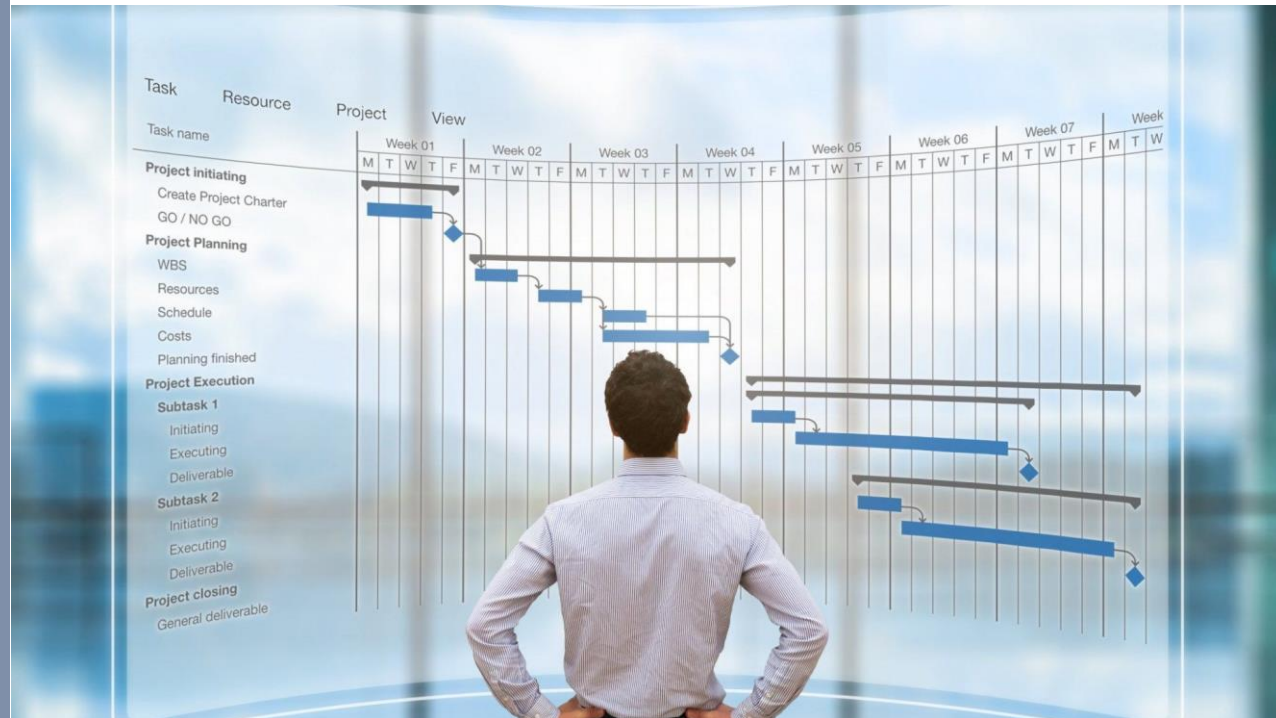


Document Control Center

Kambiz Kordani PMP,MSc

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Instagram: [@acemi_social](#)



Fourth Session

Contents



- Pre-design Documents:
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 - Programming
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 - Project Site Safety
 - Contractor Record Keeping

- Post-construction documents:
 - The contractor inspects the project and prepares a comprehensive list of outstanding items to be completed or corrected (initial punch list).
 - The contractor submits notice of substantial completion.
 - The architect inspects the project to verify substantial completion and prepares a supplement to the contractor's list (final punch list).
 - The architect prepares the certificate of substantial completion.
 - The contractor completes the items on the punch list.
 - The contractor submits notice of final completion and final application for payment.
 - The architect inspects the project to verify final completion.
 - The architect processes the final application for payment and closeout submittals.
 - The owner makes final payment.

Construction contract administration, contractor project management, and communication during the construction stage are integral activities. The contract documents establish the lines of communication and might describe how the communication process is to work. The basic lines of communication as identified in the AIA and EJCDC general conditions include the following:

- Between owner and contractor: Through the A/E
- To consultants: Through the A/E
- To subcontractors and suppliers: Through the contractor
- To separate contractors: Through the owner, construction manager, or coordinating contractor

1. Oral and Written Communication

Communications may be oral, such as telephone calls or field resolution of design or construction issues, but oral communications should be followed with written documentation confirming decisions or interpretations. After a meeting with several participants present, a copy of the minutes of the meeting should be sent to the attendees. An opportunity should be offered to each party to review and correct the documented information within a specified period of time. By adhering to the process of written communication, participants receive the same information, the integrity of the contract documents is preserved, and the documentation can be filed and retrieved as needed. In establishing the communication procedures to be used for a project, it is important to select forms of communication that are legally enforceable.

2. Electronic Communication

The use of electronic communication has become prevalent in construction. It includes faxes, electronic mail, digital photos, project web sites, text messaging, and voicemail. When electronic communications are integrated into a project, it is important to establish the following:

- Rules that clearly identify an official communication
- Types of communication that will be legally binding
- How distribution to other parties will be handled
- Record-keeping procedures

2. Electronic Communication

2.1 Faxes

2.2 Electronic Mail, Digital Photos, and Video

2.3 Project Web Sites

2.4 Text Messaging

2.5 Voicemail

1. Pre design documents

- Pre-design is the phase of analysis that occurs after some form of funding is available and before design begins. During the pre-design phase, studies are done to analyze space requirement issues, the constraints and opportunities of the proposed site, and the cost versus the budget. The amount of funding available in the pre-design phase varies and is a critical factor in determining which studies take precedence. Funds may be available to develop a detailed project program or only to investigate certain technical issues in order to determine scope, budget, or project schedule.

1. Pre design documents



- The pre-design phase may include site analysis, programming, construction cost analysis, and value engineering.
 1. **Site analysis** includes site selection, geotechnical reports, and review of existing structures.
 2. **Programming** defines the project needs of the user. Programming includes cataloging the spaces and equipment needed, and functional relationships.
 3. The construction **cost analysis** provides a construction budget amount for the capital improvement budget (CIB) and a cost plan to assist in explaining the budget and in guiding project management.
 4. **Value engineering** in the pre-design phase scrutinizes the program, site selection, and project budget.

1. Pre design documents



1.1 SITE ANALYSIS

Studies are conducted to evaluate existing conditions. These studies include geotechnical reports, **hydrology studies**, **land surveys** (including boundaries, topography, and utilities), existing building analysis, and surveys of existing hazardous materials (environmental due diligence).

1. Pre design documents



1.1 SITE ANALYSIS

1.1.1 GEOTECHNICAL REPORTS

A Facility may hire a geotechnical engineer to produce a geotechnical report that provides the Facility with information about the soils and geologic conditions on and below the surface at a project site.

The geotechnical report contains information about **existing project conditions**. The information typically includes reports done previously for neighboring buildings and actual samples taken at the project site. Sampling techniques vary depending on the project.

- Geotechnical Hazards
- Soil Samples
- Recommendations

1. Pre design documents

1.1 SITE ANALYSIS

1.1.2 HYDROLOGY STUDIES

- Surface water drainage patterns (on and off site).
- Floodplain zones. (مناطق سیلاب گیر)
- Aquifers and recharge zones. (سفره های زیرزمینی)
- Depth to ground water.
- Storm drainage system requirements.
- Erosion hazard areas.
- Debris flows and mudslides hazards.
- Coastal flooding and tsunami hazards.

1. Pre design documents



1.1 SITE ANALYSIS

1.1.3 LAND SURVEYS

Land surveys describe existing site features, project boundaries, and legal boundaries (if applicable) such as property lines, rights-of-way, and easements. The surveyor locates **physical elements, including structures, roads, trees, and land formations**; and reviews existing records to gather information on utilities and boundaries. The survey determines the site configuration and area.

The surveyor's measurements of the elevations of existing elements are particularly important for tying the proposed project into existing roads and utilities and, possibly, to existing buildings.

1. Pre design documents

1.1 SITE ANALYSIS

1.1.4 EXISTING BUILDING ANALYSIS

- Overall building suitability and adaptability for the proposed use (e.g., area on each floor, column bay sizes, floor-to-floor heights, and vibration and acoustical control).
- Capacity, suitability, and adaptability of the existing engineered systems (e.g., electrical, HVAC, fire protection, and plumbing).
- Vertical load bearing capacity (e.g., slabs, beams, girders, and columns).
- Earthquake resistance and lateral load capacity (e.g., shear walls and frame bracing).
- Accessibility to the disabled. (دسترسی افراد معلول).
- Fire and life-safety systems.
- Energy issues.

1. Pre design documents



1.1 SITE ANALYSIS

1.1.5 SURVEYS OF EXISTING HAZARDOUS MATERIALS (DUE DILIGENCE)

Consultants are used to inspect existing sites or buildings that contain asbestos, polychlorinated biphenyls (PCBs), old fuel tanks, or other suspected hazards and recommend the proper removal or mitigation methods. Although the Facilities are generally aware of hazards on current sites, new sites or previously occupied sites may pose soils or ground water contamination problems as a result of past uses.

1. Pre design documents



1.1 SITE ANALYSIS

1.1.6 DATA COMPILATION

- SITE ANALYSIS REPORT
- SITE ANALYSIS DRAWINGS
 - Building permit template
 - Discretionary template
 - Lot-Line Adjustments Template
- COMPARATIVE SITE ANALYSIS
- FACILITY AND INFRASTRUCTURE ANALYSIS

1. Pre design documents



1.2 PROGRAMMING

- Consultant Qualification Packet
- Assignment of Work Agreement
- Assignment of Materials or Equipment Agreement
- Waiver of Liability, Assumption of Risk & Indemnity Agreement for Volunteers
- Material Substitution Proposal
- Bid Summary Sheet
- Notice of Disqualification
- Notice of Selection as Apparent Lowest Responsible Bidder, Long Form
- License for Early Start of Construction
- Recommendation for Award of Contract

1. Pre design documents



1.2 PROGRAMMING (checklists)

- Environmental Impact Classification Form
- State Agencies with Plan Approval Authority over University Projects
- Construction Document Review Checklist
- Errors Commonly Made in the Construction Documents
- Bid Form Check-off List: Informal Bidding
- Bid Form Check-off List: Competitive Bidding
- Business Case Analysis
- Certification Checklist
- Lease/License Checklist
- Easement Checklist

1. Pre design documents



1.2 PROGRAMMING (Ancillary Contract Documents)

- Permission to Solicit Bids
- Addenda
- Inspector's Daily Report
- Notice of Substitution
- Substitution of Subcontractors Indemnity Agreement
- Temporary Certificate of Occupancy
- Certificate of Occupancy

1. Pre design documents



1.3 CONSTRUCTION COSTS

- SOURCES OF COST INFORMATION
- METHODS OF ESTIMATING COSTS
- CONTINGENCIES
- PREPARING THE CONSTRUCTION COST ESTIMATE
- COST INDEXING

1.4 Value Engineering Report

Consultant Qualification Packet



CONSULTANT EXPERIENCE FORM

Project:

Specialty (include information for all specialties & consultants on proposed design team) <i>Note which is Prime Consultant</i>	Consultant/Firm	Active UC projects - campus/project (list all for each firm)	Claims* or litigation (Yes** or No)	All UC projects within last 5 years - campus/project (list all for each firm)	Claims* or Litigation? (Yes** or No)	All other projects with any claims* - active & past 5 years (list all for each firm)
Architect						
Mechanical Engineer						
Structural Engineer						
Lab Consultant						
Electrical						
Civil						
Other Consultants (list all)						

The information provided on this experience form was prepared the office of the prime consultant listed above, who verifies under penalty of perjury that all information set forth on this form, to the best of my knowledge, is complete and accurate as of the date of submission of the Statement of Qualifications.

		{Date}		{Signature}	
Attach additional pages if necessary for any category					
* Claims includes all Claims includes all pending, unresolved claims of professional negligence or breach of contract for professional services against your firm or any owner or principal of your firm.				{Name}	
				{Title}	
** If yes, explain					

Assignment of Work Agreement



Project Name: { }

Project No.: { }

ASSIGNMENT OF WORK AGREEMENT

TITLE AND LOCATION OF THE WORK: _____

NAME AND ADDRESS OF THE COMPANY FACILITY: _____

NAME AND ADDRESS OF THE EXECUTIVE DESIGN PROFESSIONAL: _____

NAME AND ADDRESS OF THE CONTRACTOR: _____

ASSIGNMENT OF WORK AGREEMENT

THIS AGREEMENT, made and entered onto this { } day of { }, 20{ } by {CONTRACTOR}, a {LEGAL ENTITY}, hereafter referred to as "Contractor," and THE REGENTS OF THE COMPANY OF CALIFORNIA, a California corporation, hereinafter referred to as "Company."

RECITALS

1. On {DATE}, Company tendered to {CONTRACTOR}, a {LEGAL ENTITY}, hereinafter referred to as Subcontractor, a construction contract for {TITLE OF THE WORK}, for {LOCATION OF THE WORK}, which was executed by Subcontractor on {DATE}. A copy of the foregoing {CONTRACT TITLE} is attached hereto as EXHIBIT "A" and shall be incorporated herein by reference; and
2. On {DATE}, Company and Contractor entered into a construction contract for {TITLE AND LOCATION OF THE WORK}; and
3. Said contract required the Contractor to accept an assignment of the Company's rights, duties, and obligations under the {CONTRACT TITLE}.

