



**AIA B201 -2007 (formerly B141 Appendix A), Arizona Edition
EXHIBIT B
DESCRIPTION OF SERVICES**

AGREEMENT made as of the _____ day of _____ in the year _____. *(In words, indicate day, month and year)*

BETWEEN the Architect's identified as the Owner: *(Name, address and other information)*

Owner's Name: _____

Owner's Address: _____

City, State, Zip Code: _____

Phone No.: _____

FOR FILLABLE DOCUMENT – Scroll down to "AIA CONTRACT DOCUMENTS" - click on AIA B201-2007 Exhibit B.doc

And the Architect: *(Name, address and other information)*

Architect Firm Name: _____

Architect's Address: _____

City, State, Zip Code: _____

Phone No.: _____

The Owner and Architect agree as follows: *(Scope of Work)*

Where a box on the left is checked, services must be included in Basic Services. When boxes are printed preceding each described service where an indication to include or exclude the service is required, the box on the left is the YES selection which when marked means the described service is included as any other basic service. The box on the right is the NO selection which when marked means the described service is not included as a basic service. If the service is Not Applicable, underneath each section number write N/A.

A.1 PREDESIGN SERVICES

In the Pre-design Phase the Architect shall provide those services designated necessary for the Architect to assist the Owner in establishing the Owner's program and the financial and time requirements and limitations for the Project prior to beginning design. The following descriptions shall apply to those services assigned as the responsibility of the *Architect*.

*****Please note that all boxes checked "Yes" are mandatory by ADOA for turn-key projects only. If your project is not a turn-key project, then some or all of these items checked "Yes" may not apply to your project. In that case, please check "No" boxes for items that are checked "Yes" to indicate that these items are not applicable to your specific project. If you do not check "No" boxes, then it would indicate that those items would apply to your project.**

A.1.1 Programming services required to establish the following detailed requirements for the Project:

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	.01 Design objectives, limitations and criteria
<input type="checkbox"/>	<input type="checkbox"/>	.02 Space requirements
<input type="checkbox"/>	<input type="checkbox"/>	.03 Space relations
<input type="checkbox"/>	<input type="checkbox"/>	.04 Number and functional responsibilities of personnel
<input type="checkbox"/>	<input type="checkbox"/>	.05 Flexibility and expandability
<input type="checkbox"/>	<input type="checkbox"/>	.06 Special equipment and systems
<input type="checkbox"/>	<input type="checkbox"/>	.07 Site requirements.



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A.1.2 **Space Schematics/Flow Diagrams** services consisting of diagrammatic studies and pertinent descriptive text for:

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	.01 Internal functions
<input type="checkbox"/>	<input type="checkbox"/>	.02 Human, vehicular and material flow patterns
<input type="checkbox"/>	<input type="checkbox"/>	.03 General space allocations
<input type="checkbox"/>	<input type="checkbox"/>	.04 Analysis of operating functions
<input type="checkbox"/>	<input type="checkbox"/>	.05 Adjacency
<input type="checkbox"/>	<input type="checkbox"/>	.06 Special facilities and equipment
<input type="checkbox"/>	<input type="checkbox"/>	.07 Materials handling
<input type="checkbox"/>	<input type="checkbox"/>	.08 Flexibility and expandability.

A.1.3 **Existing Facilities Surveys** services consisting of researching, assembling, reviewing and supplementing information for Projects involving alterations and additions to existing facilities or determining new space usage in conjunction with a new building program and including:

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	.01 Photography
<input type="checkbox"/>	<input type="checkbox"/>	.02 Field measurements
<input type="checkbox"/>	<input type="checkbox"/>	.03 Review of existing design data
<input type="checkbox"/>	<input type="checkbox"/>	.04 Analysis of existing structural capabilities
<input type="checkbox"/>	<input type="checkbox"/>	.05 Analysis of existing mechanical capabilities
<input type="checkbox"/>	<input type="checkbox"/>	.06 Analysis of existing electrical capabilities.
<input type="checkbox"/>	<input type="checkbox"/>	.07 Review of existing drawings for critical inaccuracies, and the development of required measured drawings.

A.1.4 **Project Development Scheduling** services during the Pre-design Phase consisting of establishing a tentative schedule for pre-design services, decision making, design, documentation, contracting and construction, based on determination of the Architect's services, the Owner's **Program Schedule and Budget** and proposed design and construction procedures.

A.1.5 **Project Budgeting** services relating to development of a Predesign Phase Statement of Probable Construction Cost based on **the Owner's Program Schedule and Budget along with** programming and scheduling studies.

