES COORDINATION

BASIC SERVICES

- _ Confirm and update the building program's functional, occupancy and spatial requirements with the client
- _ Identify any new consultants required for this phase, and after review with client and written approval, negotiate contracts
- _ Transmit updated information on building occupancies and schematic plans to consultants
- _ Provide approximate estimate of Design Development time and cost
- _ Obtain or update lists of special building equipment and fixtures required by the client that may affect consultants' work, and distribute the lists to the appropriate consultants

STANDARD SERVICES Includes the above listed services plus:

- _ Review previous decisions on structural, construction, mechanical, and other building systems for possible economies and improvements
- _ Obtain updated written estimates from consultants of spatial requirements for appurtenances and engineered systems
- _ Provide project schedule time estimate in cooperation with all disciplines

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Require all consultants to do their Design Development drawings according to the same scale, format, and drawing positioning as the architectural drawings
- _ Provide architectural base sheets of the overall building plans and sections and require consultants to do their work on transparency overlays
- _ Provide training as required for consultants' staff members on the coordination of CADD displays
- _ Use formal Value Analysis techniques to review previous decisions on structural, construction, mechanical and other building systems for possible economies and improvements
- _ Provide detailed multi-discipline coordination checklist and CPM or PERT scheduling program
- _ Obtain or update the consultants' current estimates of building operating costs
- _ Review with the client the consultants' building operating cost estimates, and obtain written approval of the final proposed mechanical and electrical systems
- _ Hold meetings to allow consultants to compare their drawings and confirm that all selected engineering and construction systems are compatible with one another

PHASE 4: DESIGN DEVELOPMENT

ARCHITECTURAL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Reconfirm the program's functional, occupancy and spatial requirements with the client
- _ Identify client preferences or requirements in types of construction bidding and contracting that might effect the format of construction drawings and specifications
- _ Review schematic design for revisions and proceed with client approved design
- _ Review the schematic design, updates of the design, and changes in the program for possible violations of codes and regulations
- _ Verify that all parties involved have received completely up_to_date program and schematic design data
- _ Prepare architectural Design Development drawings such as:
 - Site Plan
 - Floor Plans
 - Exterior Elevations
- _ Perspective views
- _ Design Development drawings may include additional data as required for:
 - Building regulatory agency preliminary review
 - Planning agency preliminary review
 - Preliminary contractor construction estimates
- _ Design alternatives or options may be included as per agreement between client and design firm
- _ Two primary variations may be included within the base fee if agreed by client and design firm
- _ Provide statement of possible construction cost based on recent comparable project bids

STANDARD SERVICES Includes the above listed services plus:

- _ Prepare architectural Design Development drawings of Site Plan, Floor Plans, and Exterior Elevations as noted above, plus: Roof Plan Cross Sections Interior Elevations Wall Sections
- _ Design Details
- _ Special presentation perspectives and models may be prepared as per agreement between client and design firm, such as:
 - Full renderings
 - Presentation model
 - CADD modeling presentation
- _ Prepare and coordinate Outline Specifications
- _ Confirm the construction budget and resolve contradictions between stated program needs and available funding
- _ Confirm the type of construction contract to be used, such as single or separate contracts, and evaluate the effect of the contract type on drawing and specifications content and format
- _ Prepare architectural Design Development drawings of Site Plan, Floor Plans, and Exterior Elevations

COMPREHENSIVE SERVICES Includes the above listed services, plus:

- _ Roof Plan, Cross Sections, Interior Elevations, Wall Sections
- _ Design Details

PHASE 4: DESIGN DEVELOPMENT

ARCHITECTURAL DESIGN AND DOCUMENTATION continued

STANDARD SERVICES continued

- _ Prepare and coordinate Outline Specifications
- _ Review architectural Design Development drawings in process and compare them with the structural, mechanical, electrical, transportation, and other consultants' drawings
- _ Prepare building floor area calculations, building volume, usable area ratios, and other numerical comparisons with program requirements
- _ Review preferred construction methods for impact on design and documentation
- _ Provide "Statement of Probable Construction Cost" by square footage cost comparison with other comparable projects

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Use transparency overlays for comparing and cross coordinating the work of all disciplines
- _ Prepare data on costs and availability of special equipment and furnishings
- _ Confirm with the client whether a detailed construction cost estimate, such as a quantity survey, is desired with the Design Development package

EXTRA SERVICE

- _ Provide as an extra service "Statement of Probable Construction Cost" through more precise estimation method such as itemized quantity survey

PHASE 4: DESIGN DEVELOPMENT STRUCTURAL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Coordinate phase checking of structural drawings
- _ Coordinate check of structural drawings with architectural and mechanical work
- _ Confirm with the structural engineer that the proposed structural system satisfies all legal requirements

STANDARD SERVICES Includes the above listed services plus:

- _ Review and reach agreement with the structural engineer on the number and content of structural Design Development documents such as:
 - _ Design criteria
 - _ Structural grid or system
- _ Conduct structural, mechanical, and architectural drawing cross checking meetings with consultants
- _ Schedule completion dates for interim and final structural Design Development drawings and specifications
- _ Obtain preliminary estimates of probable construction costs of structural systems

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Create structural framing models as necessary to clarify structure and construction methods
- _ Observe structural materials testing to confirm design intent
- _ Coordinate consultants for non standard structural design such as tensile and fabric structures, below ground structures, etc.

PHASE 4: DESIGN DEVELOPMENT

MECHANICAL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Progress phase checking of mechanical drawings
- _ Coordination check between mechanical drawings with architectural and structural work

STANDARD SERVICES Includes the above listed services plus:

- _ Review and reach agreement with the mechanical engineer on the number and content of mechanical Design Development documents such as:
 - _ Design criteria such as:
 - Noise and vibration control
 - HV AC system type and standard
- _ Building plans and sections to show such as:
 - Equipment sizes and locations
 - Chase sizes and locations
- _ Conduct mechanical, structural, and architectural drawing cross checking meetings
- _ Schedule completion dates and monitor progress of interim and final mechanical Design Development drawings and specifications
- _ Confirm with mechanical consultant the acquisition of necessary approvals and permits for utilities
- _ Confirm with the mechanical consultant the compliance of the building mechanical and plumbing system design with codes and utility company requirements
- _ Acquire estimates for probable construction costs of the building's mechanical systems

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Acquire estimates for probable operating costs of the building's mechanical systems
- _ Coordinate specialized consulting regarding indoor air pollution and related environmental hazards
- _ Coordinate detailed energy saving analysis and/or solar energy design

PHASE 4: DESIGN DEVELOPMENT

ELECTRICAL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Progress phase checking of electrical drawings
- _ Coordination check between electrical drawings with architectural, structural, and mechanical work

STANDARD SERVICES Includes the above listed services plus:

- _ Conduct multidiscipline and architectural drawing cross checking meetings
- _ Review and reach agreement with the electrical engineer on the number and content of electrical Design Development documents such as:
 - _ Building plans and sections to show:
 - _ Reflected ceiling lighting plans
 - _ Power and switching
- _ Confirm and arrange the assistance of the electrical engineer in obtaining approvals and permits for electrical and communications services
- _ Schedule and monitor completion dates for interim and final electrical Design Development drawings and specifications
- _ Confirm with the engineer that the building electrical system design complies with codes and utility company requirements
- _ Obtain preliminary estimates for probable electrical systems construction costs

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Coordinate specialized communications systems such as for computers, environmental sensors, intelligent building appurtenances, etc.
- _ Select, purchase, and check delivery of specialized fixtures
- _ Coordinate specialized lighting consultants such as for exhibit lighting _ Custom design and mockup assembly of electrical fixtures
- _ Field testing and observation of specialized lighting