NOW, THEREFORE, in consideration of the promises and acts contained therein, the parties agree with each other as follows:

1. Contractor hereby assumes responsibility for and agrees to perform all the duties of Company under the {CONTRACT TITLE} attached as EXHIBIT "A."
2. Company hereby assigns and transfers to Contractor all of its rights under said {CONTRACT TITLE} including all liabilities and responsibilities of any kind to Company which may have existed, exist, or may arise under said {CONTRACT TITLE}. Contractor accepts all liabilities and obligations.

IN WITNESS WHEREOF, the parties have executed this Agreement the day and year first above written.

Project Name: { }

Project No.: { }

Company name

THE REGENTS OF THE COMPANY OF CALIFORNIA

By: {Name}
{Title}

Signature

Date

CONTRACTOR

{CONTRACTOR NAME}

By: {Name}
{Title}

Signature

Date

Assignment of Work Agreement



Project Name: *Phase 1 Structural Steel for Cory Hall Fifth-Floor Addition and Alterations for Computer Aided Design* Project No.: *Account No. 912401*

ASSIGNMENT OF WORK AGREEMENT (COMPLETED EXAMPLE)

TITLE AND LOCATION OF THE WORK: _____
Cory Hall Fifth-Floor Addition and Alterations for Computer-Aided Design
Account No. 912401
Phase 1b Structural Steel

NAME AND ADDRESS OF THE COMPANY FACILITY: _____
The Regents of the Company of California
Oakland, CA 94612

NAME AND ADDRESS OF THE EXECUTIVE DESIGN PROFESSIONAL: _____
Joan T. Architect
300 Professional Square, Suite 101
Berkeley, CA 94720

NAME AND ADDRESS OF THE CONTRACTOR: _____
The Builders Company
2001 Oakdale Avenue
Oakland, CA 94613

ASSIGNMENT OF WORK AGREEMENT

THIS AGREEMENT, made and entered onto this *fourth* day of *March*, 2017 by *The Builders Company (Phase 2 Contractor)*, a *California Partnership*, hereafter referred to as "Contractor," and THE REGENTS OF THE COMPANY OF CALIFORNIA, a California corporation, hereinafter referred to as "Company."

RECITALS

4. On *February 27, 2017*, Company tendered to *Sacramento Steel (Phase 1b Contractor)*, a corporation, hereinafter referred to as Subcontractor, a construction contract for *Phase 1b Structural Steel, for Cory Hall Fifth-Floor Addition and Alterations for Computer Aided Design*, which was executed by Subcontractor on *February 27, 2017*. A copy of the foregoing *Phase 1b Contract* is attached hereto as EXHIBIT "A" and shall be incorporated herein by reference; and
5. On *May 8, 2017*, Company and Contractor entered into a construction contract for *Phase 1b Structural Steel, Cory Hall Fifth-Floor Addition and Alterations for Computer Aided Design*; and
6. Said contract required the Contractor to accept an assignment of the Company's rights, duties, and obligations under the *Phase 1b Contract*.

NOW, THEREFORE, in consideration of the promises and acts contained therein, the parties agree with each other as follows:

3. Contractor hereby assumes responsibility for and agrees to perform all the duties of Company under the *Phase 1b Contract* attached as EXHIBIT "A."
4. Company hereby assigns and transfers to Contractor all of its rights under said *Phase 1b Contract* including all liabilities and responsibilities of any kind to Company which may have existed, exist, or may arise under said *Phase 1b Contract*. Contractor accepts all liabilities and obligations.

Project Name: *Phase 1 Structural Steel for Cory Hall Fifth-Floor Addition and Alterations for Computer Aided Design* Project No.: *Account No. 912401*

IN WITNESS WHEREOF, the parties have executed this Agreement the day and year first above written.

COMPANY

THE REGENTS OF THE COMPANY OF CALIFORNIA

By: *James Johnson*
Assistant Vice Chancellor Administration

Signature

Date

CONTRACTOR

The Builders Company

By: *Glancey Wall*
Managing Partner

Signature

Date

Assignment of Materials or Equipment Agreement



Project Name: { }

Project No.: { }

ASSIGNMENT OF MATERIALS OR EQUIPMENT AGREEMENT

[Buyer: Construction Contracts Administrator shall coordinate execution of Assignment upon award of construction contract to Contractor.]

TITLE AND LOCATION OF THE WORK: _____

NAME AND ADDRESS OF THE COMPANY FACILITY: _____

NAME AND ADDRESS OF THE EXECUTIVE DESIGN PROFESSIONAL: _____

NAME AND ADDRESS OF THE CONTRACTOR: _____

ASSIGNMENT OF MATERIALS OR EQUIPMENT AGREEMENT

THIS AGREEMENT, made and entered onto this { } day of { }, 20{ } by {CONTRACTOR}, a {LEGAL ENTITY}, hereafter referred to as "Contractor," and THE REGENTS OF THE COMPANY OF CALIFORNIA, a California corporation, hereinafter referred to as "Company."

RECITALS

1. On {date}, Company tendered to {SUPPLIER, a corporation}, hereinafter referred to as Supplier, a Purchase Agreement for {SERVICES}, which was executed by Supplier on {DATE}. A copy of the foregoing Purchase Agreement is attached hereto as EXHIBIT "A" and shall be incorporated herein by reference; and
2. On {DATE}, Company and Contractor entered into a construction contract for {PROJECT}; and
3. Said contract required the Contractor to accept an assignment of the Company's rights, duties, and obligations under the Purchase Agreement.
4. The total amount of the Purchase Agreement is \${ }, of which \$0.00 has been paid to Supplier to date.
5. Supplier agreed to delivery of Services to the Company pursuant to the attached Purchase Agreement no later than {DATE}.

NOW, THEREFORE, in consideration of the promises and acts contained therein, the parties agree with each other as follows:

1. Contractor hereby assumes responsibility for and agrees to perform all the duties of Company under the Purchase Agreement attached as EXHIBIT "A."
2. As part of its contract with Company, Contractor shall assume assignment of said Purchase Agreement and shall assume all responsibility for payment, receiving, handling, storage, transportation to job site, inspection, rigging, connecting, guarantees, bonding, and all other factors involved in producing a complete job. This assignment shall be made via this Assignment of Materials or Equipment Agreement between Company and Contractor, executed at the award of contract.

Project Name: { }

Project No.: { }

3. Company hereby assigns and transfers to Contractor all of its rights under said Purchase Agreement including all liabilities and responsibilities of any kind to Company which may have existed, exist, or may arise under said Purchase Agreement. Contractor accepts all liabilities and obligations.

IN WITNESS WHEREOF, the parties have executed this Agreement the day and year first above written.

COMPANY

THE REGENTS OF THE COMPANY OF CALIFORNIA

By: {Name}
{Title}

Signature

Date

CONTRACTOR

{CONTRACTOR NAME}

By: {Name}
{Title}

Signature

Date

Material Substitution Proposal



Project Name: { }

Project No.: { }

To: {Company's Representative}

Name:

Project:

Project No.:

1. We hereby submit for your consideration the following product instead of the specified item:

1. Section _____ Article Number _____

2. Specified Item _____

3. Proposed Substitution (Mfg., Type, Model, etc.)

2. Complete all of the following:

1. Does this substitution offer Company a cost credit (including costs for changes by other subcontractors)?

____ Yes ____ No How much? _____

2. Does this substitution offer earlier delivery or less Contract Time?

____ Yes ____ No

Project Name: { }

Project No.: { }

How much and why?

3. How does this substitution affect any dimensions, layout, or details of other subcontractors as shown on the Drawings?

4. What are the specific differences between this substitution and the specified item?

3. Attach the following as applicable (Check if attached)

1. Manufacturer's technical data _____
2. Laboratory test or performance results _____
3. Drawings & wiring diagrams of the proposed product _____
4. Drawings & description of changes required by other subcontractors _____
5. Samples _____
6. Manufacturer's guarantee & maintenance instructions _____

4. Submitted by Contractor

Signature _____ Date _____

Bid Summary Sheet

{Project Name}

{Location of Bid Opening}

{Project/Contract No.}

{Date and Time of Bid Opening}

{Estimated Contract Cost in \$}

(1) Name of Contractor	(2) Lump-Sum Base Bid	(3) Unit Prices (Unit Price) x (Estimated No. of Units) = Extended Unit Price)	(4) Accepted Alternates (Indicate + or -)	(5) Total Bid Price = (2)+(3)+(4)
	\$ _____	No. 1 _____ = \$ _____ No. 2 _____ = \$ _____ No. 3 _____ = \$ _____ No. 4 _____ = \$ _____ Total \$ _____	No. ____ \$ _____ No. ____ \$ _____ No. ____ \$ _____ No. ____ \$ _____ Total \$ _____	(2) \$ _____ (3) \$ _____ (4) \$ _____ Total \$ _____

(repeat for all Bidders)

Environmental Impact Classification Form

Campus/Field Station/Division _____

Project Account _____

Project Title _____

For purposes of compliance with the California Environmental Quality Act of 1970 (CEQA), and Amended University of California Procedures for Implementation of CEQA, this project has been reviewed and initially classified as indicated below. Please check (X) as appropriate. Include project description and appropriate local map with your submission.

☐ I. EXEMPT FROM THE CALIFORNIA ENVIRONMENTAL QUALITY ACT OF 1970 - When it can be seen with certainty that there is no possibility the action will result in physical change to the environment (15061(b)(3)), or the action is specifically exempted by statute (15260-15285), the project is classified as generally exempt from CEQA. General/Statutory Exemption:

§ [Insert reference to applicable CEQA statutory provision and, if applicable, the correlating guidelines Section]

☐ II. CATEGORICALLY EXEMPT* - This project falls under the indicated Class(es) of Exemption(s), none of the exceptions to the exemption apply (15300.2), and there is no significant effect on the environment (for complete list see CEQA Guidelines Section 15300):

_____ Class 1: Existing Facilities

_____ Class 2: Replacement or Reconstruction

_____ Class 3: New Construction or Small Structures

_____ Class 4: Minor Alterations to Land

_____ Class 6: Information Collection

_____ Class 11: Accessory Structures

_____ Class 13: Acquisition for Conservation

_____ Class 16: Transfer of Land Ownership for Parks

_____ Class 17: Open Space Contracts or Easements

_____ Class 23: Normal Operation of Facilities for Public Gatherings

_____ Class 25: Transfer of Land: Natural Conditions/Historical Resources

_____ Class 30: Minor Actions: Prevent Hazardous Waste/Substances

_____ Class 31: Historical Resource Restoration/Rehabilitation

_____ Class 32: In-Fill Development Projects

_____ Class 33: Small Habitat Restoration Projects

_____ Other: _____

*Exemptions should be supported by a memorandum to the file documenting project compliance with the specific exemption conditions and exceptions to ensure CEQA defensibility.

☐ III. INITIAL STUDY - This project is not statutorily or categorically exempt from CEQA; an Initial Study is to be prepared to determine if the project may have a significant effect on the environment.

☐ Stand-Alone ☐ Tiered Initial Study (15152): _____

☐ IV. ENVIRONMENTAL IMPACT REPORT (EIR) - It is known that the project will have a direct or cumulatively significant effect on the environment and an EIR will be/has been prepared. Identify the type of EIR:

☐ Programmatic ☐ Stand-Alone (Project-Specific) _____

Additional project analysis:

☐ None/Findings Only ☐ Addendum ☐ Subsequent ☐ Supplement to EIR: _____

PROJECT DESCRIPTION - [Insert brief project description, provide supporting documentation as appropriate]

Real estate transaction type: ☐ Acquisition ☐ Sale ☐ Lease ☐ Easement ☐ License [Include proposed use in project description below]

V. Does this project conform to the approved LRDP? ☐ YES ☐ NO ☐ NA

VI.

Prepared by _____

Date _____

Local Approved by _____

Date _____

VII. OFFICE OF THE PRESIDENT

☐ Concur with Classification

☐ Do not concur with Classification

Signed _____

Date _____

By: K.Kordani PMP, MSc

Temporary Certificate of Occupancy



Temporary Certificate of Occupancy

University of California, _____

INSERT CAMPUS ADDRESS
CITY, CA ZIP CODE
PHONE NUMBER

Project Name: _____ Project Number: _____

Building Name: _____ Building Owner: _____
(only when University is not Building Owner)

Campus/Facility: _____ Street Address: _____

Occupancy: _____ Type of Construction: _____

Contractor: _____

The Designated Campus Fire Marshal and Certified Building Official are authorized to issue a temporary certificate of occupancy before completion of the entire work. Referred to in the California Building Code, section 111.3 as temporary occupancy. The Temporary Certificate of Occupancy shall limit the usage to a specific period, provided that such portion or portions shall be occupied safely. This form should not be used to take Beneficial Occupancy.