A.1.6 **Presentations** services consisting of presentations of Pre-design Phase analyses and recommendations by the Architect to the **Owner**:

A.2 **SITE ANALYSIS SERVICES**

In the Site Analysis Phase the Architect, shall provide those services designated necessary to establish site-related limitations and requirements for the Project. Some of the described services will be provided during pre-design activities and some during other phases of Project design. Grouping herein is for convenience to identify the site analysis services required for the project. The following descriptions shall apply to those services assigned as the responsibility of the **Architect**.

A.2.1 **Site Development Planning** services consisting of preliminary site analysis, and preparation and comparative evaluation of conceptual site development designs, based on:

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	.01 Land utilization
<input type="checkbox"/>	<input type="checkbox"/>	.02 Structures placement
<input type="checkbox"/>	<input type="checkbox"/>	.03 Facilities development



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<input type="checkbox"/>	<input type="checkbox"/>	.04	Development phasing
<input type="checkbox"/>	<input type="checkbox"/>	.05	Movement systems, circulation and parking
<input type="checkbox"/>	<input type="checkbox"/>	.06	Utilities systems
<input type="checkbox"/>	<input type="checkbox"/>	.07	Surface and subsurface conditions
<input type="checkbox"/>	<input type="checkbox"/>	.07	Ecological requirements
<input type="checkbox"/>	<input type="checkbox"/>	.09	Deeds, zoning and other legal restrictions
<input type="checkbox"/>	<input type="checkbox"/>	.10	Landscape concepts and forms.

A.2.2 Detailed Site Utilization Studies consisting of detailed site analysis, based on the approved conceptual site development design, including:

<u>YES</u>	<u>NO</u>		
<input type="checkbox"/>	<input type="checkbox"/>	.01	Land utilization
<input type="checkbox"/>	<input type="checkbox"/>	.02	Structures placement
<input type="checkbox"/>	<input type="checkbox"/>	.03	Facilities development
<input type="checkbox"/>	<input type="checkbox"/>	.04	Development phasing
<input type="checkbox"/>	<input type="checkbox"/>	.05	Movement systems, circulation and parking
<input type="checkbox"/>	<input type="checkbox"/>	.06	Utilities systems
<input type="checkbox"/>	<input type="checkbox"/>	.07	Surface and subsurface conditions
<input type="checkbox"/>	<input type="checkbox"/>	.08	Review of soils report
<input type="checkbox"/>	<input type="checkbox"/>	.09	Vegetation
<input type="checkbox"/>	<input type="checkbox"/>	.10	Slope analysis
<input type="checkbox"/>	<input type="checkbox"/>	.11	Ecological studies
<input type="checkbox"/>	<input type="checkbox"/>	.12	Deeds, zoning and other legal restrictions
<input type="checkbox"/>	<input type="checkbox"/>	.13	Landscape forms and materials.

A.2.3 On-site Utility Studies services consisting of establishing requirements and preparing initial designs for on-site:

<u>YES</u>	<u>NO</u>		
<input type="checkbox"/>	<input type="checkbox"/>	.01	Electrical service and distribution
<input type="checkbox"/>	<input type="checkbox"/>	.02	Gas service and distribution
<input type="checkbox"/>	<input type="checkbox"/>	.03	Water supply and distribution
<input type="checkbox"/>	<input type="checkbox"/>	.04	Site drainage
<input type="checkbox"/>	<input type="checkbox"/>	.05	Sanitary sewer collection and disposal
<input type="checkbox"/>	<input type="checkbox"/>	.06	Process waste water treatment
<input type="checkbox"/>	<input type="checkbox"/>	.07	Storm water collection and disposal
<input type="checkbox"/>	<input type="checkbox"/>	.08	Central-plant mechanical systems
<input type="checkbox"/>	<input type="checkbox"/>	.09	Fire systems
<input type="checkbox"/>	<input type="checkbox"/>	.10	Emergency systems
<input type="checkbox"/>	<input type="checkbox"/>	.11	Security
<input type="checkbox"/>	<input type="checkbox"/>	.12	Pollution control
<input type="checkbox"/>	<input type="checkbox"/>	.13	Site illumination
<input type="checkbox"/>	<input type="checkbox"/>	.14	Communications systems.