PHASE 4: DESIGN DEVELOPMENT

CIVIL ENGINEERING DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Confirm that site soils tests conform to requirements of local building authorities
- _ Review engineer's site observation and soil test report with structural engineer to coordinate foundation planning
- _ Recommend additional tests if original observations and tests are inconclusive and/or unacceptable to the prime design firm or structural engineer

STANDARD SERVICES Includes the above listed services plus:

- _ Confirm that results of all previously requested site tests have been received and transmitted to the client, consultants, and design team
- _ Identify additional tests that may be required
- _ Review site and surroundings for history of subsidence, upheaval, slides, flooding, etc.
- _ Update the Test Log and file
- _ Conduct civil, structural, and architectural coordination meetings
- _ Review and reach agreement with the civil engineer on the number and content of civil Design Development documents:
 - _ Site plans and sections to show such as: Cut and fill Excavations
 - _ Outline specifications
 - _ Schedule and monitor completion dates for interim and final civil Design Development drawings and specifications
- _ Check and confirm compliance of site work and civil engineering design with codes and regulations
- _ Obtain preliminary estimates for probable civil engineering related construction costs

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Design and coordination of required excavation
- _ Underground construction design

PHASE 4: DESIGN DEVELOPMENT

LANDSCAPE DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Provide schematic landscape plan
- _ Provide site plan for landscape consultant with designer's recommendations
- _ Review landscape plan proposed by consultant or nursery company and provide recommendations

STANDARD SERVICES Includes the above listed services plus:

- _ Review and coordinate landscape, civil engineering, mechanical, and electrical work
- _ Review and reach agreement with the landscape architect on the number and content of landscape Design Development documents such as:
 - _ Preliminary landscape planning
 - _ Site related plumbing work
 - _ Schedule and monitor completion dates for interim and final landscape Design Development drawings and specifications
- _ Obtain preliminary estimates for probable landscape development costs

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Conduct landscape architectural, civil engineering, mechanical, and electrical coordination meetings
- _ Survey, mark, and diagram existing landscape requiring storage and protection during construction
- _ Provide field search for specialized landscape elements
- _ Custom design of specialized landscape features
- _ Plan and proposal for full landscape planting and landscape service if required through separate contract

PHASE 4: DESIGN DEVELOPMENT

INTERIOR DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Provide preliminary floor plans for use by interior design consultants
- _ Provide referrals for interior design consulting services

STANDARD SERVICES Includes the above listed services plus:

- _ Conduct interior design and architectural coordination meetings
- _ Review and reach agreement with the interior designer on the number and content of interior Design Development documents such as:
 - _ Preliminary interior partition landscaping
 - _ Preliminary furniture planning
- _ Schedule and monitor completion dates for interim and final interior Design Development drawings and specifications
- _ Obtain preliminary estimates for probable costs of interior design furnishings and fixtures

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Complete furnishings consultation such as:
 - _ Selection Purchase
 - _ Delivery scheduling
 - _ Final approval on delivery
- _ Complete color coordination
- _ Art and decorative component purchase consultation
- _ Signage design
- _ Appurtenance and furnishings design
- _ Graphic design

PHASE 4: DESIGN DEVELOPMENT

MATERIALS RESEARCH AND SPECIFICATIONS

BASIC SERVICES

- _ Update project products and materials file folder or binder
- _ Start a checklist of primary first choices and alternative choices in products and materials

STANDARD SERVICES Includes the above listed services plus:

- _ Start cost and reliability research on materials, equipment, fixtures, and building systems
- _ Start project outline specifications in coordination with schematic architectural drawings
- _ Review with consultants the extent of outline specifications required from them at the close of Design Development

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Creation of a Project Manual or Project Database in which will be stored all data relevant to building maintenance and facilities management
- _ Field testing, site testing, and/or observation of installed materials and products to confirm suitability to the project
- _ Investigation of unusual materials and material combinations that are contemplated for the project
- _ Design and mockup fabrication of new construction systems, unusual materials and new material or product combinations

PHASE 4: DESIGN DEVELOPMENT

PROJECT DEVELOPMENT SCHEDULING

BASIC SERVICES

- _ Provide estimated probable time and cost for completion of design services
- _ Review with client the Scope of Work for possible revisions and additions to design services

STANDARD SERVICES Includes the above listed services plus:

- _ Create or update the job calendar of estimated phase starts and completions such as:
 - _ Design Development Construction Documents
 - _ Distribute copies of the new or updated job calendar to all job participants
 - _ Create a schedule for budget and progress reviews

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Provide CPM or Pert diagram charts and computer service for project scheduling and monitoring _
- _ Provide collaboration on scheduling for Design Management contract and/or Fast Track construction

PHASE 4: DESIGN DEVELOPMENT

BASIC SERVICES

ESTIMATING PROBABLE CONSTRUCTION COSTS

- _ Provide statement of possible construction cost based on recent comparable project bids

STANDARD SERVICES Includes the above listed services plus:

- _ Have all consultants prepare construction cost estimates for their phases of work
- _ Provide "Statement of Probable Construction Cost" by square footage cost comparison with other comparable projects

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Obtain detailed bid estimates for negotiated contract if desired by client
- _ Provide cost estimates for contracting/design-build service as separate contract if desired by client

EXTRA SERVICE

- _ Provide "Statement of Probable Construction Cost" through more precise itemized estimation method such as quantity survey

PHASE 4: DESIGN DEVELOPMENT

PRESENTATIONS

All presentation and meeting time that is unpredictable in frequency, duration, extensions, and delays is presumed to be charged hourly as agreed by client and design firm.

BASIC SERVICES

- _ Participation in public agency meetings (meetings at standard hourly consulting rates)
- _ Preparation and presentation of Design Development graphics as required for permits and financing
- _ Review and negotiation meetings as required for permits and financing at standard hourly rates
- _ Design and presentation revisions as required for permits and financing

STANDARD SERVICES Includes the above listed services plus: _ Plan the scope and media for the

- Design Development presentation
- _ Verify that graphic presentations will reproduce well in printed media
- _ Review with client, costs of presentation media and costs of presentation options
- _ Prepare for the client, presentations of optional design features and variations to compare and decide
- _ Finalize building floor area calculations, building volume, usable area ratios, and other numerical comparisons with program requirements
- _ Present the Design Development documents and cost data

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Detailed presentation model
- _ Detailed presentation renderings
- _ Prepare presentation data on preferred construction methods

PRESENTATIONS continued next page

PHASE 4: DESIGN DEVELOPMENT

PRESENTATIONS continued

COMPREHENSIVE continued

- _ Prepare presentation materials in a format which will maximize possible reuse in working drawing:
- _ Production as well as later marketing
- _ Plan any elaborated scope and media for the Design Development presentation and coordinate with outside specialist consultants such as:
 - _ Finish rendering
 - _ Detail models
 - _ Full scale simulations and/or mockups
 - _ CADD modeling and/or animation
 - _ Storyboard or mini mock-up of the final presentation
 - _ Press release and publicist services
 - _ Publicity photography services
- _ Review possible future client uses of design presentation material for project promotion

POST-PRESENTATIONS

BASIC SERVICES

- _ Review with client any impact of design changes on Scope of Work and design service time and cost
- _ Review with client any contradictions between requested design changes and the original design program or prior client/designer decisions
- _ Review with client any impact on probable construction cost resulting from requested design changes
- _ Update approximate time and cost estimates for the remainder of design services

STANDARD SERVICES Includes the above listed services plus:

