


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

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Department:	Design & Construction	Date:	1/11/2016
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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
 - o Frequency of Progress Meetings
 - o 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