Ontario Association of Architects

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Coordination of Consultants

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Summary

Coordination of the design and construction phase services of the various consultants is imperative in order to have a successful and safe project. This Practice Tip has been prepared to clarify the definition contained in the standard forms of client/architect contracts by listing tasks involved within the various phases of the architect's services.

Background

Consultant coordination is a basic part of the services in the Ontario Association of Architects (OAA) and the Architecture Canada (RAIC) client/architect agreements. Permit applications, for projects required to be designed by architects and engineers, include a "Commitment to General Review" by the owner and the consultants. In the owner's portion there is a space to name the "coordinator of the work of all consultants".

The Canadian and Ontario standard contracts for architect's services, OAA 600 and Architecture Canada (RAIC) Document 6, each have the same wording in relation to coordination of consultants. The Articles state, "The architect shall coordinate the services of the following consultants", followed by a list of the consultants engaged either by the architect or engaged by the client.

Consultant Coordination is defined in these two contracts as consisting of:

- managing the communications between *Consultants* and with the *Client*, and
- providing direction as necessary to give effect to any design decisions taken, and
- reviewing the product of the *Work* to assist in identifying conflicts and to monitor compliance with directions.

What are the expectations of this coordinator of all consultants?

Where an owner retains either an architect or engineer as the coordinator of all consultants, it is that professional's responsibility to co-ordinate the various parts of the design in order that all of the various parts of the project documentation including those items that come at a later date will fit with the original design and comply with building code requirements.

Architects have a professional responsibility to protect the public safety by virtue of the architectural licence granted to them by the OAA under the *Architects Act*. They are also required to carry professional liability insurance. Engineers have a similar responsibility with regard to public safety granted to them by the Professional Engineers Ontario (PEO) under the *Professional Engineers Act*.

Architects are educated and qualified to bring disparate parts together into a coherent whole. It is both a traditional and a typical role for architects by virtue of their required training and on-going experience. When a building official knows that there is an architect who has undertaken this coordinating role, it diminishes concern that something is missing from the building permit submission that might jeopardize public safety. In larger projects, this is reinforced in Ontario's Building Code by the requirement for General Review by an architect or engineer during construction.

There are two parts to the coordination of the work of all consultants:

1. the coordination of the architectural design with the designs of the engineers and other consultants;
2. the coordination of the management of the project for:
    a) the management part of design coordination: choices and decisions affecting the design and,
    b) overall management coordination: program, budget, schedule, communications, construction contract administration, general reviews required by the codes etc.

Coordination begins at the inception of the project, the first meetings with the client and/or consultants, and continues as long as the architect is involved with the project.

Architects start with the pre-design services and an initial conceptual design. As the design develops the architect incorporates various disparate functional needs such as codes, life safety, structural, mechanical, electrical and other consultants, sustainable goals, client's needs and aspirations, program, schedule and budget parameters into a final design - coordinating of all these factors while maintaining the design.

Tasks Included in the Role of Coordination of All Consultants:

1. Overall - All Phases

1.1 Establish procedures for and manage information flow among all consultants and all other parties involved.

1.2. Provide direction as necessary to give effect to any design decisions taken.

1.3 Obtain and circulate client comments whenever they occur and approvals to move from phase to phase and changes to budget to coordinate with estimates of construction cost estimates.

1.4 Review the program of requirements and design documents as they develop to assess, identify and assist to modify and resolve incompatibilities among requirements of all consultants.

1.5 Assist to identify any imbalance or incompatibilities and to establish a congruent relationship among the client’s building program, budget and project schedule.

2. Pre-Design Phase

2.1 Review agreements of all consultants for compatibility including General Review during construction.

2.2 Assist client to obtain and circulate relevant information about existing conditions of the client’s property, such as geotechnical, survey, topographical, toxic and hazardous material.

2.3 Obtain, review and circulate client-supplied data (program, budgets, schedule, etc.)

2.4 Obtain, review and circulate requirements of all consultants, related to existing conditions, such as boreholes.

2.5 Obtain, review and circulate requirements of authorities having jurisdiction including the requirements from each of the consultants.

2.6 Prepare project schedule for design documentation by all consultants and construction phase indicating milestones for decision-making.

3. Schematic & Design Development Phases

3.1 Establish and review with all consultants design criteria for all components to be integrated into the project.

3.2 Review alternative conceptual solutions, materials and systems proposed by all consultants and identify criteria and quality standards for selection.

3.3 Review schematic and design development documents to confirm that requirements of program, all consultants and authorities having jurisdiction have been incorporated.

3.4 Integrate outline specifications and/or materials lists of all consultants for completeness of all elements.

3.5 Review consultant's drawings to confirm consistency of layouts.

3.6 Monitor, review and update the program, budget and schedule.

3.7 Monitor and review estimates of construction cost.

4. Construction Documents Phase

4.1 Determine format, sequence, numbering, revision system and schedule for production of construction documents.

4.2 Review detailed documents prepared by all consultants to confirm previously agreed decisions and requirements of statutes, regulations, codes and by-laws have been incorporated.

