

RESOLUTION NO. R-2433

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF KIRKLAND AUTHORIZING THE MAYOR TO SIGN ON BEHALF OF THE CITY OF KIRKLAND A CONTRACT FOR ARCHITECTURAL SERVICES TO BE RENDERED FOR THE SENIOR CITIZENS CENTER AND ADDITIONS TO EXISTING LIBRARY BUILDING.

BE IT RESOLVED by the City Council of the City of Kirkland as follows:


Section 1. The contract, a copy of which is attached to the original of this Resolution, between the City of Kirkland as owner and Ridenour, Cochran & Lewis AIA as architects, for architectural services to be provided to the City for the Senior Citizens Center and additions to existing library building combined projects is hereby approved.

Section 2. The Mayor is hereby authorized and directed to sign said contract on behalf of the City of Kirkland.

ADOPTED BY MAJORITY VOTE of the Kirkland City Council at regular meeting on the 16th day of May, 1977.


MAYOR

ATTEST:


Director of Administration &
Finance
(ex officio city clerk)

EGG131

THE AMERICAN INSTITUTE OF ARCHITECTS



AIA Document B141

Standard Form of Agreement Between Owner and Architect

*THIS DOCUMENT HAS IMPORTANT LEGAL CONSEQUENCES; CONSULTATION WITH
AN ATTORNEY IS ENCOURAGED WITH RESPECT TO ITS COMPLETION OR MODIFICATION*

AGREEMENT

made this Twelfth day of May in the year of Nineteen
Hundred and Seventy Seven

BETWEEN the Owner: CITY OF KIRKLAND

and the Architect: RIDENOUR, COCHRAN & LEWIS AIA

For the following Project:
(Include detailed description of Project location and scope)

Design for new Senior Citizen Center and additions to existing Library Building.
All facilities shall be contained in a single building.

The Owner and the Architect agree as set forth below.

FIXED FEE

- I. THE ARCHITECT shall provide professional services for the Project in accordance with the Terms and Conditions of this Agreement.
- II. THE OWNER shall compensate the Architect, in accordance with the Terms and Conditions of this Agreement.
- A. FOR BASIC SERVICES, as described in Paragraph 1.1, Basic Compensation shall be computed on the basis of a FIXED FEE Forty Five Thousand dollars (\$ 45,000.).
- B. FOR ADDITIONAL SERVICES, as described in Paragraph 1.3, compensation computed as follows:
1. Principals' time at the fixed rate of Thirty dollars (\$ 30.00) per hour.
For the purpose of this Agreement, the Principals are:

Myron E. Lewis (Partner in Charge)
Donald C. Cochran
William C. Ridenour
 2. Employees' time (other than Principals) at a multiple of Two & One/Half (2.5) times the employees' Direct Personnel Expense as defined in Article 4.
 3. Services of professional consultants at a multiple of One & One/Tenth (1.1) times the amount billed to the Architect for such services.
- C. AN INITIAL PAYMENT of (5% of \$45,000) Two Thousand, Two Hundred Fifty dollars (\$2,250.) shall be made upon the execution of this Agreement and credited to the Owner's account.
- D. FOR REIMBURSABLE EXPENSES, amounts expended as defined in Article 5.
- III. THE OWNER AND ARCHITECT agree in accordance with the Terms and Conditions of this Agreement that:
- A. IF SCOPE of the Project is changed materially, compensation shall be the subject to renegotiation.
- B. IF THE SERVICES covered by this Agreement have not been completed within Eighteen (18) months of the date hereof, the amounts of compensation, rates and multiples set forth in Paragraph II shall be subject to renegotiation.

TERMS AND CONDITIONS OF AGREEMENT BETWEEN OWNER AND ARCHITECT

ARTICLE 1

ARCHITECT'S SERVICES

1.1 BASIC SERVICES

The Architect's Basic Services consist of the five phases described below and include normal structural, mechanical and electrical engineering services and any other services included in Article 14 as Basic Services.

SCHEMATIC DESIGN PHASE

1.1.1 The Architect shall review the program furnished by the Owner to ascertain the requirements of the Project and shall confirm such requirements to the Owner.

1.1.2 Based on the mutually agreed upon program, the Architect shall prepare Schematic Design Studies consisting of drawings and other documents illustrating the scale and relationship of Project components for approval by the Owner.

1.1.3 The Architect shall submit to the Owner a Statement of Probable Construction Cost based on current area, volume or other unit costs.

DESIGN DEVELOPMENT PHASE

1.1.4 The Architect shall prepare from the approved Schematic Design Studies, for approval by the Owner, the Design Development Documents consisting of drawings and other documents to fix and describe the size and character of the entire Project as to structural, mechanical and electrical systems, materials and such other essentials as may be appropriate.

1.1.5 The Architect shall submit to the Owner a further Statement of Probable Construction Cost.

CONSTRUCTION DOCUMENTS PHASE

1.1.6 The Architect shall prepare from the approved Design Development Documents, for approval by the Owner, Drawings and Specifications setting forth in detail the requirements for the construction of the entire Project including the necessary bidding information, and shall assist in the preparation of bidding forms, the Conditions of the Contract, and the form of Agreement between the Owner and the Contractor.

1.1.7 The Architect shall advise the Owner of any adjustments to previous Statements of Probable Construction Cost indicated by changes in requirements or general market conditions.

1.1.8 The Architect shall assist the Owner in filing the required documents for the approval of governmental authorities having jurisdiction over the Project.

BIDDING OR NEGOTIATION PHASE

1.1.9 The Architect, following the Owner's approval of the Construction Documents and of the latest Statement

of Probable Construction Cost, shall assist the Owner in obtaining bids or negotiated proposals, and in awarding and preparing construction contracts.

CONSTRUCTION PHASE — ADMINISTRATION OF THE CONSTRUCTION CONTRACT

1.1.10 The Construction Phase will commence with the award of the Construction Contract and will terminate when the final Certificate for Payment is issued to the Owner.

1.1.11 The Architect shall provide Administration of the Construction Contract as set forth in AIA Document A201, General Conditions of the Contract for Construction, and the extent of his duties and responsibilities and the limitations of his authority as assigned thereunder shall not be modified without his written consent.

1.1.12 The Architect, as the representative of the Owner during the Construction Phase, shall advise and consult with the Owner and all of the Owner's instructions to the Contractor shall be issued through the Architect. The Architect shall have authority to act on behalf of the Owner to the extent provided in the General Conditions unless otherwise modified in writing.

1.1.13 The Architect shall at all times have access to the Work wherever it is in preparation or progress.

1.1.14 The Architect shall make periodic visits to the site to familiarize himself generally with the progress and quality of the Work and to determine in general if the Work is proceeding in accordance with the Contract Documents. On the basis of his on-site observations as an architect, he shall endeavor to guard the Owner against defects and deficiencies in the Work of the Contractor. The Architect shall not be required to make exhaustive or continuous on-site inspections to check the quality or quantity of the Work. The Architect shall not be responsible for construction means, methods, techniques, sequences or procedures, or for safety precautions and programs in connection with the Work, and he shall not be responsible for the Contractor's failure to carry out the Work in accordance with the Contract Documents.

1.1.15 Based on such observations at the site and on the Contractor's Applications for Payment, the Architect shall determine the amount owing to the Contractor and shall issue Certificates for Payment in such amounts. The issuance of a Certificate for Payment shall constitute a representation by the Architect to the Owner, based on the Architect's observations at the site as provided in Subparagraph 1.1.14 and the data comprising the Application for Payment, that the Work has progressed to the point indicated; that to the best of the Architect's knowledge, information and belief, the quality of the Work is in accordance with the Contract Documents (subject to an evaluation of the Work for conformance with the Contract Documents upon Substantial Completion, to the results of any subsequent tests required by the Contract

Documents, to minor deviations from the Contract Documents correctable prior to completion, and to any specific qualifications stated in the Certificate for Payment); and that the Contractor is entitled to payment in the amount certified. By issuing a Certificate for Payment, the Architect shall not be deemed to represent that he has made any examination to ascertain how and for what purpose the Contractor has used the moneys paid on account of the Contract Sum.

1.1.16 The Architect shall be, in the first instance, the interpreter of the requirements of the Contract Documents and the impartial judge of the performance thereunder by both the Owner and Contractor. The Architect shall make decisions on all claims of the Owner or Contractor relating to the execution and progress of the Work and on all other matters or questions related thereto. The Architect's decisions in matters relating to artistic effect shall be final if consistent with the intent of the Contract Documents.

1.1.17 The Architect shall have authority to reject Work which does not conform to the Contract Documents. Whenever, in his reasonable opinion, he considers it necessary or advisable to insure the proper implementation of the intent of the Contract Documents, he will have authority to require special inspection or testing of any Work in accordance with the provisions of the Contract Documents whether or not such Work be then fabricated, installed or completed.

1.1.18 The Architect shall review and approve shop drawings, samples, and other submissions of the Contractor only for conformance with the design concept of the Project and for compliance with the information given in the Contract Documents.

1.1.19 The Architect shall prepare Change Orders.

1.1.20 The Architect shall conduct inspections to determine the Dates of Substantial Completion and final completion, shall receive and review written guarantees and related documents assembled by the Contractor, and shall issue a final Certificate for Payment.

1.1.21 The Architect shall not be responsible for the acts or omissions of the Contractor, or any Subcontractors, or any of the Contractor's or Subcontractors' agents or employees, or any other persons performing any of the Work.

1.2 PROJECT REPRESENTATION BEYOND BASIC SERVICES

1.2.1 If more extensive representation at the site than is described under Subparagraphs 1.1.10 through 1.1.21 inclusive is required, and if the Owner and Architect agree, the Architect shall provide one or more Full-Time Project Representatives to assist the Architect.

1.2.2 Such Full-Time Project Representatives shall be selected, employed and directed by the Architect, and the Architect shall be compensated therefor as mutually agreed between the Owner and the Architect as set forth in an exhibit appended to this Agreement.

