



○ **FEASIBILITY**

- Review purchase and sale agreement.
- Review seller's documents pursuant to the PSA.
- Assist in retaining Client's professionals to investigate the feasibility of the Project.
- Work with professionals to develop a list of general requirements for the Project, as applicable.
- Provide management, coordination and oversight of professionals' services.
- Work with professionals in gathering information and documentation.
- Based on professionals' schematic designs and investigations, compile findings to include a projected timeline.
- Work with professionals to prepare an opinion of probable costs (the "OPC"), excluding proprietary costs.

○ **DUE DILIGENCE – TESTING & DESIGN**

- *Testing*
  - Assist in retaining Client's testing engineers required for testing of the soils and environmental conditions.
  - Provide management, coordination and oversight of testing engineers' services.
  - Assist in evaluating testing engineers' test results and reports.
  - Based on testing engineers' tests and reports, prepare an opinion of conditions affecting the Project.
- *Design*
  - Assist in retaining Client's design professionals required to design the improvements including but not limited to:
    - Surveyor
    - Civil Engineer
    - Architect
    - Mechanical/Plumbing/Structural Engineer
    - Land Planner
    - Landscape Engineer
    - Lighting Engineer
  - Provide management, coordination and oversight of design professionals.
  - Assist in reviewing design professionals' services.
  - Review design professionals' design documents during their development and make recommendation on proposed improvements, selection of materials, building systems, and methods of delivery.
  - Make recommendations on construction methods, availability of materials and labor, time requirements for procurement, installation and construction, and factors related to constructability and possible economies.
  - Review design documents and make recommendation if design details adversely affect constructability, cost or schedule.

○ **APPROVALS**

- Assist Clients consultants in preparation of submittals for approvals.
- Monitor the approval process.



- Coordinate review/comments by authorities.
  - Coordinate responses by design professionals.
  - Participated government meetings as/if required:
    - Technical review (TRC)
    - Design review (DRC)
    - Planning review (PRC)
    - Planning & Zoning (P&Z)
    - Public Hearings (Council)
  - Participate in approval meetings as/if required.
  - Assist in expediting the approval processes.
  - Maintain update/log of approvals and update Client as relates to the current timetable.
- **PRE-CONSTRUCTION – BID & PERMITS**
- Assist Clients consultants in preparation of submittals for permits.
  - Monitor the permitting process.
  - Coordinate review/comments by authorities.
  - Coordinate responses by design professionals.
  - Participated government meetings as/if required:
  - Participate in approval meetings as/if required.
  - Assist in expediting the permit processes.
  - Maintain update/log of comments and update Client as relates to the current timetable.
  - Assist with agreements and approvals from utility providers.
  - Assist design professionals in preparation of bid document and construction documents.
  - Assist on the division into phases and/or contracts as applicable.
  - Assist in compiling a list of three prospective bidders and developing bidders' interest in the Project, establishing bidding schedule, and distribution of invitations to bid.
  - Assist in the enumeration and distribution of Plans.
  - Receive, review, analyze and make recommendation on bids.
  - Assist in awarding construction contract(s) to a qualified contractor(s).
  - Assist in awarding contracts to Client's consultants required to certify the ongoing work and completion of the Project.
  - Assist in preparing and negotiating the contract(s) for construction.
- **CONSTRUCTION**
- Provide oversight of the administration of the construction contract.
  - Coordinate scheduled activities and responsibilities of the contractor(s).
  - Attend bi-monthly on-site meetings to review and report on procedures, progress and schedule.
  - Review contractor's schedule and make recommendation for corrective action where/when applicable.
  - Maintain records on authorized work performed and additional work performed.
  - Develop and implement procedures for the review and processing of applications for progress and final payments.
  - Assist Client's consultants in the review and certification of amounts due on applications for payment.
- Note: DMI shall not; (i) make exhaustive or continuous on-site inspections to check the quality or quantity of the work, or; (ii) be responsible for construction means, methods, techniques, sequences for the



contractor's own work, or procedures, or: (iii) review copies of requisitions received from subcontractors and material suppliers and other data unless specifically requested by Client to substantiate the contractor's right to payment, or; (iv) be responsible for ascertaining how or for what purpose the contractor has used money previously paid on account of the contract sum.

- Determine in general that contractor's work is being performed in accordance with the requirements of the contract documents, endeavoring to guard Client against defects and deficiencies in the work. Note: DMI shall not: (i) have control over or charge of and shall not be responsible for construction means, methods, techniques, sequences or procedures, or for safety precautions and programs in connection with the work since these are solely contractor's responsibility under the contract for construction, or; (ii) be responsible for contractor's failure to carry out the work in accordance with the respective contract documents, or; (iii) have control over or charge of acts or omissions of the contractor(s), subcontractors, or consultants, or their respective agents or employees, or any other persons performing portions of the work not directly employed by DMI.
- Assist in the review of requests for interpretations and the resolutions.
- Assist in the review of requests for changes.
- Oversight of the processing and approval of shop drawings, product data, samples and other submittals.
- Record the contractor's progress and its task and schedule updates.
- Maintain a digital copy of Project records.

○ **POST CONSTRUCTION**

- Assist in the close-out of the Project.
- Coordinate Client's consultant's certifications as required for procurement of final inspections and approvals.
- Coordinate contractor's procurement of certificates of occupancy or such other document(s) as required for Client to use the facility for the intended use.
- Coordinate contractor's hand-off to Client, including operating instructions by subcontractors.
- Coordinate and review contractor's closing documents, certifications and guaranties.
- Coordinate and review contractor's final application for payment.
- Coordinate and review releases of lien and reconcile with the notices to owner received.
- Coordinate closure with lender or surety if any.
- Coordinate transition to a property management company, if applicable.

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President

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