Owner Kickoff Meeting
<enter date>

Project Overview

1. Introduce project team
2. Discuss project scope and objectives
3. Discuss services to fulfill objectives
4. Discuss team members in-house and home office structure

Owner

1. Lines of communications from the Owner
   ▪ Designate in writing a representative with overall authority for the project (per contract)
   ▪ Who does Gilbane take direction from?
   ▪ Other key Owner players involved with the project (individuals, other departments like security, safety, maintenance, users, etc.)
   ▪ Will the Owner’s operations and maintenance department be involved with any part of the project?
   ▪ Identify Owner consultants working on project
2. Owner to provide copy of A/E contract to Gilbane (per contract)
3. What in particular does the Owner expect to see from Gilbane on the project?
4. Insurance requirements
   ▪ Who is providing builders risk insurance for project?
   ▪ Who is providing liability insurance for project?
5. Evidence of sufficient funds for the entire project (per contract)
6. Permitting
   ▪ Has the Owner met with the city about the project: required permits, approvals, overview, etc.?
   ▪ Status of permitting for the project (building permit, et al)
   ▪ Is a change in zoning required and has this process been initiated? What is the status?
   ▪ Have any environmental impact studies been done?
7. Review project budget
8. Review project schedule: completion date and what is driving it, other considerations or constraints
9. Owner responses to requests for information: turnaround time goal for team
10. How public relations are to be handled
11. Owner to amend contract by change order for guaranteed maximum price acceptance (if applicable)
12. Payment process  
   - Progress payment process (electronic fund transfer if available) and importance for expediting (create a flow chart showing the process)  
   - Format of monthly pay requisitions to Owner  

13. Owner approval process and turnaround time for construction change authorizations: look for ways to expedite this approval process where possible  

14. Owner contingency and allowances to be established  

15. Provide reports on any hazardous materials on project site  

16. Provide any sub-soil analysis or geotechnical reports that have been done on or near the project site  

17. Extent of commissioning desired on project: define and clarify  

18. Extended warranties required  

19. Identify early turnover of building areas  

20. Minority business enterprise and equal employment opportunity requirements  

21. Any special tax information or breakout needed from Trade Contractors as part of bidding the work  

22. Special general conditions to be included  

23. Value engineering required  

24. Equipment purchase and installation  
   - Pre-purchase of equipment  
   - Owner-furnished equipment  
   - Furniture, fixtures, and equipment  
   - Audio/visual  
   - Telecommunications  
   - Signage  
   - Identifying long-lead equipment and materials needed for pre-purchase  

25. Defining project closeout requirements  
   - Define operations and maintenance manual content and copies needed  
   - Recommended spare parts lists to be provided from the Trade Contractors  
   - What form are as-built drawings to be provided (marked-up red line, CAD file, other) and who is to receive them from Gilbane?  
   - Define extent of training to be provided  
   - Controlling the final Owner punch list process to avoid having numerous punch lists issued  

26. Determine if in-wall utilities should be videotaped to record locations  

27. Has the property been surveyed by the Owner to establish the property lines and setbacks?  

28. Are there any apparent problems with the site or the properties adjacent to the site?  

29. Have any preliminary studies on building sitting been done?  

30. Controlling Owner-driven changes near the end of the project
31. Tours of the project site and controlling them
32. Proprietary design/bidding documents
33. Confidentiality requirements
34. Set up the tax structure for the project
35. Define what is meant by substantial completion and beneficial occupancy

A/E

1. **A/E’s key players involved with project (design team members)**
2. Need for Construction Manager to meet at A/E’s office with key personnel assigned to project; discuss relationships and operating protocols
3. A/E’s response time to requests for information
4. Submittals
   - Submittal review durations by A/E and/or sub-consultants
   - Submittal review comment wording to be used
   - Submittal review process and creative ways to expedite review process (use of single approval sheet pre-stamped with Construction Manager and A/E stamps, etc.)
   - Agree on what submittals are formally required (work to minimize the number of these)
   - Minimize the use of ‘Revise and Resubmit’ submittals
   - Use ‘Approved as Noted’ and ‘Resubmit For Record’ responses
   - Don’t use submittals to make design changes on
5. A/E contract administration process (identify personnel responsible)
6. Current status of design (meeting milestone completion dates for schematic design, design development, and construction documents)
   - Review preliminary design schedule for releasing drawings
   - Define what schematic design, design development, and construction documents really mean
7. If Gilbane is providing pre-construction services, agree that project needs to be designed to the established budget using change orders to modify the basis of design to control building design costs early on
8. **Accepted industry standards will be used for acceptable tolerances**
9. A/E to provide architectural background drawings to be used for coordination drawings
10. A/E will be given opportunity to participate in and comment on the Trade Contractor’s above-ceiling drawing coordination effort
11. Review project budget
12. Review overall project schedule in general terms
13. Issuing changes to the contract documents for construction
   - Does the Owner want to review design changes before they are issued to the Construction Manager for processing?
- How will drawing changes be issued (formal addenda or bulletins, sketches, partial full-size drawings, other)?
- All changes to be clouded and marked with revision numbers and accompanied by a narrative when issuing addenda to the drawings and specifications
- How will partial specification section changes be issued: by complete section or by affected pages only
- Will all changes made by sketches, requests for information, field reports, etc. be picked up in future addenda?