1.2.3 The duties, responsibilities and limitations of authority of such Full-Time Project Representatives shall be set forth in an exhibit appended to this Agreement.

1.2.4 Through the on-site observations by Full-Time Project Representatives of the Work in progress, the Architect shall endeavor to provide further protection for the Owner against defects in the Work, but the furnishing of such project representation shall not make the Architect responsible for construction means, methods, techniques, sequences or procedures, or for safety precautions and programs, or for the Contractor's failure to perform the Work in accordance with the Contract Documents.

1.3 ADDITIONAL SERVICES

The following Services shall be provided when authorized in writing by the Owner, and they shall be paid for by the Owner as hereinbefore provided.

1.3.1 Providing analyses of the Owner's needs, and programming the requirements of the Project.

1.3.2 Providing financial feasibility or other special studies.

1.3.3 Providing planning surveys, site evaluations, environmental studies or comparative studies of prospective sites.

1.3.4 Providing design services relative to future facilities, systems and equipment which are not intended to be constructed as part of the Project.

1.3.5 Providing services to investigate existing conditions or facilities or to make measured drawings thereof, or to verify the accuracy of drawings or other information furnished by the Owner.

1.3.6 Preparing documents for alternate bids or out-of-sequence services requested by the Owner.

1.3.7 Providing Detailed Estimates of Construction Cost or detailed quantity surveys or inventories of material, equipment and labor.

1.3.8 Providing interior design and other services required for or in connection with the selection of furniture and furnishings.

1.3.9 Providing services for planning tenant or rental spaces.

1.3.10 Making revisions in Drawings, Specifications or other documents when such revisions are inconsistent with written approvals or instructions previously given and are due to causes beyond the control of the Architect.

1.3.11 Preparing supporting data and other services in connection with Change Orders if the change in the Basic Compensation resulting from the adjusted Contract Sum is not commensurate with the services required of the Architect.

1.3.12 Making investigations involving detailed appraisals and valuations of existing facilities, and surveys or inventories required in connection with construction performed by the Owner.

1.3.13 Providing consultation concerning replacement of any Work damaged by fire or other cause during construction, and furnishing professional services of the type

set forth in Paragraph 1.1 as may be required in connection with the replacement of such Work.

1.3.14 Providing professional services made necessary by the default of the Contractor or by major defects in the Work of the Contractor in the performance of the Construction Contract.

1.3.15 Preparing a set of reproducible record prints of drawings showing significant changes in the Work made during the construction process, based on marked-up prints, drawings and other data furnished by the Contractor to the Architect.

1.3.16 Providing extensive assistance in the utilization of any equipment or system such as initial start-up or testing, adjusting and balancing, preparation of operation and maintenance manuals, training personnel for operation and maintenance, and consultation during operation.

1.3.17 Providing services after issuance to the Owner of the final Certificate for Payment.

1.3.18 Preparing to serve or serving as an expert witness in connection with any public hearing, arbitration proceeding or legal proceeding.

1.3.19 Providing services of professional consultants for other than the normal structural, mechanical and electrical engineering services for the Project.

1.3.20 Providing any other services not otherwise included in this Agreement or not customarily furnished in accordance with generally accepted architectural practice.

ARTICLE 2

THE OWNER'S RESPONSIBILITIES

2.1 The Owner shall provide full information, including a complete program, regarding his requirements for the Project.

2.2 The Owner shall designate, when necessary, a representative authorized to act in his behalf with respect to the Project. The Owner shall examine documents submitted by the Architect and shall render decisions pertaining thereto promptly, to avoid unreasonable delay in the progress of the Architect's services.

2.3 The Owner shall furnish a certified land survey of the site giving, as applicable, grades and lines of streets, alleys, pavements and adjoining property; rights-of-way, restrictions, easements, encroachments, zoning, deed restrictions, boundaries and contours of the site; locations, dimensions and complete data pertaining to existing buildings, other improvements and trees; and full information concerning available service and utility lines both public and private, above and below grade, including inverts and depths.

2.4 The Owner shall furnish the services of a soils engineer or other consultant when such services are deemed necessary by the Architect, including reports, test borings, test pits, soil bearing values, percolation tests, air and water pollution tests, ground corrosion and resistivity tests and other necessary operations for determining sub-soil, air and water conditions, with appropriate professional recommendations.

2.5 The Owner shall furnish structural, mechanical, chemical and other laboratory tests, inspections and reports as required by law or the Contract Documents.

2.6 The Owner shall furnish such legal, accounting, and insurance counseling services as may be necessary for the Project, and such auditing services as he may require to ascertain how or for what purposes the Contractor has used the moneys paid to him under the Construction Contract.

2.7 The services, information, surveys and reports required by Paragraphs 2.3 through 2.6 inclusive shall be furnished at the Owner's expense, and the Architect shall be entitled to rely upon the accuracy and completeness thereof.

2.8 If the Owner becomes aware of any fault or defect in the Project or non-conformance with the Contract Documents, he shall give prompt written notice thereof to the Architect.

2.9 The Owner shall furnish information required of him as expeditiously as necessary for the orderly progress of the Work.

ARTICLE 3

CONSTRUCTION COST

3.1 If the Construction Cost is to be used as the basis for determining the Architect's Compensation for Basic Services, it shall be the total cost or estimated cost to the Owner of all Work designed or specified by the Architect. The Construction Cost shall be determined as follows, with precedence in the order listed:

3.1.1 For completed construction, the cost of all such Work, including costs of managing construction;

3.1.2 For Work not constructed, (1) the lowest bona fide bid received from a qualified bidder for any or all of such Work, or (2) if the Work is not bid, the bona fide negotiated proposal submitted for any or all of such Work; or

3.1.3 For Work for which no such bid or proposal is received, (1) the latest Detailed Estimate of Construction Cost if one is available, or (2) the latest Statement of Probable Construction Cost.

3.2 Construction Cost does not include the compensation of the Architect and his consultants, the cost of the land, rights-of-way, or other costs which are the responsibility of the Owner as provided in Paragraphs 2.3 through 2.5 inclusive.

3.3 The cost of labor, materials and equipment furnished by the Owner for the Project shall be included in the Construction Cost at current market rates including a reasonable allowance for overhead and profit.

3.4 Statements of Probable Construction Cost and Detailed Cost Estimates prepared by the Architect represent his best judgment as a design professional familiar with the construction industry. It is recognized, however, that neither the Architect nor the Owner has any control over the cost of labor, materials or equipment, over the contractors' methods of determining bid prices, or over competitive bidding or market conditions. Accordingly, the

Architect cannot and does not guarantee that bids will not vary from any Statement of Probable Construction Cost or other cost estimate prepared by him.

3.5 When a fixed limit of Construction Cost is established as a condition of this Agreement, it shall be in writing signed by the parties and shall include a bidding contingency of ten percent unless another amount is agreed upon in writing. When such a fixed limit is established, the Architect shall be permitted to determine what materials, equipment, component systems and types of construction are to be included in the Contract Documents, and to make reasonable adjustments in the scope of the Project to bring it within the fixed limit. The architect may also include in the Contract Documents alternate bids to adjust the Construction Cost to the fixed limit.

3.5.1 If the Bidding or Negotiating Phase has not commenced within six months after the Architect submits the Construction Documents to the Owner, any fixed limit of Construction Cost established as a condition of this Agreement shall be adjusted to reflect any change in the general level of prices which may have occurred in the construction industry for the area in which the Project is located. The adjustment shall reflect changes between the date of submission of the Construction Documents to the Owner and the date on which proposals are sought.

3.5.2 When a fixed limit of Construction Cost, including the Bidding contingency (adjusted as provided in Subparagraph 3.5.1, if applicable), is established as a condition of this Agreement and is exceeded by the lowest bona fide bid or negotiated proposal, the Detailed Estimate of Construction Cost or the Statement of Probable Construction cost, the Owner shall (1) give written approval of an increase in such fixed limit, (2) authorize rebidding the Project within a reasonable time, or (3) cooperate in revising the Project scope and quality as required to reduce the Probable Construction Cost. In the case of (3) the Architect, without additional charge, shall modify the Drawings and Specifications as necessary to bring the Construction Cost within the fixed limit. The providing of such service shall be the limit of the Architect's responsibility in this regard, and having done so, the Architect shall be entitled to compensation in accordance with this Agreement.

ARTICLE 4

DIRECT PERSONNEL EXPENSE

Direct Personnel Expense is defined as the salaries of professional, technical and clerical employees engaged on the Project by the Architect, and the cost of their mandatory and customary benefits such as statutory employee benefits, insurance, sick leave, holidays, vacations, pensions and similar benefits.

ARTICLE 5

REIMBURSABLE EXPENSES

5.1 Reimbursable Expenses are in addition to the Compensation for Basic and Additional Services and include actual expenditures made by the Architect, his employ-

ees, or his professional consultants in the interest of the Project for the expenses listed in the following Subparagraphs:

5.1.1 Expense of transportation and living when traveling in connection with the Project; long distance calls and telegrams; and fees paid for securing approval of authorities having jurisdiction over the Project.

5.1.2 Expense of reproductions, postage and handling of Drawings and Specifications excluding duplicate sets at the completion of each Phase for the Owner's review and approval.

5.1.3 If authorized in advance by the Owner, expense of overtime work requiring higher than regular rates and expense of renderings or models for the Owner's use.

5.1.4 Expense of computer time for professional services when included in Paragraph II.

5.1.5 Expense of computer time when used in connection with Additional Services.

ARTICLE 6

PAYMENTS TO THE ARCHITECT

6.1 Payments on account of the Architect's Basic Services shall be made as follows:

6.1.1 An initial payment as set forth in Paragraph II is the minimum payment under this Agreement.

6.1.2 Subsequent payments for Basic Services shall be made monthly in proportion to services performed so that the compensation at the completion of each Phase, except when the compensation is on the basis of a Multiple of Direct Personnel Expense, shall equal the following percentages of the total Basic Compensation:

Schematic Design Phase	15%
Design Development Phase	35%
Construction Documents Phase ...	75%
Bidding or Negotiation Phase	80%
Construction Phase	100%

6.1.3 If the Contract Time initially established in the Construction Contract is exceeded by more than thirty days through no fault of the Architect, compensation for Basic Services performed by Principals, employees and professional consultants required to complete the Administration of the Construction Contract beyond the thirtieth day shall be computed as set forth in Paragraph II for Additional Services.