- _ Prepare operational checklist for the next phase: Construction Documents
- _ Update the schedule and completion dates for working drawing and specification production

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Update CPM or Pert charts for the next phases of design service
- _ Apply a formal Value Engineering process to find potential project improvements and economies
- _ Review the next stage planning with working drawing consultants for methods of expediting and economizing on the production process

PHASE 5: CONSTRUCTION DOCUMENTS - WORKING DRAWINGS

BASIC DESIGN SERVICES

- _ Construction documents, specifications, and calculations sufficient to acquire building permit
- _ Working drawings typically including site plan with legal property description and survey, floor plans, roof plan or framing plan, exterior elevations and structural details as required by the building department

STANDARD DESIGN SERVICES Includes the above listed services plus:

- _ Construction documents and specifications of standard content sufficient for owner-built, negotiated contract, or competitive bid
- _ Working drawings typically including site plan with legal property description and survey (plus additional site plans as required for engineering and landscaping), existing and new conditions, floor plans, roof plan framing plans, exterior and interior elevations, finish/door/window schedules and details, cross sections, wall sections, interior and exterior construction details. Consultant drawings including structural drawings, schedules, and details; electrical plans and schedules, plumbing plans and schedules, HVAC plans and schedules
- _ Additional schedules as required such as for cabinets, hardware, and paint or other final finishes
- _ Shop drawing review and coordination
- _ Probable construction cost estimates at beginning and end of construction document phase

COMPREHENSIVE DESIGN SERVICES Includes the above listed services plus:

- _ Additional construction clarification documents such as aerial survey with site plan and construction photo drawings
- _ Extensive specific cross referencing between architectural and consultant drawings and specifications. Additional schedules such as for hardware schedule with door schedule
- _ Extensive detailing of finish items
- _ Consultant documentation review meetings at primary phases of work
- _ Probable construction cost estimates at each phase
- _ Complete checklist documentation of all changes in design and scope of work

PHASE 5: CONSTRUCTION DOCUMENTS - WORKING DRAWINGS

PRODUCTION MANAGEMENT DISCIPLINES COORDINATION AND DOCUMENT CHECKING

BASIC SERVICES

- _ Identify any new consultants required for this phase, and negotiate contracts
- _ Before finalizing new consultant contracts, review consultant service and contract terms with the client and obtain written client approval
- _ Transmit updated information on building occupancies and design changes to consultants; make sure the architectural design team has identical updated information
- _ Submit progress prints of architectural and consultants' work to all consultants

STANDARD SERVICES Includes the above listed services plus:

- _ Review previous decisions on structural, construction, mechanical, and other systems for possible economies and improvements
- _ Confirm that the various selected engineering and construction systems are compatible with one another
- _ Obtain updated estimates of spatial requirements for appurtenances and engineered systems
- _ Confirm that consultants, client, or others are handling the acquisition of approvals and permits for all utility services
- _ Obtain or update lists of special building equipment and fixtures required by the client that may affect consultants' work, and distribute to appropriate consultants

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Conduct group meetings to allow consultants to compare their drawings with one another
- _ Obtain update of the consultants' estimates of building operating costs
- _ Review with the client the consultants' building operating cost estimates; obtain from the client written approval of the proposed mechanical and electrical systems

PHASE 5: CONSTRUCTION DOCUMENTS - WORKING DRAWINGS

PRODUCTION MANAGEMENT ARCHITECTURAL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Confirm and update the program's functional, occupancy, and spatial requirements with the client
- _ Review changes in the program and note possible impact on the project design and documentation
- _ Review the Design Development documents, updates of the design, and changes in the program for possible violations of codes and regulations
- _ Continue and update the code search
- _ Inform the client of necessary applications for approvals and permits

STANDARD SERVICES Includes the above listed services plus:

- _ Review the Design Development documents, updates of the design, and changes in the program for possible conflicts with the original design intent or with fundamental engineering decisions
- _ Compare the developed design with the client's construction budget
- _ Confirm the type of construction contract to be used, such as single or separate contracts, and the effect of the contract type on drawing, specifications content and format
- _ Prepare and coordinate final specifications (SEE THE SECTION ON SPECIFICATIONS) and evaluate
- _ Confirm the construction budget and review any contradictions between stated program needs and available funding
- _ Enforce coordination check points to confirm that the architectural production team is fully informed of the most up to date consultants' information and vice versa
- _ Determine and note reasons for changes in the design
- _ Confirm client preferences or requirements for types of construction bidding and contracting that might affect the format of construction drawings and specifications
- _ Review preferred construction methods for impact on design and documentation
- _ Confirm the dates for submittal of all construction documents (drawings, calculations, contracts, specifications, and updates on construction cost estimates) to the client

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Confirm with the client whether a detailed construction cost estimate, such as a quantity survey, is desired with the final working drawings
- _ Compare architectural working drawings with the structural, mechanical, electrical, transportation, and other consultants' drawings by means of transparency overlays
- _ Identify possible or definite bid alternates and plan content and organization of documents accordingly
- _ Prepare data on costs and availability of special equipment and furnishings

PHASE 5: CONSTRUCTION DOCUMENTS - WORKING DRAWINGS

PRODUCTION MANAGEMENT STRUCTURAL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Coordinate progress checking of structural drawings and comparison with all other disciplines
- _ Identify changes in the scope of structural work that occurred during the Design Development Phase

STANDARD SERVICES Includes the above listed services plus:

- _ Review and reach agreement with the structural engineer on the number and content of structural Construction Documents:
- _ Design criteria
- _ Structural grid or system
- _ Conduct structural, mechanical, civil, and architectural drawing cross-checking meetings

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Create structural framing study models as necessary to clarify structure and construction methods
- _ Observe structural materials testing to confirm design intent
- _ Coordinate specialized consultants for non-standard structural design

PHASE 5: CONSTRUCTION DOCUMENTS - WORKING DRAWINGS

PRODUCTION MANAGEMENT MECHANICAL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Identify changes in the scope of mechanical work that occurred during the Design Development Phase ~
Coordinate progress checking of mechanical drawings and comparison with all other disciplines

STANDARD SERVICES Includes the above listed services plus:

- _ Review and reach agreement with the mechanical engineer on the number and content of final mechanical construction documents:
- _ Building plans, sections, and other drawings to show such as:
 - Noise and vibration control
- _ HVAC system type(s) and standard(s)
- _ HVAC heat load and cooling calculations
- _ Confirm with the mechanical consultant the acquisition of necessary approvals and permits for utilities
- _ Conduct mechanical, structural, and architectural drawing cross-checking meetings_ Confirm with the mechanical consultant the compliance of the building mechanical and plumbing system design with codes and utility company requirements
- _ Determine the impact on project time and cost as well as construction cost of revisions in mechanical work
- _ Acquire estimates for probable construction costs of the building's mechanical systems

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Acquire estimates for probable operating costs of the building's mechanical systems
- _ Coordinate specialized consulting regarding indoor air pollution and related environmental hazards
- _ Coordinate detailed energy-saving analysis and/or solar energy design

PHASE 5: CONSTRUCTION DOCUMENTS - WORKING DRAWINGS

PRODUCTION MANAGEMENT ELECTRICAL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Progress phase checking of electrical drawings
- _ Coordination check between electrical drawings with architectural, structural, and mechanical work

STANDARD SERVICES Includes the above listed services plus:

- _ Conduct multidiscipline architectural drawing cross-checking meetings
- _ Identify changes in the scope of electrical work that occurred during the Design Development Phase
- _ Determine the impact on cost of revisions in electrical work
- _ Confirm that changes in the electrical design comply with legal requirements
- _ Review and reach agreement with the electrical engineer on the number and content of Electrical Construction Documents:
- _ Building plans and sections to show:
 - _ Reflected ceiling lighting plans
 - _ Power and switching
- _ Specifications
- _ Arrange the assistance of the electrical engineer in obtaining approvals and permits for electrical and communications services
- _ Obtain updated final estimates for probable electrical systems construction costs

