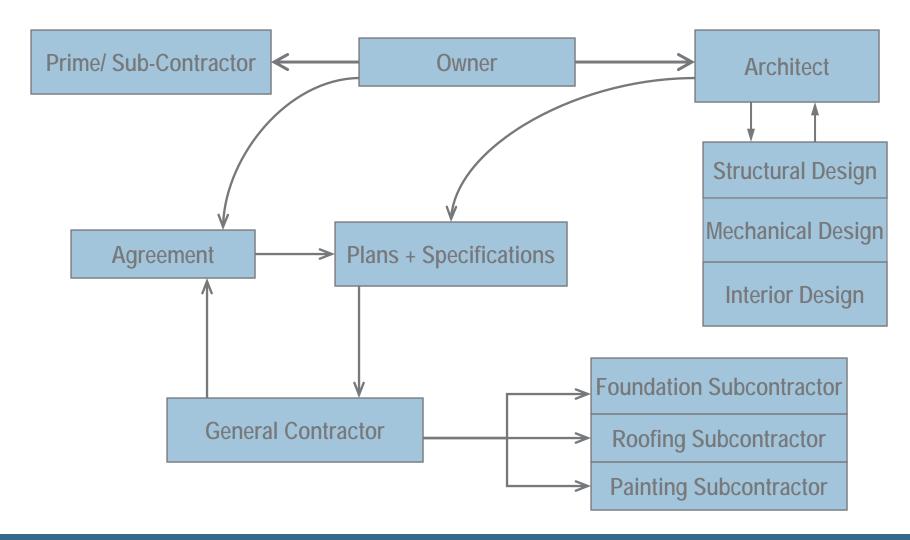




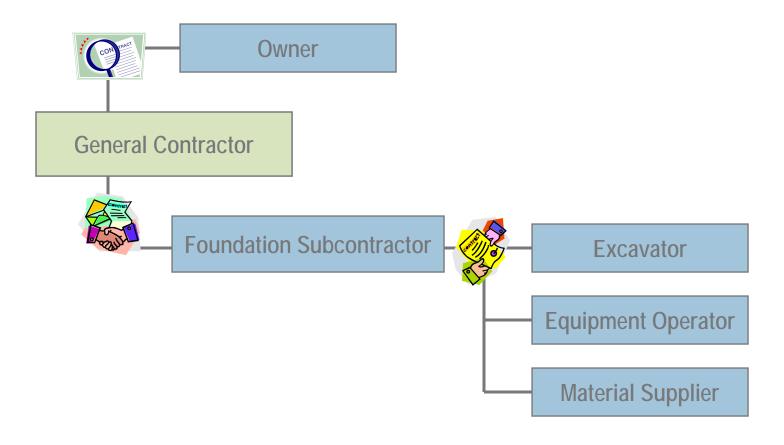
April 23rd, 2015

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- The Owner (1.) wants a project, similar to anyone who wants to buy something, such as a car, but with a construction project the product being purchased is not something that is already built.
- The Owner goes to an Architect (2.) to translate his/her desires into a set of documents.



- The Architect works with (3.) Specialty (Sub)
 Designers such as structural engineers, mechanical
 engineers and interior designers to place the details
 in the (4.) Plans and Specifications (Construction
 Documents) what the Owner wants to buy from a
 (5.) General Contractor (GC).
- The Plans and Specifications are sent to qualified and interested GCs, who then submit the proposals to the Owner. Ultimately the Owner and a GC compose an (6.) Agreement (or Contract).



- An Agreement (or Contract) for construction is simply "a promise by the Contractor to deliver what is described in the Plans and Specifications and a promise by the Owner to pay for it."
- The Agreement refers to the Plans & Specifications and should include the Scope of Work including: Inclusions and Exclusions, Allowances, a provision for handling Change Orders, and Payment Milestones or a Schedule of Values. GCs usually hire (7.) Subcontractors, who are specialists in their respective trades, to help deliver what has been promised in the Agreement.



 There is nothing in this scheme which prohibits the Owner from hiring (8.) Prime Contractors (Specialty / Trade / Subcontractor) directly for work that is not in the Scope of Work in the Agreement with the GC.