University hereby takes Temporary Occupancy as follows:

- 1 The date of commencement of Temporary Occupancy of the above described portion of the Work is from _____ to _____
The date of Temporary Occupancy Issued _____
- 2 The systems or equipment may not be fully operational and utilized by University. If installed, the Contractor shall remain fully responsible for the operation and maintenance of such systems and equipment. For such systems and equipment only, the Guarantee to Repair Period shall commence on the date set forth in General Conditions of the Contract.
- 3 Concurrence of Lead Designated Campus Fire Marshal.
- 4 Concurrence of University's Certified Building Official.



UNIVERSITY OF CALIFORNIA, _____

Approved: _____

Signature: _____

Name: _____

Title: _____

Designated Campus Fire Marshal

Signature: _____

Name: _____

Title: _____

University's - Certified Building Official

_____ Check here if additional Conditions are attached

This certificate is issued pursuant to the requirements of the California Building Code section 111.3, General Conditions of the Contract and Facilities Manual 6:17.3., inspections of the building/premises, Building Owner maintaining all conditions listed, and the representations made by the Contractor, Inspector(s) and the Design Professional(s) of Record.

If Building Owner is not the University, a copy of this Certificate shall be maintained at the subject building/premise at all times. The University shall maintain a copy of this certificate at the Campus Building Official's Office.

TCO -179008

By: K.Kordani PMP, MSc

Certificate of Occupancy



Certificate of Occupancy University of California, _____

INSERT CAMPUS ADDRESS
CITY, CA ZIP CODE
PHONE NUMBER

Project Name: _____	Project Number: _____
Building Name: _____	Building Owner: _____
Campus/Facility: _____	Street Address: _____
Occupancy: _____	Type of Construction: _____
Occupant Load: _____	Number of Stories: _____
Square Footage: _____	Fire Sprinklered (FS): _____
Special conditions: _____	Required (FS): _____
stipulations _____	

The University hereby acknowledges compliance with the California Building and Fire Codes _____ edition.

Description of the Occupied Space: Including use of the Facility, requirements of the code for occupancy and division of occupancy for which the proposed occupancy is classified.

This certificate is issued pursuant to the requirements of the California Building Code section 111.2, after the Designated Campus Fire Marshal and Certified Building Official inspects the facility or structure and finds no violations of the provisions of the code or other laws enforced by the University including the General Conditions of the Contract and Facilities Manual 5:17.1.2. This certifies that all inspections of the building and premises by the Designated Campus Fire Marshal, Certified Building Official, and Building Inspector(s) are complete and in compliance with the Contract Documents.

This certificate is issued on: _____

UNIVERSITY OF CALIFORNIA, _____

Approved: _____
Signature: _____
Name: _____
Title: _____

Designated Campus Fire Marshal



Approved: _____
Signature: _____
Name: _____
Title: _____

Certified Building Official

2. Design documents

- ترنسमितال داخلی
- برگه کنترل ورودی طراحی
- دورگردانی بین دیسیپلینی
- ترنسमितال خارجی
- فرم درخواست اصلاح مدارک
- محاسبه پیشرفت فاز مهندسی پروژه
- رویه شماره گذاری مدارک
- مدیریت MDR
- تضمین کیفیت طراحی و تولید مدارک مهندسی
- گردش کارهای مربوطه
- مهندسی خرید پروژه
- پرسش های فنی
- فرم تغییرات مهندسی
- فرم اعلام نیاز خدمات بیرونی

3. Procurement documents



1. Contractor's Organization
2. Notice to Proceed
3. Contract Documents
4. Preconstruction Submittals
5. Permits and Regulatory Issues
6. Preconstruction Meetings
7. Verification of Site Conditions
8. Mobilization

3. Procurement documents



1. Contractor's Organization

The contract documents require many preconstruction activities. Other preconstruction activities are determined by good business practices, the contractor's organization, duration of the project, interaction with outside agencies, and interface with the project team.

Preconstruction activities begin when the contractor has received an executed agreement or a notice to proceed. Occasionally, a “Letter of Intent to Award” may initiate this phase as well.

3. Procurement documents



Letter of Intent to Award

Notice of Intent to Award

SAMPLE NOTICE OF INTENT TO AWARD LETTER (for a task order project)

[Name of ESCO]
[Address of ESCO]

SUBJECT: [ESCO contract number; project description]

Dear [ESCO]:

We are pleased to inform you that you have been selected to provide energy savings performance contract services for [SITE NAME]. This notice of intent to award a delivery order against your IDIQ contract, however, is subject to your successful satisfaction of the requirements contained in Sections H.5, H.6, and H.7 of your award. Specifically, within ____ days of this notice, you are required to perform an Investment-Grade Audit of the applicable project site facilities and energy systems, and provide a final proposal summarizing the survey results to the undersigned Contracting Officer. The survey shall be conducted in accordance with the requirements of Section H.5 of your contract. The final proposal and schedules submitted must verify the accuracy of the estimated annual cost savings you originally proposed for this project. Otherwise, the Pre-Award Requirements of Sections H.5, H.6, and H.7 will not be considered to have been met, and negotiations and award will not be pursued further.

Upon receipt of the final proposal and its DO schedules, the Government will notify you when negotiations can commence. You are also reminded to take necessary actions to obtain the required financing and bonding (if required) for this project, as required by Section H.8 of your contract. These pre-award requirements will also require satisfaction once negotiations are completed, and prior to issuance of the intended award.

Should you have any questions, please contact the Contracting Officer's Representative (COR), [name of COR] at (XXX) XXX-XXXX, or the undersigned Contracting Officer at (XXX) XXX-XXXX.

By: K.Kordani PMP, MSc

[Name]
Contracting Officer

3. Procurement documents



1.1 Estimating Pass-off

- Upon receipt of the notice to proceed, the contractor has much work to do in a relatively short time frame. This usually begins with the estimator's passing off the project to the team that will be constructing the project.

1.2 Buyout

- Buyout is one of the contractor's preconstruction activities between award of the contract and the actual start of construction. Buyout can and often does extend past the start of construction, but the majority of these tasks are completed before it starts. During buyout, the contractor issues subcontracts, supply contracts, and purchase orders for the work to be done. Any final negotiating with suppliers and subcontractors is also done during buyout. There are several aspects to successfully negotiating with subcontractors and suppliers.

3. Procurement documents

1.2 Buyout

- The decision of whether to issue a purchase order or subcontract can be affected by several criteria:
 - ✓ When on-site labor will be performed (such as site excavating and grading, placement of rebar, erection of structural steel, or application of finishes), a subcontract is appropriate.
 - ✓ The contract requirements may indicate that an installer or applicator is required to be a licensed subcontractor or authorized agent of the manufacturer.
 - ✓ The cost of the work to be performed may exceed certain monetary limitations placed on the use of purchase orders.
 - ✓ The type of service to be provided may indicate which document to use. Sometimes short-term specialty work can be covered by a purchase order.
 - ✓ A hybrid document may be more appropriate. A supply contract usually has more contractual detail and requirements than a standard purchase order, and in many ways resembles a subcontract, though it does not address on-site labor.

3. Procurement documents



1.3 Award of Subcontracts

- Subcontracts typically include requirements for:
 - Payment and performance bonds
 - Liability insurance
 - Workers' compensation insurance
 - Certified payrolls and other required payroll reports
 - Payment applications
 - Submittals, samples, and mock-ups
 - Warranties
 - Record documents

3. Procurement documents



1.4 Purchase Orders

- Purchase orders are contracts for materials being purchased, reference the project specifications, and include pertinent terms such as discounts, cost escalations, submittals, certifications required, samples required, freight, taxes, delivery schedule, and quantities.
- Purchase orders may include:
 - Requirements for submittals, such as shop drawings, samples, and mockups
 - Certifications and certificates of materials origin
 - Testing requirements

3. Procurement documents



1.4 Purchase Orders

PURCHASE ORDER			
<Company Name> <Street Address> <City>, <State> <Zip>		PO Number: <12345> PO Date: <7/15/2009> Vendor ID: <Vendor ID>	
Purchase From: <Vendor Name> <Vendor Street Address> <City>, <State> <Zip> Contact Name: <Name>		Ship To: <Company Name> <Company Street Address> <City>, <State> <Zip> Contact Name: <Name>	
Shipping Method <UPS>		Payment Terms <Net 30 Days>	Required By Date <Date>
Item Description	Quantity	Unit Price	Amount
<Item 1>			
<Item 2>			
<Item 3>			
<Item 4>			
<Item 5>			
<Item 6>			
<Item 7>			
<Item 8>			
<Item 9>			
<Item 10>			
Approved By: X _____		Subtotal \$ _____ Freight _____ Sales Tax _____ Order Total _____	

By: K.Kordani PI

3. Procurement documents



2. Notice to Proceed

The project time limit provisions are normally established by the date of commencement stated in the agreement. The date of commencement may be established by a notice to proceed. The agreement for a design-build (D-B) project or a negotiated contract that has the contractor performing value analysis and constructability reviews during the design stage may not establish the construction start time or duration. In this case, the notice to proceed issued by the owner to the contractor establishes the construction start date and the construction duration.

The notice to proceed is a short document, addressed directly to the contractor and referencing the specific project, or portion of the project, for which the work is to be accomplished. Most important, it lists the date work is authorized to commence and occasionally the number of calendar days or date of substantial completion, all followed by the signature of the owner.

3. Procurement

2. Notice to Proceed

Notice to Proceed

Date: _____

Project: _____

Owner: _____

Owner's Contract No.: _____

Contract: _____

Engineer's Project No.: _____

Contractor: _____

Contractor's Address: *[send Certified Mail, Return Receipt Requested]*

You are notified that the Contract Times under the above Contract will commence to run on _____. On or before that date, you are to start performing your obligations under the Contract Documents. In accordance with Article 4 of the Agreement, the date of Substantial Completion is _____, and the date of readiness for final payment is _____ [(or) the number of days to achieve Substantial Completion is _____, and the number of days to achieve readiness for final payment is _____].

Before you may start any Work at the Site, Paragraph 2.01.B of the General Conditions provides that you and Owner must each deliver to the other (with copies to Engineer and other identified additional insureds and loss payees) certificates of insurance which each is required to purchase and maintain in accordance with the Contract Documents.

Also, before you may start any Work at the Site, you must:

_____ *[add other requirements]*.

Owner

Given by:

Authorized Signature

Title

Date

3. Proc

2. Notice to Proceed



Knowledge for Creating
and Sustaining
the Built Environment

NOTICE TO PROCEED

Project: _____ Date: _____

A/E Project Number: _____
To: _____ Contract For: _____

You are hereby notified that the Contract Times stated for the Project will commence on _____. On that date, start performing the obligations required by the Contract Documents. (Date)

Before commencing Work at the Project Site, deliver the certificates of insurance to the Owner as required by the Contract Documents.

Also before commencing Work at the Project Site, perform:

Authorized By: _____
(Owner)

(Authorized Signature)

(Title)

Accepted By: _____
(Contractor)

(Authorized Signature)

(Title)

(Date)

☐ Attachments

Copies: ☐ Owner ☐ A/E ☐ Consultants ☐ _____ ☐ _____ ☐ _____ ☐ File

By: K.Kordani PMP, MSc

3. Procurement documents



3. Contract Documents

- The construction contract administration (CCA) and contractor project management procedures established by documents published by AIA have become standards of the industry in defining the rights, duties, and responsibilities of the various parties to a construction contract. Although Consensus DOCS promulgated by several construction related associations and some private companies and governmental agencies use other documents, the following information focuses on those published by the AIA.

3. Procurement documents



3. Contract Documents

- The documents typically used in the administration of a construction contract include:
 - Owner-A/E agreement
 - Owner-contractor agreement(s)
 - Conditions of the contract
 - Specifications
 - Drawings
 - Bid form or proposal, when attached as an exhibit to the agreement (Engineers Joint Contract Documents Committee EJCDC)
 - Precontract revisions, including addenda with items relating to contract documents
 - Contract modifications, including change orders

3. Procurement

3. Contract Documents

3.1 Owner-A/E agreement

MASTER AGREEMENT BETWEEN OWNER AND ARCHITECT/ENGINEER Contract No. _____

The "Effective Date" of this Agreement is: _____

The "Parties" to this Agreement are:

The "Owner": _____

Washington State University
c/o Facilities Services, Capital
P.O. Box 643611
Pullman, WA 99164-3611

The "Architect/Engineer" or "A/E": _____

Basic Information:

The "Project": _____

The "MACC": (see Article 5)

\$ _____

The "Services": _____

As described in Articles 1, 2, and 3, and Exhibit A

The "Compensation": _____

The Services will be compensated on an hourly basis at the rates specified in Exhibit B.

"Reimbursable Expenses": _____

See Exhibit C.

"Maximum Compensation": _____

\$ _____

The Maximum Compensation includes the Compensation, Reimbursable Expenses and any consultant costs. In no event is Owner obligated to pay more than the Maximum Compensation.

The "A/E's Representative": _____

Schedule of Services:

Base Term Completion: _____

1st Optional Extension: _____

2nd Optional Extension: _____

A/E's Consultants:

Minimum Required Insurance:

Commercial General Liability: _____

At least \$1 million per occurrence and in the aggregate

3. Procurement documents

3. Contract Documents

3.2 Owner-contractor agreement(s)

AIA Document A121™ – 2018 *Standard Form of Master Agreement Between Owner and Contractor where Work is provided under multiple Work Orders*

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

BETWEEN the Owner:
(Name, legal status, address, and other information)

and the Contractor:
(Name, legal status, address, and other information)

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

This document does not contain a description of the Contractor's scope of Work or related terms. This document is intended to be used in conjunction with AIA Document A221™–2018, Work Order, for use with Master Agreement Between Owner and Contractor.