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Coordinate specialized communications systems such as for computers, environmental sensors, intelligent building appurtenances, etc.
- _ Select, purchase, and check delivery of specialized or designer fixtures
- _ Coordinate specialized lighting consultants such as for theatrical and exhibit lighting
- _ Custom design and mockup assembly of electrical fixtures
- _ Field testing and observation of specialized lighting effects

PHASE 5: CONSTRUCTION DOCUMENTS - WORKING DRAWINGS

PRODUCTION MANAGEMENT CIVIL DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Provide all data necessary for Civil Engineer to complete grading and excavation plan
- _ Confirm that site soils tests conform to requirements of local building authorities
- _ Review engineer's site observation and soil test report with structural engineer to coordinate foundation plan
- _ Recommend additional tests if original observations and tests are inconclusive and/or unacceptable to the prime design firm or structural engineer

STANDARD SERVICES Includes the above listed services plus:

- _ Confirm that results of all previously requested site tests have been received and transmitted to the client, consultants, and the design team
- _ identify additional tests that may be required
- _ Update the Test Log and file
- _ Identify changes in the scope of civil engineering construction that have occurred through the Design Development Phase
- _ Determine the impact on cost of revisions in civil work
- _ Confirm that changes in the civil engineering design comply with legal requirements
- _ Review and reach agreement with the civil engineer on the number and content of civil engineering Construction Documents such as:
 - _ Site plans and sections to show such as:
 - _ Cut and fill Excavations
 - _ Irrigation
 - _ Drainage Site-related construction
 - _ Civil engineering construction details
 - _ Specifications
- _ Schedule completion dates for interim and final civil working drawings and specifications
- _ Check and confirm compliance of site work and civil engineering design with codes and regulations
- _ Acquire updated estimates for probable civil engineering related construction costs

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Conduct civil, structural, landscaping, and architectural drawing cross-checking meetings
- _ Design and coordination of special purpose excavation
- _ Underground construction design

PHASE 5: CONSTRUCTION DOCUMENTS - WORKING DRAWINGS

PRODUCTION MANAGEMENT LANDSCAPE DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Provide schematic landscape plan
- _ Provide site plan for landscape consultant with designer's recommendations
- _ Review landscape plan proposed by consultant or nursery company and provide recommendations

STANDARD SERVICES Includes the above listed services plus:

- _ Review and reach agreement with the landscape architect on the number and content of landscape Construction Documents such as:
 - _ Landscape plans
 - _ Site work construction details
- _ Identify special order planting that must be ordered early, to assure delivery and installation before the completion date
- _ Schedule completion dates for interim and final landscape working drawings and specifications
- _ Update estimates for probable landscape development costs

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Conduct landscape architectural, civil engineering, mechanical, and electrical coordination meetings _
- _ Survey, mark, and diagram existing landscape requiring storage and protection during construction
- _ Provide field search for specialized landscape elements
- _ Custom design of specialized landscape features such as fountains, artificial streams, grottos, etc.
- _ Plan and proposal for full landscape planting and landscape service through separate contract

PRODUCTION MANAGEMENT INTERIOR DESIGN AND DOCUMENTATION

BASIC SERVICES

- _ Provide floor plans for use by interior design consultants

STANDARD SERVICES Includes the above listed services plus:

- _ Review and reach agreement with the interior designer on the number and content of interior design Construction Documents such as:
 - _ Interior partition landscaping
 - _ Furniture selection and planning
 - _ Schedule completion dates for the final interior drawings and specifications
- _ Review architectural, electrical, mechanical features for impact on Interior Design drawings
- _ Update estimates for probable costs of interior design furnishings and fixtures
- _ List and schedule special-order furnishings (such as carpet) that must be ordered early, to assure delivery and installation before move in date

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Complete color coordination and finish schedule
- _ Art and decorative component purchase consultation:
 - _ Selection Purchase
 - _ Delivery scheduling
- _ Final approval on delivery
- _ Signage design and construction details
- _ Appurtenance and furnishings design and construction details

PHASE 5: CONSTRUCTION DOCUMENTS - WORKING DRAWINGS

PRODUCTION MANAGEMENT PROJECT DEVELOPMENT SCHEDULING

BASIC SERVICES

- _ Provide estimated probable time and cost for completion of design services
- _ Review with client the Scope of Work for possible revisions and additions to design services

STANDARD SERVICES Includes the above listed services plus:

- _ Create or update the job calendar of estimated phase starts and completions:
 - _ Construction Documents
 - _ Bidding/Negotiation
 - _ Contract Administration
 - _ Post Construction
- _ Distribute copies of the new or updated job calendar to all job participants
- _ Create a schedule for budget and progress reviews

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Provide CPM or Pert diagram charts and computer service for project scheduling and monitoring
- _ Provide collaboration on scheduling for Construction Management contract and/or Fast Track construction

PHASE 5: CONSTRUCTION DOCUMENTS - WORKING DRAWINGS

PRODUCTION MANAGEMENT ESTIMATING PROBABLE CONSTRUCTION COSTS

BASIC SERVICES

- _ Provide statement of possible construction cost based on comparative square footage or similar building type bids

STANDARD SERVICES Includes the above listed services plus:

- _ Have all consultants prepare construction cost estimates for their phases of work
- _ Provide "Statement of Probable Construction Cost" by square footage cost comparison with other similar projects

COMPREHENSIVE SERVICES

Includes the above listed services plus:

- _ Obtain all consultants' construction cost estimates
- _ Provide "Statement of Probable Construction Cost" through more precise itemized estimation method such as quantity survey
- _ Obtain detailed bid estimates for negotiated contract
- _ Provide cost estimates for contracting/design-build service as separate contract

PHASE 5: CONSTRUCTION DOCUMENTS - WORKING DRAWINGS

PRODUCTION MANAGEMENT PRESENTATIONS

All presentation and meeting time that is unpredictable in frequency, duration, extensions, or delays is presumed to be charged hourly as agreed by client and design firm.

BASIC SERVICES

- _ Participation in public agency meetings or loan application meetings
- _ Preparation and presentation of Design Development graphics as required for permits and financing
- _ Review and negotiation meetings as required for permits and financing

STANDARD SERVICES Includes the above listed services plus:

- _ Conduct all Construction Document presentations such as:
 - _ Interim presentations to client
 - _ Presentations to financing agencies
 - _ Presentations to regulatory agencies
- _ Revisions in working drawings as required for permits and financing
- _ Identify any contradictions between requested design changes and the original design program or prior client/designer decisions
- _ Note any extended repercussions from design changes, and review with the client any extensions of the Scope of Work and any required changes in design service time and cost
- _ Update building floor area calculations, building volume, usable area ratios, and other numerical comparisons with program requirements.
- _ Present the Design Development documents and cost data
- _ Obtain approvals required for next phase: PRE_BIDDING and BIDDING

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Prepare presentation materials in a form which will maximize possible reuse in working drawing production as well as later marketing:
- _ Review possible future client uses of working drawing material, such as base sheet floor plans for promotional graphics
- _ Update CPM or Pert charts for working drawings _ Assist in charting and planning construction schedule
- _ Apply a formal Value Engineering process to find potential construction improvements and economies
- _ Review the next stage planning with consultants for methods of expediting and economizing on the bidding and construction administration processes

