**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.*

**SMALL PROJECT INITIAL INFORMATION**

***PROJECT TITLE***

***AGENCY***

***LOCATION***

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

***Agency #***

***Month \*\*, 20\*\****

**Scope:**

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

**Design Standards:**

Coordinate with A/E project manager regarding project specific design standards and expectations including Basic Project Requirements.

**Project Budget:**

The project is funded *with [amounts & source(s)]* this includes all project-related expenditures including consultant fees, testing, construction and contingencies.

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:** *[Define as appropriate.]*

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 agree to milestones to meet this bid date.

Contract Execution:

Preliminary Design/cost estimate:

Bid/Construction documents including any revisions to estimated cost for base bid and alternates:

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

**Project Reviews:**

Upon receipt of the Consultant’s complete submission (see <http://architecture.mt.gov/> ) the A&E Division and the Agency representatives will review and marked-up documents and conduct a review meeting unless the project manager chooses more formal written comments/responses. The Consultant will resolve all issues and adjust the design accordingly.

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 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. *[Revise is different and verify requirements if federal funds or other funds that have restrictions are used]*

**PROJECT TEAM**

Owner Project Representatives: [*Edit to identify Owner’s team and have Consultant complete for his team.]*

**Owner’s Project Representatives:**

|  |  |
| --- | --- |
| A&E Design Project Manager:  Name  1520 East Sixth Avenue  Helena MT 59601  Phone: (406) 444-\*\*\*\*  e-mail: | A&E Construction Project Manager:  TBD  1520 East Sixth Avenue  Helena MT 59601  Phone: (406) 444-\*\*\*\*  e-mail: |
| Agency Project Representative:  Name  Address  City MT 59\*\*\*  Phone: (406) \*\*\*-\*\*\*\*  e-mail: |  |
|  |  |

Owner Consultants:

|  |  |
| --- | --- |
| Hazardous Materials Investigation: TBD | Commissioning Authority: NA |

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

|  |  |
| --- | --- |
| Project Engineer/Architect:  Name  Street  City MT 59\*\*\*  Phone: (406) \*\*\*-\*\*\*\*  e-mail: |  |

**Communications:**

All correspondence shall copy both A&E and agency representatives and must include the A&E Division project number A/E #\*\*\*\*-\*\*-\*\*

**Attachments and documents to be provided by the Owner:** [*List resources, existing drawings, utility information asbestos reports, agency project/work requirements, etc.]*

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):

Preliminary Design

High-Performance Building Criteria applies

Construction Documents

Bidding

Construction Administration

Anticipated Frequency of site visits

Architect

Civil

Structural

Electrical

Mechanical

Commissioning

3rd Party Part of A/E Services

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)