

Designated Scope of Services

Russell Architecture Ltd. provides full scope of architectural services acting as the prime consultant or sub-consultant able to lead interdisciplinary design teams adjusting to our client's needs, team and methods of construction delivery including design-bid-build, design-build, Construction Management and Project Management approaches to the construction industry and CCDC contracts. Our projects include space planning and design in commercial office/ professional, institutional, light industrial, residential (barrier free design), sustainability design as a LEED accredited professional, base building, tenant improvements (turn-key), Edmonton Public Schools modernization/ renovation projects, Alberta Infrastructure, Canada's aboriginal communities, national and international range of project types 4,000sqft – 80,000sqft (\$500K - \$10M)

The following outlines our scope of services.

SCOPE OF SERVICES – BASE BUILDING/ TENANT IMPROVEMENTS/ INTERIOR DESIGN

A. Project Start-Up/ Programming/Space Planning/Design Development

1. Attend initial project meeting to understand:
 - Roles and responsibilities of consultant team members.
 - Reporting structures
 - Project meeting schedule.
2. Review current facilities: tour site, review.
3. Verify accuracy of existing base building plans through site verification/measurement.
4. Conduct kick-off discussion with assigned project team to understand:
 - Project goals, objectives, requirements
 - Proposed project budget
 - Proposed project schedule
5. Understand client needs/requirements by gathering information and/or conducting interviews:
 - Current and projected staffing requirements
 - Departmental functions, relationships and adjacencies
 - Special facility requirements, e.g. workplace, common areas, amenities, and special area facilities
 - Existing office and furniture standards, individual workspace allocation policies
 - Sustainability requirements and concepts.
6. Finalize space plan requirements with client.
7. Review tenant/landlord agreements in effect.
8. Prepare construction budget for client approval.
9. Prepare a detailed space plan to reflect approved program and cost limits. Space plan to indicate all built elements and furniture/equipment. Minor revisions required. Major revisions will be additional fees. **Sign off required.**
10. Work with Client standard materials and suggested new generic furniture elements as required to communicate design concept. **Sign off required.**
11. Present overall design concept for client approval.
Deliverable: Verified Base Building Plan, Approved Space Program, Approved Design concept.

B. Contract Documentation/Construction Tender

1. Coordinate with engineers to transfer mechanical, electrical, structural and communication information relating to engineering requirements.
2. Prepare contract document package including: (but not limited to)
 - Key plan or site plan
 - Demolition plan
 - Partition plan
 - Reflected ceiling plan
 - Construction details (sections, elevations, finishes and specifications)
 - Floor finishes plan or schedule
 - Wall finishes plan or schedule
 - Door and hardware schedules
 - Furniture plan
 - General notes and specifications
3. Review interior design contract documents for compliance with current authorities having jurisdiction.
4. Receive the Client signature on all construction documents for the project.
5. Issue construction drawings to the landlord for approval.
6. Prepare permit application forms. Construction manager/Contractor to apply for permit on behalf of client.
7. Issue contract document package to construction manager/contractor for tendering to sub-trades.
8. Conduct site walk through with all bidders.
9. Obtain addenda/clarifications from all consultants.
10. Review tenders with construction manager to determine the award of sub-trades.
11. Update contract documents if needed to reflect contractual changes resulting from tender process.

Deliverable: Contract Document Package, Permit Application Forms, Final Contract Document Package

C. Construction Contract Administration/Project Closeout

1. Conduct facility turnover inspection with construction manager.
2. Conduct mandatory inspections as required by authorities having jurisdiction.
3. Attend one weekly site meeting and inspection for construction period as defined in project schedule.
4. Chair site meetings, construction manager to take minutes and distribute.
5. Prepare contract administration documents (e.g. change orders, notices) to reflect the intent of approved contract documents. **Client requested changes after sign off will be billed per hourly rates.**
6. Review submittals samples and shop drawings for compliance to contract documents.
7. Monitor schedule to ensure progress and fulfillment of contractor agreements.
8. Review monthly draws and forward to Client for "Certificate of Payment".
9. Receive "Contemplated Change Orders" from all Consultants and issue to contractors.
10. Review and obtain client approval to proceed. Issue Change Orders.
11. Upon receipt of Certificate of Substantial Performance prepare a list of construction deficiencies relative to interior design intent.
12. Conduct final site inspection no later than 3 weeks after initial date of substantial completion.
13. Ensure proper publication of "Certificates of Substantial Performance".
14. Provide a complete record set of interior design as-built drawings in electronic format (PDF) to client.

15. Receive all warranties and maintenance manuals from contractor(s); review with client to establish ongoing maintenance procedures.

