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Working With Contractors

March 2023

Contractor Management - Kickoff

Kickoff with all relevant parties – ideally, in person

- District staff, contractor staff, construction & architect staff (if relevant)
- Project scope
- Project timelines
- Communications & project status
- Escalation process
- Work hours & building access
- Damage
- Contract administration (change orders & payments)
- Training, documentation, testing & acceptance
- Next steps

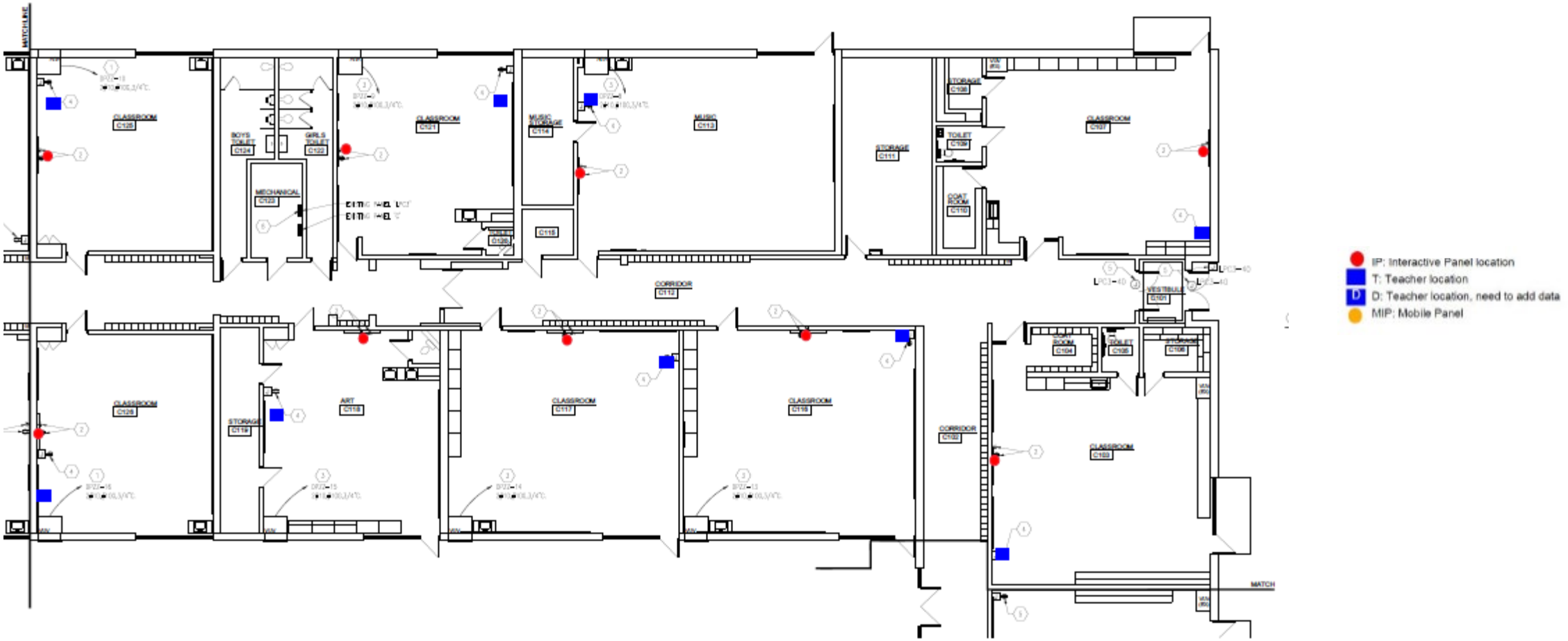
Contractor Management – Design Review

Design Review

- Typically follows kickoff and varies in scope based on technology
- Review and/or finalize contractor design documents
- Print review *
- Building walkthrough *
- Notify architect/construction of any changes necessary based on final walkthrough

* if relevant based on technology

Contractor Management – Design Review



Contractor Management - Implementation

Weekly status meetings

- Progress updates
- Coordination between district and vendor
- Coordination with architects and construction
- Also require vendors to attend on-site construction meetings

Building walkthroughs (if relevant)

- Weekly for AV, cabling, video surveillance, door access, etc.
- Milestone based for other technologies
- Check status of implementation
- Ensure adherence to proposal/contract requirements
- Ensure adherence to codes (electrical, other)
- Develop and provide documentation of issues to contractor

