



Scope of Basic Services for Construction Manager

GENERAL SERVICES:

- Provide overall Project coordination and Project Team management.
- Monitor Project Team performance relative to contractual obligations.
- Provide regular Project budgeting, scheduling, cost accounting and reporting (with input from others as required).
- Prepare monthly reports addressing project progress and issues.
- Propose, develop and implement Project quality assurance plan (e.g., model room, mockups, testing and inspection program, etc.).
- Schedule and conduct progress meetings and issue minutes and action lists as required.
- Maintain project files and records, including a Project directory with names, addresses, phone and fax numbers and responsibilities of all individuals and organizations associated with the Project.
- Prepare, review and process monthly requisitions and draw requests.
- Provide advice and assistance in resolving claims and disputes.
- Recommend and monitor appropriate levels of budget contingency required during all phases of the project.

PHASE I: PRELIMINARY PLANNING/FEASIBILITY

- Analyze Project program, quality, cost and schedule requirements. Recommend a design and construction strategy that best addresses all of these issues.
- Prepare for Owner's review and approval a Project Cost budget based upon a statistical analysis of completed projects adjusted for current market conditions. Such budget should clearly identify all necessary categories of cost, including, but not necessarily limited to, all professional fees (e.g. design, consultants, project management, legal etc.), construction, testing, landscaping, furnishings, fixtures & equipment ("FF&E"), including taxes, freight and storage, and contingencies.
- Prepare the Master Schedule showing duration, responsibility and precedence for all major activities. Establish the duration of the Project and identify the most critical activities. Update and expand the level of detail as the Project progresses.

- Identify, monitor and report on the status of key decisions and issues which will influence the progress of the Project.
- Identify all critical Project constituents as well as all approvals and permits required to be obtained from the relevant governmental jurisdiction(s), public agencies, community interest groups, etc.
- Determine necessary design team members, qualify and recommend potential firms, prepare and issue requests for proposals, receive and evaluate written proposals and conduct interviews to assist the Owner in selecting the Architect, Interior Designer and other consultants as required. Assist Owner in the negotiation of these contracts.
- Review existing conditions and available documentation of same, identify additional research, studies, surveys, etc. required and with Owner's approval coordinate the procurement of same.
- Develop organization charts for client, architect, consultants and contractors. Prepare a Project directory with names, addresses and responsibilities of all individuals and organizations associated with the Project. Document procedures for decisions, communications, distribution of reports, billings, etc.
- Identify and define the systems and tools that will be used to communicate, monitor and control the Project.

PHASE II: DESIGN & CONSTRUCTION DOCUMENTATION

- Develop and refine project design requirements (program, Design Standards, etc.), in coordination and consultation with Owner.
- Coordinate design reviews with Owner and design team. At the conclusion of each design phase, confirm Owner's approval prior to directing the design team to proceed with the next phase.
- Ensure that Owner requirements and requests are properly reflected in the design and construction documents.
- Monitor and administer design contracts as to quality, timeliness of performance, payment, compliance with contract requirements, etc.
- Review plans and specifications for constructability, completeness, clarity, lack of ambiguity, coordination, etc.
- Assist the Owner in coordinating with and obtaining all necessary design approvals from the relevant governmental jurisdiction(s), public agencies, community interest groups, etc.

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- Update and expand the Master Schedule to include milestone activities for each of the design phases, permits and approvals, the bidding or negotiation of construction contracts, construction and the purchase, fabrication, inspection, delivery and installation of furniture, fixtures and equipment.
- Report on activities which are on or behind schedule, and recommend corrective action as required.
- As design progresses and as each design phase is completed, update Project Cost estimates for comparison with the Owner's approved Project Cost budget.
- Estimate the cost of alternate building systems in order to finalize selections prior to construction documentation.
- Identify areas for value engineering study as the design progresses. Where energy, maintenance and operational considerations dictate, perform life-cycle costing studies to evaluate the most cost effective systems.
- Update Project Cost budgets.
- Document all procedures required for the submittal of materials, samples and shop drawings. Develop and maintain schedules and logs.
- Advise on contract provisions for controlling construction schedules. Advise on special and general conditions sections of the specifications.
- Investigate and prequalify contractors and manufacturers interested in bidding the work. Review plans with them and promote their interest in the Project.
- Recommend the division of work into separate contracts to permit phasing. Consider such factors as construction durations, construction document preparation, long-lead-time materials and equipment, labor availability, trade jurisdictions, and interface problems between contractors.
- Identify materials and equipment which require long delivery times and are critical to the progress of the work. Develop a strategy for purchasing these items directly and later assigning them to a contractor.