Deliverables: Mandatory Inspections, List of Construction Deficiencies, Interior Design As-Built Drawings in PDF format

D. Furniture/Equipment (Procurement) – additional services

1. Review existing furniture items to be considered for re-use. Recommend re-use/new items.
2. Develop inventories of existing equipment identified for relocation (including size, model and connectivity requirements).
3. Ensure engineering consultants received detailed equipment requirements from client (e.g. printers, copiers). Locate equipment on plan.
4. Propose new furniture items anticipated based on Client standards. Prepare preliminary budget for new furniture items for approval.
5. Prepare furniture plans.
6. Integrate equipment indicated by client for placement in furniture plans.
7. Provide dimensions to installation supplier for provision of installation drawings.
8. Provide staff numbers/names for relocation plans.
9. Prepare furniture specifications for pricing.
10. Coordinate final detailed specifications.
11. Review final quotation on behalf of client.
12. Liaise with building management and contractors to accommodate furniture and equipment delivery and installation.
13. Coordinate furniture delivery and installation; providing supervision where required. (Assume one delivery.)
14. Review completed installation and identify deficiencies.
15. Conduct final inspection.

Deliverables: Furniture Inventory, Furniture Order.

E. Mechanical/Electrical/Structural Engineering

1. Co-ordinate with mechanical, electrical and structural engineers for preparation of their drawings.
2. Engineers to review as-built drawings and condition of existing site.
3. Development of engineering drawings to include, HVAC, lighting, power and location of communication. Engineering documents complete. Communication consultant by client.
4. Attend site meetings during construction.
5. Preparation of site review reports
6. Conduct a deficiency review and report.
7. Review maintenance manuals and as-builts. Prepare record drawings.

Deliverables: Engineering Construction Drawings, As-built drawings.

SCOPE OF SERVICES – PROJECT MANAGEMENT

A. Project Start-up (& General Services)

1. Define roles and responsibilities, required information flow and approvals process.
2. Establish the type of construction contract (e.g. stipulated bid, construction management).
3. Prepare overall project cost estimate.
4. Prepare overall project schedule.
5. Review tenant/landlord agreements in effect.
6. Recommend and coordinate all Consultants. Prepare RFP's for consultants. Review and determine selection of all Consultants with the Client.
7. Receive consultant invoices throughout project for review and approval, and monitor timely payment.
8. Chair project related meetings.
9. Issue progress reports.

B. Needs Analysis & Programming

1. Attend meetings with Consultants.
2. Identify key issues requiring lead times and approvals prior to construction.
3. Update cost estimate based on all known information.
4. Update schedule based on all known information.
5. Ensure timely approvals prior to commencement of next phase.

C. Schematic Design

1. Attend meetings with Consultants.
2. Conduct review of schematic design documents.
3. Update cost estimate based on all known information.
4. Update schedule based on all known information.
5. Ensure timely approvals prior to commencement of next phase.

D. Design Development

1. Coordinate the issuance of preliminary documents to mechanical/electrical engineers and other Consultants to permit commencement of their work.
2. Request cost estimates from all Consultants based on layout and design concepts.
3. Conduct review of design development documents.
4. Update cost estimate based on all known information.
5. Update schedule based on all known information.
6. Ensure timely approvals prior to commencement of next phase.

E. Contract Documentation

1. Review construction documents as prepared by all Consultants.
2. Receive the Client signature on all construction documents for the project.
3. Issue construction drawings to the landlord for approval.
4. Receive the permit application documents prepared by all Consultants.
5. Update cost estimate based on all known information.
6. Update schedule based on all known information.
7. Ensure timely approvals prior to commencement of next phase.

F. Construction Tender

1. Negotiate construction management contract.

G. Construction Contract Administration

1. Prepare final schedule for project execution.
2. Conduct facility turnover inspection with contractor and landlord.
3. Conduct regular site reviews and meetings regarding progress to ensure work is in accordance with construction documents.
4. Monitor schedule to ensure progress and fulfillment of contractor agreements.
5. Review and approve "Request for Payment", submit to Client and monitor payment based on general site reviews.
6. Obtain progress draw reviews from Consultants, prepare "Certificate for Payment", submit to Client and monitor payments.
7. Receive "Contemplated Change Orders" from all Consultants and issue to contractors.
8. Review and obtain client approval to proceed. Issue Change Orders.
9. Receive deficiency reports from all Consultants and issue to the Client and contractor(s).
10. Inspect space upon completion and prior to installation of furniture and prior to movers' activities ensuring readiness for installation of furniture.
11. Ensure that all inspections required by jurisdictions having authority have taken place and deficiencies are rectified prior to turnover to Client.

H. Project Closeout/ Substantial Performance/ Client Take-over Procedures

1. Ensure proper publication of "Certificates of Substantial Performance".
2. Work with contractor(s) to ensure timely completion of deficiencies.
3. Obtain occupancy permits where applicable.
4. Review final invoices, approve and pass onto the Client for payment.
5. Receive all warranties and maintenance manuals from contractor(s); review with client to establish ongoing maintenance procedures.
6. Receive all as-built documents from contractor(s) and file with landlord, client and maintenance contracts as appropriate.