**INSTRUCTIONS:**

The **Initial Project Information** is developed by the A&E project manager and agency representatives. The purpose of the Basic Project Information is to clearly communicate to the consultant the intent and scope of the project, project constraints and expectations, and team structure. Our goal is to render a clear and realistic vision of the project so the design team understands our expectations and is able to build the best building they can for the money we have.

*Italic print needs to be edited; expand or abbreviate as appropriate*.  *Red print is instructions to be deleted.*

**INITIAL INFORMATION**

***PROJECT TITLE***

***AGENCY***

***LOCATION***

***A/E #20\*\*-\*\*-\*\****

***Agency #***

**PROJECT INFORMATION *Month \*\*, 20\*\****

**Introduction:**

*State the Agency’s mission and the relevance of this project to the Agency’s mission. As appropriate, provide a brief history of the project and explain how and why the project was conceived. This section can be omitted on projects where agency’s mission is not pertinent to the project such as repair and maintenance.*

**Scope:**

*Explain the scope of the project; describe the project intent and define the problem being addressed. Identify any physical or administrative limitations that may impact the project not addressed elsewhere.*

**Program:**

*Options:*

1. *Omit program if the project is adequately described in the above scope, or*
2. *Insert additional program information or project parameters, or*
3. *Provide more extensive program using Program Attachment at the end of this document as a guide or similar format that is appropriate to the project, or*
4. *Indicate that the program will be developed by Consultant as part of the consultant’s services.*

Any significant deviation from the program must be approved in writing by the Architecture & Engineering Division. Any work done outside this project scope without A&E Division approval will be the responsibility of the Consultant.

**Design Standards:**

This project must comply with the Architecture & Engineering Minimum Design Standards found at (INSERT LINK). Questions regarding specific application must be referred to the A&E project manager who may provide written exceptions to requirements that are not applicable or feasible to a particular project.

*The following paragraph* ***may*** *be deleted if the project is NOT a new construction or major renovation funded pursuant to 17-7-201 MCA. Confirm with agency regarding High Performance expectations.*

All new construction and all major renovations are required to comply with the State of Montana High Performance Building Standards Minimum Requirements For All Projects found at (INSERT LINK) The consultant will provide documentation and support to the project manager in completing the High Performance Building Standards Checklist.

**Project Budget:**

The project is funded with (*amounts & sources*) for a total project budget of (*total amount*); this includes all project-related expenditures. The initial project allocation is as follows:

 Estimated Construction Cost $

 Construction Contingency $

 Architect/Engineer Fees $

 Commissioning $

 Advertising $

 Printing & Reproduction $

 Plan Review & Permits $

 Site/Topo Survey $

 Geotechnical $

 Hazardous Materials $

 Construction Materials Testing $

 Telecomm/Data $

 FF&E $

 % for Art $

 Other $

 Supervisory Fee $

 **Total Project Costs $**

Anticipated additional funds may include an estimated (*amount)* from (*sources*): *Delete this sentence if budget is fixed. If the above budget may be augmented with additional funds, explain conditions and potential amounts that may be added to the budget.*

The budget will be further defined through the design process. If at any time the Cost of Work or project costs exceed the above budget, the Consultant must notify both A&E Division and the Agency in writing.

**Project Schedule:** *Restructure as appropriate, especially for smaller projects.*

It is expected the project will begin advertising for bids by (*insert date).* Before execution of the Agreement, A&E Division, the Agency, and the Consultant will complete the following schedule which will then form the basis of contractually required project schedule.

To meet this schedule, the Consultant is required to provide complete submittals that capture the essence of the design problem.

|  |  |  |
| --- | --- | --- |
| **Task** | **Start date or NA** | **Duration (wk or mo)** |
| Programming/Pre-design |  |  |
| Schematic Design |  |  |
| SD & Budget Review |  |  |
| Geotech |  |  |
| Site Survey |  |  |
| Design Development |  |  |
| Energy Analysis  |  |  |
| DD & Budget Review |  |  |
| Construction Documents |  |  |
| Commissioning Documents |  |  |
| CD & Budget Review |  |  |
| Local Jurisdiction Review |  |  |
| Advertising/Solicitation |  |  |
| Award |  |  |
| Construction |  |  |
| *Other* |  |  |

This schedule may be adjusted with written mutual agreement of all parties.

**Project Reviews:**

Upon receipt of the Consultant’s complete submission as outlined in the A&E Division’s submittal requirements located at **http://architecture.mt.gov/** the A&E Division and the Agency representatives will review the documents and provide written comments or marked-up drawings as determined appropriate by the project manager. The Consultant will respond to all comments in writing; marked drawings will be returned to the A&E Division and the Agency.