Contractor Management - Implementation

Issues Lists

	A	B	C	D	E	F	G	H
1	School	Door Location	Installed?	Card Swipe Releases Door?	AIPhone / Remote Latch Works?	Solid Green Light on Card Swipe	ADA Operator w/ Card Swipe	Notes
2	High School	Main Entrance	Yes	Yes	Yes	Yes	Yes	
3	High School	East Entrance	Yes	Yes	N/A	No	No	Contractor to revisit/resolve
4	High School	West Entrance	Yes	Yes	N/A	Yes	Yes	
5	High School	Gym Entrance	No	No	N/A	No	No	Contractor to install
6	Middle School 1	Main Entrance	Yes	Yes	No	Yes	No	Contractor to revisit/resolve
7	Middle School 1	North Entrance	No	No	N/A	No	No	Contractor to install
8								

Contractor Management – Paperwork

Change Orders

- Documentation of additions and deductions to contract
- Validation of scope
- Validation of amount against contract
- Tracking of total contract against award and contingency

G703

SCOPE CHANGE

Initiated by OWNER ■ ARCHITECT ☐ DESIGNER ☐ OTHER ☐

SCOPE CHANGE ORDER NUMBER: 15
DATE: 9/22/2017

PROJECT:	TO CONTRACTOR:
[redacted]	

PROJECT #'s:	2017 Classroom AV
CONTRACT DATE:	5/19/2017
CONTRACT FOR:	Classroom AV Project
DIST. PO NUMBER	

The Contract is changed as follows:

	QTY	UNIT	EXTENDED
Additions			
<Building Name> - Labor and Material for Audio Enhancement system - Room D01	1	$ 1,299.75	$ 1,299.75
<Building Name> - Labor and Material for Audio Enhancement system & Collaboration - Room B11			
Audio System - Installed	1	$ 1,299.75	$ 1,299.75
Classroom Collaboration	1	$ 756.48	$ 756.48
District Provided Projector (Wireless Module Not Included)	1	$ 385.73	$ 385.73
Epson Wireless Module	1	$ 79.00	$ 79.00
		Total Additions	***$ 3,820.71***
Net Change			***$ 3,820.71***

Contractor Management – Paperwork

Change Orders

- Identify timing impacts
- Written approval prior to work
- Communication and coordination with construction

Net Change			***$ 3,820.71***
The original contract amount was . .PO#(Amt):			$ 1,392,551.00
Net change by **previously** authorized scope change/change orders . (sum of prev CO#1+CO#2+.....CO#n, to date)			$ 103,915.46
The contract amount prior to this scope change/change order was			$ 1,496,466.46
The contract amount will be increased by this scope change/change order in the amount of			$ 3,820.71
The new contract amount including the scope change/change order will be			$ 1,500,287.17
The contract time will be increased by			0 days
The new date of completion as of the date of this scope change/change order therefore is			No Change
Not valid until signed by all parties below.			
Designer	Contractor	Owner	
Address	Address	Address	
BY	BY	BY	
Technology Consultant	Account Executive	Director of Technology	
DATE	DATE	DATE	

Contractor Management – Paperwork

Billing

- AIA Form G702/703
- Validation of work completed
- Stored materials
- Retainage
- “Architect” must be identified on every pay app

APPLICATION AND CERTIFICATION FOR PAYMENT *AIA DOCUMENT G702* PAGE ONE OF 2 PAGES

TO OWNER: PROJECT: APPLICATION NO: Distribution to:
☐ OWNER
☐ ARCHITECT
☐ CONTRACTOR
☐
☐

PERIOD TO:

FROM CONTRACTOR: VIA ARCHITECT:
Plante & Moran
27400 Northwestern Hwy
Southfield, MI 48037

PROJECT NOS:

CONTRACT Servers CONTRACT DATE:

CONTRACTOR'S APPLICATION FOR PAYMENT

Application is made for payment, as shown below, in connection with the Contract.
Continuation Sheet, AIA Document G703, is attached.

1. ORIGINAL CONTRACT SUM		$
2. Net change by Change Orders		$
3. CONTRACT SUM TO DATE (Line 1 ± 2)		$
4. TOTAL COMPLETED & STORED TO DATE (Column G on G703)		$ 0.00
5. RETAINAGE:		
a. 10 % of Completed Work (Column D + E on G703)	$ 0.00	
b. % of Stored Material (Column F on G703)	$ 0	
Total Retainage (Lines 5a + 5b or Total in Column I of G703)		$ 0.00
6. TOTAL EARNED LESS RETAINAGE (Line 4 Less Line 5 Total)		$ 0.00
7. LESS PREVIOUS CERTIFICATES FOR PAYMENT (Line 6 from prior Certificate)		$
8. CURRENT PAYMENT DUE		$ 0.00
9. BALANCE TO FINISH, INCLUDING RETAINAGE (Line 3 less Line 6)		$ 0.00

CHANGE ORDER SUMMARY	ADDITIONS	DEDUCTIONS
Total changes approved in previous months by Owner		
Total approved this Month		
TOTALS	$0.00	$0.00
NET CHANGES by Change Order	$0.00	

The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner, and that current payment shown herein is now due.