6.2 Payments for Additional Services of the Architect as defined in Paragraph 1.3, and for Reimbursable Expenses as defined in Article 5, shall be made monthly upon presentation of the Architect's statement of services rendered.

6.3 No deductions shall be made from the Architect's compensation on account of penalty, liquidated damages, or other sums withheld from payments to contractors.

6.4 If the Project is suspended for more than three months or abandoned in whole or in part, the Architect

shall be paid his compensation for services performed prior to receipt of written notice from the Owner of such suspension or abandonment, together with Reimbursable Expenses then due and all termination expenses as defined in Paragraph 8.3 resulting from such suspension or abandonment. If the Project is resumed after being suspended for more than three months, the Architect's compensation shall be subject to renegotiation.

6.5 Payments due the Architect under this Agreement shall bear interest at the legal rate commencing sixty days after the date of billing.

ARTICLE 7

ARCHITECT'S ACCOUNTING RECORDS

Records of Reimbursable Expenses and expenses pertaining to Additional Services on the Project and for services performed on the basis of a Multiple of Direct Personnel Expense shall be kept on a generally recognized accounting basis and shall be available to the Owner or his authorized representative at mutually convenient times.

ARTICLE 8

TERMINATION OF AGREEMENT

8.1 This Agreement may be terminated by either party upon seven days' written notice should the other party fail substantially to perform in accordance with its terms through no fault of the party initiating the termination.

8.2 In the event of termination due to the fault of parties other than the Architect, the Architect shall be paid his compensation for services performed to termination date, including Reimbursable Expenses then due and all termination expenses.

8.3 Termination Expenses are defined as Reimbursable Expenses directly attributable to termination, plus an amount computed as a percentage of the total compensation earned to the time of termination, as follows:

20 percent if termination occurs during the Schematic Design Phase; or

10 percent if termination occurs during the Design Development Phase; or

5 percent if termination occurs during any subsequent phase.

ARTICLE 9

OWNERSHIP OF DOCUMENTS

Drawings and Specifications as instruments of service are and shall remain the property of the Architect whether the Project for which they are made is executed or not. They are not to be used by the Owner on other projects or extensions to this Project except by agreement in writing and with appropriate compensation to the Architect.

ARTICLE 10

SUCCESSORS AND ASSIGNS

The Owner and the Architect each binds himself, his partners, successors, assigns and legal representatives to

the other party to this Agreement and to the partners, successors, assigns and legal representatives of such other party with respect to all covenants of this Agreement. Neither the Owner nor the Architect shall assign, sublet or transfer his interest in this Agreement without the written consent of the other.

ARTICLE 11

ARBITRATION

11.1 All claims, disputes and other matters in question between the parties to this Agreement, arising out of, or relating to this Agreement or the breach thereof, shall be decided by arbitration in accordance with the Construction Industry Arbitration Rules of the American Arbitration Association then obtaining unless the parties mutually agree otherwise. No arbitration, arising out of, or relating to this Agreement, shall include, by consolidation, joinder or in any other manner, any additional party not a party to this Agreement except by written consent containing a specific reference to this Agreement and signed by all the parties hereto. Any consent to arbitration involving an additional party or parties shall not constitute consent to arbitration of any dispute not described therein or with any party not named or described therein. This Agreement to arbitrate and any agreement to arbitrate with an additional party or parties duly consented to by the parties hereto shall be specifically enforceable under the prevailing arbitration law.

11.2 Notice of the demand for arbitration shall be filed in writing with the other party to this Agreement and with the American Arbitration Association. The demand shall be made within a reasonable time after the claim, dispute or other matter in question has arisen. In no event shall the demand for arbitration be made after the date when institution of legal or equitable proceedings based on such claim, dispute or other matter in question would be barred by the applicable statute of limitations.

11.3 The award rendered by the arbitrators shall be final, and judgment may be entered upon it in accordance with applicable law in any court having jurisdiction thereof.

ARTICLE 12

EXTENT OF AGREEMENT

This Agreement represents the entire and integrated agreement between the Owner and the Architect and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement may be amended only by written instrument signed by both Owner and Architect.

ARTICLE 13

GOVERNING LAW

Unless otherwise specified, this Agreement shall be governed by the law of the principal place of business of the Architect.

ARTICLE 14
OTHER CONDITIONS OR SERVICES

5% of total fee (\$2,250) shall be retained from final billing until project is completed and accepted by Owner. The Architect shall not be penalized for noncompletion problems arising on the job which are through no fault of his own. Such retainage shall be placed in escrow earning the normal current rate of interest, until released.

This Agreement executed the day and year first written above.

OWNER CITY OF KIRKLAND

ARCHITECT RIDENOUR, COCHRAN & LEWIS AIA

MAYOR

Myron E. Lewis

not be included under this service heading.

- 2.07 Environmental Studies and Reports services relate to obtaining approval of environmental agencies and may include: determination of the need and/or requirements for environmental monitoring, assessment and/or impact reports; preparation of reports in accordance with the requirements of governing authorities; attendance at hearings and presentations if needed; and general follow-through of processing. Environmental monitoring is considered a supplemental service included under Phase 9 of the scope of services.
- 2.08 Project Budgeting services relate to development of probable site development costs based on programming and scheduling studies. A probable construction cost range is usually developed by application of updated unit cost data from other completed projects with similar requirements. It normally includes estimates of such costs as on-site utilities, utilities connections, drainage, roads and paving, site lighting, lawn and landscaping work and site furniture. Adjustments in scope of program, quality standards and/or project budget may be required at this time.
- 2.09 Agency Consulting/Review/Approval services relate to both governmental and non-government entities which have statutory or non-statutory impact relative to site analysis on a proposed project. They may be local, county, regional, state and/or federal agencies having jurisdiction regarding applicable laws, statutes, regulations and codes; or they may be user or community groups with little or no statutory authority but significant influence on approving agencies and individuals. The architect may: do extensive agency consulting, research critical applicable regulations and community attitudes, prepare written and graphic explanatory material, and appear on the owner's behalf at a wide range of agency and community meetings.
- 2.10 Zoning Processing Assistance services relate to changes of variances in zoning as opposed to normal zoning research and compliance. The architect may assist the owner in preparing applications for adjustments, variances, or use permits with supporting data and evidence that the project will be constructed in accordance with designated requirements. Specific activities may include: assistance in preparation of petition for rezoning, when indicated; attendance at hearings; presentations, if requested or required; and assistance in application and presentation of appeal, if required.
- 2.11 Owner-Supplied Data Coordination services relate to reviewing, handling and coordinating data furnished for the project as a responsibility of the owner. Site visits will usually be needed and the architect's services could include establishing criteria and assisting the owner in arranging for the data. In this phase, acquisition of detailed surface

reports, etc. These services do not include general firm management.

- 2.02 Site Analysis and Selection services relate to the process of analyzing and ultimately selecting a site and basically entail assisting the owner in evaluating sites for a proposed project or locating a site, for the owner, to meet the needs of the proposed facility. Specific operations may include comparative studies of the physical characteristics of alternative sites to test the adequacy of each with regard to the proposed project. Site analysis also usually entails a detailed study of topographic and subsurface conditions, utilities, zoning and land use requirements, parking and traffic flow regulations, and determination of deed restrictions and any existing or proposed easements, etc. Studies of labor potential, availability of special skills, labor relations and public relations values may also be included.
- 2.03 Site Development Planning services relate to the preparation of development plans for a site considering land utilization, structures placement and massing, facilities development, development phasing, circulation and utility systems, and parking and landscape forms for the creation of a pre-planned, total environment.
- 2.04 Detailed Site Utilization Studies services relate to more detailed analysis of a particular site than is needed under site development planning and may be necessary to develop the full utilization capability of the site and to determine optimum location of facilities. Activities within this service heading may include: a review of existing conditions and site information, a soils report, and research of all code and planning requirements to establish all facility locations, grounds improvements and landscaping concepts needed to prepare site development drawings.
- 2.05 On-Site Utility Studies services relate to development studies of all on-site utility requirements to determine practical and economical solutions prior to preparing for design review, engineering and final working drawings. These may include electrical service and distribution, sewer and storm collection and drainage, water supply and distribution, fire control and alarm, emergency lighting, security, air conditioning, pollution control, site illumination and telephone service. Where master planning for future development is needed, preliminary selection and routing of utility systems may be included under this service heading.
- 2.06 Off-Site Utility Studies relate to confirming the location and size and determining the adequacy of all existing utilities serving the building site, and determining the cost and physical requirements for making connection thereto in preparation for engineering design and working drawings. Design of separate off-site utilities facilities would normally

1.12 Project Financing services relate to obtaining financing commitments from financing entities. The service may be provided in its entirety, or the architect may simply assist the owner in preparing and submitting data, including supplementary drawings and documentation, to private and/or public financing institutions. Project financing may include the need for seed money and financing for: interim planning and development; construction; and long term mortgaging.

On the forms the blank lines numbered .13 through .20 are provided for entry of additional services for a specific project and/or for entry of estimates or quotations from consultants and others falling under the classification of "Outside Services."

PHASE 2: SITE ANALYSIS SERVICES

Phase Description

In the Site Analysis Phase the architect provides those services necessary to establish site-related constraints, requirements and planning for the project. Some of the services will normally be provided during pre-design activities and some during project design. They are grouped here for convenience to identify the site analysis services normally required during the early stages of project development.