The Consultant will confer with governmental authorities with jurisdiction over the project and utility companies providing services to the project and will notify the A&E Division in writing of requirements imposed by the entities and incorporate them into the design.

After all review comments are resolved to A&E Division satisfaction, the design may proceed to the next phase or be advertised for bidding.

**Bidding Requirements:**

The project will be bid as one general contract.

* *Modify this clause as appropriate if the project will involve an alternative delivery method.*
* *Modify this clause to indicate if the Work will be phased, and if so, describe the phases and potential schedule to the best of your ability.*
* *Indicate if the project is anticipated to be commissioned by a third-party commissioning agent.*
* *Discuss any potential for multiple construction contracts.*
* *Indicate any associated work that is outside the Consultant’s scope.*

Restrictions or requirements associated with the project funding include the following: *Edit as appropriate depending on funding restrictions:*

* Federal Contract Clauses Requirements
	+ Davis-Bacon Act (40 U.S.C. 276a)
	+ Contract Work Hours and Safety Standards (40 U.S.C. 327-333)
	+ Equal Employment Opportunity (E.O.s 11246 and 11375)
	+ Copeland “Anti-Kickback” Act (18 U.S.C. 874 and 40 U.S.C. 276c)
	+ Rights to Inventions and Data Made Under a Contract or Agreement (10 CFR 600.325)
	+ Clean Air Act (42 U.S.C. 7401 et seq.) and the Federal Water Pollution Control Act (33 U.S.C. 1251 et seq.), as amended
	+ Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)
	+ Debarment and Suspension (E.O.s 12549 and 12689)
	+ For ARRA Funds: Sec. 1605, “Buy American” provision
	+ ARRA logos for all bid documents
	+ Other
* Time constraints associated with the obligation of funds
* Restrictions placed on private funds by donors
* Other restrictions that may apply

**PROJECT TEAM**

Owner Project Representatives: *Edit to identify Owner’s team before interviews and complete Consultant’s team after appointment, but before contract is signed.*

**Owner’s Project Representatives:**

|  |  |
| --- | --- |
| A&E Design Project Manager:Name1520 East Sixth AvenueHelena MT 59601Phone: (406) 444-\*\*\*\*e-mail:  | A&E Construction Project Manager:Name1520 East Sixth AvenueHelena MT 59601Phone: (406) 444-\*\*\*\*e-mail: |
| Agency Project Representative: NameAddressCity MT 59\*\*\*Phone: (406) \*\*\*-\*\*\*\*e-mail:  | Agency: Key Team Member(s)NameAddressCity MT 59\*\*\*Phone: (406) \*\*\*-\*\*\*\*e-mail:  |
|  |  |

Owner Consultants:

|  |  |
| --- | --- |
| Hazardous Materials Investigation: TBD | Commissioning Authority: TBD |
| Construction Project Management: TBD |  |

**Consultant’s Project Representatives*:***

|  |  |
| --- | --- |
| Principal:Name1520 East Sixth AvenueHelena MT 59601Phone: (406) 444-\*\*\*\* | Project Architect:Name1520 East Sixth AvenueHelena MT 59601Phone: (406) 444-\*\*\*\* |
| Structural Engineer:  | Civil Engineer: |
| Mechanical Engineer: | Electrical Engineer: |
| Landscape Architect: | Cost Estimating: |
| Site Survey: | Geotechnical Investigation: |
| Hazardous Materials: | Commissioning: |

**Communications:**

All correspondence shall copy both A&E and agency representatives and must include the A&E Division project number A/E #\*\*\*\*-\*\*-\*\* *(add Agency project number if they have a separate numbering system).*

**Attachments and documents to be provided by the Owner:**

* Outline Project Program *(or Project Program)*
* Site surveys, if available
* Utility information, if available
* Geotechnical information, if available
* Asbestos inspection reports or other hazardous material surveys, if available
* Campus security, tool control, smoking or access policies if pertinent
* All applicable federal or other requirements associated with funding. Agencies are required to verify the status of federal and other funds and coordinate the requirements of the funding before advertising.
* Any agency drafting standards or format requirements
* Other

**PROJECT PROGRAM *Format referenced in option 3***

**Area Requirements**

**Level 1**

*Provide a list of anticipated assignable spaces and approximate size, and general relationships among the various functions and groups, or*

**Level 2**

*Provide room descriptions or diagrams, identify users and functions and provide a general narrative of furnishings, equipment, finishes and system requirements. Identify relationships and adjacencies among spaces and functions and groups.*

It will be the Consultant’s responsibility to verify and refine the space requirements and priorities with the users.