A.2.4 Off-site Utility Studies services consisting of:

<u>YES</u>	<u>NO</u>		
<input type="checkbox"/>	<input type="checkbox"/>	.01	Confirmation of location, size and adequacy of utilities serving the site
<input type="checkbox"/>	<input type="checkbox"/>	.02	Determination of requirements for connections to utilities
<input type="checkbox"/>	<input type="checkbox"/>	.03	Planning for off-site utility extensions and facilities
<input type="checkbox"/>	<input type="checkbox"/>	.04	Design of off-site utility extensions and facilities



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A.2.5 Environmental Studies and Reports services consisting of:

YES	NO		
<input type="checkbox"/>	<input type="checkbox"/>	.01	Determination of need or requirements for environmental monitoring, assessment and/or impact statements
<input type="checkbox"/>	<input type="checkbox"/>	.02	Ecological studies
<input type="checkbox"/>	<input type="checkbox"/>	.03	Preparation of environmental assessment reports
<input type="checkbox"/>	<input type="checkbox"/>	.04	Preparation of environmental impact reports
<input type="checkbox"/>	<input type="checkbox"/>	.05	Attendance at public meetings and hearings
<input type="checkbox"/>	<input type="checkbox"/>	.06	Presentations to governing authorities.

A.2.6 Project Budgeting services relating to development of a Statement of Probable Construction Cost for site-related work based on programming and scheduling of site work.

A.2.7 Presentations services consisting of presentations of Site Analysis studies, reports and data by the Architect to the *Owner*

A.3 SCHEMATIC DESIGN SERVICES

In the Schematic Design Phase, the Architect shall provide those services necessary to prepare Schematic Design Documents consisting of drawings and other documents illustrating the general scope, scale and relationship of Project components for approval by the Owner. Designs will be conceptual in character and based on the requirements *developed under previous phases and approved by the Owner.*

A.3.1 Project Administration services consisting of schematic design administrative functions of

A.3.2 Disciplines Coordination/Document Checking services consisting of schematic design activities for:

YES	NO		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01	Coordination between the architectural work and the work of engineering and other involved disciplines for the Project
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02	Review and checking of documents prepared for the Project.

A.3.3 Agency Consulting/Review/Approval services consisting of schematic design activities including:

YES	NO		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01	Agency consultations
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02	Research of critical applicable regulations
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.03	Preparation of written and graphic explanatory materials
<input type="checkbox"/>	<input type="checkbox"/>	.04	Appearances on Owner's behalf at agency and community meetings.

The services apply to applicable laws, statutes, regulations and codes of regulating entities and to reviews required of user or community groups with limited or no statutory authority but significant influence on approving agencies and individuals, including:

<input type="checkbox"/>	<input type="checkbox"/>	.05	Local political subdivisions
<input type="checkbox"/>	<input type="checkbox"/>	.06	Planning boards
<input type="checkbox"/>	<input type="checkbox"/>	.07	County agencies
<input type="checkbox"/>	<input type="checkbox"/>	.08	Regional agencies
<input type="checkbox"/>	<input type="checkbox"/>	.09	Federal agencies

A.3.4 Architectural/Design Documentation services during the Schematic Design Phase responding to program requirements and consisting of preparation of:

YES	NO		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01	Conceptual site and building plans



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<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02	Preliminary sections and elevations
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.03	Preliminary selection of building systems and materials
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.04	Development of approximate dimensions, areas and volumes
<input type="checkbox"/>	<input type="checkbox"/>	.05	Perspective sketch(es)
<input type="checkbox"/>	<input type="checkbox"/>	.06	Study model(s).

A.3.5 Structural Design/Documentation services during the Schematic Design Phase consisting of recommendations regarding basic structural materials and systems, analyses, and development of conceptual design solutions.

A.3.6 Mechanical Design/Documentation services during the Schematic Design Phase consisting of consideration of alternate materials, systems and equipment, and development of conceptual design solutions for:

YES	NO		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01	Energy source(s)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02	Energy conservation
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.03	Heating and ventilating
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.04	Air conditioning
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.05	Plumbing
<input type="checkbox"/>	<input type="checkbox"/>	.06	Fire protection
<input type="checkbox"/>	<input type="checkbox"/>	.07	Special mechanical systems
<input type="checkbox"/>	<input type="checkbox"/>	.08	Process systems
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.09	General space requirements.

A.3.7 Electrical Design/Documentation services during the Schematic Design Phase consisting of consideration of alternate systems, recommendations regarding basic electrical materials, systems and equipment, analyses, and development of conceptual design solutions for:

YES	NO		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01	Power service and distribution
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02	Lighting
<input type="checkbox"/>	<input type="checkbox"/>	.03	Telephones
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.04	Fire detection and alarms
<input type="checkbox"/>	<input type="checkbox"/>	.05	Security systems
<input type="checkbox"/>	<input type="checkbox"/>	.06	Electronic communications
<input type="checkbox"/>	<input type="checkbox"/>	.07	Special electrical systems
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.08	General space requirements.