List of Services

- 2.01 Project Administration
- .02 Site Analysis and Selection
- .03 Site Development Planning
- .04 Detailed Site Utilization Studies
- .05 On-Site Utility Studies
- .06 Off-Site Utility Studies
- .07 Environmental Studies and Reports
- .08 Project Budgeting
- .09 Agency Consulting/Review/Approval
- .10 Zoning Processing Assistance
- .11 Owner-Supplied Data Coordination
- .12 Presentations
- .13 Project Development Scheduling

Description of Services

2.01 Project Administration services relate to all administrative functions necessarily undertaken by the architect in providing services during this phase of the owner's project and may include initial site consultation and project-related research, conferences, coordination of the work of in-house personnel and outside consultants, correspondence, travel, progress

costs including: utilities, maintenance, repairs, replacements, supplies, staff and contracted services. Comparative economic feasibility studies may be needed for alternative design schemes and options for a particular project.

- 1.07 Agency Consulting/Review/Approval services relate to both governmental and non-government entities which have statutory or non-statutory impact on a proposed project. They may be local, county, regional, state and/or federal agencies having jurisdiction regarding applicable laws, statutes, regulations and codes; or they may be user or community groups with little or no statutory authority but significant influence on approving agencies and individuals. The architect may: do extensive agency consulting, research critical applicable regulations and community attitudes, prepare written and graphic explanatory material, and appear on the owner's behalf at a wide range of agency and community meetings.
- 1.08 Existing Facilities Surveys services relate to researching, assembling, reviewing and supplementing information for projects involving alterations and/or additions. They may include photographic, measurement and capability surveys of existing facilities and systems. When original construction documents and initial systems design data are available, a building measurement check and a review of the design data may be needed to verify accuracy of original documents and to record any changes from the original.
- 1.09 Owner-Supplied Data Coordination services relate to reviewing, handling and coordinating data furnished for the project as a responsibility of the owner. Site visits may be needed and the architect's services may include establishing criteria and assisting the owner in arranging for the data. In this phase, acquisition of preliminary and exploratory surface and subsurface site information is a typical activity.
- 1.10 Presentations services relate to presentations, to the owner and closely related groups, of the material and studies prepared under this phase. They may include presentations to individuals, building committees, staff and user committees, boards of directors, groups and individual representing financial interests, and any special consultants retained by the owner.
- 1.11 Marketing Studies services relate to determination of need for and/or the social, economic and political acceptability of a proposed project and may range from a very simple to a highly sophisticated survey of the market. Marketing studies do not apply to all building types but do often apply to non-profit as well as profit-making entities. The service is often provided by consultants and is often required by financial approving entities.

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- 1.03 Space Schematics/Flow Diagrams services relate to development of diagrammatic studies and pertinent text relative to: internal functions; human, vehicle and material flow patterns; and general space allocations. They are customarily developed in collaboration with the owner and may include a detailed analysis of all operating functions and studies of adjacency, circulation and traffic patterns. The studies will normally relate to: numbers of personnel; special facilities and equipment requirements; materials handling; flexibility and expandability; and site requirements/constraints.
- 1.04 Project Development Scheduling services relate to establishing with or for the owner a schedule for overall development of a project. It will usually entail careful determination of the architect's services, the owner's responsibilities and the design and construction procedures to be followed. Scheduling is used to establish a time framework for pre-design services, decision-making, design, documentation and construction. It can reflect overlapping of the various service phases, including design and construction, when appropriate. The schedule should usually be kept flexible at this early stage, and a contingency to permit schedule adjustment should be incorporated.
- 1.05 Project Budgeting services relate to development of probable costs based on programming and scheduling studies. It usually consists of: conversion of net programmed areas to gross areas, use of factors appropriate to the particular project to develop an initial probable gross area; conversion to a probable construction cost range by application of updated unit cost data from other completed projects with similar requirements; and the addition of estimates of related costs such as site development, landscaping, utilities, furniture, equipment, and design costs. Adjustments in scope of program, quality standards and/or project budget may be required at this time. When the owner has approved a project budget it can be used in economic feasibility studies.
- 1.06 Economic Feasibility Studies services relate to economic analysis and determination of economic feasibility of a building project. The services may include: estimates of total project cost; projection of owning and operating costs; cash flow requirements; return on investment; and probable financing needs. Total project cost estimating will usually include costs of land, construction, furnishings and equipment; compensation for design professionals; interest, insurance and taxes during construction; legal fees, miscellaneous and contingency items. Projecting financial needs includes establishing necessary equity, cash and loan requirements, and expected interest and amortization payments. Cash flow requirements may be projected for the pre-design, design, documentation and construction periods based on the estimated project costs and the project development schedule. Owning and operating cost projections may include both total project cost amortization and operating management
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**	.13 Graphics	\$ 500.
**	.14 Energy Studies Included in Life Cycle Cost Analysis	
	.15 Project Promotion	
	.16 Quantity Surveys	
**	.17 Acoustical Consultant	750.

DETAILED LIST OF SERVICES

PHASE 1: PRE-DESIGN SERVICES

Phase Description

In the Pre-Design Phase the architect provides those services necessary to establish the programmatic, financial and time constraints and requirements for the project prior to beginning design.

List of Services

- 1.01 Project Administration
- .02 Facility Programming
- .03 Space Schematics/Flow Diagrams
- .04 Project Development Scheduling
- .05 Project Budgeting
- .06 Economic Feasibility Studies
- .07 Agency Consulting/Review/Approval
- .08 Existing Facilities Surveys
- .09 Owner-Supplied Data Coordination
- .10 Presentations
- .11 Marketing Studies
- .12 Project Financing

Description of Services

- 1.01 Project Administration services relate to all administrative functions necessarily undertaken by the architect in providing services during this phase of the owner's project and may include initial consultation in project development and project-related research, conferences, correspondence, travel, progress reports, etc. These services do not include general firm management.
- 1.02 Facility Programming services relate to establishment of a detailed set of requirements for a proposed facility. This often includes determination of: quantity, size, technical, human, and physical requirements of each type of space; functional interrelationships among spaces; requirements for flexibility and expandability; needs relative to special equipment and systems; and site requirements. Programming may be staged to provide only basic requirements initially, with more detailed requirements established as needed.

- .09 Analysis of Alternates/Substitutions
 - .10 Special Bidding Services
 - ** .11 Reimbursable Reproduction Costs for Plans & Specs \$1,500.
- Phase 7. Construction Contract Administration Services

- *7.01 Project Administration
- * .02 Construction Observation
- * .03 Shop Drawings/Submittals Review
- ** .04 Construction Cost Accounting Normally included in Basic Services
- * .05 Supplemental Documents
- ** .06 Quotation Requests/Change Orders Normally included in Basic Services
- ** .07 Testing and Inspection ~~Coordination~~ 750.
- * .08 Project/Monitoring Schedule
- * .09 Agency Consulting/Review/Approval
- * .10 Owner-Supplied Data Coordination
- .11 Full-Time Project Representation
- * .12 Project Close-Out
- * .13 Civil Engineering
- * .14 Structural Engineering
- * .15 Mechanical Engineering
- * .16 Electrical Engineering
- ** .17 Landscape Architecture (1)
- ** .18 Interiors (2)

Phase 8. Post-Construction Services

- 8.01 Project Administration
- .02 Maintenance and Operational Programming
- .03 Start-Up Assistance
- ** .04 Record Drawings 12 hrs. @ \$25 = 300.
- .05 Warranty Review
- .06 Post-Construction Evaluation

Phase 9. Supplemental Services

- 9.01 Special Studies
- .02 Computer Applications
- ** .03 Fine Arts and Crafts 1% of \$500,000 = 5,000.
- .04 Non-Building Equipment Selection
- .05 Design of Special Furnishings
- .06 Value Analysis
- ** .07 Life Cycle Cost Analysis 3,000.
- .08 Environmental Monitoring
- ** .09 Presentation Models/Renderings 500.
- .10 Mock-Ups
- .11 Demolition Projects
- .12 Tenant-Related Services

.13 Project Development Scheduling

Phase 4. Design Development Services

- *4.01 Project Administration
- * .02 Architectural Design Development
- * .03 Civil Design Development
- * .04 Structural Design Development
- * .05 Mechanical Design Development
- * .06 Electrical Design Development
- ** .07 Landscape Design Development . . . (1)
- ** .08 Interior Design Development . . . (2)
- * .09 Outline Specifications
- * .10 Statement of Probable Construction Cost
- * .11 Agency Consulting/Review/Approval
- * .12 Owner-Supplied Data Coordination
- * .13 Presentations
- .14 Project Development Scheduling
- ** .15 Semi Detailed Contractors Cost Estimate \$ 300.

Phase 5. Construction Documents Services

- *5.01 Project Administration
- * .02 Architectural Working Drawings
- * .03 Civil Construction Documents
- * .04 Structural Construction Documents
- * .05 Mechanical Construction Documents
- * .06 Electrical Construction Documents
- ** .07 Landscape Construction Documents . . . (1)
- ** .08 Interior Construction Documents . . . (2)
- * .09 Specifications
- * .10 Statement of Probable Construction Cost
- ** .11 Detailed Construction Cost Estimates Updating 200.
- * .12 Agency Consulting/Review/Approval
- * .13 Owner-Supplied Data Coordination
- * .14 Document Checking/Coordination
- .15 Special Bid Documents

Phase 6. Bidding or Negotiations Services

- *6.01 Project Administration
- * .02 Bidding Documents
- * .03 Addenda
- * .04 Bidding/Negotiations
- * .05 Bid Evaluation
- * .06 Construction Contract Agreements
- * .07 Agency Consulting/Review/Approval
- * .08 Owner-Supplied Data Coordination

** Possible Additional Services Needed

SUMMARY LIST OF SERVICES

ESTIMATED AMOUNTS

Phase 1. Pre-Design Services

**	1.01 Project Administration		
**	.02 Facility Programming	16 hrs. @ \$25 =	\$ 400.
**	.03 Space Schematics/Flow Diagrams		
**	.04 Project Development Scheduling	4 hrs. @ \$25 =	100.
**	.05 Project Budgeting	4 hrs. @ \$25 =	100.
	.06 Economic Feasibility Studies		
	.07 Agency Consulting/Review/Approval		
	.08 Existing Facilities Surveys		
**	.09 Owner-Supplied Data Coordination	8 hrs. @ \$25 =	200.
**	.10 Presentations	8 hrs. @ \$25 =	200.
	.11 Marketing Studies		
	.12 Project Financing		

Phase 2. Site Analysis Services

	2.01 Project Administration		
	.02 Site Analysis and Selection		
**	.03 Site Development Planning	8 hrs. @ \$25 =	200.
**	.04 Detailed Site Utilization Studies	16 hrs. @ \$25 =	400.
**	.05 On-Site Utility Studies (Special Drainage)		500.
	.06 Off-Site Utility Studies		
**	.07 Environmental Studies and Reports	40 hrs. @ \$25 =	1,000.
	.08 Project Budgeting		
	.09 Agency Consulting/Review/Approval		
	.10 Zoning Processing Assistance		
**	.11 Owner-Supplied Data Coordination	8 hrs. @ \$25 =	200.
**	.12 Presentations	8 hrs. @ \$25 =	200.
	.13 Project Development Scheduling		
**	.14 Site Surveying and Soil Testing		1,000.