4.3 Integrate specifications of all consultants for completeness of all elements and coordination with proposed General and Supplementary Conditions.

4.4 Manage consultants checking of own documents plus the overall coordination - stress to all "have you done your own coordination?"

4.5 Coordinate exchanges of information, documentation, drawings and specifications, among all consultants and resolve conflicts and inconsistencies.

4.6 Review and update the estimate of construction cost to incorporate information from all consultants.

5. Bidding or Negotiations

5.1 Review bidding information and forms for compatibility with documents prepared by all consultants and client's requirements.

5.2 Establish procedures for organizing and handling bid documents, including arranging reproduction, distribution, retrieval, record keeping, receipt and return of deposits.

5.3 Receive all questions related to bidding documents; expedite exchanges of information among consultants and coordinate necessary responses to questions.

5.4 Organize preparation and distribution of addenda, including review of supplementary documents for compatibility.

5.5 Establish procedure with all consultants for evaluation of bids.

5.6 Assist in award and preparation of construction contract.

6. Permits

6.1 Coordinate preparation, compilation and submission of application for building permit and other authorities approvals.

6.2 Obtain owner's and consultants' signatures on application and commitment forms.

6.3 Act as the "coordinator of the work of all consultants" in the "Commitment to General Review by Architect and Engineer" form produced by Engineers, Architects and Building Officials liaison group (EABO).

6.4 Coordinate and expedite response to any questions or requests for additional information from authorities, such as the Building Code Data Matrix.

7. Construction Contract Administration Phase

7.1 Review procedures for all consultants to carry out General Review. Utilize recommended standard forms such as those produced by EABO.

7.2 Establish and/or advise regarding the basic line of communications for the project among all parties, including contractor, client and all consultants.

7.3 Establish with the contractor procedures for the testing and inspection of specific materials and work by inspection and testing companies and for appropriate notification to the consultants prior to commencement of significant segments of the work.

7.4 Arrange for submission of General Review and other reports by all consultants to the contractor, building officials and client, per commitment for general review forms.

7.5 Establish procedures with all consultants for communication, approval, notification and record-keeping related to contractor's submissions, shop drawings and samples and applications for payments, etc.

7.6 Receive requests for interpretation of the contract documents and expedite and coordinate issuing of supplementary details, instructions and interpretations and findings with all consultants.

7.7 Establish procedure for documenting and implementing changes to contract, including: review of contractor's submissions, advice to the client and issuing of change orders and notifications of changes to building officials and other authorities.

7.8 Establish project close-out procedure with all consultants and authorities having jurisdiction; coordinate review and reporting, correction of deficiencies, receipt, review and distribution of required submittals (i.e. warranties, as-built drawings, guarantees, bonds, operating manuals, etc.) and coordinate submission of “Final General Review Report” (EABO standard form) to building officials and other authorities.

7.9 Arrange for review by all consultants of defects reported and for notification to contractor of items requiring attention prior to the end of the one-year contract warranty period.

Suggested Procedure

1. Be familiar with the tasks involved in the role of coordination of consultants and expectations of clients, consultants, building officials and contractors.
2. Use standard contracts that have the role of the architect properly documented; properly list all consultants that you will be expected to coordinate in the client / architect agreement (e.g. OAA 600).
3. Include adequate fees for coordination of the consultants, whether retained by the architect or directly by the client. The Architecture Canada/RAIC – “A Guide to Determining Appropriate Fees for the Services of Architects” (fee guide) notes a suggested percentage. If the client retains consultants directly so that you do not have knowledge of the fees, you would have to estimate for your fee purposes.
4. Review and confirm the architect’s role of “coordination of consultants” with your client and also with your consultants; remind all consultants of their role in checking and coordinating their own work.
5. If consultants which you are expected to coordinate are later added to a project, document this as a change to the client/architect agreement and obtain appropriate fees.
6. In the application for building permit, the “Commitment to General Review by Architect and Engineer” form should have the architect named as “coordinator of the work of all consultants”. If on your project you have not been engaged for this role (e.g. if you are a subconsultant to an engineer who acts as the prime consultant and is performing the coordination of consultants role) make sure your name is not indicated.

   If you have been engaged for the role of coordination of consultants with your name indicated as such and there is a change to your services during construction, you should advise the building department in writing.

7. On Design-Build, or Construction Management projects, with an active client's Project Manager, or if engaged for partial services, the role of coordinator of all consultants may not be as clearly defined as in traditional Design-Bid-Build work or understood the same way by all parties. Clarify the role contractually and with discussions with the parties.

References

Owner's Commitment for General Review by Architect or Engineer, Obtain from local municipality.

The OAA does not provide legal, insurance or accounting advice. Readers are advised to consult their own legal, accounting or insurance representatives to obtain suitable professional advice in those regards.