A.3.8 Civil Design/Documentation services during the Schematic Design Phase consisting of consideration of alternate materials and systems and development of conceptual design solutions for:

YES	NO		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01	On-site utility systems
<input type="checkbox"/>	<input type="checkbox"/>	.02	Off-site utilities work
<input type="checkbox"/>	<input type="checkbox"/>	.03	Fire protection systems
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.04	Drainage systems
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.05	Paving.

A.3.9 Landscape Design/Documentation services during the Schematic Design Phase consisting of consideration of alternate materials, systems and equipment and development of conceptual design solutions for land forms, lawns and plantings based on program requirements, physical site characteristics, design objectives and environmental determinants.



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A.3.10 Interior Design/Documentation services during the Schematic Design Phase consisting of space allocation and utilization plans based on functional relationships, consideration of alternate materials, systems and equipment and development of conceptual design solutions for architectural, mechanical, electrical and equipment requirements in order to establish:

YES	NO		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01	Partition locations
<input type="checkbox"/>	<input type="checkbox"/>	.02	Modular furniture and equipment layouts.
<input type="checkbox"/>	<input type="checkbox"/>	.03	Built-in furniture.

A.3.11 Materials Research/Specifications services during the Schematic Design Phase consisting of:

YES	NO		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01	Identification of potential architectural materials, systems and equipment and their criteria and quality standard consistent with the conceptual design
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02	Investigation of availability and suitability of alternative architectural materials, systems and equipment
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.03	Coordination of similar activities of other disciplines.

A.3.12 Project Development Scheduling services during the Schematic Design Phase consisting of reviewing and updating previously established Project schedules or initial development of Project schedules (if not previously established) for decision-making, design, documentation, contracting and construction.

A.3.13 Statement of Probable Construction Cost services during the Schematic Design Phase consisting of development of a probable construction cost range for the Project based on the most recent schematic design studies, current and historic area, volume, or other unit costs, expected Project delivery process, and appropriate contingencies.

A.3.14 Presentations services consisting of presentations of Schematic Design Documents by the Architect to the **Owner**.

A.4 DESIGN DEVELOPMENT SERVICES

In the Design Development Phase, the Architect shall provide those services designated necessary to prepare from the approved Schematic Design Documents, 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, including architectural, structural, mechanical and electrical systems, materials and such other elements as may be appropriate. Consideration shall be given to availability of materials, equipment and labor, construction sequencing and scheduling, economic analysis of construction and operations, user safety and maintenance requirements, and energy conservation.

A.4.1 Project Administration services consisting of design development administrative functions. ~~including:~~

A.4.2 Disciplines Coordination/Document Checking services consisting of design development activities for:

YES	NO		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01	Coordination between the architectural work and the work of engineering and other involved disciplines for the Project
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02	Review and checking of documents prepared for the Project.

A.4.3 Agency Consulting/Review/Approval services consisting of design development activities including:

YES	NO		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01	Agency consultations
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02	Research of applicable regulations



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- | | | | |
|-------------------------------------|--------------------------|------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .03 | Preparation of written and graphic explanatory materials |
| <input type="checkbox"/> | <input type="checkbox"/> | .04 | Appearances on Owner's behalf at agency and community meetings. |

The services apply to applicable laws, statutes, regulations and codes of regulating entities and to reviews required of user or community groups with limited or no statutory authority but significant influence on approving agencies and individuals, including: _____

- | | | | |
|--------------------------|--------------------------|------------|------------------------------|
| YES | NO | | |
| <input type="checkbox"/> | <input type="checkbox"/> | .05 | Local political subdivisions |
| <input type="checkbox"/> | <input type="checkbox"/> | .06 | Planning boards |
| <input type="checkbox"/> | <input type="checkbox"/> | .07 | County agencies |
| <input type="checkbox"/> | <input type="checkbox"/> | .08 | Regional agencies |
| <input type="checkbox"/> | <input type="checkbox"/> | .09 | Federal agencies |

A.4.4 Architectural/Design Documentation services during the Design Development Phase consisting of continued development and expansion of architectural Schematic Design Documents to establish the final scope, relationships, forms, size and appearance of the Project through:

- | | | | |
|-------------------------------------|--------------------------|------------|--------------------------------|
| YES | NO | | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 | Plans, sections and elevations |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 | Typical construction details |
| <input type="checkbox"/> | <input type="checkbox"/> | .03 | Three dimensional sketch(es) |
| <input type="checkbox"/> | <input type="checkbox"/> | .04 | Study model(s) |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .05 | Final materials selections |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .06 | Equipment layouts |

A.4.5 Structural Design/Documentation services during the Design Development Phase consisting of continued development of the specific structural system(s) and Schematic Design Documents in sufficient detail to establish:

- | | | | |
|-------------------------------------|--------------------------|------------|---|
| YES | NO | | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 | Basic structural system and dimensions |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 | Final structural design criteria |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .03 | Foundation design criteria |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .04 | Preliminary sizing of major structural components |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .05 | Critical coordination clearances |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .06 | Outline Specifications or materials lists. |

A.4.6 Mechanical Design/Documentation services during the Design Development Phase consisting of continued development and expansion of mechanical Schematic Design Documents and development of outline Specifications or materials lists to establish:

- | | | | |
|-------------------------------------|--------------------------|------------|--|
| YES | NO | | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 | Approximate equipment sizes and capacities |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 | Preliminary equipment layouts |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .03 | Required space for equipment |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .04 | Required chases and clearances |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .05 | Acoustical and vibration control |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .06 | Visual impacts |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .07 | Energy conservation measures. |

A.4.7 Electrical Design/Documentation services during the Design Development Phase consisting of continued development and expansion of electrical Schematic Design Documents and development of outline Specifications or materials lists to establish:



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<u>YES</u>	<u>NO</u>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01 Criteria for lighting, electrical and communications systems
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02 Approximate sizes and capacities of major components
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.03 Preliminary equipment layouts
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.04 Required space for equipment
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.05 Required chases and clearances.

A.4.8 Civil Design/Documentation services during the Design Development Phase consisting of continued development and expansion of civil Schematic Design Documents and development of outline Specifications or materials lists to establish the final scope and preliminary details for on-site and off-site civil engineering work.

A.4.9 Landscape Design/Documentation services during the Design Development Phase consisting of continued development and expansion of landscape Schematic Design Documents and development of outline Specifications or materials lists to establish final scope and preliminary details for landscape work.

A.4.10 Interior Design/Documentation services during the Design Development Phase consisting of continued development and expansion of interior Schematic Design Documents and development of outline Specifications or materials lists to establish final scope and preliminary details relative to:

<u>YES</u>	<u>NO</u>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01 Interior construction of the Project
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02 Materials and finishes and colors
<input type="checkbox"/>	<input type="checkbox"/>	.03 Modular Furniture and equipment layouts
<input type="checkbox"/>	<input type="checkbox"/>	.04 Built-in furniture.

A.4.11 Materials Research/Specifications services during the Design Development Phase consisting of activities:

<u>YES</u>	<u>NO</u>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01 Development of architectural outline Specifications or itemized lists and brief form identification of significant architectural materials, systems and equipment and their criteria and quality standards of significant architectural materials, systems and equipment and their criteria and quality standards
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02 Coordination of similar activities of other disciplines
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.03 Production of design manual including design criteria and outline Specifications or materials lists.

A.4.12 Project Development Scheduling services during the Design Development Phase consisting of reviewing and updating previously established schedules for the Project.

A.4.13 Statement of Probable Construction Cost services during the Design Development Phase consisting of updating and refining the Schematic Design Phase Statement of Probable Construction Cost of the Project.

A.4.14 Presentations services consisting of presentations of Design Development Drawings and other documents by the Architect to the *Owner*.

A.5 CONSTRUCTION DOCUMENTS SERVICES

In the Construction Documents Phase, the Architect shall provide those services necessary to prepare, from the approved Design Development Documents, for approval by the Owner, Construction Documents consisting of Drawings, Specifications and other documents setting forth in detail the requirements for construction of the Project and bidding and contracting for the construction of the Project.

A.5.1 Project Administration services consisting of Construction documents administrative functions.

A.5.2 Disciplines Coordination/Document Checking services consisting of construction documents activities for:



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- | YES | NO | |
|-------------------------------------|--------------------------|--|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 Coordination between the architectural work and the work of engineering and other involved disciplines for the Project |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 Review and checking of documents prepared for the Project. |

A.5.3 Agency Consulting/Review/Approval services relating to applicable laws, statutes, regulations and codes of regulating entities and consisting of Construction Documents Phase activities *for*:

- | YES | NO | |
|-------------------------------------|--------------------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 Agency consultations |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 Research of applicable regulations |
| <input type="checkbox"/> | <input type="checkbox"/> | .03 Appearances on Owner's behalf at agency meetings. |

A.5.4 Architectural/Design Documentation services during the Construction Documents Phase consisting of preparation of Drawings based on approved Design Development Documents setting forth in detail the architectural construction requirements for the Project:

A.5.5 Structural Design/Documentation services during the Construction Documents Phase consisting of preparation of final structural engineering calculations, Drawings and Specifications based on approved Design Development Documents, setting forth in detail the structural construction requirements for the Project.