Phase 3. Schematic Design Services

**	*3.01 Project Administration		
*	.02 Architectural Schematic Design		
*	.03 Civil Design Concepts		
*	.04 Structural Design Concepts		
*	.05 Mechanical Design Concepts		
*	.06 Electrical Design Concepts		
**	.07 Landscape Design Concepts (1) Total all Phases		3,000.
**	.08 Interior Design Concepts (2) Total all Phases		3,500.
*	.09 Statement of Probable Construction Cost		
*	.10 Agency Consulting/Review/Approval		
*	.11 Owner-Supplied Data Coordination		
*	.12 Presentations		
**	.13 Contractors Preliminary Cost Estimate		100.

R. SCOPE OF SERVICES

The combinations of services required for specific projects are as varied as the projects themselves. Similarly, the allocation of responsibility for specific services varies from project to project; one owner may undertake responsibility for a reasonable number of the requirements, while another may request the architect to provide most services. The following list of services is offered to help establish responsibilities for services required for a specific project prior to developing the estimated cost of those services and the terms of the owner-architect agreement. The services described below are grouped into generally chronological design and construction phases for consistency with groupings used in current AIA documents. Asterisks on the summary list of services designate those services historically considered "Basic Services" under AIA Document B141, Standard Form of Agreement Between Owner and Architect, and it is suggested these be considered the minimum services to be provided by the architect under most circumstances.

The detailed list of services provides broad descriptions of individual phases, a list of the services included under each phase, and narrative descriptions of each item of service. While these lists and descriptions are intended to be guidelines only, they hopefully will establish consistency of terms that will permit interfacing compensation management with business management and project management in architectural offices.

The descriptions of items of service, which are general indications of the potential elements of each item of service, should be carefully reviewed for each project and revised as appropriate for specific proposals and cost estimates. The lists and descriptions of services are not to be construed as standards of performance for the architect on any particular project. Rather, they are intended both to permit better understanding between owner and architect of the scope of services required and to assist the architect in estimating the cost of those services. The listed descriptions are intended to be only a starting point and should be modified appropriately to reflect the understanding reached by owner and architect for each specific project.

Users of these guidelines may supplement the printed list of services provided on certain of the forms by filling in the blank spaces or deleting headings for services not required. Not all architects will offer the full scope of services described and few projects will require all of the listed services. The lists and forms herein are intended to be used for estimating costs of services and preparing proposals only.

and subsurface site information is a typical activity.

- 2.12 Presentations services relate to presentations, to the owner and closely related groups, of the material and studies prepared under this phase. It may include presentations to individuals, building committees, staff and user committees, boards of directors, groups and individuals representing financial interests, and any special consultants retained by the owner.
- 2.13 Project Development Scheduling services in this phase relate primarily to establishing with or for the owner a schedule for overall site development of a project. It will usually entail careful determination of the architect's services, the owner's responsibilities and the design and construction procedures to be followed. Scheduling is used to establish a time framework for pre-design services, decision making, design, documentation and construction. It can reflect overlapping of the various service phases, including design and construction, when appropriate. The schedule should usually be kept flexible at this early stage, and contingency to permit schedule adjustment should be incorporated. If a project development schedule was established under Pre-Design Phase services it may require updating as part of the Site Analysis Phase services.

On the forms, the blank lines numbered .14 through .20 are provided for entry of additional services for a specific project and/or for entry of estimates or quotations from consultants and others falling under the classification of "Outside Services."

PHASE 3: SCHEMATIC DESIGN SERVICES

Phase Description

In the Schematic Design Phase the architect provides those services necessary to prepare Schematic Design Studies consisting of drawings and other documents illustrating the scope and relationship of project components for approval by the owner. Designs are normally conceptual in character and are based on the requirements developed under previous phases and approved by the owner and/or provided directly by the owner and reviewed and confirmed by the architect.

List of Services

- 3.01 Project Administration
- .02 Architectural Schematic Design
- .03 Civil Design Concepts
- .04 Structural Design Concepts
- .05 Mechanical Design Concepts
- .06 Electrical Design Concepts

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- .07 Landscape Design Concepts
 - .08 Interior Design Concepts
 - .09 Statement of Probable Construction Cost
 - .10 Agency Consulting/Review/Approval
 - .11 Owner-Supplied Data Coordination
 - .12 Presentations
 - .13 Project Development Scheduling

Description of Services

- 3.01 Project Administration services relate to those administrative functions necessarily undertaken by the architect in providing services during this phase of the owner's project and include project-related research, conferences, correspondence, travel, progress reports, etc. These services may include coordination of the work of in-house personnel and outside consultants for normal architectural work and for normal civil, structural, mechanical and electrical engineering disciplines. Coordination of the work of other disciplines should be included in the appropriate line item. These services do not include general firm management.
- 3.02 Architectural Schematic Design services relate to initial physical representations responding to the requirements of the program and normally include simplified site and building plans, vertical sections, elevations and perspective sketches or other three-dimensional representations to obtain the owner's approval. Preliminary material selections may be made at this time. Development of approximate dimensions permits calculation of gross areas and volumes based on physical planning for comparison with programmed gross areas.
- 3.03 Civil Design Concepts services relate to development of initial basic solutions for on-site utility systems, fire protection systems and drainage systems for consideration of alternatives. The systems selected are normally developed in sufficient detail to permit coordination with building and landscape design and preparation of specific cost projections.
- 3.04 Structural Design Concepts services relate to development of initial basic structural design concepts to determine the specific structural system(s) appropriate for the project. Preliminary designs are often developed for consideration of alternatives. The designs selected are normally developed in sufficient detail to permit coordination with other building elements and to allow preparation of specific cost projections.
- 3.05 Mechanical Design Concepts services relate to development of initial basic mechanical design concepts to determine the specific heating, ventilating, air conditioning and plumbing systems appropriate for the project. Preliminary designs are developed for consideration of alternatives. The systems selected are normally developed in sufficient detail to permit

coordination with other building elements and to allow preparation of specific cost projections.

- 3.06 Electrical Design Concepts services relate to development of initial basic electrical design concepts to determine the specific power service and distribution systems, lighting, telephone, fire detection and alarm, security and electronic communications systems appropriate for the project. The designs selected are normally developed in sufficient detail to permit coordination with other building elements and to allow preparation of specific cost projections.
- 3.07 Landscape Design Concepts services relate to the development and coordination of landscape design concepts entailing analyses of natural, physical and social determinants. Studies usually include locations of planting, amenities and ground improvements.
- 3.08 Interior Design Concepts services relate to development and coordination of interior design concepts through studies of all interior spaces based on programmed usage, economic considerations and compatibility with the architectural concepts.
- 3.09 Statement of Probable Construction Cost services relate to development of a probable cost range for project construction based on updated historic unit cost information and appropriate contingencies. Sources of data may be the architect's records of previous similar projects, published data or data banks with broad based professional input. The data may be expressed in overall probable area or volume cost or in unit costs per area, volumes or building elements. Cost projections will normally reflect the current project schedule and the latest schematic design studies. Adjustments in facilities, quality standards and/or project budget may be needed at this time.
- 3.10 Agency Consulting/Review/Approval services in this phase relate primarily to governmental entities which have statutory impact on a proposed project. They may be local, county, regional, state and/or federal agencies having jurisdiction regarding applicable laws, statutes, regulations and codes. The architect may: do extensive agency consulting, research critical applicable regulations, prepare written and graphic explanatory material, and appear on the owner's behalf at agency meetings.
- 3.11 Owner-Supplied Data Coordination services relate to reviewing, handling and coordinating data furnished for the project as a responsibility of the owner. Specialized health care, research, educational, process and manufacturing equipment are examples under this phase.
- 3.12 Presentations services relate to presentations, to the owner and closely related groups, of the material and studies prepared under this phase.

They may include presentations to individuals, building committees, staff and user committees, boards of directors, groups and individuals representing financial interests, and any special consultants retained by the owner.

3.13 Project Development Scheduling services in this phase relate primarily to a review and updating of previously established project schedules. If schedules were not established earlier, they would be set in this phase. See item 1.04 for a typical description of this service.

On the forms, the blank lines numbered .14 through .20 are provided for entry of additional services for a specific project and also provide for entry of estimates or quotations from consultants and others falling under the classification of "Outside Services."

PHASE 4: DESIGN DEVELOPMENT SERVICES

Phase Description

In the Design Development Phase the architect provides those services necessary to prepare from the approved Schematic Design Studies for approval by the owner, the Design Development Documents consisting of drawings and other documents which fix and describe the size and character of the entire project.

List of Services

- 4.01 Project Administration
 - .02 Architectural Design Development
 - .03 Civil Design Development
 - .04 Structural Design Development
 - .05 Mechanical Design Development
 - .06 Electrical Design Development
 - .07 Landscape Design Development
 - .08 Interior Design Development
 - .09 Outline Specifications
 - .10 Statement of Probable Construction Cost
 - .11 Agency Consulting/Review/Approval
 - .12 Owner-Supplied Data Coordination
 - .13 Presentations
 - .14 Project Development Scheduling

Description of Services

4.01 Project Administration services relate to those administrative functions necessarily undertaken by the architect in providing the services required during this phase of the owner's project and include project-related research, conferences, correspondence, travel, progress reports, etc.