**Site Considerations**

1. *Identify the site location, limits, and description. If site is to be selected, identify the sites under consideration and describe the attributes desired for the site and the process anticipated for selecting the site.*
2. *Describe required site improvements and anticipate future development or building expansions.*
3. *Describe pedestrian circulation expectations.*
4. *Describe vehicular circulation, parking, bike parking, bus or other drop-off zones, delivery areas, garbage collection, and fire access requirements.*
5. *Express landscape and site lighting expectations.*
6. *Identify anticipated site concerns or restrictions during construction.*

**Design Considerations**

1. **Circulation:** *Describe building general organization, hours of use, entry and public access, user access, security, control as they relate to hours of operation and delivery and control of materials.*
2. **Security:** *Indicate building access control, any video monitoring or restricted access areas.*
3. **Building envelope:** *Indicate any expectations regarding the exterior materials, relationship to surrounding buildings or the site, any campus standards or review committee approvals needed. Discuss envelope performance expectations, durability, views and daylighting desires, and roof performance.*
4. **Materials:** *Indicate expectations for general interior finishes or any specific areas that vary from the norm. Discuss any expectation that material selection will include sustainable design criteria (local, reuse, recycled, rapidly renewable).*
5. **Indoor Air Quality:** The building is designated tobacco/smoke free. Provide signage prohibiting smoking within *50*’ of all entrances or air intakes unless the building is on a tobacco-free campus.
6. **Environmental design parameters:** *Describe temperature, ventilation, filtration, sound/decibel level concerns, any special systems anticipated associated with specific uses, level of control and variation based on hours of operation. Describe general building pressurization expectations*. Locate air intakes away from all sources of contaminants.
7. **Emergency systems:** *Describe any systems anticipated to require battery back-up or generator power. Indicate if alarms need to annunciate at any point outside the building.*
8. **Telephone and Data Systems:** *Describe density, protocols, and infrastructure expectations. Indicate areas to be served by wireless networks.*

CONSULTANT SCOPE CHECKLIST:

*This Consultant Scope Checklist is for the purposes of assembling the original agreement between the Owner and Architect/Engineer based upon the Basic Project Information above. The format is nearly identical to Form 117, Architect/Engineer Fee Proposal. The executed agreement and any subsequent addenda between the parties will supersede this checklist.*

BASIC SERVICES (check all that apply):

[ ] Schematic Design [ ] Combine SD/DD into “Preliminary Design”

[ ] Design Development [ ] High-Performance Building Criteria applies

[ ] Construction Documents

[ ] Bidding

[ ] Construction Administration

ADDITIONAL SERVICES (check all that apply):

[ ] Site Planning

[ ] Programming

[ ] Fund-Raising & Marketing Assistance

Deliverables shall include:

[ ] Character Sketches, # of perspectives:

[ ] Presentation Boards, # of perspectives:

[ ] Descriptive Project Booklets, # copies:

[ ] Project Brochures - # of copies:

[ ] Physical Presentation Model

[ ] 3-D Computer Graphic Animation

[ ] Feasibility Study

[ ] Value Engineering Analysis

[ ] Energy Study

[ ] Hazardous Materials Investigation

[ ] Specialty Consultants requested by the Owner

 [ ] Acoustical [ ] Audio/Visual [ ] IT/Communications

 [ ] Correctional [ ] Cost Estimating [ ] Education/Demographics

 [ ] Interior Design [ ] Food Services [ ] Lab/Research

 [ ] Landscape [ ] LEED [ ] Security

 [ ] Other:

 [ ] Site/Topographic Survey

 [ ] Geotechnical Investigation

 [ ] Anticipated Frequency of site visits

 [ ] Architect

 [ ] Civil

 [ ] Structural

 [ ] Electrical

 [ ] Mechanical

 [ ] Commissioning

 [ ] 3rd Party [ ] Part of A/E Services

 [ ] Third-Party Document Review (e.g. Redi-Check)

 [ ] Bid Document Reproduction (check here if fixed sum)

 [ ] Record Documents

 [ ] Warranty Inspection

SUPPLEMENTAL SERVICES AND REIMBURSABLES (check all that apply):

 [ ] Bid Document Reproduction (check here if # sets to be determined later)

 [ ] Reimbursable Expenses (check here only if NOT part of Basic Services)