



SCOPE OF SERVICES

A partial list of potential Development Management Services

The strength and uniqueness of Planning Partners Limited is our flexibility with role and scope of responsibility, as well as our lean attitude toward business operations. Both of these attributes provide our clients with advantages that we believe add considerable value to the overall project.

In regard to role and scope of responsibility, outlined below is a list of services that we often provide our clients to demonstrate the breadth of services we may provide. We note that your project may not require our involvement with all of these actions. Working with the goal of maximizing the efficiency of professional management time expended on your behalf, we would provide you with a detailed proposal for service once we have discussed your specific needs.

Specific services that we will provide are as follows:

Pre-Construction Start-up/Buyout Phase:

Establish Program. Working with the Owner and Owner's design professionals, develop a "Program" which acts as a written understanding of the parameters of the Project. This document shall outline preliminary goals for planning issues such as number of structures and features on the site, the size and make-up of each structure and feature, and the anticipated development cost of each element along with the site itself.

Entitlement Rights. Research the Project site's entitlement rights and restrictions with governmental agencies to establish if all Program goals can be accomplished. This may include the ordering of a preliminary title report if a current title report is not available for the site. Such action shall not relieve the Architect of its responsibility to research and comply with all applicable codes, governmental regulations and other planning restrictions.

Site Review. Research the physical characteristics of the Project site to establish if all Program goals can be accomplished. This may include the ordering of soils and geological reports as well as an ALTA survey.

Architect Selection. Working with the Owner, identify potential architects, pre-qualify all candidates identified, facilitate the receipt and the evaluation of proposals for service, and negotiate appropriate fees and other contract issues as required.

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Establish an Overall Development Budget. Working with Owner and Owner's design and construction professionals, create a detailed development budget including estimates for hard construction costs, as well as design and engineering fees, governmental approval fees, testing and inspection fees, and other project related expenses.

Establish an Overall Construction Schedule. Working with Owner and Owner's design and construction professionals, facilitate the creation of a detailed schedule for the project's overall development.

Consultant Selection. Working with the Owner and Owner's Architect, secure the services of any and all consultants, design professionals, and engineers required for the facilitation of the project. This shall include receiving and evaluating proposals, negotiating terms of agreement, and facilitating the execution of final agreements.

Design and Intent Review. Working with Owner and Owner's design and construction professionals, review the design and construction documents to identify areas not fully complete or defined, or inconsistent with Owner's stated Program goals, and establish a path and schedule for their resolution.

Owner Liaison. Work with Owner and Owner's design and construction professionals in identifying the various components of development that Owner will be required to facilitate directly, such as furnishings and equipment.

Contractor Selection. Working with the Owner, identify potential general contractors, pre-qualify all candidates identified, facilitate the receipt and the evaluation of proposals for service, negotiate appropriate fees and other contract issues as required, and facilitate the execution of final agreements.

Construction Buy Out. Oversee the general contractor(s) process for final buy out of subcontractor costs. This will include the approval of proposed subcontractors, the facilitation of the bid process, and an evaluation of said process when complete.

Value Engineering. If required, work directly with Owner and Owner's design and construction professionals to establish a list of value engineering options for Owner review and approval. This process may require revisions to and re-submittal of construction documents, and a re-evaluation of fees for professional services.

Analyzing Bids. Upon presentation of the bids, assist Owner in its evaluation of the bids, including alternate bid prices and unit prices, and, at the request of Owner, make our recommendation regarding the award of construction contracts.

Construction Phase:

General. Provide administrative, management, and related services as required to monitor and coordinate the work of the Contractor with the activities and responsibilities of Owner and Architect to complete the Project in accordance with Owner's objectives for cost, time and quality, as amended from time to time.

Systemic Objectives. In consultation with Owner and subject to Owner's approval, implement a program of project management which shall include the following:

- (a) the scheduling, conduct and documentation of meetings at which Owner, PPL, the design team, and the Contractor discuss the status of the work;
- (b) the provision of periodic reports (generally not less frequently than monthly) to Owner on the progress of the entire work, which will include a brief description of the status of work completed, the status of work to be completed in the forthcoming period, and where the project stands against the completion schedule, in general;
- (c) the provision for periodic reports (generally not less frequently than monthly) to Owner on the status of the Project's budget which will include a recap of the budget, an itemization of the costs incurred to date, and an itemization of budgeted costs remaining to be expended. This report shall provide detail on all invoices charged to the budget specifying from whom the invoice was generated, where it was charged in the budget, and when it was submitted for remittance.

Permits, Bonds and Insurance. Verify that required permits, bonds, and insurance have been obtained and make periodic verifications to ensure that such permits, bonds, and insurance continue to be maintained in full force and effect. Such action shall not relieve the Contractor of its responsibility to comply with the provisions of the Contract Documents.