These services may include coordination of the work of in-house personnel and outside consultants for normal architectural work and for normal civil, structural, mechanical and electrical engineering disciplines. Coordination of the work of other disciplines should be included in the appropriate line item. These services do not include general firm management.

- 4.02 Architectural Design Development services relate to more detailed development and expansion of the architectural design in terms of the building's size, appearance and form, and coordination with engineering systems, through sketches and/or three-dimensional studies and two-dimensional drawings of plans, elevations, sections, and certain critical construction details. Major materials selections are normally made at this time.
- 4.03 Civil Design Development services relate to development of on-site utility systems, fire protection systems and drainage systems in sufficient detail to permit close coordination with building and landscape design and to allow preparation of refined cost projections. Consideration is usually given to availability of materials and labor, construction sequence and scheduling, economic trade-offs, safety and maintenance requirements.
- 4.04 Structural Design Development services relate to development of the specific structural system(s) in sufficient detail to permit preliminary sizing of major components and establishment of clearances, and to allow preparation of preliminary structural plans, sections and refined cost projections. Consideration is usually given to availability of materials and labor, access to site, construction schedule and economic trade-offs.
- 4.05 Mechanical Design Development services relate to development of the specific heating, ventilating, air conditioning and plumbing systems in sufficient detail to permit preliminary sizing of major components; establishment of required equipment areas, chases and clearances; and preparation of diagrammatic plans, sections, riser diagrams, equipment layouts and refined cost projections. Consideration is usually given to availability of components, construction sequence and scheduling, economic trade-offs, acoustical and vibration control, safety and maintenance requirements.
- 4.06 Electrical Design Development services relate to development of the specific power service and distribution systems, lighting, telephone, fire detection and alarm, security and electronic communications systems in sufficient detail to permit preliminary sizing of major components; establishment of required equipment areas, chases and clearances; and preparation of diagrammatic plans, sections, riser diagrams, equipment layouts and refined cost projections. Consideration is usually given to availability of components, construction sequence and scheduling, economic trade-offs, safety and maintenance requirements.

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- 4.07 Landscape Design Development services relate to development and coordination of scope and location of all ground improvements, amenities and planting closely coordinated with building placement. Designs are usually sufficiently developed to permit refined cost projections.
- 4.08 Interior Design Development services relate to development and coordination of interior designs based on programmed usage, economic considerations and compatibility with the architectural development. They may include finish materials selection, furniture and equipment layouts, sound attenuation and basic color palette and are normally based on plans, elevations, schedules, sketches and material samples. Designs are usually sufficiently developed to permit refined projections of cost for items in general construction and interiors installation contracts.
- 4.09 Outline Specifications services relate to development of an itemized list of major components of each section of the specifications, including the General and Supplementary Conditions of the Contract, and reflecting initial materials and systems selections.
- 4.10 Statement of Probable Construction Cost services relate to development of a refined probable cost range for project construction through updating of the Schematic Design Phase statement of probable construction cost, taking into account such information developed during this phase as availability of material and labor and construction sequence and scheduling. Adjustments in facilities, quality standards and/or project budget may be needed at this time.
- 4.11 Agency Consulting/Review/Approval services in this phase relate primarily to governmental entities which have statutory impact on a proposed project. They may be local, county, regional, state and/or federal agencies having jurisdiction regarding applicable laws, statutes, regulations and codes. The architect may: do extensive agency consulting, research critical applicable regulations, prepare written and graphic explanatory material, and appear on the owner's behalf at agency meetings.
- 4.12 Owner-Supplied Data Coordination services relate to reviewing, handling and coordinating data furnished for the project as a responsibility of the owner. Specialized health care, research, education, process and manufacturing equipment requirements are examples under this phase.
- 4.13 Presentations services relate to presentations, to the owner and closely related groups, of the material and studies prepared under this phase. They may include presentations to individuals, building committees, staff and user committees, boards of directors, groups and individuals representing financial interests, and any special consultants retained by the owner.
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4.14 Project Development Scheduling services in this phase relate primarily to a review and updating of previously established project schedules.

On the forms, the blank lines numbered .15 through .20 are provided for entry of additional services for a specific project and also provide for entry of estimates or quotations from consultants and others falling under the classification of "Outside Services."

PHASE 5: CONSTRUCTION DOCUMENTS SERVICES

Phase Description

In the Construction Documents Phase the architect provides services necessary to prepare from the approved Design Development Documents, for approval by the owner, drawings, specifications and other documents setting forth in detail the requirements for construction of the entire project.

List of Services

- 5.01 Project Administration
 - .02 Architectural Working Drawings
 - .03 Civil Construction Documents
 - .04 Structural Construction Documents
 - .05 Mechanical Construction Documents
 - .06 Electrical Construction Documents
 - .07 Landscape Construction Documents
 - .08 Interior Construction Documents
 - .09 Specifications
 - .10 Statement of Probable Construction Cost
 - .11 Detailed Construction Cost Estimates
 - .12 Agency Consulting/Review/Approval
 - .13 Owner-Supplied Data Coordination
 - .14 Document Checking/Coordination
 - .15 Special Bid Documents

Description of Services

5.01 Project Administration services relate to those administrative functions necessarily undertaken by the architect in providing services during this phase of the owner's project and include project-related research, conferences, correspondence, travel, progress reports, etc. These services may include coordination of the work of in-house personnel and outside consultants for normal architectural work and for normal civil, structural, mechanical and electrical engineering disciplines. Coordination of the work of other disciplines should be included in the appropriate line item. These services do not include general firm management.

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- 5.02 Architectural Working Drawings services relate to preparation of the architectural working drawings from the approved Design Development Phase drawings with two-dimensional graphic presentations such as plans, elevations, sections, and details, plus notes and schedules, illustrating the design, location, size and dimensions of the project and of the parts thereof for the purpose of construction. Architectural drawings are coordinated with and referenced to the other working drawings.
- 5.03 Civil Construction Documents services relate to preparation of civil working drawings to represent graphically those features dealing with on- and off-site improvements such as utilities, roadways, bridges, culverts, drainage, grading, excavation, compaction, shoring, underpinning, retaining walls, parking lots and fire systems. The services usually include both the engineering calculations which establish the size, shape, dimensions and capacity of the work involved, and careful coordination with landscape, mechanical, electrical, structural and architectural drawings.
- 5.04 Structural Construction Documents services relate to preparation of structural working drawings in concert with the architectural working drawings, which present graphically the complete structural concept of the project and include details, schedules, notes and information necessary to facilitate construction. The services usually include both the preparation of engineering calculations, which establish the size, dimensions and capacity of foundations, structural reinforcing walls, columns, beams, floor and roof structure, and careful coordination with mechanical, electrical, civil and architectural drawings.
- 5.05 Mechanical Construction Documents services relate to preparation of detailed engineering calculations and drawings for heating, ventilating, air conditioning, plumbing work and building fire protection systems related to the approved architectural design and engineering analysis in order to establish the size, shape, dimensions and capacity of the various elements involved. Mechanical working drawings services usually include plans, sections, details, schedules, diagrams and notes as necessary to construct the mechanical work, and careful coordination with the structural, civil, electrical and architectural drawings to insure proper clearances and location for all ductwork, piping, support and equipment as necessary.
- 5.06 Electrical Construction Documents services relate to preparation of detailed engineering calculations and drawings for electrical work entailed by the approved architectural design and engineering analysis in order to establish the size, location and capacity of the various elements involved. Electrical systems may include power acquisition and generation (on- and off-site), major power distribution, interior and exterior lighting, telephone and communication systems, low voltage

systems, direct current applications, and emergency and special effects lighting. Electrical working drawings services usually include plans, sections, details, schedules, diagrams and notes as necessary to construct the electrical work, and careful coordination with mechanical, structural, civil and architectural drawings for proper location of electrical outlets, fixtures, panels, switchgear, equipment and appurtenances.

- 5.07 Landscape Construction Documents services relate to preparation and coordination of landscape working drawings from approved Design Development Phase documents for all ground improvements, amenities, planting and irrigation systems. Calculations necessary to establish the size, shape, dimensions and capacity of the work involved are usually included.
- 5.08 Interior Construction Documents services relate to preparation and coordination of detailed interior working drawings to represent graphically, usually with plans, sections, details, schedules, and notes, all information necessary to provide interior services.
- 5.09 Specifications services relate to assistance in review of general conditions of the contract for construction, which are normally standardized provisions of the construction contract describing the rights, responsibilities and relationships of parties to the contract and the related duties and responsibilities of the architect; preparation of supplementary conditions, which may be written to modify or extend the general conditions as the special requirements or location of the project may indicate or as may be required by the owner and legal counsel or by regulatory agencies having jurisdiction over the project; and preparation of specifications, which are written requirements complementing the working drawings to amplify and further describe materials, systems, methods of construction, performance, and quality to be obtained and tests to verify performance of all the components of the project. Included with these services may be assistance in developing bidding documents which describe the time, place and conditions of bidding and the form of bonds and agreements to be executed by the contractor(s) and the owner.
- 5.10 Statement of Probable Construction Cost services relate to updating, when the construction documents are approximately 90 percent complete, of the statement of probable construction cost prepared at completion of the Design Development Phase in order to reflect changes in materials, systems or details of construction which have been effected during the preparation of construction documents. Adjustments are usually also made for known changes in the cost of materials, labor and services vs. those allowed for in the previous statement of probable construction cost. Adjustments may also be made for known or anticipated changes in the bidding market for the project.

