

Scope of Service Chart (Continued)

| KEY ACTIONS | PROPOSAL TO CONTRACT | PROJECT INITIATION | SCHEMATIC DESIGN DEVELOPMENT |
|------------------------------|--|---|---|
| Information Gathering | <ul style="list-style-type: none"> ◦ Gather client background/information ◦ Identify client vendor alliances | <ul style="list-style-type: none"> ◦ Develop list of questions/interview forms ◦ Conduct client kick-off/programming meeting ◦ Gather client background information ◦ Define areas of research ◦ Define client profile | <ul style="list-style-type: none"> ◦ Conduct project research ◦ Report on findings ◦ Analyze information ◦ Chart results ◦ Identify appropriate product resources ◦ Obtain required "product" samples ◦ Identify code requirements & conformance |
| Big Idea | | <ul style="list-style-type: none"> ◦ Identify Big Idea | <ul style="list-style-type: none"> ◦ Begin conceptual development of Big Idea |
| Patterning | <ul style="list-style-type: none"> ◦ Determine if applicable | <ul style="list-style-type: none"> ◦ Identify opportunities | <ul style="list-style-type: none"> ◦ Develop conceptual patterning ◦ Apply to preliminary design components |
| Presentation Formats | <ul style="list-style-type: none"> ◦ Identify contract format | <ul style="list-style-type: none"> ◦ Establish formats for project ◦ Define quality levels | <ul style="list-style-type: none"> ◦ Outline cartoon set of presentation ◦ Develop communication matrix ◦ Outline meeting agenda ◦ Outline presentation booklets ◦ Outline board layout |
| Budget | <ul style="list-style-type: none"> ◦ Identify client's build-out budget | <ul style="list-style-type: none"> ◦ Obtain client's build-out budget | <ul style="list-style-type: none"> ◦ Prepare preliminary budget |

| DESIGN DEVELOPMENT | DOCUMENTATION | BIDS | SITE MONITORING | PROJECT CLOSEOUT |
|---|--|---|--|---|
| <ul style="list-style-type: none"> ◦ Monitor against matrix ◦ Obtain required “product” samples ◦ Confirm “product” availability ◦ Confirm code requirements & conformance ◦ Finalize research | <ul style="list-style-type: none"> ◦ Obtain all design background from team ◦ Outline questions/concerns for design-team review ◦ Identify missing information ◦ Obtain required technical products, samples, and cut sheets ◦ Confirm long-lead items ◦ Confirm code requirements & conformance | <ul style="list-style-type: none"> ◦ Research qualified bidders for project scope ◦ Clarify information for bidders ◦ Obtain necessary information to respond to bidders ◦ Receive all bids | <ul style="list-style-type: none"> ◦ Clarify information for contractors/vendors ◦ Monitor substitutions/replace ments for discontinued items ◦ Prepare addendum(s) as required | <ul style="list-style-type: none"> ◦ Gather all data for close-out meeting from team |
| <ul style="list-style-type: none"> ◦ Monitor design solutions against Big Idea ◦ Integrate Big Idea | <ul style="list-style-type: none"> ◦ Monitor technical solutions against Big Idea ◦ Integrate into technical approach | <ul style="list-style-type: none"> ◦ Monitor bid pricing/ bid alternatives against Big Idea | <ul style="list-style-type: none"> ◦ Monitor build-out for quality control of Big Idea | <ul style="list-style-type: none"> ◦ Document the Big Idea |
| <ul style="list-style-type: none"> ◦ Apply patterning to design components | <ul style="list-style-type: none"> ◦ Integrate patterning components into documentation approach | <ul style="list-style-type: none"> ◦ Identify value of patterning components | <ul style="list-style-type: none"> ◦ Monitor execution of patterning components | <ul style="list-style-type: none"> ◦ Identify impact of patterning on project |
| <ul style="list-style-type: none"> ◦ Outline cartoon set of presentation boards ◦ Develop communication matrix ◦ Outline presentation booklets & meeting agenda | <ul style="list-style-type: none"> ◦ Outline cartoon set of documents ◦ Outline cartoon set of specs ◦ Outline meeting agenda & booklet | <ul style="list-style-type: none"> ◦ Develop bid-summary format ◦ Develop budget-prioritization format | <ul style="list-style-type: none"> ◦ Outline presentation of job site to customer: path, clean site, issues | <ul style="list-style-type: none"> ◦ Identify information format required for marketing: presentation booklets, color print-outs, plans, presentation boards |
| <ul style="list-style-type: none"> ◦ Meet w/ appropriate vendors ◦ Update budget estimate | <ul style="list-style-type: none"> ◦ Monitor technical/ design solutions against budget | <ul style="list-style-type: none"> ◦ Monitor bids against budget ◦ Prioritize budget expenditures against bids | <ul style="list-style-type: none"> ◦ Monitor cost of field conditions against bid & budget | <ul style="list-style-type: none"> ◦ Obtain copies of all vendor costs |