The Owner and Contractor agree as follows.

Int. AIA Document A121™ – 2018. Copyright © 2014 and 2018 by The American Institute of Architects. All rights reserved. **WARNING:** This AIA® Document is protected by U.S. Copyright Law and International Treaties. Unauthorized reproduction or distribution of this AIA® Document, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law. To report copyright violations of AIA Contract Documents, e-mail The American Institute of Architects' legal counsel, copyright@aia.org.

3. Procurement documents



3. Contract Documents

3.2 Conditions of the Contract

- General provisions and definitions
- Owner's responsibilities
- Contractor's responsibilities
- A/E's responsibilities
- Subcontractors (definition and relationships)
- Construction by owner or separate contractors
- Changes in the work
- Contract time
- Payments to contractor and completion of work
- Protection of persons and property

3. Procurement documents



3. Contract Documents

3.2 Conditions of the Contract

- Insurance and bonds
- Correction, removal, or acceptance of defective work
- Miscellaneous provisions (مقررات متفرقه)
- Suspension of work and termination of the contract
- Claims and disputes

3. Procurement documents



4. Preconstruction Submittals

- Certificates of insurance and workers' compensation coverage
- Payment and performance bonds
- Proposed subcontractor and product lists
- Preliminary construction and submittal schedules
- Proposed use of the site and site logistics, including signage
- Erosion control plan
- Pollution control plan
- Traffic control plan

3. Procurement documents

4. Preconstruction Submittals

- Certificates of insurance and workers' compensation coverage

ACORD®		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY)		
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.						
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).						
PRODUCER		CONTACT NAME: PHONE: (A/C, No, Ext): E-MAIL: ADDRESS: PRODUCER CUSTOMER ID #:				
INSURED		INSURER(S) AFFORDING COVERAGE INSURER A : INSURER B : INSURER C : INSURER D : INSURER E : INSURER F :				
COVERAGES		CERTIFICATE NUMBER:		REVISION NUMBER:		
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.						
INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	GENERAL LIABILITY					EACH OCCURRENCE \$
	COMMERCIAL GENERAL LIABILITY					DAMAGE TO RENTED PREMISES (Ea occurrence) \$
	CLAIMS-MADE					MED EXP (Any one person) \$
	OCCUR					PERSONAL & ADV INJURY \$
						GENERAL AGGREGATE \$
						PRODUCTS - COMP/OP AGG \$
	GENTL AGGREGATE LIMIT APPLIES PER:					\$
	POLICY					\$
	PRO-JECT					\$
	LOC					\$
	AUTOMOBILE LIABILITY					COMBINED SINGLE LIMIT (Ea accident) \$
	ANY AUTO					BODILY INJURY (Per person) \$
	ALL OWNED AUTOS					BODILY INJURY (Per accident) \$
	SCHEDULED AUTOS					PROPERTY DAMAGE (Per accident) \$
	HIRED AUTOS					\$
	NON-OWNED AUTOS					\$
						\$
	UMBRELLA LIAB					EACH OCCURRENCE \$
	EXCESS LIAB					AGGREGATE \$
	DEDUCTIBLE					\$
	RETENTION \$					\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY					WC STATU-TORY LIMITS
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)					OTH-ER
	If yes, describe under SPECIAL PROVISIONS below					E.L. EACH ACCIDENT \$
						E.L. DISEASE - EA EMPLOYEE \$
						E.L. DISEASE - POLICY LIMIT \$
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)						
CERTIFICATE HOLDER						
CANCELLATION						
SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.						
AUTHORIZED REPRESENTATIVE						

By: K.Kordani PMP, MSc

3. Procurement documents

Supplemental Attachment

for ACORD Certificate of Insurance 25-S

(This document replaces AIA Document G705, Certificate of Insurance.)

PROJECT (Name and address): _____

INSURED _____

A. General Liability

1. Does the General Aggregate apply to this Project only?
2. Does this policy include coverage for:
 - a. Premises - Operations?
 - b. Explosion, Collapse and Underground Hazards?
 - c. Personal Injury Coverage?
 - d. Products Coverage?
 - e. Completed Operations?
 - f. Contractual Coverage for the Insured's obligations in A201?
3. If coverage is written on a claims-made basis, what is the:
 - a. Retroactive Date?
 - b. Extended Reporting Date?

Yes	No	N/A
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐

B. Worker's Compensation

1. If the Insured is exempt from Worker's Compensation statutes, does the Insured carry the equivalent Voluntary Compensation coverage?

☐	☐	☐
--------------------------	--------------------------	--------------------------

C. Final Payment Information

1. Is this certificate being furnished in connection with the Contractor's request for final payment in accordance with the requirements of Sections 9.10.2 and 11.1.3 of AIA Document A201, General Conditions of the Contract for Construction?
2. If so, and if the policy period extends beyond termination of the Contract for Construction, is Completed Operations coverage for this Project continued for the balance of the policy period?

☐	☐	☐
--------------------------	--------------------------	--------------------------

☐	☐	☐
--------------------------	--------------------------	--------------------------

D. Termination Provisions

1. Has each policy shown on the certificate and this Supplement been endorsed to provide the holder with 30 days notice of cancellation and/or expiration? List below any policies which do not contain this notice.

☐	☐	☐
--------------------------	--------------------------	--------------------------

E. Other Provisions



SUBCONTRACTORS AND MAJOR MATERIAL SUPPLIERS LIST

From (Contractor): _____

A/E Project Number: _____

Contract For: _____

To (A/E): _____

List Subcontractors and Major Material Suppliers proposed for use on this Project as required by the Construction Documents. Attach supplemental sheets if necessary.

[illegible]☐ Attachments

Signed by:

Date:

[illegible]

3. Procurement documents



5. Permits and Regulatory Issues

- Obtaining and Maintaining Permit Documents at Site
- Resolving Outstanding Regulatory Issues from Code Review Process
- Regulatory Inspections and Approvals

3. Procurement documents



6. Preconstruction Meetings

- Preconstruction meetings are important for establishing the ground rules for communication and for explaining the administrative process. In many cases, a single meeting is all that is required; however, large or complex projects may require more than one meeting. Preconstruction meetings may include:
 1. Procedural Meeting
 2. Site Mobilization Meeting
 3. Utility Coordination Meeting
 4. Authorities Having Jurisdiction

3. Procurement documents



7. Verification of Site Conditions

- Documenting Existing Conditions
 - ✓ It is prudent to take preconstruction photographs of existing facilities, surroundings, landscaping, and adjacent properties prior to moving onto the site. Photographs include the date taken and location, and a description of the subject. Preconstruction photographs may assist in resolving disputes later in the project. This can be especially important in renovation and remodeling projects.
- Avoiding Disputes over Damage Caused by Construction Activities
 - ✓ If proper examination and documentation have determined preexisting site conditions, then disputes over damage caused by construction activities will be minimized. A related element, however, is damage to new work during construction.

3. Procurement documents



8. Mobilization

- Use of the Project Site
- Project Site Security
- Temporary Facilities
- Temporary Utilities
- Temporary Controls
- Equipment
- Environmental Protection Requirements
- Project Site Safety
- Utility Locations
- Survey/Layout/Datum

4. Construction documents

1. Field Engineering
2. Supervision of Construction
3. Coordinating Construction Activities
4. Sequencing the Work
5. Scheduling the Work
6. Examination and Verification
7. Erection, Installation, and Application
8. Cleaning and Construction Waste Management

4. Construction documents



9. Protecting Installed Construction

10. Testing and Inspection

11. Project Site Safety

12. Contractor Record Keeping

4. Construction documents

1. Field Engineering

- Field engineering consists of taking the measurements, facility placement, and layout from the contract drawings and laying them out on the project site. Field engineering includes site surveying and layout. It is important that this work be performed by properly trained and experienced personnel, which may include a licensed land surveyor, the contractor's superintendent, or project engineer. Mistakes made in field engineering can result in significant construction and legal problems. Errors made in field engineering become compounded as the project is constructed.

➤ Surveying

➤ Layout

4. Construction documents

1. Field Engineering

Overview

In order to obtain the elevations of each land point of a land using the stadia process, this topographic survey field report was completed. The results include that elevations of each ground point are achievable with the proper precision of the theodolite and its readings.

Methodology

Scope

The topographic survey aimed to get the elevations of each ground point. In a land area at 774 Public Works Drive, GARDENA, CA, 90249.

Process

Surveyors should select a parcel of land to establish the grid, establish point A1 on the ground and mark it with a flaglet. Next is to set up and level the theodolite at point A1 with a 5-m distance interval and using the instrument to align. Set the reading for horizontal angle to zero in order to mark each grid point with flaglets.

Fieldwork Details

OBJECTIVE	STATUS	NOTES
To be able to depict the ground configuration of a terrain on a particular parcel of land	Completed	The grids should be properly set up in order to depict the land configuration
To learn how to apply the stadia method of leveling in obtaining elevation of ground points.	Completed	Understand the stadia method in order to further obtain the elevation of ground points.

4. Construction documents

1. Field Engineering



Knowledge for Creating
and Sustaining
the Built Environment

PERIODIC FIELD OBSERVATION REPORT

Project: _____ Report Number: _____

Owner: _____ Date: _____ Time: _____

Re: _____ A/E Project Number: _____

Weather

☐ Clear ☐ Snow ☐ Warm
☐ Overcast ☐ Foggy ☐ Hot
☐ Rain ☐ Cold ☐ _____

Site Conditions

☐ Clear ☐ Dusty
☐ Muddy ☐ _____
☐ Temperature Range _____

Day

☐ Monday ☐ Thursday
☐ Tuesday ☐ Friday
☐ Wednesday ☐ _____

Persons Contacted:

Work Observed:

Items Discussed:

Remarks:

☐ Attachments

Signed by:

Date:

Copies: ☐ Owner ☐ A/E ☐ Contractor ☐ Consultants ☐ _____ ☐ _____ ☐ File

By: K.Kordani PMP, MS

 the Built Environment

Project: _____ Report Number: _____
 Owner: _____ Date: _____ Time: _____
 Re: _____ A/E Project Number: _____

☐ Clear	☐ Snow	☐ Warm
☐ Overcast	☐ Foggy	☐ Hot
☐ Rain	☐ Cold	☐ _____

☐ Clear ☐ Dusty
☐ Muddy ☐ _____
☐ Temperature Range _____

☐ Monday ☐ Thursday
☐ Tuesday ☐ Friday
☐ Wednesday ☐ _____

Date:

Copies: ☐ Owner ☐ A/E ☐ Contractor ☐ Consultants ☐ _____ ☐ _____ ☐ File

By: K.Kordani PMP, MSc

4. Construction documents



Knowledge for Creating
and Sustaining
the Built Environment

WEEKLY / MONTHLY PROGRESS REPORT

Project: _____ Report Number: _____

Owner: _____ Report Date: _____

Contractor: _____ A/E Project Number: _____

Contract Completion Date/Time: _____ Approved Time Extensions (Days): _____

Date Construction Started: _____ Contract Completion Date/Days: _____

Revised Completion Date: _____ Percent of Project Completion: _____

Percent of Time Used: _____ Days Elapsed: _____

Is Project on Schedule: _____ If not, why? _____

Summary of Construction Activities Since Last Report:

☐ Attachments

Signed by: _____ Date: _____

Copies: ☐ Owner ☐ A/E ☐ Contractor ☐ Consultants ☐ _____ ☐ _____ ☐ File

By: K.Kordani PMP, MSc

4. Construction documents

Project:	_____	Date:	_____
	_____	A/E Project Number:	_____
To:	_____	☐ Letter Dated:	_____
	_____	☐ Fax Dated:	_____
From:	_____	☐ Telephone Call Dated:	_____
Re:	_____	Contact:	_____

This confirms and records our interpretation of the understanding reached concerning matters indicated. Unless notified in writing within seven days of the date below, we will assume that the following interpretation or description is complete and accurate.

☐ Attachments

Signed by:	_____	Date:	_____
Copies:	☐ _____	☐ _____	☐ _____
	☐ _____	☐ _____	☐ _____
	☐ _____	☐ _____	☐ File

By: K.Kordani PMP, MSc

4. Construction document

Review, analysis, and evaluation

FEEDBACK

Project: _____

☐ Specification Item: _____

To: _____

☐ Drawing Item: _____

Re: _____

Date: _____

A/E Project Number: _____

Contract For: _____

Use this form to suggest improvements based on actual experience. The improvements may involve changes in the master specification or the standard drawing detail library.