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- 5.11 Detailed Construction Cost Estimates services relate to development, when the working drawings and specifications are approximately 90 percent complete, of a detailed final statement of probable construction cost, which may include alternative adjustments for the project and which is normally based on estimates of the quantity and cost of all materials, labor, tools, equipment and services needed for the work. To this total direct cost is added an estimate of the contractor's overhead, estimates of the cost to comply with the General and Supplementary Conditions, a reasonable contingency, and an allowance for the contractor's profit. The detailed construction cost estimate serves as a check on the budget and provides valuable information for bid review, approval of progress payments and evaluation of future contract modifications. This service is usually furnished by a special consultant and replaces the updated statement of probable construction cost. Coordination, research and computation by the architect is normally needed.
- 5.12 Agency Consulting/Review/Approval services in this phase relate primarily to governmental entities which have statutory impact on a proposed project. They may be local, county, regional, state and/or federal agencies having jurisdiction regarding applicable laws, statutes, regulations and codes. The architect may: do extensive agency consulting, research critical applicable regulations, prepare written and graphic explanatory material, and appear on the owner's behalf at agency meetings.
- 5.13 Owner-Supplied Data Coordination services relate to reviewing, handling and coordinating data furnished for the project as a responsibility of the owner. Specialized health care, research, educational, process and manufacturing equipment are examples under this phase.
- 5.14 Document Checking/Coordination services relate to reviewing all input from architectural, engineering and related disciplines and checking all contract documents for compliance with project scope, accuracy and interface among disciplines.
- 5.15 Special Bid Documents services relate to preparation and coordination of special drawings and specifications for alternate bid proposals as may be needed when the owner wishes to insure a bid within a limited appropriation. Alternate bid documents may cover changes in material quality, finishes or equipment and areas to be added to or deleted from the project. Special drawings and specifications for advanced bid proposals may be needed when the owner wishes to occupy the new building at the earliest possible date. Advanced bid documents may cover sub-contracts for site preparation, foundation or structural steel contracts to permit fast-tracking or phased construction while the architect is completing the contract documents. Special drawings and specifications for segregated bid proposals may be needed when the owner wishes to order certain mechanical equipment, furniture, fixtures, or technical

services prior to the receipt of bids from the prime contractors.

On the forms, the blank lines numbered .16 through .20 are provided for entry of additional services for a specific project and/or for entry of estimates or quotations from consultants and others falling under the classification of "Outside Services."

PHASE 6: BIDDING OR NEGOTIATIONS SERVICES

Phase Description

In the Bidding or Negotiations Phase the architect, following the owner's approval of the construction documents and of the latest statement of probable construction cost, provides those services necessary to assist the owner in obtaining bids or negotiated proposals and in awarding and preparing construction contracts. In the case of phased construction the owner may authorize bidding and negotiation of portions of the work prior to completion of the construction documents and prior to completion of the Construction Documents Phase statement of probable construction cost.

List of Services

- 6.01 Project Administration
- .02 Bidding Documents
- .03 Addenda
- .04 Bidding/Negotiations
- .05 Bid Evaluation
- .06 Construction Contract Agreements
- .07 Agency Consulting/Review/Approval
- .08 Owner-Supplied Data Coordination
- .09 Analysis of Alternates/Substitutions
- .10 Special Bidding Services

Description of Services

- 6.01 Project Administration services relate to those administrative functions necessarily undertaken by the architect in providing services during this phase of the owner's project and may include project-related research, conferences, coordination of the work of in-house personnel and outside consultants, correspondence, travel, progress reports, etc. These services do not include general firm management.
- 6.02 Bidding Documents services relate to assistance in organizing bidding documents and may include the review, checking and reproduction of all the general bidding documents, such as the invitation to bid, instructions to bidders, proposal forms, the conditions of the contract (general, supplementary and other conditions), the working drawings,

the specifications, and an example of the agreement form. Bid security requirements, performance bonds and labor and material payment bonds requirements may be included.

- 6.03 Addenda services relate to preparation and distribution of addenda documents as may be needed during bidding and may include supplementary drawings, specifications, instructions and notices of any changes in bidding procedures.
- 6.04 Bidding/Negotiations services relate to the bidding and/or negotiation process and may include prequalifying bidders, issuing copies of the bidding documents, maintaining records of documents issued, handling of document deposits required of prospective bidders, receiving and responding to questions from bidders, participation in bidders conference, attending bid opening, recovering documents from unsuccessful bidders, and checking and repair of documents sets for use in construction.
- 6.05 Bid Evaluation services relate to bid evaluation, which may include consultation with the owner subsequent to the receipt of bids, certification of bids if needed, recommendations on award of contract(s), and participation in post-bidding negotiations between the owner and the successful bidder.
- 6.06 Construction Contract Agreements services relate to assisting in the final preparation of the construction contract agreement(s) and may include notifying the successful contractor(s) of award of contract; drafting owner-contractor agreement form(s) for review and approval by the owner's attorney, providing complete sets of the contract documents for signature and distribution to the owner and the contractor(s); receiving certificates of the required insurance and bonds; and notifying the contractor(s) to proceed with the work.
- 6.07 Agency Consulting/Review/Approval services in this phase relate primarily to governmental entities which have statutory impact on a proposed project before construction begins. They may be local, county, regional, state and/or federal agencies having jurisdiction regarding applicable laws, statutes, regulations and codes. The architect may: do extensive agency consulting, research critical applicable regulations, prepare written and graphic explanatory material, and appear on the owner's behalf at agency meetings. There may be a similar need for dealings with non-governmental entities such as community and user groups to assure that updated and accurate information is available before construction begins.
- 6.08 Owner-Supplied Data Coordination services relate to reviewing, handling and coordinating data furnished for the project as a responsibility of

the owner. Specialized construction arrangements, procedures and bidding requirements are examples under this phase.

6.09 Analysis of Alternates/Substitutions services relate to consideration, analysis and recommendations of proposed alternates or substitutions prior or subsequent to receipt of bids or conducting negotiations for the purpose of determining a final basis for the construction contracts(s) award.

6.10 Special Bidding Services relate to providing any additional contract documents over and above those required for normal bidding procedures when phased construction, systems bidding/building and similar procedures are used.

On the forms, the blank lines numbered .11 through .20 are provided for entry of additional services for a specific project and/or for entry of estimates or quotations from consultants and others falling under the classification of "Outside Services."

PHASE 7: CONSTRUCTION CONTRACT ADMINISTRATION SERVICES

Phase Description

In the Construction Contract Administration Phase the architect provides administration of the construction contract as set forth in AIA Document B141, Standard Form of Agreement Between Owner and Architect.

List of Services

- 7.01 Project Administration
- .02 Construction Observation
- .03 Shop Drawings/Submittals Review
- .04 Construction Cost Accounting
- .05 Supplemental Documents
- .06 Quotation Requests/Change Orders
- .07 Testing and Inspection Coordination
- .08 Project/Monitoring Schedule
- .09 Agency Consulting/Review/Approval
- .10 Owner-Supplied Data Coordination
- .11 Full-Time Project Representation
- .12 Project Close-Out
- .13 Civil Engineering
- .14 Structural Engineering
- .15 Mechanical Engineering
- .16 Electrical Engineering
- .17 Landscape Architecture
- .18 Interiors

Description of Services

- 7.01 Project Administration services relate to those administrative functions necessarily undertaken by the architect in providing services during this phase of the owner's project and include project-related research, conferences, correspondence, travel, progress reports, etc. These services may include coordination of the work of in-house personnel and outside consultants for normal architectural work and for normal civil, structural, mechanical and electrical engineering disciplines. Coordination of the work of other disciplines should be included in the appropriate line item. These services do not include general firm management.
- 7.02 Construction Observation services usually include periodic visits to the site to generally monitor the progress and quality of the work and to determine in general if the work is proceeding in accordance with the contract documents. Based on observations made at the site and on the contractor's applications for payment, the amount owing to the contractor may be determined and certificates for payment in such amounts issued.
- 7.03 Shop Drawings/Submittals Review services usually include receipt, review, and comment on all shop drawings, samples, material submittals and other submittals required by the contract documents; review with the owner of items of particular interest to the owner; provision of copies to full-time project representative; return of copies to the contractor, properly marked as to their disposition and status; and verification that changes required are actually effected.
- 7.04 Construction Cost Accounting services relate to monitoring and administration of construction cost accounting and may include maintenance of records on the cost of the construction and all changes (additions and deductions) thereto, evaluation of the amount owed to the contractor based on the progress of construction and payments certified theretofore, and adjustments for unsatisfactory or uncorrected work. The complexities of construction cost accounting increase as the construction contract arrangements vary from single to multiple contracts and lump sum to unit price to "cost-plus." This service encompasses only the exercise of judgment relative to the value of work performed. It does not include verification that the contractor has paid subcontractors, material suppliers or workmen.
- 7.05 Supplemental Documents services relate to responsibilities for supplemental documents and usually include receipt and processing of requests from the contractor(s) for clarifications of the contract documents (including errors and/or omissions in the documents); modifications required by construction exigencies; consultation with and advice to the

owner on those matters which may affect the utilization of the project, extra cost or additional time; and issuance of the appropriate instructions to the contractor or modifications to the contract documents.

- 7.06 Quotation Requests/Change Orders services relate to administration, preparation and issuance of necessary drawings and specifications to describe work to be added, deleted or modified; review of contractors' proposal and detailed breakdowns of quantities of labor and materials and their costs for general accuracy of quotations; review for general validity of any changes in contract completion time; recommendations to the owner to accept, reject or question quotations; negotiations with contractors; securing of the owner's approval to act on the modifications; and preparation of appropriate documents to modify owner-contractor agreements.
- 7.07 Testing and Inspection Coordination services relate to testing and inspection coordination and administration, and may include making arrangements, on behalf of the owner, for independent testing and inspection agencies to perform those services, either specified or required, which the owner will pay for; determining (and informing those agencies) what materials or procedures are to be tested and/or inspected and the frequency thereof; establishing a procedure for notification of the agencies as to when their services are required; ascertaining whether those services are being performed; and reviewing the reports generated thereby for compliance with the requirements of the contract documents of the materials or procedures. The architect does not conduct technical tests and inspections or make arrangements for those which are to be paid for by the contractor or to be made by governmental agencies having jurisdiction. The architect usually reviews any reports generated by the same for compliance with the requirements of the contract documents.
- 7.08 Project/Monitoring Schedule services relate to monitoring the progress of construction relative to an established schedule, the maintenance of the schedule by the contractor(s), and the reporting of such information to the owner. When required due to multiplicity of contracting parties or complexity or scope of the project, these services may include monitoring relative to all entities involved in the construction process and the reporting required to coordinate the work and services of all parties with the master project schedule. Integration of this information with construction disbursements and project cash flow may also be included.
- 7.09 Agency Consulting/Review/Approval services in this phase relate primarily to governmental entities which have statutory impact on the project. They may be local, county, regional, state and/or federal agencies having jurisdiction regarding applicable laws, statutes,

regulations and codes. The architect may: do extensive agency consulting, research critical applicable regulations, prepare written and graphic explanatory material, and appear on the owner's behalf at agency meetings.