CONTRACTOR:

By: _____ Date: _____

State of: County of:
Subscribed and sworn to before me thi: day of
Notary Public:
My Commission expires:

ARCHITECT'S CERTIFICATE FOR PAYMENT

In accordance with the Contract Documents, based on on-site observations and the data comprising the application, the Architect certifies to the Owner that to the best of the Architect's knowledge, information and belief the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment of the AMOUNT CERTIFIED.

AMOUNT CERTIFIED . . . . . $ _____

(Attach explanation if amount certified differs from the amount applied. Initial all figures on this Application and on the Continuation Sheet that are changed to conform with the amount certified.)
ARCHITECT:

By: _____ Date: _____

This Certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.

AIA DOCUMENT G702 · APPLICATION AND CERTIFICATION FOR PAYMENT · 1992 EDITION · AIA® · © 1992 THE AMERICAN INSTITUTE OF ARCHITECTS, 1735 NEW YORK AVE., N.W., WASHINGTON, DC 20006-5292

Users may obtain validation of this document by requesting a completed AIA Document D401 – Certification of Document's Authenticity from the Licensee.

Contractor Management – Paperwork

Billing

- AIA Form G702/703
- Validation of work completed
- Stored materials
- Retainage

CONTINUATION SHEET *AIA DOCUMENT G703* PAGE 2 OF 2 PAGES

AIA Document G702, APPLICATION AND CERTIFICATION FOR PAYMENT, containing Contractor's signed certification is attached.
In tabulations below, amounts are stated to the nearest dollar.
Use Column I on Contracts where variable retainage for line items may apply.

APPLICATION NO:
APPLICATION DATE:
PERIOD TO:
ARCHITECT'S PROJECT NO:

A ITEM NO.	B DESCRIPTION OF WORK	C SCHEDULED VALUE	D WORK COMPLETED FROM PREVIOUS APPLICATION (D + E)	E WORK COMPLETED THIS PERIOD	F MATERIALS PRESENTLY STORED (NOT IN D OR E)	G TOTAL COMPLETED AND STORED TO DATE (D+E+F)	G % (G ÷ C)	H BALANCE TO FINISH (C - G)	I RETAINAGE (IF VARIABLE RATE)
1						$0.00			$0.00
2						$0.00			$0.00
3						$0.00			$0.00
4						$0.00			$0.00
5						$0.00			$0.00
6						$0.00			$0.00
7						$0.00			$0.00
8						$0.00			$0.00
9						$0.00			$0.00
10						$0.00			$0.00
11						$0.00			$0.00
12						$0.00			$0.00
13						$0.00			$0.00
14						$0.00			$0.00
15						$0.00			$0.00
16						$0.00			$0.00
17						$0.00			$0.00
18						$0.00			$0.00
19						$0.00			$0.00
						$0.00			$0.00
						$0.00			$0.00
						$0.00			$0.00
						$0.00			$0.00
	GRAND TOTALS	$0.00	$0.00	$0.00	$0.00	$0.00	0.00%	$0.00	$0.00

Users may obtain validation of this document by requesting of the license a completed AIA Document D401 - Certification of Document's Authenticity

Contractor Management – Closeout

Obtain documentation

- Updated and validated as-built documentation
- Warranty documentation
- User/technical manuals
- Training documentation

Acceptance testing/walkthrough

- Develop and resolve punch-list
- Perform testing as defined by contract acceptance criteria
- Communication and follow up with contractor

Training

- Confirmation that all training required by contract has been delivered
- IT training
- End User training

Warranty

- Understanding of process
- Documentation received
- Start of warranty period (include in RFP/contract)

Lessons Learned

Strong contract

- Acceptance process and criteria
- Contractor staff requirements/right to replace
- Timing for warranty
- Training and other requirements

Clarity of scope and design

Strong contractor staff, including project management

Consistent communications

Ongoing coordination with construction

Continued oversight of contractor

Permits

Knowledge transfer

Acceptance testing

Escalation process

- Implementation vendor
- Manufacturer
- Construction and architect
- Other contractors
- District

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Finalize Credit for Attendance

New Process: The MSBO Evaluation is your record for attendance.

Please complete by March 6

- ✓ Receive an email from survey monkey for the MSBO evaluation. Your evaluation will be your record for attendance.
- ✓ Receive e-mail from MOECS-noreply@michigan.gov to fill out an evaluation for SCECHs.