Construction Administration Procedures. Establish and implement procedures for reviewing, validating, and processing requests for clarifications and interpretations of the Contract Documents, including Requests for Information (RFI) and alternate means of tracking information; shop drawings, samples and other submittals; Contract Schedule adjustments; change order proposals; written proposals for substitutions; payment applications; and the maintenance of logs.

Contractor's Construction Schedule. Review the Contractor's final construction schedule and verify that the schedule is prepared in accordance with the requirements of the Contract Documents and that it establishes completion dates that comply with the expectations of Owner.

Construction In Progress Review. As part of periodic site visits, PPL shall review the work in place and in progress, and shall immediately bring to the attention of the Architect and/or the Contractor issues observed, indicating an actual or potential deviation from the general design intent, including quality of work, as set forth in the Architect's plans and specifications. Owner agrees that such observation and reporting is secondary, and shall not relieve the Architect and the Contractor of their contractual obligations in these regards.

Review Effect of Requests for Information, Shop Drawings, Samples, and other Submittals. Examine the Contractor's requests for information, shop drawings, samples and other submittals and work with the Contractor to determine the anticipated effect on compliance with the Project requirements, the Construction Budget, and the Contract Schedule.

Disputes Between Contractor and Owner. Consult with Owner if the Contractor requests interpretations of the meaning and intent of the Drawings and Specifications that cannot be resolved by the Architect, and assist Owner in resolving any questions which may arise. At the request of Owner, render in writing within a reasonable time, recommendations concerning disputes between the Contractor and Owner relating to the acceptability of the Work, or the interpretation of the requirements of the Contract Documents pertaining to the furnishing and performing of the work.

Change Orders. Review the contents of all Contractor requested changes to the contract time or price, endeavor to determine the cause of the request and assemble and evaluate information concerning the request. This shall include information solicited from the design professionals regarding the change request. Upon evaluation, make recommendations to Owner regarding the change detail. Upon Owner's approval of the request, present a formal Change Order for execution.

Review Effect of Change Orders. Prior to the issuance of a change order, PPL shall determine and advise Owner as to the effect on the construction budget and contract schedule of the change. PPL shall verify that activities and adjustments of time, if any, required by approved change orders, have been incorporated into the Contractor's construction schedule.

Recovery Schedules. If Owner so requests, PPL shall request the Contractor to prepare and submit a Recovery Schedule. For purposes hereof, a "Recovery Schedule" shall mean a schedule that sets forth a plan to recover as much as possible the time and expense lost by reason of the change order.

Cost Records. In instances when a lump sum or unit price is not determined prior to Owner's authorization to the Contractor to perform change order work, PPL shall request and review records from the Contractor of the cost of payroll, materials and equipment and the amount of payments to each subcontractor incurred by the Contractor in performing the work.

Progress Payments. Review the payment applications submitted by the Contractor and determine whether the amount requested reflects the progress of the Contractor's work. PPL shall make appropriate adjustments to each payment application and shall prepare and forward to Owner a Progress Payment Report. The Report shall state the total contract price, payments to date, current payment requested, retainage, and actual amounts owed for the current period. The Report shall include a certificate of payment that shall be signed by PPL and, if Owner requests, the Architect.

Substantial Completion. Assist Owner and Owner's design professionals in determining when the project and the Contractor's work is substantially complete and, in this connection, render to Owner its informed judgment whether and when the project has been substantially completed in accordance with the Contract Documents.

Contractors' Final Completion (Punch) List. In consultation with Architect and Owner, PPL shall request the contractor to prepare a list of incomplete work or work which does not conform to the requirements of the Contract Documents. This list shall then be reviewed with the Owner and the design team and supplemented and/or amended as required.

Post Construction Phase:

Operation and Maintenance Materials and Warranties. PPL shall review and determine the general completeness of operations and maintenance manuals prepared by Contractor.

Training. At the request of Owner, and in concert with Contractor, PPL shall schedule training sessions with manufacturers, Contractor's representative, and Owner staff for operation and maintenance of building systems.

Record Documents. At the request of Owner, PPL shall coordinate submittals of information from Contractor for preparation of record drawings and specifications, and shall coordinate the transmittal of such record documents to Owner.

Final Completion. In consultation with Owner and Owner's design professionals, PPL shall determine when the project and the Contractor's work is finally completed, and issue, with Owner's approval, a Certificate of Final Completion, and provide to Owner a written recommendation regarding payment to the Contractor.

Occupancy Permit. Assist Owner in obtaining an Occupancy Permit (Certificate of Occupancy) by working with Contractor and Owner's design professionals to coordinate final testing, prepare and submit documentation to governmental agencies and, at the request of Owner, accompany governmental officials during inspections of the project. PPL, in concert with Architect, shall oversee Contractor's coordination of inspections with all agencies having jurisdiction over project.