Detailed Explanation:

Suggested Improvement:

Supporting Data Attached: ☐ Specification ☐ Drawing ☐ Photograph ☐ Video ☐ _____

Signed by: _____

Date: _____

Copies: ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ File

By: K.Kordani PMP, M

4. Construction documents

Labor productivity report

CSI division	Description	Units	Estimated				Actual			
			Qty of units	Hours	Hours/Units	Total cost	Qty of Units	Hours	Hours/Units	Total cost

4. Construction documents

Your Company Name

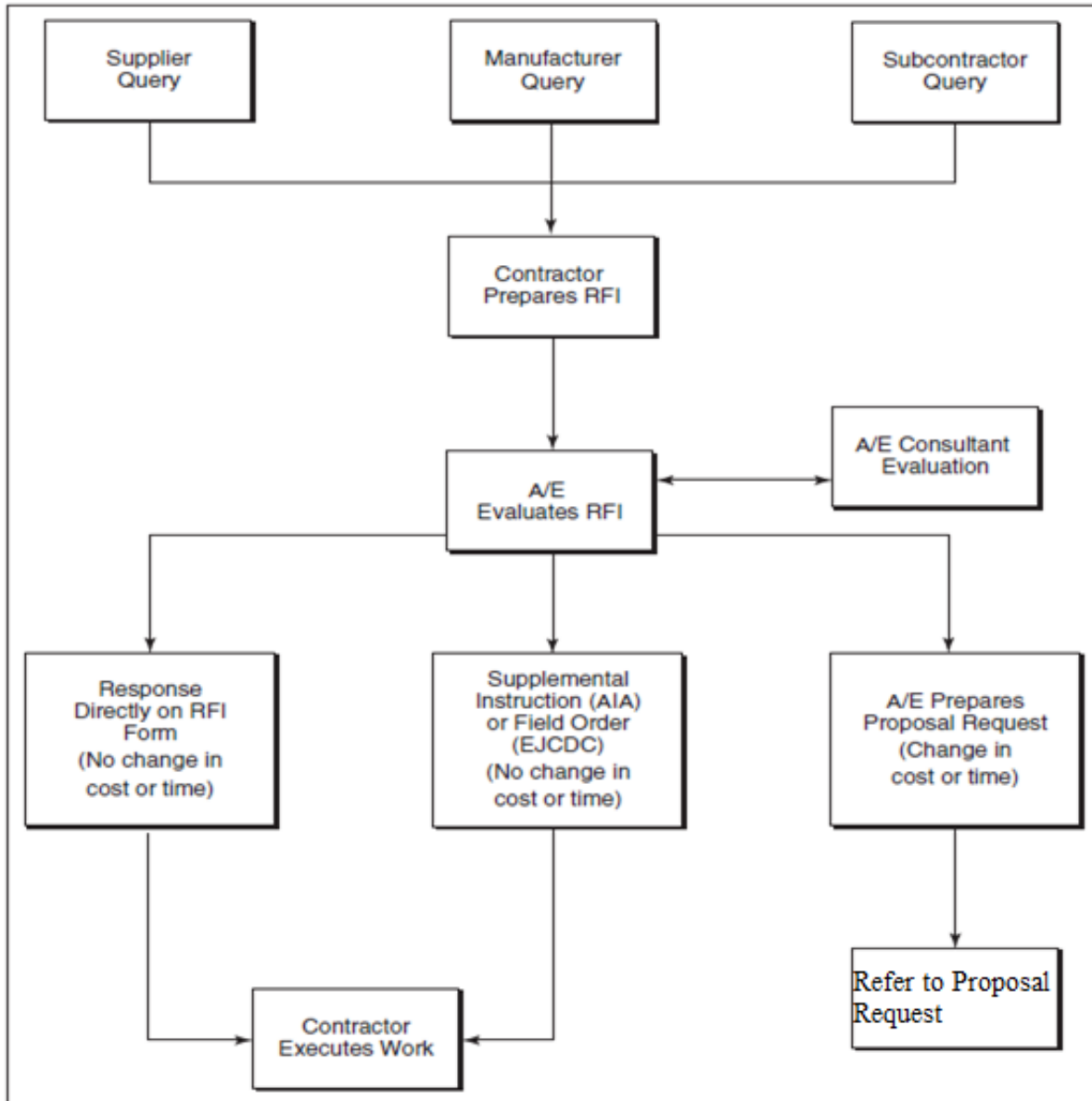
Employee Time Sheet

Friday, November 16, 2018

Employee Name		Department:	
Employee #:		Manager:	

Date	Start Time	End Time	Regular Hours	Overtime Hours	Total Hours

Request for interpretations



❑ RFIs allow:

- ❖ The contractor or the owner to inquire about an item of work insufficiently described or detailed in the contract documents and to seek an interpretation.
- ❖ The A/E to respond with an interpretation or minor change that does not require a change to the contract sum or time. A clarification notice, similar to previous Figure, may be used for projects.

Request for interpretations

REQUEST FOR INTERPRETATION

Project: _____ R.F.I. Number: _____
From: _____
To: _____ Date: _____
A/E Project Number: _____
Re: _____ Contract For: _____

Specification Section: _____ Paragraph: _____ Drawing Reference: _____ Detail: _____

Request:

Signed by: _____

Date: _____

Response:

☐ Attachments

Response From: _____ To: _____ Date Rec'd: _____ Date Ret'd: _____

Signed by: _____ Date: _____

Copies: ☐ Owner ☐ Consultants ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ File

By: K.Kordani PMP,

Design clarifications – Minor changes

Minor changes to the
project or clarifications
of the contract
documents are defined
as
instructions or
clarifications
not involving
adjustment of the
contract sum or time.

By: K.Kordani PMP,

Project: _____ Field Order Number: _____

From: _____
To: _____ Date: _____

A/E Project Number: _____
Re: _____ Contract For: _____

You are hereby directed to execute promptly this Field Order which interprets the Contract Documents or orders minor changes in the Work without change in Contract Sum or Contract Time.

If you consider that a change in Contract Sum or Contract Time is required, submit a Change Order Request to the A/E immediately and prior to proceeding with this Work.

Specification Section:	Paragraph:	Drawing Reference:	Detail:
------------------------	------------	--------------------	---------

Description of Interpretation or Change:

☐ Attachments

Signed by: _____ Date: _____

Copies: ☐ Owner ☐ Consultants ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ File

Request for change orders – Proposal request



AIA® Document G709™ – 2001

Work Changes Proposal Request

PROJECT: *(Name and address)*

PROPOSAL REQUEST NUMBER:

OWNER ☐

DATE OF ISSUANCE:

ARCHITECT ☐

CONTRACT FOR:

CONSULTANT ☐

OWNER: *(Name and address)*

CONTRACT DATE:

CONTRACTOR ☐

ARCHITECT'S PROJECT NUMBER:

FIELD ☐

OTHER ☐

FROM ARCHITECT: *(Name and address)*

TO CONTRACTOR: *(Name and address)*

Please submit an itemized proposal for changes in the Contract Sum and Contract Time for proposed modifications to the Contract Documents described herein. Within () days, the Contractor must submit this proposal or notify the Architect, in writing, of the date on which proposal submission is anticipated.

THIS IS NOT A CHANGE ORDER, A CONSTRUCTION CHANGE DIRECTIVE OR A DIRECTION TO PROCEED WITH THE WORK DESCRIBED IN THE PROPOSED MODIFICATIONS.

DESCRIPTION: *(Insert a written description of the Work)*

ATTACHMENTS: *(List attached documents that support description)*

REQUESTED BY THE ARCHITECT:

(Signature)

(Printed name and title)

By: K.Kordani PMP, MSc

Request for change orders – Proposal request



AIA® Document G709™ – 2018

Proposal Request

PROJECT: *(name and address):*

CONTRACT INFORMATION:

Architect's Project number:

Contract For:

Proposal Request Number:

Date:

Proposal Request Date:

OWNER: *(name and address):*

ARCHITECT: *(name and address):*

CONTRACTOR: *(name and address):*

The Owner requests an itemized proposal for changes to the Contract Sum and Contract Time for proposed modifications to the Contract Documents described herein. The Contractor shall submit this proposal within _____ () days or notify the Architect in writing of the anticipated date of submission.

(Insert a detailed description of the proposed modifications to the Contract Documents and, if applicable, attach or reference specific exhibits.)

THIS IS NOT A CHANGE ORDER, A CONSTRUCTION CHANGE DIRECTIVE, OR A DIRECTION TO PROCEED WITH THE WORK DESCRIBED IN THE PROPOSED MODIFICATIONS.

REQUESTED BY THE ARCHITECT:

By: K.Kordani PMP, MSc

PRINTED NAME AND TITLE

Request for change orders – Change order request (COR)

CHANGE ORDER REQUEST (PROPOSAL)

Project: _____ Change Order Request Number: _____

From (Contractor): _____
To: _____ Date: _____

A/E Project Number: _____
Re: _____ Contract For: _____

This Change Order Request (C.O.R.) contains an itemized quotation for changes in the Contract Sum or Contract Time in response to proposed modifications to the Contract Documents based on Proposal Request No. _____.

Description of Proposed Change:

Attached supporting information from: ☐ Subcontractor ☐ Supplier ☐ _____ ☐ _____

Reason For Change:

Does Proposed Change involve a change in Contract Sum? ☐ No ☐ Yes [Increase] [Decrease] \$ _____
Does Proposed Change involve a change in Contract Time? ☐ No ☐ Yes [Increase] [Decrease] _____ days.

Attached pages: ☐ Proposal Worksheet Summary: _____
☐ Proposal Worksheet Detail(s): _____

Signed by:

Date:

By: K.Kordani PM

Request for change orders – Change order request (COR)

WORKSHEET SUMMARY

Project: _____ Change Order Request Number: _____

To: _____ From: _____

Re: _____ Date: _____

Proposal Request Number: _____ A/E Project Number: _____

Complete and attach Proposal Worksheet Detail for each element of Work. Enter Worksheet Information below.

ADDITIONS:

	Sheet	Description	Material	Labor	Subtotal
1					
2					
3					
4					
5					
6					
7					
Subtotal					

DEDUCTIONS:

	Sheet	Description	Material	Labor	Subtotal
1					
2					
3					
4					
5					
6					
7					
Subtotal					

Subcontractor's Net: _____

Subcontractor's OH&P: _____

Subcontractor's Bond: _____

Subcontractor's Total: \$ -

Contractor's OH&P: _____

Contractor's Bond: _____

Insurance: _____

Tax: _____

WORKSHEET TOTAL: \$ -

By: K.Kordani PMP, MSc

Request for change orders – Change order request (COR)



Knowledge for Creating
and Sustaining
the Built Environment

PROPOSAL WORKSHEET DETAIL

Project: _____

Change Order Request Number: _____

To: _____

From: _____

Contact: _____

Re: _____

Date: _____

Proposal Request Number: _____

A/E Project Number: _____

SHADED AREAS FOR A/E USE

ADDITIONS

	Ref. No.	Item Description	Quantity		UNIT PRICES		SUBTOTALS		TOTAL	
					Materials	Labor	Materials	Labor		
1										
2										
3										
4										
Subtotal (Enter this number on Worksheet Summary.)										

DEDUCTIONS

	Ref. No.	Item Description	Quantity		UNIT PRICES		SUBTOTALS		TOTAL	
					Materials	Labor	Materials	Labor		
1										
2										
3										
4										
Subtotal (Enter this number on Worksheet Summary.)										

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110 South Union Street, Suite 100, Alexandria, VA 22314

Page 1

Form Version: July 1994

By: K.Kordani PMP, MSc

Request for change orders – Change order request (COR)

RFI Log

RFI number	Date submitted	Description of information needed	Submitted to	Date of response	Initiated by	Status

Request for change orders – Change order request (COR)



☐ Change Order Status (COS) report

Contract No. _____ Date _____ Change Order Status Report No. _____

Extra Work Order #	Change Order #	Date Initiated	Description	Date of Request to Proceed	Date of Receipt of Notice to Proceed	Projected Cost (Ballpark Figure)	Proposal Submitted		Date Negotiated	Modification		Remarks (Current Status)
							Date	Amount		No.	Amount	

4. Construction documents



2. Supervision of Construction

- Contractor Responsibilities for Supervision of the Work
- Complying with Contract Documents
- Quality Assurance and Quality Control Procedures

4. C

2. Supervision of Construction

- Quality Assurance and Quality Control Procedures

Quality Assurance Activities	Quality Control Activities
Industry Associations	
Establish quality standards for reinforcement and concrete materials.	
Material Manufacturer	
Review material requirements in contract documents.	Test reinforcement and concrete materials by testing laboratory.
Concrete Supplier	
Review performance requirements for cast-in-place concrete in contract documents.	Analyze of previous mix designs for optimum performance match.
Select concrete mix design and submit to A/E via contractor.	Test mix design by testing laboratory.
Review mix design by A/E and consultants.	
Concrete Subcontractor	
Prepare and submit product data and shop drawings (e.g., reinforcement and form materials), for A/E review.	
Preconstruction conference with suppliers, subcontractors, contractor, testing laboratory, and A/E.	
Construct a cast-in-place concrete panel mock-up by subcontractor for review by contractor, A/E, and owner.	
Formwork and Reinforcement Installer	
Tag reinforcement and coordinate with drawings and required locations.	Inspect and observe form work and reinforcement by contractor and A/E, respectively.
Concrete Placement Crew	
Observe concrete placement by contractor and A/E.	
Take test cylinders and slump measurement by testing laboratory.	Do compressive strength testing of test cylinders by testing laboratory.
	Take tolerance measurements of placed concrete by contractor and A/E.