A.5.6 Mechanical Design/Documentation services during the Construction Documents Phase consisting of preparation of final mechanical engineering calculations, Drawings and Specifications based on approved Design Development Documents, setting forth in detail the mechanical construction requirements for the Project.

A.5.7 Electrical Design/Documentation services during the Construction Documents Phase consisting of preparation of final electrical engineering calculations, Drawings and Specifications based on approved Design Development Documents, setting forth in detail the electrical construction requirements for the Project.

A.5.8 Civil Design/Documentation services during the Construction Documents Phase consisting of preparation of final civil engineering calculations, Drawings and Specifications based on approved Design Development Documents, setting forth in detail the civil construction requirements for the Project.

A.5.9 Landscape Design/Documentation services during the Construction Documents Phase consisting of preparation of Drawings and Specifications based on approved Design Development Documents, setting forth in detail the landscape requirements for the Project.

A.5.10 Interior Design/Documentation services during the Construction Documents Phase consisting of preparation of Drawings, Specifications and furnishings, furniture and equipment schedules based on approved Design Development Documents, setting forth in detail the requirements for interior construction and for furniture, furnishings and equipment for the Project.

A.5.11 Materials Research/Specifications services during the Construction Documents Phase consisting of activities by in-house architectural personnel in:

- | YES | NO | |
|-------------------------------------|--------------------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 Assistance to the Owner in development and preparation of Bidding Documents which describe the time, place and conditions of bidding, bidding forms, and the form(s) of Agreement between the Owner and Contractor(s) |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 Assistance to the Owner in development and preparation of the Conditions of the Contract (General, Supplementary, and other Conditions) |



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- | | | | |
|-------------------------------------|--------------------------|------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .03 | Development and preparation of architectural Specifications describing materials, systems and equipment, workmanship, quality and performance criteria required for the construction of the Project |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .04 | Coordination of the development of Specifications by other disciplines |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .05 | Compilation of Project Manual including Conditions of the Contract, Bidding Documents and Specifications. |

A.5.12 Special Bidding Documents/Scheduling services during the Construction Documents Phase consisting of:

- | | | | |
|--------------------------|--------------------------|------------|--|
| <u>YES</u> | <u>NO</u> | | |
| <input type="checkbox"/> | <input type="checkbox"/> | .01 | Preparation and coordination of special Drawings and Specifications for obtaining bids or prices on alternate subdivisions of the Work |
| <input type="checkbox"/> | <input type="checkbox"/> | .02 | Preparation and coordination of special Drawings and Specifications for obtaining alternate bids or prices on changes in the scope of the Work |
| <input type="checkbox"/> | <input type="checkbox"/> | .03 | Review and update of established schedules for the Project. |

A.6 BIDDING SERVICES

In the Bidding Phase the Architect following the Owner's approval of the Construction Documents and of the most recent Statement of Probable Construction Cost, shall provide those services designated necessary for the Architect to assist the Owner in obtaining bids

A.6.1 Bidding Materials services consisting of organizing and handling Bidding Documents for:

- | | | | |
|-------------------------------------|--------------------------|------------|---|
| <u>YES</u> | <u>NO</u> | | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 | Coordination |
| <input type="checkbox"/> | <input type="checkbox"/> | .02 | Reproduction (Deliver _____ sets of Bid Documents to Owner) |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .03 | Completeness review |

A.6.2 Addenda services consisting of preparation and distribution of Addenda as may be required during bidding or negotiation and including supplementary Drawings, Specifications, instructions and notice(s) of changes in the bidding schedule and procedure.

A.6.3 Bidding services consisting of:

- | | | | |
|-------------------------------------|--------------------------|------------|---|
| <u>YES</u> | <u>NO</u> | | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 | Participation in pre-bid conferences |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 | Responses to questions from Bidders or proposers and clarifications or interpretations of the Bidding Documents |
| <input type="checkbox"/> | <input type="checkbox"/> | .03 | Attendance at bid opening(s) |

A.6.4 Analysis of Alternates/Substitutions services consisting of consideration, analyses, comparisons, and recommendations relative to alternates or substitutions proposed by Bidders.

