

## SCOPE OF SERVICES

### Entitlements Coordination:

Considering how the entitlement process is unique to each individual project and jurisdictional municipality, our entitlement coordination services are as varied as the individual projects themselves. When we have had a leadership role in the overall entitlement process, we have coordinated the selection of the individual team members w/ the Client and usually their legal counsel and led the team throughout the entitlement / Development Agreement process. On other projects, we have served as the day-to-day coordinator w/ the entitlement team to insure schedule commitments are met, inter-team communication is occurring, and that the City and the Client are kept current at all times as to progress.

### Pre-Construction:

- ❑ Finalize project team requirements and solicit service proposals for review and approval.
- ❑ Finalize project reporting and recordation requirements.
- ❑ Determine City permit requirements and projected plan check duration.
- ❑ Develop a comprehensive fee schedule and determine document submittal schedule.
- ❑ Determine Client approval time frame to insure that permit issuance complies with construction schedule constraints.
- ❑ Determine schedule format and frequency of required updates.
- ❑ Identify team reporting requirements.
- ❑ Finalize occupancy requirements.
- ❑ Finalize the comprehensive project budget.
- ❑ Establish the date of determination for a Guaranteed Maximum Price.

### Schematic Design:

- ❑ Integrate all required professional disciplines into the process and establish clear expectations and required target completion requirements.
- ❑ Coordinate the phasing and scheduling of required document preparation for review and approval.
- ❑ Investigate design-build /design-assist opportunities with design team and the General Contractor (GC).
- ❑ Finalize client design input and approval process.
- ❑ Establish and lead weekly project team and City coordination meetings.

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- ❑ Finalize client design input and approval process.
- ❑ Establish and lead weekly project team and City coordination meetings.
- ❑ Coordinate comprehensive code, budget, and schedule review (each phase).
- ❑ Coordinate the finalization and update of project visuals (models, renderings, material/samples boards, etc.).
- ❑ Coordinate Schematic Design for review and approval.
- ❑ Conduct preliminary code/ Fire Department design review.
- ❑ Issue initial comprehensive budget and schedule for review and approval.

### Design Development:

- ❑ Coordinate design adjustment in accordance with previous phase budget update.
- ❑ Coordinate construction implementation analysis for material pre-order.
- ❑ Identify peer review team and schedule for review and reporting.
- ❑ Begin mock-up review and material sampling for review and approval.
- ❑ Begin formal code review and approval at 50% completion of DD (final with City at completion of this phase).
- ❑ Finalize all design-build and design-assist opportunities.
- ❑ Finalize sub-contractor qualification process- coordinate preparation of sub-bid forms and contract procedures.
- ❑ Coordinate Design Development for approval.
- ❑ Establish a Guaranteed Maximum Price for the project, identify update requirements and overall project schedule.
- ❑ Coordinate Owner requirements for furnishings, fixtures, and accessories. Negotiate/select dealers and procure pricing proposals.

### Construction Documents:

- ❑ Insure that the General Contractor participates in the preparation of the Construction Documents (mandatory).
- ❑ Accelerate City approvals on a phased basis if necessary (target is to have a permit-ready set of documents at the end of this phase).
- ❑ Coordinate execution of all required permits.
- ❑ Finalize and implement applicable peer review comments.
- ❑ Establish and monitor final construction schedule.
- ❑ Coordinate a final constructability / code review w/ GC and applicable sub-contractors.

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- Coordinate site mobilization and final pre-construction activities.
- Review Guaranteed Maximum Price status.

### Construction:

- Coordinate weekly construction meetings and documentation preparation.
- Establish a system to manage Requests For Information, design and material submittals, field log documentation, shop drawings, and external trade coordination.
- Coordinate continual schedule updates to identify client milestones, City requirements, etc.
- Coordinate all project reporting (meeting notes, consultant updates, City status, etc.)
- Provide overview and tracking of City-provided services including plan check, permitting, and inspection.
- Coordinate all necessary approvals to insure timely occupancy.
- Prepare a comprehensive monthly billing review package for all project invoices. Submit to Owner for approval and payment.
- Provide on-site construction observation personell.
- Coordinate generation of progress and final punch lists and project close-out items.
- Review construction progress and billing to verify GMAX compliance.

### Occupancy / Project Close-out:

- Insure coordination and cooperation between design, construction and the occupancy team.
- Coordinate receipt of all necessary occupancy permits.
- Assemble and coordinate all systems training and warranty information.
- Coordinate filing of the Notice of Substantial Completion and final payment to the GC, including retention (all unconditional lien releases are in place).