By: K.Kordani PMP,

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2. Supervision of Construction

- Quality Assurance and Quality Control Procedures

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2. Supervision of Construction

➤ Quality

Assurance and

Quality

Control

Procedures



QUALITY SYSTEM QUESTIONNAIRE



NAME OF ORGANISATION

ADDRESS:

TEL No.

SERVICES OR GOODS OFFERED BY YOUR ORGANISATION:

Does your organisation: DESIGN ☐ MANUFACTURE ☐
INSTALL ON SITE ☐ CONSTRUCT ON SITE ☐ (Tick as applicable)

1. Does your organisation have a documented Quality System? YES/NO
If YES, state to which Standard it relates (if any)

2. Does your organisation have a Quality Manual? If YES, YES/NO
please attach a photocopy of the index or contents page to this Questionnaire when it is returned.

3. Does your organisation have other Manuals or YES/NO
Procedures which relate to the control exercised over its quality management activities? If YES, state titles:

4. Does your organisation have a person appointed as YES/NO
"Quality Manager" (or similar title)? If YES, please state his name, functional title and to whom in the organisation he reports:

5. Does your organisation have a current formal approval or YES/NO
registration in respect of its quality system to a national or industry sector scheme? If YES, give details with Approval/Registration No. and effective date:

6. Has your organisation received any quality system YES/NO
audits by any major companies within the last 12 months? If YES, give brief details and dates:

Signature

Job Title

Date

By: K.Kordani PMP, MSc

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2. Supervision of Construction

➤ Quality

Assurance and

Quality

Control

Procedures

A

SUPPLIER / SUB-CONTRACTOR

PERFORMANCE SUMMARY



SUPPLIER/SUB-CONTRACTOR:

ADDRESS:
TELEPHONE:

TELEX:

PROJECT/CONTRACT:

PURCHASE ORDER No. & DATE:

MATERIAL/SERVICE SUPPLIED:

RATING

A = Acceptable
B = Some improvement required
C = Substantial improvement required
D = Unacceptable

WAS:

- a quality plan submitted when required
- work carried out in accordance with an approved quality plan

- quality of all work acceptable

- delivery and completion date met

- operational documentation satisfactory

DID SUPPLIER/SUB-CONTRACTOR:

- co-operate with supervisors

- react effectively to quality problems

- offer a good standard of technical co-operation

- react effectively in emergencies

- maintain technical representation in the field

- advise us promptly of potential trouble

- efficiently handle introduction of any new or unfamiliar materials or processes

- adequately control his own suppliers/sub-contractors

- adequately protect and preserve finished work and products

COMMENTS (continue on separate sheet if necessary)

Signature

Job Title

Date

4. Const

2. Supervision of Construction

➤ Quality

Assurance and

Quality

Control

Procedures

A

SUPPLIER / SUB-CONTRACTOR

PERFORMANCE SUMMARY



SUPPLIER/SUB-CONTRACTOR:

ADDRESS:
TELEPHONE:

TELEX:

PROJECT/CONTRACT:

PURCHASE ORDER No. & DATE:

MATERIAL/SERVICE SUPPLIED:

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- efficiently handle introduction of any new or unfamiliar materials or processes

- adequately control his own suppliers/sub-contractors

- adequately protect and preserve finished work and products

COMMENTS (continue on separate sheet if necessary)

Signature

Job Title

Date

A



TECHNICAL QUERY

Department/Company:

Department/Company: -----

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2. Supervision of Construction

➤ Quality

Assurance and

Quality

Control

Procedures

A		SITE :		CONTRACT No. :	
		CONCRETE PRE-PLACEMENT CHECK AND INSPECTION			
CONTRACTOR :		CONCRETE GRADE :			
LOCATION :		ADDITIVE :			
		TARGET SLUMP (mm) :		VOL. (m ³) :	
		METHOD OF PLACEMENT :			
DRAWING No. :		METHOD OF CURING :			
APPROVAL IS REQUESTED TO PLACE CONCRETE ON : / / 19 at hrs.					
CONTRACTORS SIGNATURE : DATE : / / 19					
NB. 24 HOURS SHOULD BE GIVEN PRIOR TO CONCRETING					
CHECKS		READY FOR INSPECTION		INSPECTION	DATE
		CONT. SIGN.	DATE		
SETTING-OUT					
REINFORCEMENT CONTENT					
REINFORCEMENT COVER					
JOINT DETAILS					
WATER BARS					
CLEANLINESS					
FORMWORK & TIES					
BUILT IN ITEMS	CIVIL				
	M & E				
NOTES :					
YOU ARE CLEARED TO PLACE THIS CONCRETE FOR CLIENT DATE TIME					

4. Construction documents



3. Coordinating Construction Activities

- Issues Related to Coordinating the Work
- Coordination Drawings

4. Construction documents



- 4. Sequencing the Work
- 5. Scheduling the Work

4. Construction documents

6. Examination and Verification

- Each installer should inspect previously completed work prior to starting the installer's own work. This is especially true for specialized subcontractors, such as cabinet installers, floor covering installers, glazers, and finish carpenters. This may include verifying actual field dimensions with dimensions on shop drawings; ensuring that openings, built-in anchorage, and reinforcing are in place and correctly sized; and ensuring that all work required prior to the start of the installer's work has been completed. This examination is intended to identify defects in previously completed construction. It is advisable to not begin work until defects and deficiencies have been noted and brought to the attention of the contractor. This procedure is a QA action that will help prevent compounding defects.

4. Construction documents



Knowledge for Creating
and Sustaining
the Built Environment

NONCONFORMING WORK NOTICE

Project: _____ Report Number: _____

From: _____
To: _____ Date Observed: _____ Date Reported: _____

A/E Project Number: _____
Re: _____ Contract For: _____

Specification Section: _____ Paragraph: _____ Drawing Reference: _____ Detail: _____

Nature of Nonconformance:

Signed by: _____ Date: _____ Date Response Needed: _____

Proposed Correction (Response):

Amount of Time for Correction:

☐ Attachments

Response From: _____ To: _____ Date Rec'd: _____ Date Ret'd: _____

Signed by: _____ Date: _____

Copies: ☐ Owner ☐ A/E ☐ Consultants ☐ _____ ☐ _____ ☐ _____ ☐ File

By: K.Kordani PMP, M

4. Construction documents



7. Erection, Installation, and Application

- Erection
- Installation
- Application
- Tolerances
- Contractor's Inspections

4. Construction documents



8. Cleaning and Construction Waste Management

- Progress Cleaning
- Construction Waste Management
- Final Cleaning

4. Construction documents



9. Protecting Installed Construction

- Protection of Installed Work during Construction
- Protection of Work until Owner's Acceptance
- Protection of Workers and the Public

4. Construction documents



10. Testing and Inspection

- Coordination with Owner's Selected Testing Agency
- Notices

4. Construction documents



11. Project Site Safety

- Considerations
- Procedures
- Meetings
- Training

4. Construction documents

12. Contractor Record Keeping

- Daily reports
- Project scheduling information
- Communications with subcontractors and suppliers
- Safety procedures, reports, and records
- Reference standards included in the contract documents
- Material certifications
- Construction photographs
- Record documents
- Safety issues
- Staffing reports

4. Co

12. Contractor

Record Keeping

➤ Daily reports

CONTRACTOR'S DAILY REPORT

Contractor: _____		Project No.: _____
Project Name: _____		
Address: _____		
Day and Date: _____		Report No.: _____
Owner Name: _____	A/E Name: _____	
Telephone: _____	Telephone: _____	
Contact Name: _____	Contact Name: _____	
E-mail Address: _____	E-mail Address: _____	

Weather:

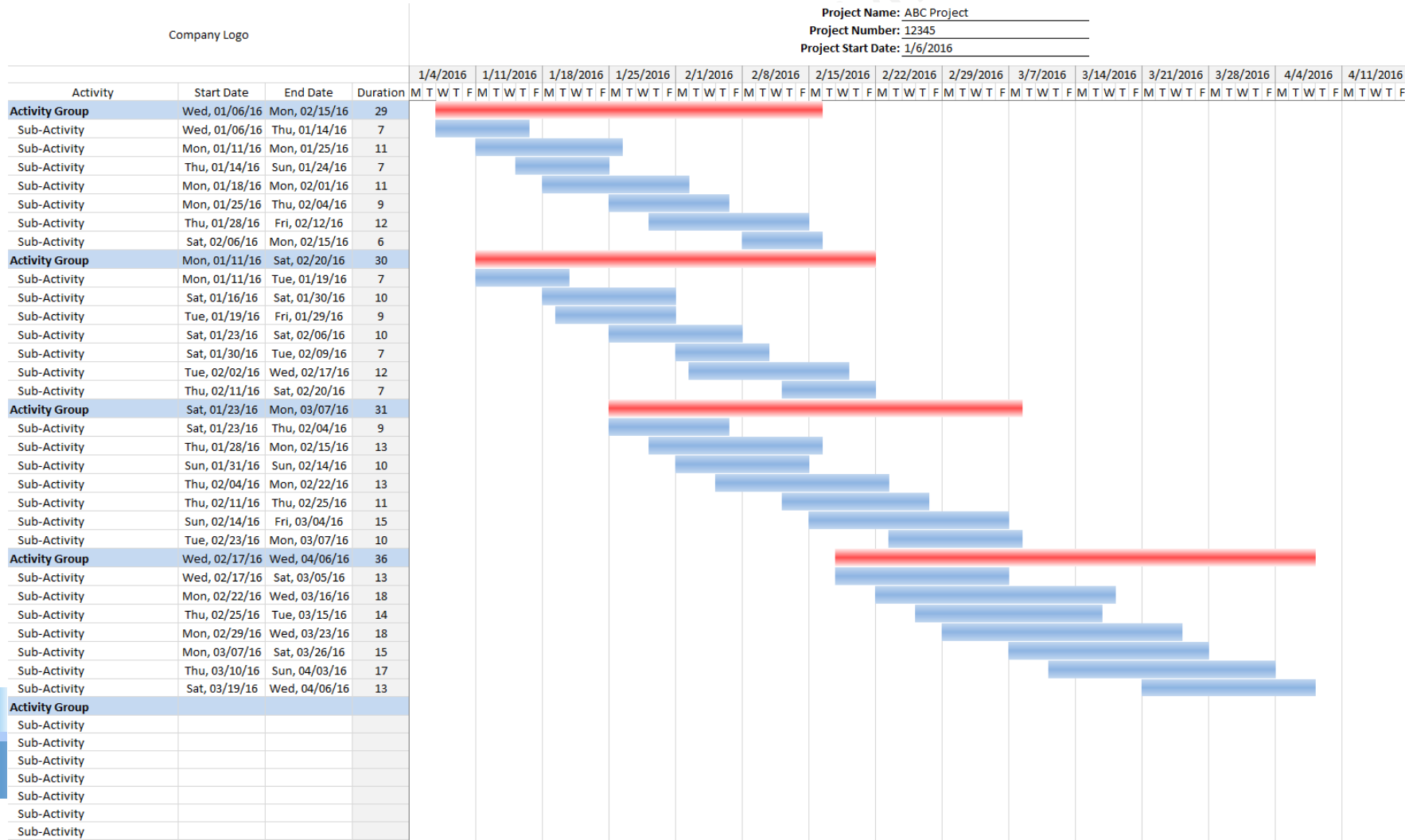
Temperature at:	7:00 a.m. _____	11:00 a.m. _____	3:00 p.m. _____
Weather: _____	Wind Velocity: _____		
Precipitation: _____	Total Precipitation to Date: _____		

<u>Crew:</u>	<u>Name</u>	<u>Hours</u>	<u>OT Hours</u>	<u>DT Hours</u>	<u>Task or Activity Code</u>
Contractor:	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____

	<u>Company Name</u>	<u>Number of Workers</u>	<u>Hours Worked</u>
Subcontractors:	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

	<u>Company Name</u>	<u>Visitor Name</u>	<u>Reason for Visit</u>
Visitors:	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

➤ Project scheduling information



4. Constr

12. Contractor Record Keeping

- Safety procedures, reports, and records

CONSTRUCTION SAFETY CHECKLIST

Find and record common construction hazards.

City, Street/Address _____

Observer (Initials) _____ Date Observed _____

CHECKLIST COMPLETED: (Check ☒ all boxes that apply)

- ☐ From sidewalk (Not working here)
- ☐ Off-Site before or after work
- ☐ On-Site

INSTRUCTIONS

Every section of the audit should have a check ☒.

