
A boutique
platform for
real estate
development
and hospitality
management
that is innovative,
sustainable, and
engaging.

*We approach each aspect
of our work through a
combination of innovation,
sustainability & beauty.*

Phase One - Project Management Services

- Review any existing site documentations such as surveys, environmental reports, existing building plans or other information available.
- Identify any other due diligence data required for Phase Two Schematic Design.
- Establish the overall project control goals for compliance and quality expectations for use in refining the services of the interior designer, design architect and related consultants.
- Assist the Client in completing their agreement with the Architect and Interior Designer and establish a list of qualified consulting firms appropriate for this project.
- Develop a scope description and solicit proposals from the prime consultants. Review the proposals and make a recommendation of award to the Client.
- Finalize the scope, fee and contracts of the prime consultants in conjunction with Client
- Develop the Diff Doc outlining responsibilities for each party specifically identifying the delineation between the Client, general contractor and any other applicable parties
- Lead and manage the Client design team and evaluate their design concepts, anticipated materials and finishes selections relative to their impact on the building scope and cost and requirements.
- Owner Rep will provide the crucial initial step in identifying with the design team the appropriate overall building systems to create the optimal approach to the building design that balances cost, schedule, and program to ensure the project gets off to the right start.
- Prepare a Client's project budget based upon the design team's concepts and optimized systems incorporating estimated construction costs, fees and other soft costs, and FF&E costs as established with the Client



- Assist the Client in identifying pre-qualified general contractors, develop an RFP and solicit general contracting proposals to provide pre-construction services.
- Review the general contractor proposal, arrange interviews and make a recommendation of award to the Client.
- At the completion of this phase, Owner Rep will provide wan initial Client's Project Control Budget and Preliminary Project Control Schedule, for use in managing the next phases of the project.

Phase Two - Schematic Design/Engineering

- Provide preliminary review of all governmental agency requirements of the local AHJ departments like the zoning, building, transportation, and in conjunction with Historic Architect, landmark requirements.
- Convene regular design coordination and progress meetings with the Architect and Prime Consultants and actively participate in managing the design and consulting team in their efforts to achieve the short term and overall project goals.
- Evaluate options being proposed for key structural and MEP/FP systems relative to their fit with the building, desired programmatic requirements and budgetary impacts.
- Solicit proposals from specialty consultants such as lighting designer, acoustic engineer, kitchen designer, etc. as determined necessary to complete the design of the project.
- Update the Project Control Budget including all design costs by discipline, related support services and fees, and refine the overall project construction estimate based upon the schematic design scope of work
- Update the Project Control Schedule based upon the proposed elements of the schematic design including architectural and engineering progress, permitting, site entitlements and construction items.
- Lead and manage the Client, design and construction team and input to facilitate efficient performance and resolution of problems or issues.
- Establish a payment schedule for all consultants. Receive and process all consultant billings for approval and payment by Client.

Phase Three - Design Development & Contract Documents

- Provide oversight of the design team in the development of the design and engineering documents as they progress from Schematic Design to final bid and permit documents. Hold regular team meetings and identify and track key action items.
- Bring critical decision items to the Client with an appropriate review, analysis and recommendation on the options or their impact to assist the Client in making informed decisions. Ensure that the decisions are made in a timely manner to meet the overall project schedule.



- Provide regular review of the design as it develops for conformance with the project program and overall project budget. Assist the design team in evaluating components of the design as they relate to the budget, evaluate potential value engineering, and recommend adjustments to the components or budget reallocation to ensure the overall design is developed within the overall project budget.
- Review the construction documents for constructability issues and provide relative cost information to evaluate selections of materials and details consistent with the target budget for the project and with the intent of minimizing conflicts and missing scope.
- Reevaluate the Diff Doc responsibilities for the scope of the work, material procurement and installation between the General Contractor and Client.
- Manage the development of the scope for the low voltage design with the low voltage consultant.
- Manage the development of the scope for signage with the signage consultant.
- Update the Project Control Schedule showing the design, permitting and construction activities required to meet the targeted completion date and indicate the key interim milestones for all the preconstruction activities including the completion of the design phases, Client reviews and approvals, City agency approvals, and the preliminary project construction schedule.
- Update the Project Control Budget for both soft and hard costs based upon costs for consultants and other items expended or committed to date as well the general estimate of the construction costs.
- Establish methodology and requirements for permit submission and facilitate the design team in the production of the proper documentation for this submission.
- Review with the Client alternate construction contract methods including lump sum, negotiated GMAX or subcontractor level bidding to determine the most optimum delivery method for the project.

