

SCHEDULE OF SERVICES

PLANNING AND EVALUATION

Project Initiation

- Discuss and refine client requirements
Project brief, Schedule, Budget
- Confirm client's space needs and program
- Establish scope of work

Obtain client-supplied information

- Site ownership and status
- Site occupancy
- Existing conditions & Surveys
- Legal: easements, encroachments, rights-of-way, etc.

Existing facilities surveys

- Site visit & analysis
- Utilities: off- and on-site
- Measured drawings
- Photographic Record
- Adjacent building and/or property condition survey
- Environmental studies & reports
- Soils investigation & report

Analyze client requirements

- Functional, Budget & Schedule

Feasibility studies

- Functional, Regulatory & Construction
- Public/User meetings
- Research
- Report preparation

Programming

- Research
- User surveys and meetings
- Data collection
- Analysis of space requirements
- Report preparation and presentation
- Space Plans

Site development

- Master planning
- Detailed site utilization study
- Geo-technical investigations

Client budget review

- Quantity Survey
- Contractor Estimate & Grant Applications

Zoning and permitting

- Research and Documentation
- Applications and submittals
- Meetings & Negotiations
- Official Plan amendment
- Zoning
- Committee of Adjustment
- Site plan control agreement
- Demolition permit
- Construction permit(s)
- Municipal fees
- Department of Ministry of Labour

PRELIMINARY DESIGN

Prepare schematic design documents

- Site plan
- Principal floor plans
- Vertical sections
- Elevations
- General descriptive views

Visualizations

- Physical study models
- Artist renderings
- Computer visualizations

Permitting

- Research applicable regulations, codes & by-laws
- Meet with, & present designs to appropriate user or community groups who have influence with permitting agencies
- Meet with appropriate permitting authorities to review schematic designs
- Incorporate comments into design revisions
- Calculations
- Calculate areas and volumes
- Analyze plan efficiency
- Determine applicable net-to-gross ratios
- Costing
- Perform or coordinate preliminary cost estimate
- Prepare written preliminary cost estimate
- Review
- Submit schematic design documents to client including drawings, visualizations, project brief, calculations & cost estimates
- Incorporate client revisions
- Obtain client's written approval to proceed to Design Development

DESIGN DEVELOPMENT

Detailed design

- Review program to ensure compliance through this stage
- Continue development of conceptual design documents
- Provide consultants with pertinent program data and functional space requirements
- Confer with consultants to determine major systems to be used
- Analysis and recommendation of comparative systems
- Determine building system space and location requirements
- Update project brief to include system and equipment descriptions

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DESIGN DEVELOPMENT Cont'd

- Research and identify potential architectural materials, finishes, equipment and furnishings to be used
- Prepare design development documents
- Prepare site plan indicating building location and site improvements
- Principal floor plans
- Typical floor plans
- All elevations
- Critical sections
- Typical construction details
- Schedules
- Equipment layouts Visualizations
- Physical study models
- Artist renderings
- Computer visualizations

Develop preliminary specifications

- Establish criteria and quality standards for materials, systems and equipment
- Identify potential materials, systems and equipment
- Investigate availability of preferred materials, systems and equipment
- Identify and investigate availability of alternative materials, systems and equipment
- Prepare preliminary specification
 - Architectural
 - Structural
 - Mechanical
 - Electrical
 - Civil

Permitting

- Review design against all applicable codes and regulations
- Meet with authorities to review designs
- Make applications for approvals under building acts, etc
- Incorporate comments into design revisions
 - Planning Dept. Building Dept.
 - Fire Marshal Ministry of Labour
 - Health Public Utilities
 - Traffic Airport Authority
 - Conservation Authority Regional

Authorities

- Environment Other

Consultants

- Prepare layouts and drawings as required

Structural

- Confirm a review of applicable legislation
- Development of specific structural system
- Final structural design criteria
- Foundation design criteria
- Preliminary sizing of major structural components
- Critical coordination and clearances
- Outline specification or materials list
 - Mechanical
- Development of specific mechanical systems

- Develop outline specifications and material lists
- Select fuel source for mechanical systems
- Contact utility companies and public authorities on all services and obtain written approval for all service connections
- Establish approximate equipment sizes and capacities
- Preliminary equipment layouts and space allocations
- Required chases and clearances
- Acoustical and vibration control
- Visual impact of equipment
- Energy conservation requirements