Yes = Observed and in compliance

No = Observed and not in compliance

Not Needed = Not present on jobsite

DK = Do not know

PERSONAL PROTECTIVE EQUIPMENT: Needed at this worksite? Yes ☐ No ☐ Do not know ☐				
HARD HATS		COMMENTS		
1. Supplied by employer	Yes No Not Needed DK			
2. Worn when required	Yes No DK			
BOOTS				
1. Supplied by workers	Yes No Not Needed DK			
2. Worn when required	Yes No DK			
HEARING PROTECTION				
1. Supplied by employer	Yes No Not Needed DK			
2. Worn when required	Yes No DK			
EYE PROTECTION				
1. Supplied by employer	Yes No Not Needed DK			
2. Worn when required	Yes No DK			
RESPIRATORY PROTECTION				
1. Supplied by employer	Yes No Not Needed DK			
2. Training provided	Yes No DK			
3. Worn when required	Yes No DK			
LADDERS: Are present at this worksite? Yes ☐ No ☐ Do not know ☐				
1. Correct size for the job	Yes No DK			
2. Fully opened and spreader bars locked	Yes No DK			
3. Firm foundation for ladder feet	Yes No DK			
4. Proper climbing procedures	Yes No DK			
5. Three-point contact rule followed	Yes No DK			
6. Free from obvious defects	Yes No DK			
7. Workers stand below top 2 steps	Yes No DK			
8. Extend more than three feet above support	Yes No DK			

آرم پیمانکار	صورت جلسه	آرم کارفرما
نام فهرست بها:		تاریخ:
نام پیمان:		کارفرما:
نام پیمانکار:		شماره صورتجلسه : ۱ صفحه : ۱ از ۱
موضوع صورتجلسه:		
شرح صورتجلسه :		
• بدینوسیله امضاء کنندگان ذیل گواهی و تأیید می نمایند که شرکت پیمانکار پروژه.....، عملیات ذیل را طبق قرارداد و دستور کارهای ابلاغی و همچنین طبق ریز متره پیوست انجام داده است، که مقادیر آن از ردیف های اشاره شده و پس از اعمال ضریب قرارداد ، در صورت وضعیت قابل پرداخت می باشد.		
ردیف	شماره آیتم	شرح آیتم
۱		
۲		
۳		
۴		
۵		
۶		
۷		
پیمانکار :		ناظر پروژه :
امضاء :		امضاء :
تایید کننده :		امضاء :

By:

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5. Post-Construction documents



American Institute of Architects (AIA) Document A201, General Conditions of the Contract for Construction, and Engineers Joint Contract Documents Committee (EJCDC) C-700, Standard General Conditions of the Construction Contract, outline procedures to be followed in closing out the project. AIA Document A201 contains the following:

1. The contractor inspects the project and prepares a comprehensive list of outstanding items to be completed or corrected (initial punch list).
2. The contractor submits notice of substantial completion.
3. The architect inspects the project to verify substantial completion and prepares a supplement to the contractor's list (final punch list).

5. Post-Construction documents



AIA Document A201 contains the following:

4. The architect prepares the certificate of substantial completion.
5. The contractor completes the items on the punch list.
6. The contractor submits notice of final completion and final application for payment.
7. The architect inspects the project to verify final completion.
8. The architect processes the final application for payment and closeout submittals.
9. The owner makes final payment.

5. Post-Construction documents



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PUNCH LIST

Project: _____

From (A/E): _____

Site Visit Date: _____

To (Contractor): _____

A/E Project Number: _____

Contract For: _____

The following items require the attention of the Contractor for completion or correction. This list may not be all-inclusive, and the failure to include any items on this list does not alter the responsibility of the Contractor to complete all Work in accordance with the Contract Documents.

Item Number	Room Number	Location (Area)	Description	Correction/Completion Date	Verification A/E Check
----------------	----------------	--------------------	-------------	-------------------------------	---------------------------

☐ Attachments

Signed by: _____ Date: _____

Copies: ☐ Owner ☐ Consultants ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ File

NOTICE OF COMPLETION

THIS DOCUMENT PREPARED BY: _____
 ADDRESS: _____

(a) _____
 Name of Owner or Owners of the Land

(b) _____
 Name of person, firm or organization contracted with for the entire
 job or improvement or demolition

(c) LOCATION AND DESCRIPTION OF THE PROPERTY:

(d) _____
 Date of Completion of the structure, improvement or demolition

(e) A transfer of ownership of all or a part of the real property or an interest therein & encumbrance thereon or a settlement of the claims of parties' entitled to the benefits of Chapter 307, 1975 Public Acts of the General Assemble of Tennessee will take place not earlier than ten (10) days from the date of the filing of this notice of completion.

(f) The name & address of the person, firm, or organization to which parties entitled to the benefits of the said law may send notice, is as follows:

Dated this _____ day of _____, 20____.

 Signature

Check One
_____ Owner
_____ Purchaser
_____ Contractor

By: K.K

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5. Post-Construction documents

PUNCH	TASK NAME	RESPONSIB	DUE DA	DESCRIPTIO	COMMEN
	GENERAL REQUIREMENTS				
	SITE WORK				
	CONCRETE				
	Concrete counter cracks	Bob		cracks at the narrow areas near sinks	
	MASONRY				
	METALS				
	WOOD & PLASTIC				
	THERMAL & MOISTURE PROTECTION				
	DOORS & WINDOWS				
	Door screws	Bob		latch screws fouling frame	
	FINISHES				
	SPECIALTIES				
	EQUIPMENT				
	FURNISHINGS				
	SPECIAL CONSTRUCTION				
	CONVEYING SYSTEMS				
	MECHANICAL				
	ELECTRICAL				



AIA® Document G704™ CMA – 1992

Certificate of Substantial Completion, Construction Manager-Adviser Edition

PROJECT: (Name and address) PROJECT NUMBER: OWNER ☐
 CONTRACT FOR: CONSTRUCTION MANAGER ☐
 CONTRACT DATE: ARCHITECT ☐
 TO OWNER: (Name and address) TO CONTRACTOR: (Name and address) CONTRACTOR ☐
 FIELD ☐
 OTHER ☐

DATE OF ISSUANCE:

PROJECT OR DESIGNATED PORTION SHALL INCLUDE:

The Work performed under this Contract has been reviewed and found, to the Construction Manager's and Architect's best knowledge, information and belief, to be substantially complete. Substantial Completion is the stage in the progress of the Work when the Work or designated portion thereof is sufficiently complete in accordance with the Contract Documents so the Owner can occupy or utilize the Work for its intended use. The date of Substantial Completion of the Project or portion thereof designated above is hereby established as _____, which is also the date of commencement of applicable warranties required by the Contract Documents, except as stated below:

Warranty

Date of Commencement

A list of items to be completed or corrected is attached hereto. The failure to include any items on such list does not alter the responsibility of the Contractor to complete all Work in accordance with the Contract Documents.

CONSTRUCTION MANAGER BY (Signature) DATE

ARCHITECT BY (Signature) DATE

The Contractor will complete or correct the Work on the list of items attached hereto within _____ days from the above date of Substantial Completion.

CONTRACTOR BY (Signature) DATE

The Owner accepts the Work or designated portion thereof as substantially complete and will assume full possession thereof at _____ (time) on _____ (date).

OWNER BY (Signature) DATE

The responsibilities of the Owner and the Contractor for security, maintenance, heat, utilities, damage to the Work and insurance shall be as follows: (NOTE: Owner's and Contractor's legal and insurance counsel should determine and review insurance requirements and coverage.)

AIA® Document G702™ – 1992

Application and Certificate for Payment

TO OWNER:	PROJECT:	APPLICATION NO:	Distribution to:
		PERIOD TO:	OWNER ☐
		CONTRACT FOR:	ARCHITECT ☐
FROM CONTRACTOR:	VIA ARCHITECT:	CONTRACT DATE:	CONTRACTOR ☐
		PROJECT NOS:	FIELD ☐
			OTHER ☐

CONTRACTOR'S APPLICATION FOR PAYMENT

Application is made for payment, as shown below, in connection with the Contract. AIA Document G703™, Continuation Sheet, is attached.

1. ORIGINAL CONTRACT SUM	\$
2. NET CHANGE BY CHANGE ORDERS	\$
3. CONTRACT SUM TO DATE (Line 1 + 2)	\$
4. TOTAL COMPLETED & STORED TO DATE (Column G on G703)	\$
5. RETAINAGE:	
a. _____ % of Completed Work (Columns D + E on G703)	\$
b. _____ % of Stored Material (Column F on G703)	\$
Total Retainage (Lines 5a + 5b, or Total in Column I of G703)	\$
6. TOTAL EARNED LESS RETAINAGE	\$
(Line 4 minus Line 5 Total)	
7. LESS PREVIOUS CERTIFICATES FOR PAYMENT	\$
(Line 6 from prior Certificate)	
8. CURRENT PAYMENT DUE	\$
9. BALANCE TO FINISH, INCLUDING RETAINAGE	\$
(Line 3 minus Line 6)	

CHANGE ORDER SUMMARY	ADDITIONS	DEDUCTIONS
Total changes approved in previous months by Owner	\$	\$
Total approved this month	\$	\$
TOTAL	\$	\$
NET CHANGES by Change Order	\$	

The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner, and that current payment shown herein is now due.

CONTRACTOR: _____

By: _____ Date: _____

State of: _____

County of: _____

Subscribed and sworn to before me this _____ day of _____

Notary Public: _____

My commission expires: _____

ARCHITECT'S CERTIFICATE FOR PAYMENT

In accordance with the Contract Documents, based on on-site observations and the data comprising this application, the Architect certifies to the Owner that to the best of the Architect's knowledge, information and belief the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment of the AMOUNT CERTIFIED.

AMOUNT CERTIFIED \$

(Attach explanation if amount certified differs from the amount applied. Initial all figures on this Application and on the Continuation Sheet that are changed to conform with the amount certified.)

ARCHITECT: _____

By: _____ Date: _____

This Certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.

CAUTION: You should sign an original AIA Contract Document, on which this text appears in RED. An original assures that changes will not be obscured.


Consent of Surety to Final Payment

 PROJECT: *(Name and address)*

ARCHITECT'S PROJECT NUMBER:

 OWNER ☐

CONTRACT FOR:

 ARCHITECT ☐

 CONTRACTOR ☐

 TO OWNER: *(Name and address)*

CONTRACT DATED:

 SURETY ☐

 OTHER ☐

 In accordance with the provisions of the Contract between the Owner and the Contractor as indicated above, the
(Insert name and address of Surety)

on bond of

(Insert name and address of Contractor)

, SURETY,

 hereby approves of the final payment to the Contractor, and agrees that final payment to the Contractor shall not relieve
 the Surety of any of its obligations to
(Insert name and address of Owner)

, CONTRACTOR,

as set forth in said Surety's bond.

, OWNER,

 IN WITNESS WHEREOF, the Surety has hereunto set its hand on this date:
(Insert in writing the month followed by the numeric date and year.)

(Surety)

(Signature of authorized representative)

 Attest:
(Seal)

(Printed name and title)
CAUTION: You should sign an original AIA Contract Document, on which this text appears in RED. An original assures that changes will not be obscured.

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DISP/ACEM

❑ To reach a **clear** and **documented** agreement on **record keeping**, the parties should **consider**:

- (a) the types of records to be produced and the information to be contained therein;
- (b) who is responsible for both producing and checking those records;
- (c) the frequency with which those records are to be updated or produced;
- (d) the distribution list for those records;
- (e) the format of those records (for example, to ensure compatibility with any project-wide database); and
- (f) the ownership (including any relevant intellectual property rights) and storage of, and access to, those records.

It is recommended that the items mentioned included in the bidding documents.

- ❑ The **employer (owner)** should consider **whether it is appropriate** to **produce** and **maintain** its own **independent set of relevant records**.
- ❑ **Why is it helpful?** Such records **assist** to:
 1. Have **better management control**
 2. **Support any claims** the employer or contractor may have **against each other**

❑ The **“Records”** recommended here **divided** into the following **six categories**:

1. Programme records
2. Progress records
3. Resource records
4. Costs records
5. Correspondence and administration records
6. Contract and tender documents

❑ Format and storage of records:

❖ **Records** should be produced and stored **electronically (at least in PDF format)**

✓ Emails, programmes and spreadsheets containing formula should be kept in **their electronic format.**

✓ **Some records** may need to be **shared by other parties** such as contractor.

DO NOT FORGET TO DEFINE ACCESS AT THE OUTSET

✓ Technology is **quickly changing**, therefore use **standard document management systems** that are **flexible.**

✓ Regarding the **growing use of building information modeling (BIM)**, the effective use of **BIM requires specific agreement** between the parties regarding:

1. Content of records
2. Use of records
3. Ownership of records

1. Programme records

- ☐ These records **set out** the **contractor's plan** for **carrying out the works**.
- ☐ Include **three major items**:
 1. **Main programmes**
 2. **Supplemental detailed programmes**
 3. **Explanatory records**

1. Programme records

❑ Main programmies include:

1. Tender programmes
2. Contractor's proposed programmes (**submitted for acceptance**)
3. Baseline (as-planned) programme (**accepted programme**)
4. Updated programmes (**the last of which should be an as-built programme**)
5. Revised programmes to take account of
 - ❖ **Re-sequencing**
 - ❖ **Acceleration measures**
 - ❖ **Mitigation measures**
6. Detailed short-term look ahead programmes such as four week look-ahead programmes
7. Contractor's internal target programmes

1. Programme records

❑ Supplemental detailed programmes in a suitable format such as CPM, LOB, time location analysis, tabular spreadsheet, or database for:

- (a) design;
- (b) approvals (including the CA's approvals and public authority approvals);
- (c) procurement or manufacturing;
- (d) delivery;
- (e) installation;
- (f) construction of key aspects of the works; and
- (g) testing and commissioning.