3. DBSKCV CM Method

- 1. Define
- 2. Budget
- 3. Schedule
- 4. (K) Contract
- 5. Coordinate
- 6. Verify





Overview

- <u>Define</u> the Scope of Work (this includes the design phase).
- <u>Budget</u>: identify how much the project will cost the contractor and owner.
- <u>Schedule</u> when the construction will happen (and share this information).
- <u>Contract (K)</u>: Who is doing what? Everyone should know what to expect.
- <u>Coordinate</u> the construction.
- <u>Verify</u>, document and communicate that everyone is doing what they should.



3. DBSKCV CM METHOD

Budget

MILESTONES VS. VALUES

Notes:

- (1.) Allowance of \$30 for hardware.
- (2.) Allowance of \$40 for signs.
- (3.) Allowance of \$40 for material.
- (4.) Exclusion Ladder

#	Scope	Milestone	Value	<i>PMT</i> #1	PMT #2	PMT #3	Total Paid
1	Excavation	200	250	0	0	0	0
2	Walls *1	200	300	0	0	0	0
3	Roof	200	200	0	0	0	0
4	Signage*2	100	50	0	0	0	0
5	Paint*3	100	100	0	0	0	0
6	Complete	200	100	0	0	0	0
7	Total	1,000	1,000	0	0	0	0
8	-	-	-	-	-	-	-
9	CO#1	-	-	-	-	-	-
10	CO#2	-	-	-	-	-	-
11	CO#3	-		-	-	-	-
12	CO#4	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	Total	-	-	-	-	-	-