PHASE III: PRE-CONSTRUCTION

- Finalize Project bidding and procurement strategies. Finalize all bid packages and phasing techniques.
- Qualify and recommend potential contractors, prepare and issue requests for proposals and bid forms, receive and evaluate written proposals and conduct

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interviews to assist the Owner in selecting the Contractor. Assist Owner in the negotiation of the construction contract(s).

- Update the Master Schedule to reflect the current Project plan. Prepare both graphic and numeric reports. Distribute to all members of the Project team.

PHASE IV: CONSTRUCTION

- Organize and direct a preconstruction meeting with the Contractor, Architect, Interior Designer, other consultants and the Owner as appropriate. Review Project organization, lines of authority and Project procedures.
- In collaboration with the Contractor, develop a construction schedule outlining start and finish dates for procurement and construction activities. Establish major milestones for each segment of the work. Update the Master Schedule as appropriate to incorporate such activities and dates.
- Review Contractor's updates to the construction schedule. Observe construction progress and report deviations from the schedule which will jeopardize job progress. Work with Contractor to develop recovery plans. Update the Master Schedule as appropriate to incorporate such activities and dates.
- Establish/confirm the schedule for the purchase, fabrication, inspection, delivery and installation of furnishings, fixtures and equipment.
- Review the capabilities of proposed subcontractors and evaluate their suitability. Evaluate proposed procedures and equipment prior to use.
- Coordinate the construction, review and approval of model room(s) or other mock-up installations as required.
- Observe Work in progress for conformance with plans and specifications and report defects and deficiencies.
- Coordinate the work of separate contractors engaged by Owner.
- Assist in the selection of independent testing agencies. Coordinate their work, review their reports and make recommendations regarding their findings.
- Maintain a complete and current record of Project contracts, drawings and specifications, progress photos, testing and inspection reports, etc. Maintain a file of all Project correspondence, directives and meeting minutes.
- Maintain or cause to be maintained daily job site reports recording weather, numbers of workmen, equipment in use, general activities completed and special occurrences (e.g. accidents, injuries, etc.).

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- Monitor delivery and review of shop drawings and submittals and expedite approvals of same. Maintain (or cause to be maintained) submittal/approval logs and sets of all such documents and samples.
- Monitor and coordinate design team site visits and responses to Contractor requests for information.
- Monitor Contractor performance as to cost, quality and schedule.
- Monitor and confirm Contractor and Owner compliance with insurance requirements.
- Attend regular job site meetings with all Owner and Contractor representatives and Owner consultants as appropriate; discuss job progress, track and record key actions and decisions and prepare and/or review meeting minutes as required.
- Visit off-site fabrication facilities as required (out-of-pocket cost of such trips is a reimbursable expense).
- Prepare monthly reports addressing project progress and any quality, cost and schedule issues.
- Identify and attempt to resolve construction issues/disputes as they arise and prior to engagement of legal counsel to handle the matter.
- Support the Owner in the defense and resolution of any claims related to the Project. Assemble and analyze data as required for such defense.
- Manage the processing of any claims, payments and rebates related to Owner's insurance.
- Develop and implement a procedure for the review and processing of Contractor applications for payment. Review Contractor's schedule of values for use in processing payments.
- Develop and implement a system for the preparation, review and processing of construction change directives and change orders. Estimate the cost of all change orders and negotiate them with the Contractor on behalf of the client. Identify and recommend to Owner changes that will save time or money or improve quality.
- Retain material and field testing agencies as required on behalf of owner (cost of testing is a reimbursable expense).
- Recommend and oversee corrective and recovery measures, as required.
- Review all FF&E documents and purchase orders for design and budget compliance.
- Coordinate construction activities with FF&E delivery and installation.

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- Maintain an accurate, up-to-date construction cost accounting system. Include costs of contracts, direct purchased materials and other appropriate items. Make revisions to incorporate approved changes as they occur.

PHASE V: PROJECT CLOSE-OUT

- In collaboration with the Contractor, develop a detailed schedule of close-out activities, including punch lists, equipment testing, start-up procedures and occupancy. Incorporate such schedule into the Master Schedule and distribute it to all Project team members as appropriate.
- Monitor and confirm Contractor compliance with all turnover requirements.
- Schedule and direct inspections to develop punch lists. Establish dates of Substantial and Final Completion.
- Coordinate, catalogue and confirm delivery to Owner of all keys, manuals, warranties, as-built drawings, plans and specifications, lien releases, attic stock materials, etc.
- Work with the Contractor to monitor the completion of punch list items and to finalize all outstanding changes in their scope of work. Verify the payment of retainages.
- Schedule and monitor all product and equipment demonstrations and training.
- Monitor initial start-up and testing of all systems to confirm compliance with specifications.
- Coordinate performance of corrective and warranty work.