A.6.5 Bid Evaluation services consisting of:

- | | | | |
|-------------------------------------|--------------------------|------------|--|
| <u>YES</u> | <u>NO</u> | | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 | Evaluation of Bids or proposals |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 | Recommendation on award of Contract(s) |

A.7 CONSTRUCTION CONTRACT ADMINISTRATION SERVICES

In the Construction Contract Administration Phase the Architect shall provide those services designated necessary for the administration of the construction contract as set forth in the General Conditions of the Contract for Construction.



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Unless otherwise provided The Architect's duties and responsibilities during construction shall be as set forth in the Agreement between Owner and Architect.

A.7.1 Owner-supplied Data Coordination services consisting of the activities relating to construction contract administration including:

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	.01 Review and coordination of data furnished for the Project as a responsibility of the Owner
<input type="checkbox"/>	<input type="checkbox"/>	.02 Assistance in establishing criteria
<input type="checkbox"/>	<input type="checkbox"/>	.03 Assistance in obtaining data
<input type="checkbox"/>	<input type="checkbox"/>	.04 Coordination of delivery and installation for Owner-supplied equipment
<input type="checkbox"/>	<input type="checkbox"/>	.05 Coordination of delivery and installation of Owner-supplied furniture and furnishings.

A.7.2 Office Construction Administration services consisting of:

<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01 Processing of submittals, including receipt, review of, and appropriate action on Shop Drawings, Product Data, Samples and other submittals required by the Contract Documents
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02 Distribution of submittals to Owner, Contractor and/or Architect's field representatives as required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.03 Maintenance of master file of submittals
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.04 Related communications.

A.7.3 Construction Field Observation: *Refer to Article 2, paragraph 2.6.5 of Agreement. If permitting does not occur, construction field observation shall include all inspections required by the building code of the local authority.*

A.7.4 Project Representation services consisting of selection, employment and direction of:

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	.01 Full-time Project Representative(s)
<input type="checkbox"/>	<input type="checkbox"/>	.02 Part-time Project Representative(s).

A.7.5 Inspection Coordination services relating to independent inspection and testing agencies, consisting of:

YES	NO	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01 Administration and coordination of field testing required by the Contract Documents
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02 Recommending scope, standards, procedures and frequency of testing and inspections
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.03 Arranging for testing and inspection on Owner's behalf
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.04 Notifying inspection and testing agencies of status Work requiring testing and inspection
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.05 Evaluating compliance by testing and inspection agencies with required scope, standards, procedures and frequency
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.06 Review of reports on inspections and tests and notifications to Owner and Contractor(s) of observed deficiencies in the Work.

A.7.6 Supplemental Documents services consisting of:

YES	NO	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.01 Preparation, reproduction and distribution of supplemental Drawings, Specifications and interpretations in response to requests for clarification by Contractor(s).
<input checked="" type="checkbox"/>	<input type="checkbox"/>	.02 Forwarding Owner's instructions <i>on the Owner's behalf relative to changed requirements and schedule revisions.</i>

A.7.7 Quotation Requests/Change Orders services consisting of:



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- | <u>YES</u> | <u>NO</u> | |
|-------------------------------------|--------------------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 Preparation, reproduction and distribution of Drawings and Specifications to describe Work to be added, deleted or modified |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 Review of proposals from Contractor(s) for reasonableness of quantities and costs of labor and materials |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 Review and recommendations relative to changes in time for Substantial Completion |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .04 Negotiations with Contractor(s) on Owner's behalf relative to costs of Work proposed to be added, deleted or modified |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .05 Assisting in the preparation of appropriate Modifications of the Contract(s) for Construction |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .06 Coordination of communications, approvals, notifications and record keeping relative to changes in the Work. |

A.7.8 Project Schedule Monitoring services consisting of monitoring the progress of the Contractor(s) relative to established schedules and making status reports to Owner.

