



# Summary Of Contracting Services Program

## 1.0 Preconstruction Phase

**1.1 Consultation During Project Development:** Schedule and attend regular meetings with the Architect during the development of conceptual and preliminary design to advise on site use and improvements, selection of materials, building systems and equipment. Provide recommendations on construction feasibility, availability of materials and labor, time requirements for installation and construction, and factors related to cost of alternative designs or materials, preliminary budgets, and possible economies.

**1.2 Scheduling:** Develop a Project Time Schedule that coordinates and integrates the Architect's design efforts with construction operations of the Project, including realistic activity sequences and durations, allocation of labor and materials, processing of shop drawings and samples, and delivery of products requiring long lead-time procurement. Include the Owner's occupancy requirements showing portions of the Project having occupancy priority.

**1.3 Project Construction Budget:** Prepare a Project budget as soon as major Project requirements have been identified, and update periodically for the Owner's approval. Prepare an estimate based on a quantity survey of Drawings and Specifications at the end of the schematic design phase for approval by the Owner as the Project Construction Budget. Update and refine this estimate for the Owner's approval as the development of the Drawings and Specifications proceeds, and advise the Owner and the Architect if it appears that the Project Construction Budget will not be met and make recommendations for corrective action.

**1.4 Value Engineering:** Both our Project Executive and Project Manager would take an active role in providing the value engineering leadership required for this project. H.B.D. has an extensive and up-to-date costing system that allows us to have very accurate material and labor cost figures on all trade areas of your project. This database is updated on a daily basis and is the foundation for quick and accurate cost figures when providing the value engineering services. We would work with the Construction Services Team and use value engineering techniques to ensure the highest quality project at the most competitive cost. Value engineering will be provided throughout the design process, not just at the end of the bid process.

**1.5 Coordination of Contract Documents:** Review the Drawings and Specifications as they are being prepared, recommending alternative solutions whenever design details affect construction feasibility or schedules without, however, assuming any of the Architect's responsibilities for design.

**1.6 Construction Planning:** Recommend for purchase and expedite the procurement of long-lead items to ensure their delivery by the required dates.

**1.6.1** Make recommendations to the Owner and the Architect regarding the division of Work in the Drawings and Specifications to facilitate the bidding and awarding of Trade Contracts, allowing for phased construction taking into consideration such factors as time of performance, availability of labor, overlapping trade jurisdictions, and provisions for temporary facilities.

**1.6.2** Review the Drawings and Specifications with the Architect to eliminate areas of conflict and overlapping in the Work to be performed by the various Trade Contractors and prepare prequalification criteria for bidders.

**1.6.3** Develop Trade Contractor interest in the Project and as working Drawings and Specifications are completed, take competitive bids on the Work of the various Trade Contractors. After analyzing the bids, either award contracts or recommend to the Owner that such contracts be awarded.

## **2.0 Construction Phase**

**2.1 Project Control:** Monitor the Work of the Trade Contractors and coordinate the Work with the activities and responsibilities of the Owner, Architect and HBD to complete the Project in accordance with the Owner's objectives of cost, time and quality.

**2.1.1** Maintain a competent full-time staff at the Project site to coordinate and provide general direction of the Work and progress of the Trade Contractors on the Project.

**2.1.2** Establish on-site organization and lines of authority in order to carry out the overall plans of the Construction Team.

**2.1.3** Establish procedures for coordination among the Owner, Architect, Trade Contractors and HBD with respect to all aspects of the Project and implement such procedures.

**2.1.4** Schedule and conduct progress meetings at which Trade Contractors, Owner, Architect and HBD can discuss jointly such matters as procedures, progress, problems and scheduling.

**2.1.5** Provide regular monitoring of the schedule as construction progresses. Identify potential variances between scheduled and probable completion dates. Review schedule for Work not started or incomplete and recommend to the Owner and Trade Contractors adjustments in the schedule to meet the probable completion date. Provide summary reports of each monitoring and document all changes in schedule.

**2.1.6** Determine the adequacy of the Trade Contractors' personnel and equipment and the availability of materials and supplies to meet the schedule. Recommend courses of action to the Owner when requirements of a Trade Contract are not being met.