PHASE 5: CONSTRUCTION DOCUMENTS – SPECIFICATIONS

BASIC SERVICES

- _ If the client is also the contractor, no specification may be required
- _ For small projects, specifications may be handled as general notes in the drawings
- _ For larger jobs, the design firm may have to review the following decisions and options with the client:
- _ Decide with client the type of construction contract
- _ Decide among related options such as:
 - _ Phased Construction Fast Track
- _ Confirm the type of specification
- _ If documents require any more than standardized or outline specification, the quality and quantity of services will most likely shift to Mid-level or COMPREHENSIVE

STANDARD SERVICES Includes the above listed services plus:

- _ Conduct review meetings and/or drawing checks to coordinate decisions and alternatives on:
 - _ Room functions and relationships
 - _ Room finish schedule
 - _ Construction system
 - _ Structural system
 - _ Mechanical system
 - _ Lighting
 - _ Vertical transportation
 - _ Exterior materials:
 - _ Roofing
 - _ Walls
 - _ Fenestration
 - _ Interior partitioning system
 - _ Cabinetry
 - _ Site appurtenances
 - _ Materials, finishes, and fixture quality:
 - _ Superior Middle Grade
 - _ Economy Grade Mixed Grades
- _ Identify and write specification sections that can be completed early in the working drawing process
- _ Make checklist of latest special trade association standards required for the project
- _ Confirm use of latest applicable product literature
- _ Confirm use of latest applicable testing agency standards
- _ Confirm use of all latest applicable codes and regulations _ Acquire from the client any previous relevant specifications
- _ Create a Project Manual binder for preliminary organization of specification information (use index tabs following the CSI Master format)

PHASE 5: CONSTRUCTION DOCUMENTS - SPECIFICATIONS continued

COMPREHENSIVE SERVICES Includes the above listed services plus:

_ Provide completely detailed specification divisions and sections incorporating the following data:

Materials:

- _ Required characteristics of materials
- _ Components or proportions of components of materials:
- _ Installed location on the job if not fully indicated in the drawings
- _ Preparation for installation
- _ Installation

Coordination:

- _ Broad scope working drawing sheet reference
- _ Detail drawing sheet reference
- _ Consultant's drawing sheet reference
- _ Related and/or connecting work by other trades or subcontractors
- _ Related other specifications sections
- _ Workmanship standards and tolerances
- _ Inspections and tests (may be combined with workmanship standards and tolerances)
- _ Repair and patching
- _ Clean-up, preparation for other work
- _ Warranties, bonds, or guarantee requirements
- _ Post-construction adjustments or service
- _ Review "Scope of Work" and "Work Not Included" articles in each section
- _ Verify all references to work in other sections
- _ Distribute copies of specifications for content review by department heads and/or job captains, and the designated project site representative(s)

PHASE 6: CONSTRUCTION BID ADMINISTRATION

BASIC SERVICES

- _ For smaller projects, bids may be taken and negotiated without formalities
- _ Clients may act as their own contractors and handle all sub-contractor bids themselves
- _ Larger projects in open bidding may require the following even as BASIC SERVICES:

ADMINISTRATION : PRE-BID

- _ Prepare and assemble bid documents such as:
 - Bid Notice
- _ Bid Advertisement (if separate from the invitation to Bid)
 - Invitation to Bid
 - Instructions to Bidders
- _ Contractor's Qualification Statement
 - Bid Form
- _ Owner-Contractor Agreement
- _ Confirm that all necessary permits and approvals from regulatory agencies have been obtained
- _ Confirm that all necessary permits and approvals from public utilities have been obtained

FOR NON-OPEN BIDDING, NEGOTIATED CONTRACTS

- _ Establish the criteria for contractor qualifications and acceptable contract terms
- _ Review selection(s) of preferred contractor(s) and discuss choices with the client
- _ Establish terms for bargaining and acceptable alternatives in scheduling and budgeting construction

BIDDING MATERIALS - FOR INVITED BIDDING

- _ Establish criteria for qualifications of acceptable contractors
- _ Select the preferred contractor(s) for negotiation, and review the selection with the client for approval
 - Create invited bidders list
- _ Notify invited bidders

BIDDING MATERIALS - FOR OPEN BIDDING

- _ Provide Instructions to Bidders and/or advertising for bidders _ Begin and maintain a Register of Bid Documents
- _ Identify favored prospective prime contract bidders
- _ Identify media for bid advertising: construction periodical(s), newspapers, plan rooms, etc.

BASIC SERVICES continued next page

PHASE 6 - CONSTRUCTION BID ADMINISTRATION

BASIC SERVICES continued

BIDDING MATERIALS - FOR OPEN BIDDING continued

- _ Write the criteria for acceptable bidder qualifications, and confirm criteria with the client
- _ Write the Invitation to Bid, and obtain client's approval
- _ Identify the surety or bid bond to be required of bidders
 - _ Publish and distribute the Invitation to Bid
- _ Obtain statements of qualification from prospective bidders
- _ Notify selected bidders
- _ Identify and list all bid documents to be distributed to bidders, and identify the amount of bid document deposit
- _ Review the complete bid package with the client
- _ Identify the quantity of bid documents to distribute to each bidder and the total number of bidders
- _ Identify those other than bidders who will receive bid documents, such as the client, consultants etc.
- _ Distribute bid documents to bidders, plan rooms, client, and all other concerned parties
- _ Schedule a pre-bid conference to review documents with prospective bidders
- _ Maintain a log of distributed documents, including bidders' deposit security payments and refunds
- _ Review proposed substitutions according to formal procedures established in the Instructions to Bidders

ADDENDA

- _ Prepare an addendum log in the Register of Bid Documents
- _ Distribute addenda to all bidders according to procedures established in the Bid Documents
- _ When responding to any bidder's request for clarification or additional data, send copies of the clarification data as an addendum to all other bidders

BIDDING AND NEGOTIATIONS

- _ Hold pre-bid meeting(s) with prospective bidders and client
- _ Prepare a report on the pre-bid meeting(s) and send copies to all concerned parties
- _ Prepare a Bid Tabulation Form
- _ Receive bids according to procedures in the Instructions to Bidders
- _ Check all bids to confirm the validity of the contractors' and major subcontractors' licenses
- _ Confirm that the rules regarding bid security are enforced

BASIC SERVICES continued next page

PHASE 6 - CONSTRUCTION BID ADMINISTRATION

BASIC SERVICES continued

ANALYSIS OF ALTERNATES AND SUBSTITUTIONS

- _ Create a "Confirmation Form" memo to set down in writing all verbal interpretations, instructions, and confirmations (establish a time limit in which copies of such memos must be distributed)
- _ Establish a record of consultations with the client on changes and alternates, with space for notes confirming client approvals of alternates
- _ Establish a record of notifications to the Contractor(s) of approved and not approved alternates
- _ Notify all bidders of accepted substitutions

STANDARD SERVICES Includes the above listed services plus:

- _ Identify alternates that concern the work of consultants
- _ Ask consultants to identify favored prospective subcontractors
- _ If the selected contract form is Cost Plus Fee, establish the accounting and record keeping procedures to be used to monitor the contractor's performance
- _ If the project is out-of-state, consult with the client's legal counsel on the existence of any special laws regarding the bidding process, construction documents, and forms of agreement
- _ Identify and confirm the design firm and client's separate responsibilities in advertising for bids, receiving bids, negotiation, and acceptance
- _ Identify insurance coverage the client should have prior to the execution of the contract
- _ Identify insurance and bonds the client will require the contractor to have
- _ List and confirm what materials, equipment, and furnishings are supplied by the client and installed by the contractor
- _ List and confirm what materials, equipment, and furnishings are supplied by the client and installed by anyone other than the contractor
- _ Confirm that the client has supplied an accurate site survey, site legal description, and a soil and subsurface condition report, all to be included with the construction documents.