A.7.9 Construction Cost Accounting services consisting of:

- | <u>YES</u> | <u>NO</u> | |
|-------------------------------------|--------------------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 Maintenance of records of payments on account of the Contract Sum and all changes thereto |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 Evaluation of Applications for Payment and certification thereof |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .03 Review and evaluation of expense data submitted by the Contractor(s) for work performed under cost-plus-fee arrangements. |

A.7.10 Project Closeout services initiated upon notice from the Contractor(s) that the Work, or a designated portion thereof which is acceptable to the Owner, is sufficiently complete, in accordance with the Contract Documents, to permit occupancy or utilization for the use for which it is intended, and consisting of:

- | <u>YES</u> | <u>NO</u> | |
|-------------------------------------|--------------------------|--|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 A detailed inspection with the Owner's representative for conformity of the Work to the Contract Documents to verify the list submitted by the Contractor(s) of items to be completed or corrected |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 Determination of the amounts to be withheld until final completion |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .03 Securing and receipt of consent of surety or sureties, if any, to reduction in or partial release of retainage or the making of final payment(s) |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .04 Issuance of Certificate(s) of Substantial Completion |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .05 Inspection(s) upon notice by the Contractor(s) that the Work is ready for final inspection and acceptance |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .06 Notification to owner and Contractor(s) of deficiencies found in follow-up inspection(s), if any |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .07 Final inspection with the Owner's representative to verify final completion of the work |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .08 Receipt and transmittal of warranties, affidavits, receipts, releases and waivers of lien or bonds indemnifying the Owner against liens |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .09 Securing and receipt of consent of surety or sureties, if any, to the making of final payment(s) |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .10 Issuance of final Certificate(s) for Payment. |

A.8 POST CONSTRUCTION SERVICES

In the Post construction Phase, the Architect shall provide those services necessary to assist the Owner in the use and occupancy of the facility.

A.8.1 Start-up Assistance services consisting of:

- | <u>YES</u> | <u>NO</u> | |
|-------------------------------------|--------------------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 On-site observation, troubleshooting and assistance in the operation of building systems during initial occupancy |



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- | | | | |
|-------------------------------------|--------------------------|-----|--|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 | Assistance in the training of the Owner's operation and maintenance personnel in proper operations, schedules and procedures |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .03 | Administration and coordination of remedial work by the Contractor(s) after final completion. |

A.8.2 Record Drawings services consisting of:

- | <u>YES</u> | <u>NO</u> | | |
|-------------------------------------|--------------------------|-----|--|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 | Making arrangements for obtaining from Contractor(s) and other parties <i>Record Drawings</i> , certified by them, on all changes made during construction from the initial Contract Documents and on the location of concealed systems as installed during construction |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 | Review of general accuracy of information submitted and certified to by the Contractor(s) |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .03 | Transmittal of record drawings and general data, appropriately identified, to the Owner and others as directed. |

A.8.3 Warranty Review services consisting of:

- | <u>YES</u> | <u>NO</u> | | |
|-------------------------------------|--------------------------|-----|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .01 | Consultation and recommendation to the Owner during the duration of warranties in connection with inadequate performance of materials, systems and equipment under warranty |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .02 | Inspection(s) prior to expiration of the <i>12-month</i> warranty period(s) to ascertain adequacy of performance of materials, systems and equipment |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | .03 | Documenting defects or deficiencies and assisting the Owner in preparing instruction to the Contractor(s) for correction of noted defects. |

A.9 SUPPLEMENTAL SERVICES

These non-sequential services may be provided during a single Phase of services or during several phases. The following descriptions shall apply to those services assigned as the responsibility of the *Architect*.

A.9.1 Renderings services relating to providing graphic pictorial representations, as required by the Owner, of the proposed Project and consisting of:

- | <u>YES</u> | <u>NO</u> | | |
|--------------------------|--------------------------|-----|-------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | .01 | Black and white elevation view(s) |
| <input type="checkbox"/> | <input type="checkbox"/> | .02 | Black and white perspective view(s) |

A.9.2 Graphics Design services consisting of:

- | <u>YES</u> | <u>NO</u> | | |
|--------------------------|--------------------------|-----|--|
| <input type="checkbox"/> | <input type="checkbox"/> | .01 | Design of interior and exterior signs and identifying symbols |
| <input type="checkbox"/> | <input type="checkbox"/> | .02 | Design of special logos or graphics for the Project |
| <input type="checkbox"/> | <input type="checkbox"/> | .03 | Documentation of requirements for procurement of graphics work |

A.9.3 Demolition Services consisting of:

- | <u>YES</u> | <u>NO</u> | | |
|--------------------------|--------------------------|-----|--|
| <input type="checkbox"/> | <input type="checkbox"/> | .01 | Preparation of Contract Documents for demolition of existing structures |
| <input type="checkbox"/> | <input type="checkbox"/> | .02 | Providing field observation and general administration services during demolition. |

A.10 This Scope of Services for the project has been agreed upon by Owner and Architect on this _____ day of _____ 200_____.



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Architect/Engineer:	Authorized by:
<i>Signature</i>	Owner/Purchasing Manager
(Printed Name & Title)	Approved by:
	Chief Engineer, ADOA

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