Electrical

- Continued development of electrical systems
- Develop outline specifications and material lists
- Contact utilities and public authorities on all services to obtain written approval for service connections
- Establish criteria for lighting, electrical and communication systems
- Establish approximate component sizes and capacities
- Preliminary equipment layouts and space allocations
- Required chases and clearances
- Energy conservation requirements

Continue development and expansion of schematic design documents, outline specifications and materials lists to establish final scope and preliminary details for on- and off-site work of:

- Civil engineering
- Landscape design
- Interior design
- Other specialty consultants

Develop and forward to consultants, or alternatively obtain from consultants list of specialized systems and requirements

- Cable TV
- Clock
- Closed circuit TV
- Compressed air
- Electronic systems
- Communication systems
- Computer systems
- Energy management systems
- Gas and medical gas
- Intercom
- Lighting
- Lightning protection
- Oxygen
- Pneumatic tube

Develop and forward to consultants Cont'd

- Remote control operations
- Security
- Steam
- Telephone

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DESIGN DEVELOPMENT Cont'd

- Vacuum
- Voice communication
- Other

Calculations

- Define actual occupancy loads for each area
- Area calculations (gross and net)
- Volume calculations

Costing

- Perform detailed cost estimates
 - Architectural
 - Structural
 - Mechanical
 - Electrical
 - Civil
- Confer with contractor for review of cost estimates

Review

- Submit design development documents to client including drawings, visualizations, specifications,

Calculations & Cost estimates

- Incorporate client revisions
- Obtain client's written approval to proceed to contract documents

CONTRACT DOCUMENTATION

- Working drawings
- Develop drawing plan and sheet index
- Establish information to appear on each drawing sheet
- Set up CAD layers
- Establish drawing scales- Metric/Imperial
- Establish drawing format
- Establish drawing check set review schedule with client, consultants and authorities to mandatory and/or office policy
- Prepare final working drawings for architectural and all consulting disciplines
 - Site plan
 - Foundation plan
 - Principal floor plans
 - Typical floor plans
 - Elevations
 - Sections
 - Construction details
 - Equipment layouts
 - Structural grid
 - Dimensions/Notations
 - Material hatching

- Specifications
 - Notice to bidders
 - Advertisement or invitation to bid
 - Instructions to bidders
 - Bid form
 - Construction contract
 - General Conditions

Divisions 1-17
Supplementary Conditions
Cash allowances

- Submit to, and assist client with review of General and Supplementary Conditions and specific contract requirements
- Determine acceptable alternatives to specified materials,
- Prepare testing and quality control program and budgets
- Schedules
 - Hardware
 - Room finish
 - Equipment
 - Furniture
- Quality Control
- Check completed documents for coordination, compliance with program, accuracy and cross-coordination with consultants work
 - Architectural
 - Structural
 - Mechanical
 - Electrical
 - Other
- Have consultants carry out required coordination
- Verify all revisions

Contracting

- Assist client in selection of testing agencies
- Obtain client's instructions on insurance and bonding
- Obtain client's instructions regarding construction agreements and bidding procedures
- Obtain client's requirements for phased occupancy or other special requirements
- Determine items or work to be furnished by the client, or not to be included in the construction contract
- Review with client schedule for delivery and installation of client-furnished materials and equipment
- Determine bidding procedures including time, date and place of bid delivery
- Review list of potential contractors with client

Permitting

- Review design development documents for compliance with all applicable codes and regulations
- Meet with appropriate permitting authorities to review
- Obtain client's instruction on application and payment of necessary permits including:
 - Building Department
 - Ministry of Labour
 - Health
 - Public Utilities
 - Traffic

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CONTRACT DOCUMENTATION Cont'd

Airport Authority
Conservation Authority
Regional Authorities
Environment
Other

Review

- Submit drawings, specifications, estimate of construction cost and area calculations to client for review
- Revise where required
- Obtain client's written approval
- Obtain client's written authorization to proceed to bidding or negotiation

CONSTRUCTION PROCUREMENT

Identify bidders

- Publish advertisements for open bidding
- Research bidders for invited bidding
- Obtain and review qualification statements from interested bidders
- Notify selected invited bidders