BID EVALUATION

- _ Analyze the bids; check for errors or omissions
- _ Write a comparison of bid tabulations with the latest design firm construction cost estimates
- _ Review significant discrepancies between the bid tabulations and the last previous construction cost estimate
- _ Review bids with the client and advise on bid acceptance and rejection
- _ Obtain the client's acceptance of a bid or rejection of a bid
- _ Record reasons for acceptance/rejections in the project manual

STANDARD SERVICES continued next page

PHASE 6 - CONSTRUCTION BID ADMINISTRATION

STANDARD SERVICES continued

BID EVALUATION continued

- _ Advise the client how to draft a notice of acceptance that states an intent to execute the contract without specifically awarding the contract
- _ Notify all bidders of acceptance or rejection
- _ Return received documents and refund the bid deposits/security to unsuccessful bidders

CONSTRUCTION CONTRACT AGREEMENTS

- _ Advise the client on construction contract format and content
- _ Have consultants assist on preparation of separate prime contracts
- _ Provide the client with a checklist of separate designer/client-contractor responsibilities as stated in the contract
- _ Advise client and contractor of their insurance responsibilities _ Schedule times for confirmation of required insurance coverage
- _ Obtain performance and labor and material payment bonds from the contractor; review and forward copies of bonds to client
- _ Obtain the contractor's certificate of insurance; review and forward copies of certificate to client
- _ Obtain the client's property insurance policy; review and forward copies to the contractor
- _ Identify and review the establishment of any non-typical insurance arrangements between the client and the contractor, include descriptions of such arrangements in the contract
- _ Obtain the post-bid information from the accepted contractor as required in the Instructions to Bidders
- _ Review the construction plan and time schedule with the client and contractor for inclusion in the contract
- _ Consult with and assist the client in negotiating and executing the final contract

POST-BIDDING ADMINISTRATION

- _ Create a log for recording all change orders and modifications to the contract
- _ Provide all necessary contract documents, specified equipment brochures, and related project data to the contractor
- _ Identify bid tabulation data, special agreements addenda, and memos, reports, minutes, and correspondence that should be included in the final Project Manual as part of construction contracts or construction documents

- COMPREHENSIVE SERVICES** Includes the above listed services plus: _ If all bids are rejected, confer with the client to establish the next step of bidding invitations or negotiations
- _ If the client wants to proceed with limited interim construction prior to awarding the final contract, advise the client on the form and content of this type of letter of intent
 - _ Investigate whether other major projects are coming up for bid at the same time, and, if necessary, modify the bid date
 - _ Establish whether the design firm or the client's legal representative is to identify special governing laws for out-of-state bidding. contracts. and construction
 - _ Evaluate building construction systems proposed by contractors for phased construction
 - _ Assist the client in establishing criteria and schedules for phased construction or multiple contracts

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION

PROJECT ADMINISTRATION - PRE-CONSTRUCTION

BASIC SERVICES

- _ Establish what minimum Construction Contract Administration services and site observation should be part of the contract
- _ Provide site observation visits as required by the contract

STANDARD SERVICES Includes the above listed services plus:

Create a Construction Contract Administration Manual to include:

- _ Schedules and Progress Charts
- _ Project Field Observations and Field Reports
- _ Project Photo Surveys
- _ Client Approvals
- _ Waivers, Receipts, and Vouchers
 - Field Orders
- _ Change Orders
- _ Supplemental Documents and Instructions

Tests

- _ Shop Drawings and Samples
- _ Inspections, Permits and Approvals
- _ Certificates of Payment
- _ Owner-Architect Agreement/Owner-Contractor Agreement
 - Schedule of Values

Observations of Contractor Performance Certificate of Insurance

Record of Document Distribution

Construction Detail Job site Feedback

- _ Broad scope Working Drawing Job site Feedback
- _ Specifications Job site Feedback
- _ Final Inspections and Close-out

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Daily or full_time Project Representative
- _ Design construction barrier fence
- _ Provide publicity related services for groundbreaking ceremony - Assist contractor in planning construction facilities

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION

SHOP DRAWING CHECKING AND COORDINATION

BASIC SERVICES

- _ For minimum service small projects and owner-contractor projects there may be no shop drawing checking
- _ If shop drawings are to be reviewed, follow the General and Supplementary Conditions describing the relative responsibilities of the contractor and design firm in regard to shop drawings

STANDARD SERVICES Includes the above listed services plus:

- _ Maintain a Shop Drawing and Sample Record to record all shop drawings received from the contractor
- _ Create a list of anticipated shop drawings and a preliminary calendar schedule of when they should be received by the contractor and when submitted to the design firm
- _ Submit lists to the contractor of construction items that will require:
 - _ Shop drawings
 - _ Product data
 - _ Product and material samples
 - _ Color samples
- _ Establish a transmittal form for conveying reasons for disapproval of a sample or shop drawing
- _ Confirm that copies of all approved items are being kept by the contractor for the client
- _ Follow a checking sequence and criteria such as:
 - _ Conformance of submitted item to specified item, model, and type
 - _ Explanation of substituted items and conformance of substitutions to specified standards
 - _ Conformance to required testing criteria such as ASTM, ANSI, ASME, or UL
 - _ Conformance to specified performance or capacity
 - _ Materials as specified
- _ Relationship to other construction

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Coordinate with consultants their responsibilities in checking shop drawings
- _ Provide site visits and shop visits to confirm that fabrications and assemblies are as per the shop drawings and the design intent

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION

PROJECT ADMINISTRATION - ACTIONS REGARDING CONTRACTOR

BASIC SERVICES

- _ If any amount of Construction Contract Administration services are provided, minimal services regarding the contractor may include:
- _ Confirm that the contract with the contractor is complete
- _ Confirm that the contractor's Performance Bond and the Labor and Material Bond are correct
- _ Send the contractor a copy of the client's directions regarding required insurance Confirm that the contractor has filed the Certificate of Insurance with the client
- _ Confirm that the contractor has acquired and paid for all necessary permits
- _ Acquire and review the list of proposed subcontractors from the prime contractor
- _ Make recommendations regarding acceptable, unacceptable, or questionable subcontractors

STANDARD SERVICES Includes the above listed services plus:

- _ Acquire the names of substitute subcontractors plus differences in construction time or cost caused by any such substitution
- _ Assist the client in evaluating substitute contractors
- _ Write Change Orders when necessary to modify contract terms because of any substitution of subcontractors
- _ Review and approve, or have corrected, the contractor's Schedule of Values before the first scheduled application for payment
- _ Review and modify as necessary the contractor's schedule of required shop drawings, samples, and colors
- _ Review and approve, or have corrected, the contractor's estimated job construction progress schedule
- _ Notify the client of the estimated job construction schedule and report any scheduling problems
- _ Establish a site visit and job observation schedule based on the contractor's estimated construction schedule
- _ Confirm that all contractor schedules (shop drawing, values, job progress, etc.) conform to contract requirements

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Review qualifications of proposed subcontractors in detail with consultants
- _ Provide detailed research assistance to the client in approving, disapproving, or acquiring more information on subcontractors proposed by the prime contractor
- _ Conduct detailed pre-construction coordination meeting with consultants, contractor, and subcontractors

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION

CONSULTANTS COORDINATION AND DOCUMENT CHECKING

BASIC SERVICES

- _ If any Construction Contract Administration services are provided, minimal services may include:
- _ Notify consultants of changes in construction contract that affect their work
- _ Coordinate consultant drawing scheduling, checking, and change orders