Schedule

www.petefowler.com													_		Resi				,																	3/1	8/20	011		
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4 Demolition/Rough Grading			$\Box \Box \Box$	HHH	++++	╽┋	111	111	⇈	Ш	⇈⇈	$\dagger\dagger\dagger$	Ш	++	Ш	⇈	$\dagger\dagger\dagger$	1 ††	†† †	\top	Ш	Ш	111	++	Ш	$\forall \mathbf{f}$	HT		Ш	Ш	†† †	₩	₩	Ш	⇈	$\dagger\dagger\dagger$	m	\top	Ш	Ш
5 Site Improvements	+		╫	HHH	++++	╫╫	╫	###	⇈	Ш	╫	$\dagger\dagger$	Ш	ĦĦ	HH	⇈	$\dagger\dagger\dagger$	₩	╁┼╂	+	ш	HH	1#	+++	нн	+	HT	#	Ш	Ш	†††	₩	₩	ш	₩	₩	₩	+	Ш	₩
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10 Electrical/Low Voltage	╅	Н	т	HHH	╫	╫╫	╫	₩	╫	₩	П			╫	H ill	╫	₩	╂┼┼	╫	ж	₩	нн	╂┼┤	ж	НН	₩	₩	Н	₩	Н	╫	₩	ΗП			₩	₩	₩	Н	₩
11 Windows/Exterior Doors	╅	╫╂┼┼	╫╫	HHH	╫	╫╫	╫	₩	╫	₩	╫	ш	m		ı ril I	╫	₩	╂┼┼	╫	ж	₩	нн	╂╫	ж	НН	₩	ш	ш	ш	Н	╫	₩	╫	н	ш	₩.	₩	++-	Н	₩
12 Sheet Metal and Flashings	╅	╫╂┼┤	┼┼╂┤	HHHH	++++	╫╫	┼┼╂	╫	₩	₩	╫	₩	Н	ш	<u> </u>	╫╫	₩	₩	╫	₩	₩	нн	₩	ж	₩	₩	₩	₩	₩	Н	╫	₩	₩	нн	₩	₩	₩	₩	Н	╫┫
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14 Waterproofing/Deck Coatings	╅	╫╫┼	┼┼╂┤	HHH	++++	╫╫	╫	₩	æ	₩	₩	₩	Н	┼┼╂	₩	┷╂┼	₩	╂┼┼	╫	₩	₩	нн	╂┼┤	ж	₩	-77		₩	₩	ш	┼┼╂	₩	╫	ш	₩	₩	₩	₩	Н	₩
15 Exterior Lath/Wrap	╅	╫╫┼	╫╫	HHH	++++	╫╫	╫	₩	₩	₩	╫	₩	Н	╫	₩	The	₩	╂┼┼	╫	₩	₩	нн	╂┼┤	ж	НН	₩	₩	₩	₩	Н	╫	₩	╫	НН	₩	₩	₩	₩	Н	╫╢
16 Exterior Siding	╅	┼╂┼┤	┼┼╂┤	HHH	++++	╫╫	┼┼╂	₩	₩	₩	₩	₩	Ш	┼┼╂	нн	4	ш	╂┼┼	┼┼╂	₩	₩	нн	╂┼┤	ж	Ш	₩	₩	₩	₩	Ш	┼┼╂	₩	╫	Ш	₩	₩	₩	₩	Ш	₩
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18 Tub and Shower Surrounds	╌╂┼┼┤	╫╫	╫	HHH	++++	╫╫	╫	+++	₩	₩	₩	₩	Ш	₩	нн	╫	₩	PL.	₩	Ш	₩	##	ш	щ	Ш	ш	ш	ш	₩	ш	₩	₩	╫	ш	₩	₩	₩		Ш	₩
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23 Finish Carpentry	+	$\sqcup \blacksquare \sqcup$	++++++++++++++++++++++++++++++++++++	\coprod	4444	╙	444	444	4	Ш	Щ	Ш	Ш	Щ	Щ	444	Ш	Ш	##	Щ	Ш	Ш	Ш	Щ	Ш	Щ				Щ	##	Ш	44	Ш	Ш	Ш	Ш	Щ.	Ш	#
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25 Fine Grading/Site Drainage	$\perp \perp \parallel \parallel \parallel$	ЩШ	ЩЦ	ШШ	Щ	ЩЦ	Ш	Ш	Щ	Щ	Ш	Ш	Ш	Ш	ЩЦ	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Щ	Ш	Щ		Ш	Щ	Ш	Ш	Ш	Ш	Щ	Ш	Щ	Ш	Ш
26 Hardscape	\perp	ШШ	Ш	ШШ	Ш	Ш	Ш	Ш	Щ	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш	Ш		Ι.	Щ.	Ш	Ш	Ш	Ш
27 Gutters and Downspouts		ШП		ШШ	Ш	$\coprod \coprod$	Ш	Ш	Ш	Ш		Ш	Ш		ШІ	Ш	Ш	Ш	Ш	Ш	Ш	ШТ	Ш	Ш	Ш	Ш	Ш	Ш	Ш		Щ	Ш	Ц	Ш					Ш	Ш
28 Painting and Coatings							Ш	Ш	\prod	Ш		Ш	\prod		ШТ	\prod	Ш	\prod	Ш	\prod	Ш	Ш			Ш				Ш	Ш				Ш		Ш			Ш	\prod
29 Floor Coverings					ПП	\prod	\prod	Ш		Ш		Ш	\prod		ШТ		Ш	\prod	\prod		Ш		\prod		Ш		Ш		Ш	Ш	Ш	\prod		Ш					Ш	\prod
30 Appliances and Hardware							\prod	Ш	П	Ш		Ш	Ш			\prod	Ш	\prod	\coprod		Ш		\prod				Ш		Ш	Ш	\prod	\prod	\prod	Ш	\prod	Ш			Ш	Ш
31 Landscape and Fencing				Ш	Ш		\prod	Ш	П	Ш	П	Ш	Ш	\prod	Ш		Ш	Ш	Ш	П	Ш	Ш	П	П	Ш		Ш		Ш	Ш	\prod	Ш	П	Ш	П	Ш	Ш			Ш
32 Punch list/Touch up		$\sqcap \mathbf{I} \sqcap$	$\sqcap \sqcap$	ПШ	$\top \Box \Box$	Π	$\top\!\!\!\!\top\!$	Ш	T	Ш	Π	Ш	Ш		Ш	111	Ш	Ш	ΠΪ	\top	Ш	Ш	Ш	\prod	ПП		Ш		Ш	Ш	∏Ì	Ш	Т	Ш	ΠŤ	Ш	Ш	П		
33 Final Inspection							\coprod	Ш	1	Ш		Ш	Ш		ШТ	╨	Ш	Щ	∭	\coprod	Ш	Ш	\coprod		Ш		Ш		Ш	Ш	Ш	Ш	\top	Ш	╙	Ш	Ш	\coprod	Ш	П