14. In what CAD format should the A/E provide as-builts?
15. Furniture, fixtures, and equipment procurement and installation
16. Are there any apparent known site problems (existing building debris/remnants/dump site)?
17. Energy conservation features and potential Owner rebates
18. Participate in an interdisciplinary document coordination review and incorporate results into documents

19. **Incorporate constructibility review comments into drawings**
20. Provide project survey benchmarks and baselines on the site drawings
21. Final numbering of rooms to be shown on drawings or use construction room numbering throughout project; don’t change room numbers during construction

22. **Frequency of A/E site visits**
23. Will the A/E be on site full time at any point to help keep the project moving?
24. Value engineering sessions
25. Develop specifications parallel to the drawings as they are to be issued, especially on fast track projects
26. Provide a ‘reproducible set of drawings’ for working drawings
27. Provide half-size drawings
28. Explain relationship between A/E and the other consultants working on the project.
29. Coordinate A/E general conditions specification sections with Construction Manager’s
30. General conditions/buyout wording
31. Phasing of bid package drawings and specifications to facilitate the buyout process
32. Minimize the use of sole source suppliers in the specifications

33. **What does the A/E consider the project’s biggest challenges?**
34. Will the design be ‘high end’ requiring a lot of customized work and exotic materials?

35. Specify standard in stock materials that are readily available in the design documents (especially on fast track projects)
36. Provide design estimates
37. Reconcile design estimates between A/E and Construction Manager
Construction Manager

1. Contract status
2. Obtain a clear understanding of the expectations of the Owner and A/E
3. Review list of contract deliverables: extent of services to be provided (what will and will not be provided)
4. Review project budget
5. Review project schedule: is it realistic?
6. Format of monthly status report (web page, hard copy, other)
7. Routing of correspondence between members of the team
   - Use of e-mail
   - Transmittals
8. Copy of typical forms to be used (request for information, submittal cover sheet, transmittal sheet, construction change authorization forms, quality in construction forms, bid proposal forms, etc.)
9. Type and frequency of meetings
   - Weekly Owner’s meetings
   - Weekly Trade Contractor meetings
   - Weekly Superintendents meetings
   - Weekly Project Managers meeting
   - Weekly coordination meetings
   - Bimonthly project team meetings (Owner, A/E, Construction Manager)
   - Monthly principals meeting
   - Establish agenda format for meetings
   - Discuss need for, on a monthly basis, administrative meetings to review events of the past month, critical issues needing attention, and projection on the upcoming month’s activities
10. Typical work schedule, start and end of trade workday
11. Independent third-party testing and inspections of soils, concrete, and steel work, and Gilbane’s role in procurement and management of testing agency.
12. Meet with local city inspection department to introduce team players and review project
13. Coordinate required on-site inspections by local inspectors
14. Project staffing and intended start dates for personnel
15. Responsibility matrix for on-site and home office support personnel
16. Discuss services to be provided to fulfill project objectives
17. Monthly project schedule updates and card trick sessions
18. Develop and monitor project cost control system
19. Change order process
20. Status of building permits and/or any other permits
21. Bonding and insurance requirements
22. Develop project directory
23. Emergency procedures
24. Describe buyout process
25. Coordinate design packages with bid packages to meet buyout schedule
26. Provide purchase and award schedule
27. Status of buyout
28. Are existing as-built drawings available for use
29. Trailer location and utilities: site utilization plan
30. Safety
   ▪ Safety program
   ▪ Safety incentive program and celebrations
   ▪ Drug testing
   ▪ Visitor requirements
31. Review quality plan, types of planned quality in construction (QIC) inspections to be conducted, and Owner and A/E participation in inspections
32. Define mock-ups needed up front
33. Site access
34. Site security
35. Site survey
36. Explain client survey process and feedback
   ▪ Review previous Owner and A/E client survey results: areas of strength and areas needing improvement
   ▪ Completing importance column of client survey form
37. Importance of capturing lessons learned and using them on project
38. Gilbane’s deficiency management program: rolling completion list (RCL)
39. Handling pedestrian and truck traffic to and around project site
40. Project delivery truck routing
41. Planning for project closeout
42. Identify potential known or suspected impediments to the completion of the project
43. Using materials that are readily available in the design (especially important for fast track projects)
44. Minimize sole source product specifications
45. Importance of GU training to the project
46. Discuss Thomas and William Gilbane Project Achievement Award criteria
47. Schedule teambuilding sessions
48. Use of Prolog on project and between Owner and A/E
49. Establish document signing authority for team members
50. Identify project team tasks for the next 30, 60, 90 days
51. Importance of A/E participation in the mechanical coordination process
52. Importance of performing constructibility and interdisciplinary document coordination (IDC) reviews
53. Identify project contingencies put into place for each member of the building team
54. Identify Owner/CM allowances
55. Discuss the use of allowances on the project and how they will be managed
56. Send submittals concurrently to the Owner and A/E to expedite review process
57. Shop drawings are not to be used to modify the design
58. Drawings need to be dimensioned
59. Importance of holding the design through DDs to CDs.
60. Assign team members who are empowered to make decisions on the spot to keep the project moving
61. Performing pre-condition surveys
62. Existing hazardous material report on the property
63. Any special environment conditions that need to be met for the project?
64. Any special known code considerations?
65. Who is responsible for taking minutes at which meetings?
66. Review general conditions costs
67. Review final punch list process (only one final consolidated list to be given to Trade Contractors)
68. Distribution and storage of project files at completion of project
69. Extent of commissioning desired on project: define and clarify exactly what will be provided under the terms of the contract
70. A/E needs to understand Gilbane, and not the A/E, will insert notes relative to items of work and which bid package they will be assigned to
71. Gilbane will offer any assistance to the A/E regarding cost studies, investigation of availability of materials, and review of products/systems to be used
72. Determine how Gilbane will set up its computer connections/telephones on the job
73. Discuss use and cost of a web site on the project
74. Additional items to be discussed
75. Review action items arising out of this meeting and who is responsible for them before adjourning
76. Use of an internal rating system by all team members quarterly to address how well they are performing on the job with regard to the services they are providing
77. Use of a formalized partnering agreement on project