Direct selection

- Assist client in direct selection of contractor(s)
- Assist client in contract negotiation

Distribution of bidding and proposal documents

- Arrange for printing/reproduction of bid documents
- Prepare bid packages
- Distribute documents to bidders and obtain deposits
- Issue documents to local construction association plan rooms
- Bid inquiries and addenda
- Arrange and conduct site tour
- Record all bid document inquiries
- Clarify or interpret bidding documents
- Prepare and issue supplementary information or addenda

Bidding

- Organize and run bid opening

Bid and proposal evaluation

- Open and tabulate all legitimate bids as per procedures established with client
- Analyze all bids including alternates and substitutions
- Prepare report of bidding results and analysis

Contract negotiation and award

- Assist client to issue letter of intent
- Assist client with contract negotiation with successful bidder
- Performance bond
- Labour and material bond
- Insurance certificates
- Worker's Safety Inspection Board

- Other
- Assist client in preparation/execution of construction contract
- Insurance
- Permit(s)
- Occupancy
- Access

CONTRACT ADMINISTRATION

Document management

- Obtain all bonds and insurance policies
- Provide contractor with required copies of contract documents

Permits

- Assist client with applications for gas, water, electricity, telephone and other services as required

Schedules

- Obtain and review contractor's construction schedule
- Obtain and review contractor's schedule of shop drawings and samples
- Obtain and review contractor's schedule of values
- Prepare colour selections and schedules
- Obtain client approval for colour schedules

Project procedures

- Establish basic lines of communication between all parties
- Establish with contractor requirements for testing and inspection
- Advise on interpretation of contract documents
- Issue supplementary details and instructions as required
- Respond to requests for information and issue written site instructions to contractor when applicable
- Advise contractor on Contemplated Changes to the contract

Project Procedures Cont'd

- Prepare and process requests for quotation regarding Contemplated Changes to the contract
- Process and coordinate changes to contract after consultation with client
- Review contractor's submissions for changes in contract time and amount in conjunction with consultants
- Issue Change Orders as required

Site visitation and review

- Attend site meetings
- Make periodic visits to site to determine if construction is in general conformity with contract documents
- Evaluate work performed and materials supplied in relation to contractor's progress application

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CONTRACT ADMINISTRATION Cont'd

- Make site visits to observe specific events
- Prepare and submit to client, contractor and building officials site visit reports including those of professional engineering consultants
- Issue appropriate certificate for payment

Shop drawings and samples

- Review requested shop drawings when submitted
- Instruct consultants to review shop drawings as appropriate
- Review samples where applicable and comment accordingly

Consultants

- Coordinate general review and other services of other consultants
- Direct findings of other consultants for appropriate action

Administration of changes in the work

- Prepare proposal requests
- Receive and review proposals responses
- Prepare and issue change orders

Project close-out

- Review prescribed procedures for project close-out
- Arrange for appropriate representatives to attend demonstration(s) of systems
- Obtain appropriate records of demonstration(s)
- Arrange for turnover of applicable operating instructions

Substantial Performance

- Receive application for Certificate of Substantial Performance
- Receive from contractor list of items to be completed or corrected
- Perform site review, verify for substantial performance
- Certify substantial performance

Obtain and review required documents for release of Holdback

- Issue certificate for payment for release

Obtain from contractor:

- Warranties
- Certificates of inspection
- Operating instructions and Manuals
- Statutory declaration documents
- Keying schedules
- Maintenance stock
- As-built drawings
- Other specified items

Completion

- Receive application for statement of completion
- Carry out site visit for completion review
- Issue statement of completion
- Receive contractor's written notice of total completion

- Issue certificate for payment for holdback for finishing work
- Perform final site visit and issue final site visit report
- Receive from contractor final application for payment
- Issue final certificate for payment to contractor
- Prepare record drawings if required
- Advise professional liability insurer of project completion date where required

POST CONSTRUCTION

Warranty

- Review reported defects during one year warranty period
- Notify contractor of items requiring attention
- Carry out review of reported defects or deficiencies prior to expiration of one year warranty period
- Notify contractor of items requiring attention
- Assist client in administering corrective action by contractor where defects or deficiencies occur within extended warranty period