1. Programme records

❑ Explanatory records that explain in words, graphics, and spreadsheets

❖ These **records are used** to:

1. Explain **contractor's plan** in detail
2. Explain **activities** in the programmes
3. Explain how the **durations**, **logic**, and **sequences** of **activities** were **determined**

1. Programme records

❑ Some examples of explanatory records:

1. Narrative programme for contractor's proposed programme for baseline

- ❖ Set out the **assumptions** at a minimum: key resources, risks, sequencing constraints, and the **critical path**

2. Narrative programme for updated programme or proposed revised programme

❖ *For example:*

1. Identification of any delay or disruption events
2. Key changes to the sequence and duration of *activities or as-built data* from:
 1. *Last updated programme*
 2. *Critical path*
 3. *Near critical path*

1. Programme records

☐ Some examples of **explanatory records**:

3. Progress curves for:

- ❖ Costs
- ❖ Resources
- ❖ Physical construction

4. Tabular report of milestones

- ❖ Scheduled
- ❖ Forecast
- ❖ Actual

COLOR	DESCRIPTION OF USE
Red	Items to be added to the drawing
Green	Items to be removed from a drawing
Blue	Comments that are not to be added to the drawing
Yellow Highlighter	Used for marked items as completed by the designer

5. As-built database for each activity

6. BIM files where BIM is **being used** for the **activities**

7. Marked-up drawings showing the **anticipated completion** and **as-built dates** for activities

2. Progress records

- ☐ **Identify** the **progress** of the works at a **particular time**.
- ☐ **Contain** as-built data, both (1) On-site and (2) Off-site
- ☐ **Cover** all the activities that **affect completion** of the works (**near critical** or **critical path**)
- ☐ **Progress records** are required to **establish the progress** of the works **at the time of a delay or disruption event**, the **impact of that event**, and **its effect on the works**
- ☐ **Progress records** should be **connected with**
 - ❖ As-planned programme
 - ❖ Updated programme
 - ❖ Costs records

If you use coding system learned in Project Accounting and Financial

Management course, you can record progress ideally.

2. Progress records

❑ Include **three major items:**

1. Raw data records
2. Compiled records
3. Procurement records

2. Progress records

❑ Sample of Raw data records:

1. **Reports (e.g., in Project Accounting and Financial Management course)**

- ❖ For each major work area recording weather conditions, manpower, deliveries of key materials, discovery of adverse site conditions, working hours, major plant and equipment used, and work activities underway

2. **Health, safety, environmental and/or security issues log**

3. **Evidence of area handovers between contractors/others**

- ❖ Identifying which contractor/other party should perform each work in each area at what time

2. Progress records

☐ Sample of **Raw data records**:

4. **Geological mapping** records
5. **Inspection requests/inspection** reports
6. **Site test** records
7. **Testing and commissioning** records (including certificates)
8. **Webcam videos**
9. **Progress photographs**
 - ❖ With **date taken** and if possible **GPS coordinates**

2. Progress records

❑ **Compiled records:** These are records **prepared** from the (1) **raw data records** and (2) **programme records**. These include:

1. **Detailed monthly progress** reports

2. **Weekly progress** reports setting out the following:

a) **Overview of progress in the main work areas**

❖ Including design and procurement or manufacturing

b) **Work status in each area of the works**

❖ Covering the relevant programme activities underway

c) **Illustrations of progress achieved**

❖ Such as drawing of pile locations with piles completed, level and section of concrete cast, etc.

d) **Weather reports**

2. Progress records

- ❑ **Procurement records:** These establish the procurement of **materials** and **permanent equipment** for the works that required to provided timely.
- ❑ *Examples include:*
 1. **Quotations** from **sub-contractors** and **suppliers**
 2. **Supplier contracts** including any **amendments**
 3. **Shipment** records
 4. **Delivery** records

3. Resource records

- ❑ Capture the resources used to **deliver the works**, including:
 - ❖ Management
 - ❖ Labor
 - ❖ Equipment
 - ❖ Materials
 - ❖ Subcontractors

productivity should be considered!

Without **records of planned and utilized resources**, it will be more difficult for the contractor to prove entitlement to **time and costs incurred arising from additions or changes** to the **works** and **other delay or disruption events**

Defining programme (schedule) and records in the contract (CP 1) – Categories of records



Your Company Name

Employee Time Sheet

Friday, November 16, 2018

Employee Name		Department:	
Employee #:		Manager:	

Date	Start Time	End Time	Regular Hours	Overtime Hours	Total Hours

4. Cost records

- ☐ Include a **sufficient level of detail** such that **costs** can be **linked to delay or disruption events**.
- ☐ Remember the classification in **Project Accounting and Financial Management** course?

1. Direct Cost

- ❖ Material (**fixed cost**)
- ❖ Subcontractor (**fixed cost**)
- ❖ Labor (**variable cost**)
- ❖ Equipment (**variable cost**)

2. Indirect cost

- ❖ **General overhead** or **home-office overhead** or **company overhead** == Unabsorbed overheads in SCL
 - ✓ Fixed overhead cost
- ❖ **Project overhead** or **job overhead** == Dedicated overheads in SCL
 - ✓ **Fixed or variable overhead cost**
 - Cost of bonding (fixed)
 - Mobilization (variable)

4. Cost records

1. **Business plans**
2. Contractor's **bidding history**
3. Records of **acceptance** or **rejection of bidding**
4. Records that **support** the **inputs into the formula** used, in particular **contractor's company accounts** for:
 - a) **Periods** immediately **preceding** and **succeeding** the **employer delay**
 - b) **Period** when the **employer delay** occurred

4. Cost records

- ❑ You may need to disclose some of your confidential information if the case is taken to the court...

a claiming party has to accept some **loss of confidentiality**

The **parties** might therefore consider agreeing relevant rates in the **contract**, rather than requiring **proof of actual costs or loss** for certain eventualities

Example?

An agreement regarding **staff rates** to be charged in the event of an employer delay to completion

THIS IS BENEFICIAL TO BOTH PARTIES

4. Cost records

❑ Most categories that should be considered in cost records talked in **Project**

Accounting and Financial Management course:

- ❖ Labor
- ❖ Material
- ❖ Equipment
- ❖ Subcontractors
- ❖ General overhead
- ❖ Project overhead

4. Cost records

☐ Regarding subcontractors

1. Subcontract agreements
2. Subcontractor correspondence (communication)
3. Claims made by subcontractors and responses
4. Subcontractor applications for payment
5. Details of all payments made to subcontractors

4. Cost records

☐ Regarding suppliers

1. Supply agreements
2. Supplier correspondence (communication)
3. Claims made by suppliers and responses
4. Supplier invoices
5. Details of all payments made to suppliers

4. Cost records

☐ Regarding contractor general overhead

1. **Financial statements** documenting **annual general overhead costs** and **revenue**
2. **Business plans** for **generating profit**
3. Records regarding **bidding history**
4. Records regarding **bidding opportunities**
5. **Internal meeting minutes** to review **future bidding opportunities** and **staff availability**

Copies of all invoices should be kept in an easily retrievable filing system preferably with electronic copies.

5. Correspondence and administration records

- ☐ All written communications between the employer, the CA, and third parties relevant to the progress of the works.
- ☐ This includes:
 - ❖ Emails
 - ❖ Letters
 - ❖ Notices
 - ❖ Instructions
 - ❖ Submittals
 - ❖ Requests for information and responses
 - ❖ Meeting minutes and claims

5. Correspondence and administration records

☐ Written communications should be:

- ❖ Uniquely numbered
- ❖ Contain a descriptive subject line
- ❖ Dated and issued to the agreed distribution list

5. Correspondence and administration records

❑ This includes:

1. Letters/emails
2. Contract management
3. Technical
4. Milestones
5. Claims

5. Correspondence and administration records

❑ Letters/emails covers:

1. **Letters** and **material emails** between **parties involved** in the works
2. **Other emails** (including **internal emails**)

5. Correspondence and administration records

- ☐ Email communications should have a **protocol** from the **outset of each project**.
- ☐ Emails communications should be **archived in native format**.
- ☐ Email communications that are **internal** should also **be archived**.
- ☐ Even with the **best system** for managing and achieving emails, **some emails** may be **lost**. To **reduce the adverse effect** of these issues:

1. **Material communications (of whatever nature)** should be:

- a) Prepared in the form of a letter
- b) Uniquely numbered
- c) Carefully retained

2. **Key emails** should be

- a) Kept in a centralized folder
- b) Given unique correspondence number

5. Correspondence and administration records

❑ Contract management covers **all notices** or **documents** issued under the contract, with the exception of:

- a) Letters/emails
- b) Claims related records

❑ **Examples** include:

- a) CA instructions and confirmation of instructions
- b) Early warning notices (and their close out)
- c) Variations/change requests or proposals
- d) Bonds, insurance documents or guarantees
- e) All other documents issued under or required by the contract (**other than claims related records**)

5. Correspondence and administration records

❑ **Technical records:** these are **technical documentation** submitted **during** the course of the **works**, **along** with the **final documentation** submitted by the **contractor**.

❖ Technical documentation is needed to **demonstrate compliance** by the **contractor** with the **contract drawings** and **specifications**

❑ **Examples** include:

1. **Submission logs**, including **date of submission**, **date of response**, **status** and **follow up required** and **underlying documentation** for:

- ✓ Design drawings and calculations
- ✓ Method statements
- ✓ Subcontractor approval requests
- ✓ Material submittals
- ✓ Shop drawings
- ✓ Requests for information and responses

5. Correspondence and administration records

❑ **Technical records:** **Examples** include:

2. Approvals by the CA

3. Agendas for minutes of meetings, including:

- ❖ Design
- ❖ Construction progress
- ❖ Programme review
- ❖ Management
- ❖ Health & safety, environmental and security
- ❖ Quality

4. Deficiency/non-compliance notices (and their close out)

5. As-built drawings/documents

6. Operations and maintenance manuals

5. Correspondence and administration records

❑ Milestones:

Examples:

- ❖ **Achieving certificates**
- ❖ **Contractor's request** for a **certificate** that the works are **complete**
 - ✓ And the **CA's response** including a report on any areas of **disagreement**
- ❖ **CA's certificate** that the **works are complete**

5. Correspondence and administration records

❑ **Claims records: Examples include:**

1. **EOT claims/responses including the CA's determinations**
2. **Claims for additional payment/responses including the CA's determinations**
3. **Notices of dissatisfaction with determinations**
4. **Referrals to further stages of the dispute resolution procedure**
5. **Documents produced for the purposes of further stages of the dispute resolution procedure**

6. Contract and tender (bidding) documents

❑ These documents **establish** the **contractor's requirements** in

1. **Carrying out the works**

2. **Assumed baseline** in terms of **time** and **costs** for **carrying out the works**

6. Contract and tender (bidding) documents

- ❑ A complete copy of construction contracts including **any amendments** should be maintained by both parties.
- ❑ Tender documents include **all correspondence** between the **parties** regarding the contract negotiations. These also include:

1. On the part of employer

- ❖ (a) Tender submissions by **all tenders**, (b) the tender evaluations, and (c) the employer's calculations of **any liquidated damages rates**

2. On the part of the contractor

- ❖ Records demonstrating the **build-up to its tender price** (and any amendments to the price) and the **assumptions** on which the **tender price** is based.

6. Contract and tender (bidding) documents

❑ Contract documents:

1. **Contract agreement**
2. **Correspondence** relating to the **contract negotiations**
 - ❖ Including any **letter of intent** and **letter of award**
3. **Conditions of contract**
 - ❖ **General conditions** and **special/particular conditions**
4. **Specifications** and the **employer's requirements**
5. **Drawings**
6. **Schedule of prices** or **bills of quantities**
7. **Contractor's tender submission** and any **clarifications** to that **submission**

6. Contract and tender (bidding) documents

☐ Contract documents:

1. **Contract agreement**
2. **Correspondence** relating to the **contract negotiations**
 - ❖ Including any **letter of intent** and **letter of award**
3. **Conditions of contract**
 - ❖ **General conditions** and **special/particular conditions**
4. **Specifications** and the **employer's requirements**
5. **Schedule of prices** or **bills of quantities**
6. **Contractor's tender submission** and any **clarifications** to that **submission**

6. Contract and tender (bidding) documents

- ❑ **Tender documents**: Documents **produced** or **issued** by both the **employer** and the **contractor** **pre-contract** and include the following:
 1. **Instructions** issued by the **employer** to **tenderers**, including a **draft copy** of the **contract**
 2. **Any clarifications** issued by the **employer** regarding those **instructions** or the **draft contract**
 3. **Submissions** from **all tenderers**
 - ❖ **Technical** and **commercial** **submissions** including **all clarifications** to those **submissions**
 4. **Contractor's tender build-up** including **all estimating information**
 5. **Employer's tender evaluation**
 6. **Employer's calculations** for any **liquidated damages rates** in the contract

Defining programme (schedule) and records in the contract (CP 1) – Categories of records



نوع گزارش	مسئول تهیه	مسئول بررسی	تناوب تدوین و بروزرسانی	گیرنده گزارش	فرمت تهیه	مالک گزارش	محل ثبت