STANDARD SERVICES Includes the above listed services plus:

- _ Notify the consultants of selected prime contractor(s) and subcontractors
- _ Coordinate consultants' reviews of shop drawings

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Conduct detailed pre-construction coordination meeting with consultants, contractor, and subcontractors

AGENCY CONSULTING, REVIEW, AND APPROVALS

BASIC SERVICES

- _ If Construction Contract Administration services are provided, minimal services may include review and coordination of regulatory agency inspections

STANDARD SERVICES Includes the above listed services plus:

- _ Establish inspection schedules and records and coordinate with agency inspection requirements

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Provide ongoing liaison and coordination with inspection agencies in addition to job inspection reviews

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION

SUBSTANTIAL COMPLETION AND PROJECT CLOSE-OUT OWNER_SUPPLIED DATA COORDINATION

BASIC SERVICES

- _ If Construction Contract Administration services are provided, minimal services may include review and coordination of owner-supplied data as required by regulatory agencies

STANDARD SERVICES Includes the above listed services plus:

- _ Establish whether the client or the contractor will be responsible for purchasing property insurance _
Confirm that all parties have reached written agreement as to how property insurance is to be handled
- _ Identify any special hazards insurance to be included in the property insurance, and confirm written agreement between the client and contractor
- _ Confirm that the client has all necessary property insurance and has provided copies to the contractor
- _ Review and advise contractor of client-supplied materials, equipment, and furnishings
- _ Advise client of applications that must be made for permanent utility services

COMPREHENSIVE SERVICES Includes the above listed services plus:_ Schedule and coordinate delivery and installation of client-supplied materials, equipment, and furnishings

- _ Conduct a detailed pre-construction meeting with contractors and consultants to coordinate special needs of client

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION

SUBSTANTIAL COMPLETION AND PROJECT CLOSE_OUT continued

OFFICE CONSTRUCTION ADMINISTRATION

BASIC SERVICES

- _ Establish a shop drawing and samples review procedure if required by the contract

STANDARD SERVICES Includes the above listed services plus:

- _ Review the plan and schedule for construction and update the overall contractual responsibilities of contractor(s), client, and design firm
- _ Confirm the construction start date, estimated days of construction, and the estimated date of substantial completion
- _ Confirm the client's approval of the construction schedule
- _ Confirm that all necessary insurance is in force prior to starting construction
- _ Confirm regulatory agency knowledge and approval of the scheduled construction start time
- _ Send the Notice to Proceed to the contractor
- _ Send copies of the Notice to Proceed to all concerned parties such as regulatory agencies, insurance representatives, testing companies, etc.
- _ Send cross-coordination and advisory memos to all parties regarding interpretations, special instructions, modifications, and clarifications

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Hold a detailed pre-construction meeting with all concerned parties, including the client, prime contractor(s), subcontractors, appropriate design firm staff members and management, and consultants

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION

SUBSTANTIAL COMPLETION AND PROJECT CLOSE-OUT continued

CONSTRUCTION FIELD OBSERVATION AND REPORTS

BASIC SERVICES

- _ If any Construction Contract Administration services are provided, minimal services may include: _
- _ Establish schedule and record log for periodic field observations of the construction site
- _ Provide periodic field visits, observations, and observation reports

STANDARD SERVICES Includes the above listed services plus:

- _ Provide field observations at specified intervals as per agreement with client
- _ Create a calendar of special construction events and tests to be witnessed by design firm and/or consultant firm representatives
- _ Review all Project Field Observation Reports and submit a copy of each to the contractor's field representative
- _ Include notices of any modifications required by observations in the reports
- _ Submit copies of Field Observation Reports, modifications, and construction schedule changes to the client
- _ File Field Observation Reports and corresponding construction photos (labeled and dated) in the Construction Contract Administration Manual

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ In addition to regular periodic field observations, include extended field observation visits at start points and important coordination junctures in:
 - _ Grading and Excavation Foundation Formwork and Pours
 - _ Concrete Pours and Finishing
 - _ Framing
 - _ Masonry
 - _ Closing in
 - _ Roofing
 - _ Mechanical, Plumbing, Mechanical HVAC, Electrical Finishes
- _ Request photos from consultants and contractors, as required to maintain a complete photo record of construction
- _ Establish construction photo standards and procedures and take record photographs at every site visit
- _ Establish a format for tape recorded construction site surveys and punch listing

EXTENDED COMPREHENSIVE Includes the above listed services plus:

- _ Create a Field Observation Report format for consultant's representatives and observers from the prime design firm
- _ Confirm that consulting firm and prime design firm representatives understand they must write a Project Field Observation Report after each site visit
- _ Date, label, and file all construction photos

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION

SUBSTANTIAL COMPLETION AND PROJECT CLOSE-OUT continued

BASIC SERVICES

FIELD ORDERS AND CHANGE ORDERS

- _ If Construction Contract Administration services are provided, BASIC services may include providing Field Orders and Change Orders as required to meet minimal construction standards and compliance with construction documents
- _ Start and maintain a Field and Change Order Log

STANDARD SERVICES Includes the above listed services plus:

- _ Note all supplemental drawings required for clarifications, interpretations, and revisions
- _ Provide a cross reference system to assure that all such field orders are translated into change orders for approval by the client
- _ Establish a file or log to verify that all negotiated change orders are approved and signed by the client
- _ Record extra design and/or drawing services required due to client-initiated changes

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Establish a procedure for noting field orders that affect the construction cost or time
- _ Establish a notation procedure for recording extra design and/or drawing services required due to changes initiated by the client
- _ Review and report to client on contractor Proposal Requests for changes, with price quotations

BASIC SERVICES

TESTS

- _ If Construction Contract Administration services are provided, minimal services may include observation and reports on tests required to assure minimal construction standards and compliance with documents

STANDARD SERVICES Includes the above listed services plus:

- _ Start a Tests Log in the Project Construction Administration Manual
- _ List all tests required for the job, and note approximate dates according to the current construction schedule
- _ Confirm that required tests are being requested in a correct and timely manner by the contractor Review all test results
- _ Distribute test results to the appropriate design firm department heads and consultants so they can review test results that pertain to their work
- _ Confirm in writing that the contractor has responded properly when notified of deficiencies revealed in test results

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Review and notify client of all recommended extra or special tests required by regulatory agencies
- _ Review and notify client of all recommended extra or special tests that might aid in assuring maximum quality control and fulfillment of design intent
- _ Coordinate, observe, and provide reports on all extra or special tests

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION

SUBSTANTIAL COMPLETION AND PROJECT CLOSE-OUT continued

CERTIFICATES FOR PAYMENT

BASIC SERVICES

- _ If Construction Contract Administration services are provided, minimal services may include administration of Certificates for Payment:
- _ Provide a Certificates for Payment record
- _ Review applications for payment

STANDARD SERVICES Includes the above listed services plus:

- _ Review applications for payment and compare each against:
- _ Field Inspection Reports
- _ Construction photo records
- _ Previous project schedules
- _ Test reports
- _ Client observations
- _ Consultant observations
- _ Retained percentage
- _ Potential claims
- _ Substitutions
- _ Change orders
- _ Contractor's Schedule of Values
- _ Vouchers and receipts of payments to subcontractors and suppliers
- _ Materials paid for but not installed storage and insurance
- _ Notify the contractor of disapprovals or requests for further information to validate any application for payment
- _ Send Certificates of Payment to the client, with copy to the contractor
- _ At 50% Completion, review the contract sum retained value for possible reduction
- _ If applicable, review the contractor's Consent of Surety