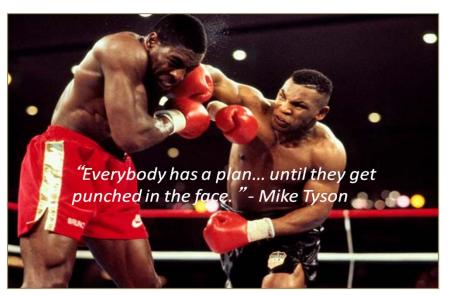
(K) Contract

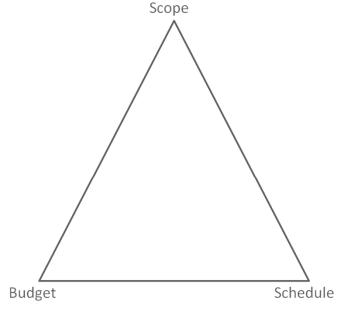
DON'T SIGN A CONTRACT CREATED BY THAT CONTRACTOR!

If you only learn one thing today, this is that one thing.



Coordinate





Scope		Budget	Actual	Schedule
1.	Item 1	\$ XXX	\$ XXX	Plan/Actual
2.	Item 2	\$ XXX	\$ XXX	Plan/Actual
3.	Item 3	\$ XXX	\$ XXX	Plan/Actual
4.	Item 4	\$ XXX	\$ XXX	Plan/Actual
5.	Item 5	\$ XXX	\$ XXX	Plan/Actual
6.	TOTAL	\$ X.XXX	\$ X,XXX	



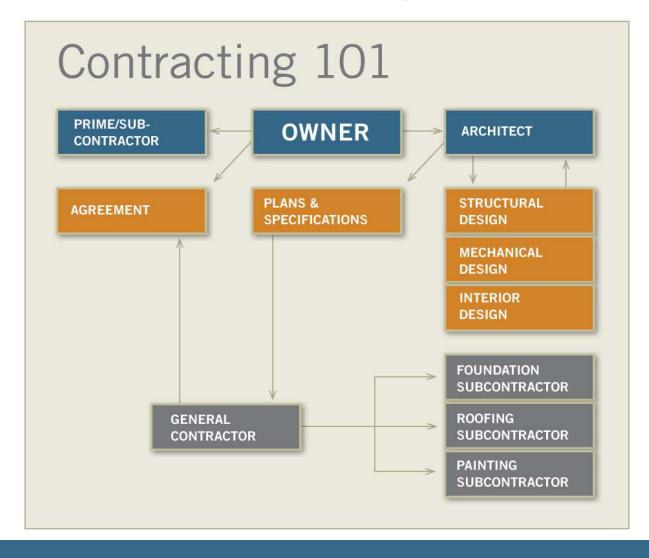
Overview

KEY DOCUMENTS

- 1. Plans
- 2. Specifications
- 3. Scope of Work
- 4. Budget
- 5. Estimate
- 6. Schedule of Values
- 7. Expense Log / Register
- 8. Allowance Schedule
- 9. Project Schedule
- 10. Request for Proposal
- 11. Addendum
- 12. Prime Contract
- 13. Contract Addenda

- 14. General Conditions to the Contract
- 15. Subcontract
- 16. Change Order
- 17. Purchase Order
- 18. Daily Log
- 19. Meeting Agenda / Minutes (Notes)
- 20. Project Contacts Register
- 21. Application for Payment
- 22. Lien Release
- 23. Punch List
- 24. Insurance Certificate
- 25. Inspection Documentation







- Roles and responsibilities in a construction project
- What do the contracts say (R.T.F.C.!)
- The Owner
- The Owner / Developer / General Contractor / Seller
- The General Contractor
- Trade Contractors
- Babysitting
- Brother's Keeper



End