- 7.10 Owner-Supplied Data Coordination services relate to reviewing, handling and coordinating data furnished for the project as a responsibility of the owner. Specialized health care, research, educational, process and manufacturing equipment are examples under this phase, as well as specialized construction arrangements and procedures.
- 7.11 Full-Time Project Representation services relate to the need on some projects for the architect to be represented at the project site on a full-time basis. If authorized, the architect's service includes selection, employment, and direction of such a representative. The duties, responsibilities and limitations of authority of the full-time project representative should be set forth in an exhibit appended to the Owner-Architect Agreement and incorporated in the contract documents.
- 7.12 Project Close-Out services may be initiated on receipt of the contractor's notice that the project is sufficiently complete to permit occupancy by the owner for its intended use, and usually include a detailed inspection, with the owner's representative if desired, of the project for conformity to the contract documents; review of the contractor's list of items to be completed or corrected; determination of the partial contract sum(s) to be retained until final completion is secured; receipt of consent by the surety, if any, on the performance and payment bonds to all payments; and issuance of a certificate of substantial completion. Services usually include detailed follow-up inspection and comparison of the work with the contractor's list(s); conveyance to the contractor, by an appropriate means, of the nature of any discrepancies found; final inspection of the work with the owner, if desired, to ascertain whether corrections have been made; receipt and review of warranties, affidavits, etc.; receipt of lien release or bond indemnifying the owner against any lien; receipt of consent of surety to final payment; and issuance of final certificate for payment.
- 7.13 Civil Engineering services relate to the services of the civil engineering discipline which may be needed to assist the architect in the performance of services in this phase as related to civil engineering work.
- 7.14 Structural Engineering services relate to the services of the structural engineering discipline which may be needed to assist the architect in the performance of services in this phase as related to structural engineering work.

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- 7.15 Mechanical Engineering services relate to the services of the mechanical engineering discipline which may be needed to assist the architect in the performance of services in this phase as related to mechanical engineering work.
- 7.16 Electrical Engineering services relate to the services of the electrical engineering discipline which may be needed to assist the architect in the performance of services in this phase as related to electrical engineering work.
- 7.17 Landscape Architecture services relate to the services of the landscape architecture discipline, coordinated by the architect, which may be needed to assist the architect in the performance of services in this phase as related to landscape work.
- 7.18 Interiors services relate to the the services of the interior design discipline, coordinated by the architect, which may be needed to assist the architect in the performance of services in this phase as related to interior design work.

On the forms, the blank lines numbered .19 through .20 are provided for entry of additional services for a specific project and/or for entry of estimates or quotations from consultants and others falling under the classification of "Outside Services."

PHASE 8: POST-CONSTRUCTION SERVICES

Phase Description

In the Post-Construction Phase the architect provides those services intended to facilitate utilization of the project.

List of Services

- 8.01 Project Administration
- .02 Maintenance and Operational Programming
- .03 Start-Up Assistance
- .04 Record Drawings
- .05 Warranty Review
- .06 Post-Construction Evaluation

Description of Services

- 8.01 Project Administration services relate to those administrative functions necessarily undertaken by the architect in providing services during this phase of the owner's project and may include project-related research, conferences, coordination of the work of in-house personnel and outside

consultants, correspondence, travel, progress reports, etc. These services do not include general firm management.

- 8.02 Maintenance and Operational Programming services may include establishing a program for either in-house or contract operation and maintenance of the physical plant and its equipment. Provision may be made for instruction by equipment manufacturers' representatives and the preparation of an operations manual.
- 8.03 Start-Up Assistance services may include on-site observation, troubleshooting, and assistance in the operation of building systems during initial occupancy and subsequent periods until proper operations are established and building maintenance and operating personnel are adequately trained and experienced. This service is supplementary to the construction phase services which establish the contractor's responsibilities to demonstrate completion and initial proper operation of building systems, usually before occupancy. The services usually include coordination of contractors' call-backs, accelerated familiarization of building maintenance and operating personnel with complex systems, and in-depth troubleshooting to establish responsibilities for corrective measures or procedures as may be needed.
- 8.04 Record Drawings services relate to preparation of drawings by the architect, after completion of construction, from data supplied by the contractor(s) and subcontractors showing significant changes in the location of concealed piping, etc., from the diagrammatic locations indicated on the contract documents, or other revisions made during the construction period. If the owner wishes more precise data relative to these or other items of construction, the owner should so indicate to the architect prior to beginning construction. The architect can then make arrangements for obtaining and certification of such data by other parties, if necessary, and check on the progress and general accuracy of such data gathering periodically during construction. On completion of the service, the architect transmits all data, with appropriate identification, to the owner.
- 8.05 Warranty Review services may include consultation and advice in the event that a particular material, item or piece of equipment fails to perform its expected function during the warranty period. The services usually include a detailed inspection prior to expiration of the warranty period to ascertain whether any previously undetected failures of materials, items or equipment exist. The findings of this inspection are incorporated into a report, and instructions for correction of noted defects are presented to the contractor.
- 8.06 Post-Construction Evaluation services may include evaluation of the initial programming vs. actual use of a facility; of the operation and

effectiveness of the various building systems and materials in use; of the functional effectiveness of the facility plan; and of the applicability and effectiveness of the design/construction process used. The services may include project inspection; review with supervisory, operating and maintenance personnel; user interviews; and review of operating costs and related data.

On the forms, the blank lines numbered .07 through .20 are provided for entry of additional post-construction services for a specific project and/or for entry of estimates or quotations from consultants and others falling under the classification of "Outside Services."

PHASE 9: SUPPLEMENTAL SERVICES

Phase Description

The Supplemental Services Phase is not precisely a phase in the sense that it has no specific sequential position in the overall work of the architect. The services provided herein might be performed during any single or several of the eight sequential phases. In addition to the services listed below, this phase would include any services not provided for in any other phase and which the architect agrees to perform. One of these might be construction management. Some offices consider construction management a separate discipline and therefore it is not included in this document. Others may offer construction management service and may wish to include it in the following list.

List of Services

- 9.01 Special Studies
- .02 Computer Applications
- .03 Fine Arts and Crafts
- .04 Non-Building Equipment Selection
- .05 Design of Special Furnishings
- .06 Value Analysis
- .07 Life Cycle Cost Analysis
- .08 Environmental Monitoring
- .09 Presentation Models/Renderings
- .10 Mock Ups
- .11 Demolition Projects
- .12 Tenant-Related Services
- .13 Graphics
- .14 Energy Studies
- .15 Project Promotion
- .16 Quantity Surveys

Description of Services

Because the substance of many of the services in this phase is likely to be determined largely by the nature of the specific project to which they contribute, no attempt has been made here to provide generalized definitions. It is critical, however, that the owner and the architect discuss any such services and be in general agreement as to their nature.

Section D, Using the System, discusses application of the above scope of services. Section C discusses compensation principles and accounting procedures, which should be understood before making the calculations which are also discussed in Section D of these guidelines.

CHECKLIST FOR PROJECT PROGRAM DEVELOPMENT

Project KIRKLAND SENIOR CENTER & LIBRARY

Date: April 25, 1977

Job. No. Combined Project

Revised: MAY 12, 1977

BUDGET

		Amount	
1. Site Acquisition	11,510 SQFT @ 43/sf	\$	
2. Building Construction	12,125 sq. ft. @ 546/s.f.	\$	485,000 495,000
3. Demolition		\$	5,000 5,000
4. Special Equipment - Signs		\$	2,000 2,000
5. Artwork 1/2 of Item 2 # 3		\$	4,850 5,000
6. Landscaping		\$	20,000 25,000
7. Special Site Improvements		\$.
8. Furnishings	# 602,000	\$	68,300 70,000
9. Sales Tax 3.4% of Items 2,3,4,6 # 8	(550,300)	\$	31,335 32,500
10. Contingencies 5% of Items " " (\$500,300)		\$	29,015 2,100
Other		\$	
	Subtotal	\$	645,500 636,600

Fees

13. Architectural	\$ 43,650 45,000 (9% of Item 2) # 3)	\$	
14. Site Engineering	\$ 1,000 1,000	\$	
15. Landscape	\$ 2,500 3,000	\$	
16. Interiors	\$ 2,500 3,500	\$	
17. Legal <i>M, S G</i>	\$ 7,900	\$	
18. Life Cycle Analysis	\$ 4,850 3,000 (1% of Item 2)	\$	
19. Total Fees	\$ 54,500 63,400	\$	54,500 63,400
20. TOTAL BUDGET		\$	700,000 700,000

TIME SCHEDULE

	Date	Elapsed Time
21. Authorization to Proceed	May 1	
22. Completion of Schematic Design	May 31	4 weeks
23. Completion of Design Development	July 31	8 weeks
Completion of Construction Documents	Nov. 31	12 weeks
Receipt of Bids	Dec. 31	4 weeks
26. Completion of General Construction	July 31	28 weeks
27. Completion of Interiors	Aug. 15	2 weeks
28. Completion of Landscaping	Sept. 1	4 weeks
29. Anticipated Opening Date	Sept. 1	4 weeks