Phase Four - Pre-Construction & Bidding/Permit

- Provide follow-up on the building permit process and coordinate the input and responses of the design team as required during the permit process. Coordinate any information required on the permit application from the General Contractor.
- Manage the preliminary governmental agency reviews and approvals with the local AHJ including Planning, Landmarks, Building, and Civil.
- Assist in securing the building permit – permit fees to be paid by the Client.
- Under the base assumption that the pre-construction General Contractor will be given the opportunity to develop a GMP proposal for review and approval of the Client, accord will provide a review, analysis, and recommendation on the GMP proposal.
- Facilitate the development of a final contract version for acceptance by both parties working with Client's legal counsel.

- Work with the AE team to prepare the bidding documents and assist the General Contractor issue the documents to a pre-approved list of selective subcontractors.
- Facilitate the response to questions by the subcontractors during the bidding process with the design team and provide coordinated communication of these responses through the General Contractor.
- Review the General Contractor's subcontractor bid proposal recommendations and assist Client in the evaluation of the bids.
- Review the major trade bid proposal details and qualifications to confirm the scope is comprehensive and that the proposal is appropriate to achieve a complete project.
- Assist in the identification and award of long lead items that may impact the project schedule.
- Facilitate the identification and procurement of testing and inspection services that are paid for directly by the Client.

Phase Five - Construction Oversight

- Prepare a communications protocol with the intent of streamlining team communication and response.
- Review General Contractor's site mobilization and construction start-up logistics.
- Facilitate development and distribution of a submittal schedule.
- Schedule, lead and insure documentation of a weekly team meeting.
- Provide follow-up to critical items identified in the weekly meetings.
- Monitor the General Contractor's performance against the approved GMP construction cost and schedule if GMP format is utilized.
- Monitor the detailed CPM construction schedule from the General Contractor.
- Monitor submittal of the General Contractor's and Subcontractors' insurance certificates and bonding requirements.
- Facilitate activities necessary to mitigate any variations from the budget and schedule.
- Spearhead actions necessary to resolve conflicts, discrepancies, and field conditions to maintain the projects budget and schedule.
- Construction Administration & Field Observation
 - Monitor Construction Progress
 - Provide regular review of the construction work for compliance with the cost, schedule and quality requirements for the project. Identify any non-compliant items to the General Contractor and follow-up with remediation actions by General Contractor and his subcontractors.

- Coordinate with the consultants and testing agencies on their scope of work, timing of site observation activities, and reporting review to ensure monitoring of construction quality is taking place as expected. Ensure that records of the reporting activities are distributed to the appropriate parties.
- Examine the status of activities against the CPM project schedule.
- Identify potential problems and discuss with the Project Consultants and General Contractor as required to achieve resolution.
- Identify any problem areas and establish with the General Contractor how they plan to mitigate these deficiencies.
- Review the General Contractor's two-week look-ahead schedule for short-term issues.
- Processing of Monthly Pay Requests
 - Review of pencil draw with the General Contractor to review the pay requests relative to the construction progress.
 - Review the pay request submittal for inclusion of all the required documentation.
 - Submit the approved pay request to Client for payment.
 - Work with the Title Company for processing of lien waivers, including attention to subcontractors and suppliers.
- Processing Monthly Client Statement
 - Secure all monthly invoices from consultants, vendors and material suppliers and review the invoices relative to contract terms and compliance and delivery.
 - Prepare the Client's bank draw statement for review and approval by Client.
- Shop Drawing/Submittal Review
 - Monitor the progress of shop drawings, material samples or submittals with the Project Consultants and the General Contractor.
 - Monitor the Project Consultant's follow through.
- Change and Claims Control
 - Review General Contractor's requests for extra costs
 - Review proposal requests prepared by the Project Consultant's for Client directed changed requests
 - Review claims submitted by the General Contractor and the subcontractors and advise Client the appropriateness of the claim and cost.



- Occupancy
 - Monitor scheduling of the inspections by the General Contractor for partial or full occupancy permit.
 - Monitor all of the submittals required of the General Contractor to achieve a final Certificate of Occupancy from the City of Portland.
 - Punch List
 - Monitor preparation of the punch list by the General Contractor and Project Consultants.
 - Monitor completion of the punch list items by the General Contractor and its subcontractors.
 - Establish financial holdbacks for items that have not been remedied.
- Project Close-Out
 - Monitor the General Contractor's activities in completing the punch list items.
 - Coordinate any final testing or inspection activities.
 - Facilitate the project close out including securing occupancy permits, warranties, final construction cost items and record as-built drawings.
 - Obtain from the General Contractor all required invoices and lien waivers required to obtain final approval from the title company for close out of the project.
 - Facilitate resolution of any open claims issues to satisfaction of Client/Developer and General Contractor.