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Prepare detailed financial records and charts of project time and costs for client review
- _ Assist in negotiations with contractor or financing agencies for additional work required or unexpected changes in costs and financing needs

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION

CONSTRUCTION ADMINISTRATION

BASIC SERVICES

- _ If Construction Contract Administration services are provided, minimal services may include:
- _ Create a schedule of construction site visits and send copy to client
- _ Acquire regulatory agency inspection dates and notify the client and contractor
- _ Establish a file or log for evaluating Applications for Payment

STANDARD SERVICES Includes the above listed services plus:

- _ Assemble copies of small scale plans, approvals, test results, and any other data required to assist regulatory agencies in their inspections
- _ Review the inspection results of regulatory agencies, and write punch lists of required corrective actions
- _ Prepare a Supplemental Drawing Log to record all new documents prepared for interpretation and clarification, and for recording project changes during construction
- _ Prepare a log to confirm reproduction and delivery of all drawings and specifications that show design and schedule changes
- _ Schedule check times for confirming that supplemental drawings and other documents that show changes and clarifications have replaced obsolete documents
- _ Establish a file or log to verify that all approved change orders are distributed to the contractor, accounting department, and all concerned consultants and departments
- _ Establish a file or log to verify that whenever there is an increase in the contract sum, you obtain copies of written consent provided to the contractor by the surety company
- _ File copies of change orders and relevant drawings and photos in the Change Order section of the Construction Contract Administration Manual
- _ Note changes in schedule and any anticipated changes in the final occupancy date
- _ With each Application and Certificate for Payment provide an account of:
 - _ Previous payments that have been approved
 - _ Total of retained values withheld
 - _ Cost effect of change orders
- _ Construction expenses compared with the original Schedule of Values
- _ Submit monthly statements to the client

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Schedule site visits specifically for determining the contractor's time schedule performance
- _ Send regular memos to the client on the contractor's time scheduling performance
- _ Assist in negotiations in disagreements involving contractors or regulatory agencies
- _ Negotiate with the contractor to expedite construction when evidence appears that liquidated damages may be required for slow performance
- _ Review and evaluate contractor expense records for cost-plus contracts

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION

CONSTRUCTION ADMINISTRATION AT SUBSTANTIAL COMPLETION

BASIC SERVICES

- _ If Construction Contract Administration services are provided, minimal services may include:
- _ Review the Notification of Substantial Completion and the contractor's list of remaining work to be corrected or finished
- _ Notify regulatory agency representatives who must inspect the building before occupancy of substantial completion
- _ Acquire final regulatory agency inspection dates and notify the client and contractor
- _ Assemble copies of small scale plans, approvals, test results, and any other data required to assist regulatory agencies in their inspections
- _ Review the inspection results of regulatory agencies and obtain a punch list of final required corrective actions
- _ Do field visit of the project to confirm substantial completion
- _ Confirm that all required test reports have been received from the contractor and review test reports as they pertain to substantial completion
- _ Prepare a punch list of remaining work to be repaired or completed
- _ When the project is judged to be substantially complete, prepare a Certificate of Substantial Completion
- _ Obtain from the client written approval of the Certificate of Substantial Completion, and written acceptance from the contractor

STANDARD SERVICES Includes the above listed services plus:

- _ Confirm that the client has completed all final required applications for utility services and easements
- _ Review a possible reduction of the contractor's retained value
- _ Have the contractor submit construction records and documents such as:
 - _ Certificates of Inspection and approvals /Bonds
 - _ Project record drawings ("as-builts"= last issued drawings, not surveyed, verified documentation.
 - _ Guarantees and warranties for installed equipment and materials
 - _ Supplies and equipment provided for maintenance of installed equipment and materials
 - _ Project maintenance manual as specified
 - _ Equipment operating instructions
 - _ Keying schedule and master keys

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Review and log all close out records in detail for completeness
- _ Provide photographs as required for clarification of work completed or not completed
- _ Identify and assemble job documentation the client needs to send to financing agencies
- _ Provide reproducible prints as required to assist the contractor in preparing final project record drawings

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION

BASIC SERVICES

SEMIFINAL AND FINAL INSPECTION

- _ If Construction Contract Administration services are provided, provide a field inspection of the project to confirm completion and confirm that clean up is satisfactory

STANDARD SERVICES Includes the above listed services plus:

- _ Prepare a final field inspection report listing items still remaining to be repaired and/or completed
- _ Conduct additional inspections as required due to incompleteness of the work
- _ Deduct the cost of required additional or special inspections from the final payment to the contractor

FINAL CERTIFICATE OF PAYMENT

BASIC SERVICES

- _ If Construction Contract Administration services are provided, review the contractor's application for final payment, and acquire affidavits, receipts, vouchers, releases, and waivers of lien as necessary to verify the contractor's payments to subcontractors and suppliers

STANDARD SERVICES Includes the above listed services plus:

- _ Verify that the correct retained amounts are noted, to deduct from the payment to contractor
- _ Review the Consent of Surety
- _ Review the Owner-Contractor Agreement, and confirm that all conditions have been met
- _ Issue a semifinal Certificate for Payment, if necessary, prior to issuing a final Certificate

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Review release of liens and investigate, as necessary to make sure subcontractors haven't been coerced into signing releases

BASIC SERVICES

IN-OFFICE CLOSE-OUT

- _ Provide required assistance to the client in obtaining final regulatory agency approvals, Certificate of Occupancy, etc.
- _ Assemble, summarize, distribute, and file the main elements of project history

STANDARD SERVICES Includes the above listed services plus:

- _ Move documents to interim storage during the warranty period
- _ Assist client in obtaining all building materials and equipment maintenance information
- _ Obtain fully complete record drawings of final construction and provide copies to client

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Assist client with publicity, open house activities, tenant rental brochures, etc.
- _ Assist client in installation of furnishings and signage _ Assist tenants in interior design and signage

PHASE 8: POST-CONSTRUCTION ADMINISTRATION

BASIC SERVICES

- _ List all corrective work required of the contractor
- _ List all corrections, repair, or replacements required of equipment and materials manufacturers
- _ Assist the client in overseeing corrective and replacement work
- _ Confirm completion of corrective work by the contractor and subcontractors and OK final payments
- _ Assist the client in obtaining any delayed final permits or certificates
- _ Check that consultants update their portions of record drawings and related documents

STANDARD SERVICES Includes the above listed services plus:

Coordinate consultant's observations of the contractor's remedial work on:

- _ Site work and site drainage
- _ Landscaping
- _ HVAC
- _ Plumbing
- _ Lighting Communications

- _ Assist the client in assembling and building operations and maintenance manual(s)
- _ Obtain certification from contractors of changes made by them during construction
- _ Identify all concealed systems installed by contractors
- _ Prepare or review record drawings to confirm that all notable changes made during construction have been accurately recorded
- _ Send record drawings and related data to the client and to any others as directed by the client

COMPREHENSIVE SERVICES Includes the above listed services plus:

- _ Schedule inspection of materials and equipment prior to the expiration of warranties
- _ Assist the client in selection and installation of client-supplied furnishings, fixtures, and equipment
- _ Coordinate maintenance and instruction meetings between the client and the equipment manufacturers' representatives
- _ Assist the client in training operational and maintenance staff members in correct work scheduling and procedures
- _ Review operation and maintenance scheduling and costs and assist in refining building operations
- _ Conduct field observation and advise client regarding functioning and maintenance of building systems and materials
- _ Provide tenant space planning, interior design, and remodeling services
- _ Commissioning of all environmental systems to meet LEED standards

END OF DOCUMENT