

## Sample Standard Scope of Project Management Services

### 1.1 Planning Stage.

1.1.1 Assist Owner in the development of clear project goals for time, cost and scope of the achievement of the Project. In conjunction with Owner, develop realistic milestones and a budget for total project costs including construction, equipment, furniture, design fees, etc.

1.1.2 Recommend for selection by Owner Contractors and consultants, including architects, designers and engineers. Prepare RFP documentation and conduct interviews, evaluations and recommendations for selection of consultants. A selection matrix summarizing the proposals will be assembled to identify pricing, alternatives, and other criteria for selecting the successful bidder. A formal recommendation to award a bid will be submitted to Owner for approval, which recommendation will be based upon pricing, experience on similar projects, personnel assigned to the Project, level of trust, and overall ability to perform the Project. Negotiate agreement with Contractors within predefined parameters.

### 1.2 Design Stage.

1.2.1 Direct and coordinate all Contractors, authorities, and service organizations related to the Project including, without limitation, the supervision and management of architects, designers and engineers involved in the Project. Arrange and chair regular coordinating meeting.

1.2.2 Direct and coordinate the architect, engineer and Contractors throughout the Project in the preparation of the Project program and the design from schematic through working drawing stages. Review the design schematic periodically and give direction as required to coordinate and achieve the Project goals.

1.2.3 Develop Project time schedules for the design stage and coordinate the activities of the Owner business unit representative, Project manager and design team.

1.2.4 Recommend the purchase and procurement of long lead time items to arrange for delivery of strategic materials in conformance with the Project schedule.

1.2.5 Provide a summary construction schedule for inclusion with the bid documents.

1.2.6 Receive and analyze Contractor bids, make award recommendation including conducting pre-award conferences and negotiate and prepare construction contracts per Owner's direction.

### 1.3 Procurement Stage.

1.3.1 Prepare "front end" documents including General and Special Conditions, contract formats, temporary specifications, guidelines for affirmative action programs, if necessary, and special contractor supplements.

1.3.2 Provide a construction time schedule for inclusion in the bid documents and develop for Owner a cost value for each activity, based upon the schedule, for use in preparing a forecast.

1.3.3 Develop bid packages, unit pricing, and alternates for inclusion in Contractor bid proposals.

1.3.4 Receive from Contractors the trade bids and report in bid tabulation form to Owner, together with a recommendation for the award of the work.

1.3.5 Implement value engineering for all aspects of design and construction with selected bidders prior to contract award.

1.3.6 Upon receipt of Owner's approval, award such work.

#### 1.4 General Management and Coordination.

1.4.1 Review the work performed by the Contractors through to completion and require that the materials furnished and the work performed are in accordance with the drawings, specifications and contract documents.

1.4.2 Coordinate with the Contractor the implementation of construction information systems, Project time control schedules and resources analysis as they relate to materials, manpower and costs.

1.4.3 Provide construction audits, status updates and other reports for each Project on a monthly basis.

#### 1.5 On-Site Management.

1.5.1 Establish with the Contractor on-site organization and lines of authority in order to carry out Owner's overall plans in all phases of the Project on a coordinated and efficient basis.

1.5.2 Require the Contractor to maintain an on-site record-keeping system which will be sufficient in detail to satisfy an audit by Owner. Such records shall include, but shall not necessarily be limited to, daily logs, progress schedules, manpower breakdowns (daily by trade), financial reports, quantities, material list, shop drawings, and the like.

1.5.3 Coordinate the obtaining of all legally required permits, licenses, and certificates. Coordinate through the Contractor aspects of the work with all local municipal authorities, governmental agencies, utility companies, etc., who may be involved in the Project.

1.5.4 Coordinate through the Contractor the work of all subcontractors until final completion and acceptance of the Project by Owner. In the event that the interpretation of the meaning and intent of the contract documents becomes necessary during construction, ascertain the architect's and Owner's interpretation, make recommendations as appropriate, and transmit such information on the appropriate subcontractor(s).

1.5.5 Attend job meetings when necessary, attended by the Contractor, subcontractors, the architect and Owner's representative to discuss procedures, progress, problems, scheduling and open items.

1.5.6 Coordinate through the Contractor all testing provided by others as required by the technical sections of the specifications, and as required by the building code.

1.5.7 Coordinate the review, for compliance with the contract documents, of shop drawings, materials and other items submitted by the Contractor.

1.5.8 Review and approve, in accordance with Owner's procedures, all applications for payments submitted through vendor(s) in accordance with established procedures.

1.5.9 Receive and review change order requests from Contractors or from Owner. Review unit prices, time and material charges and similar items. Monitor and advise upon request for changes required by field conditions and progress of the work, and obtain approval from Owner and the architect.

1.5.10 Review Contractor's scheduling system to expedite materials and equipment deliveries through the course of construction.

1.6 Post Construction.

1.6.1 At the appropriate time, coordinate the preparation of punch lists indicating the items of work remaining to be accomplished, and require that these items are completed in an expeditious manner.

1.6.2 Assemble all guarantees, warranties, etc., as required by the contract documents and forward them to Owner.

1.6.3 Receive from the Contractor, check and forward to Owner all releases of claims required prior to issuance of final certificate of completion and final payment to the Contractor.

1.6.4 Expedite the Contractor's preparation of "as-built" drawings of the entire Project in accordance with the terms of the specifications.

1.6.5 After completion of Project, CBRE's project manager will monitor the expeditious follow-up and correction of all punch list items.

1.7 Lien Waivers. Provided Owner has provided sufficient funds to pay the same, CBRE shall obtain the receipts, releases, waivers, discharges and assurances necessary to keep the Facilities free from mechanics and materialmen's liens and other claims to the extent permitted by applicable law.

2. Additional Services. In conjunction with the Services, CBRE shall provide such other services as are reasonably requested by Owner, subject to the Parties' mutual agreement as to the scope of, and pricing for, such other services.

4. Document Ownership; Professional Services. CBRE will review all Project documents, including plans and specifications, architect agreements, construction contracts, certificates, draw requests and budgets, and require such changes as are necessary so that all such documents are in the name of Owner and all warranties run in favor of Owner. CBRE shall employ its experience and knowledge regarding construction techniques and methods in order to further the interests of Owner. CBRE shall exercise due care in the selection of skilled and qualified Contractors with demonstrated expertise in their respective fields necessary to further the interests of Owner.