Standard Operating Procedure (SOP)
Architectural/Engineering (A/E) Contract/Proposal Checklist

SOP No. DC-2220 Revision: 0
Department: Design & Construction Date: 1/11/2016
Dept. Head Approval: Date: 1/30/16
Director Approval: Date: 1/30/16

Purpose
The following checklist should be used when preparing contracts or requesting proposals from (A/E) firms for professional services. It is intended to be a reference guide and not as a strict set of requirements for all proposals.

Responsibility
1. The following people are responsible for following this SOP.
   1.A. Managers

Procedure
The A/E proposal should work in conjunction with AIA B101 base contract. This is especially important for open end A/E contracts with numerous blanks that state “to be determined by mutual consent.” The A/E proposal should address relevant blanks or supplement the B101 contract. The items on the checklist below should be considered.

- Project Summary/Scope of Work
- Reference to Owners Program of Requirement (if available)
- List of Services Provided
- Identify A/E Project Manager and Design Team
- Construction Budget or Estimated “Cost of Work”
- Project Schedule/Milestones
- Design Phase Meetings/Trips
- Plans Review with State Fire Marshal (if applicable)
- Design Phase Deliverables (including # of copies)
- Utilization of Building Information Modelling (BIM)
- Construction Estimate at Each Design Phase
- Design Reviews at Each Phase
- Construction Administration
  - Frequency of Progress Meetings
  - A/E to run meetings and distribute minutes
- Participate in Cost Reconciliation with 3rd Party Estimator (if applicable)
Design Fee, Stipulated Sum Is Preferred

Payment Schedule Breakdown:
- Schematic Design (SD) (15% of Total Fee)
- Design Development (DD) (20%)
- Construction Documents (CD) (40%)
- Bidding (4%)
- Construction Administration (20%)

Electronic Bid Documents

Incorporate Addenda into Bid Documents To Create “Conformed Set”

Quantity of Hard Copy Bid Sets

CAD Electronic As-Builts

Reference Base Contract (If Open End)

Specifications in 2004 Masterformat

Reference Compliance with WVU Design Guidelines where applicable

http://www.wvu.edu/%7Efacserv/plant/design_standards.htm