



Pre-Concept

Initial Meeting

Tasks

- Introductory Meeting to Assess client needs and requirements as well as determine site limitations and opportunities
- Assemble relevant project data necessary for design
- Prepare or retain as-constructed drawings of existing building where applicable

Deliverables

- Project Design Brief
- Record of Meeting



Schematic Design

Meet every two weeks (typically 1-2 months)

Tasks

- Prepare & Present Initial Concept
- Review and Discuss

Deliverables

- Concept floor plans and site plan, elevations, 3D perspectives



Site Plan Development

Meet periodically (typically once per month for 5-6 months)

Tasks

- Design site layout, engage with engineers
- Obtain Site Plan Approval with Planning Department

Deliverables

- Detailed site and engineering drawings
- Concept floor plans and elevations



Design Development

Initial meeting with client and engineers. Periodic collaboration meetings

Tasks

- Refine approved concept with technical information in collaboration with engineers

Deliverables

- Concept drawings with augmented level of detail
- Outline Specification



Construction Documents

Meet at key milestones to review progress of drawings (50%, 75%, 90% complete)

Tasks

- Prepare complete set of drawings and specifications from approved concept plans to be use for tender, permit and construction

Deliverables

- Detailed architectural and engineering drawings
- Specifications
- Tender related documents as required



Bidding & Negotiations

2-3 week process. Meeting at completion of tendering to review results

Tasks

- Administer and Manage bidding process under General Tender process, or assist Construction Manager with bidding

Deliverables

- Tender Documents (Drawings, specifications, and Instructions to Bidders)
- Addendum
- Tender Summary
- Bidder Recommendation to Owner



Contract Administration

Construction meeting every two weeks on site throughout course of construction

Tasks

- Provide Office services including shop drawing review, contractor communication, change management, issue instructions, Payment Certification
- Provide site services including site meetings, general review, deficiency review, substantial performance review, final review

Deliverables

- Supplemental Instructions
- Proposed Changes
- Change Orders
- General Review Reports
- Substantial Letter
- Occupancy + Final Review Letter



Post-Construction

Wrap up meeting

Tasks

- Assist client in closing out project
- Perform one-year warranty review

Deliverables

- Client Survey
- Project Close-out Letter