**2.2 Physical Construction:** Provide all supervision, labor, materials, construction equipment, tools and subcontract items which are necessary for the completion of the Project which are not provided by either the Trade Contractors or the Owner. To the extent that the HBD performs any Work with his own forces, he shall, with respect to such Work, perform in accordance with the Plans and Specifications and in accordance with the procedure applicable to the Project.

**2.3 Cost Control:** Develop and monitor an effective system of Project cost control. Revise and refine the initially approved Project Construction Budget, incorporate approved changes as they occur, and develop cash flow reports and forecasts as needed. Identify variances between actual and budgeted or estimated costs and advise Owner and Architect whenever projected cost exceeds budgets or estimates.

**2.3.1** Maintain cost accounting records on authorized Work performed under unit costs, actual costs for labor and material, or other bases requiring accounting records. Afford the Owner access to these records and preserve them for a period of three (3) years after final payment.

**2.4 Change Orders:** Develop and implement a system for the preparation, review and processing of Change Orders. Recommend necessary or desirable change to the Owner and the Architect, review requests for changes, submit recommendations to the Owner and the Architect, and assist in negotiating change orders.

**2.5 Payments to Trade Contractors:** Develop and implement a procedure for the review, processing and payment of applications by Trade Contractors for progress and final payments.

**2.6 Permits and Fees:** Assist the Owner and Architect in obtaining all building permits and special permits for permanent improvements, excluding permits for inspection or temporary facilities required to be obtained directly by the various Trade Contractors. Assist in obtaining approvals from all the authorities having jurisdiction.

**2.7 Owner's Consultants:** If required, assist the Owner and/or Architect in selecting and retaining professional services of a surveyor, testing laboratories and special consultant, and coordinate these services, without assuming any responsibility or liability of or for these consultants.

**2.8 Inspection:** Inspect the Work of Trade Contractors for defects and deficiencies in the Work without assuming any of the Architect's responsibilities for inspection.

**2.8.1** Review the safety programs of each of the Trade Contractors and make appropriate recommendations. In making such recommendations and carrying out such reviews, he shall not be required to make exhaustive or continuous inspections to check safety precautions and programs in connection with the Project. The performance of such services by HBD shall not relieve the Trade Contractors of the responsibilities for the safety of persons and property, and for compliance with all federal, state and local statutes, rules, regulations and orders applicable to the conduct of the Work.

**2.9 Document Interpretation:** Refer all questions for interpretation of the documents prepared by the Architect to the Architect.

**2.10 Shop Drawings and Samples:** In collaborations with the Architect, establish and implement procedures for expediting the processing and approval of shop drawings and samples.

**2.11 Reports and Project Site Documents:** Record the progress of the Project. Submit written progress reports to the Owner and the Architect including information of the Trade Contractors' Work, and the percentage of completion. Keep a daily log available to the Owner and the Architect.

**2.11.1** Maintain at the Project site, on a current basis: records of all necessary Contracts, Drawings, samples, purchases, materials, equipment, maintenance and operating manuals and instructions, and other construction related documents, including all revisions. Obtain data from Trade Contractors and maintain a current set of record Drawings, Specifications and operating manuals. At the completion of the Project, deliver all such records to the Owner.

**2.12 Substantial Completion:** Determine Substantial Completion of the Work or designated portions thereof and prepare for the Architect a list of incomplete or unsatisfactory items and a schedule for their completion.

**2.13 Start-Up:** With the Owner's maintenance personnel, direct the checkout of utilities, operations systems and equipment for readiness and assist in their initial start-up and testing by the Trade Contractors.

**2.14 Final Completion:** Determine final completion and provide written notice to the Owner and Architect that the Work is ready for final inspection. Secure and transmit to the Architect required guarantees, affidavits, releases, bonds and waivers. Turn over to the Owner all keys, manuals, record drawings and maintenance stocks.

**2.15 Warranty:** Where any Work is performed by HBD's own forces or by Trade Contractors under contract with the HBD, HBD shall warrant that all materials and equipment included in such Work will be new, unless otherwise specified, and that such Work will be of good quality, free from improper workmanship and defective materials and in conformance with the Drawings and Specifications. With respect to the same work, HBD further agrees to correct all work defective in material and workmanship for a period of one year from the Date of Substantial Completion or for such longer periods of time as may be set forth with respect to specific warranties contained in the trade sections of the Specifications. HBD shall collect and deliver to the Owner any specific written warranties given by others.