

Suggested CCA Services Summary & Checklist

Services Agreement:

- Do not provide services without a written agreement
- Do not agree to services that are not reasonable
- Use AIA documents
- Provide CCA services during construction (state statutes may require)
- Provide all services required in the contract
- Document owner-waived services in writing

Statutes and Standards:

- Read and conform to adopted state jurisdiction statutes
- Determine if the state has adopted minimum CCA requirements
- Be aware of codes and standards affecting the project
- Conform to the standard of care

Site Visits:

- Check state regulatory requirements for site visits
- Provide site visits as required in the services agreement
- Discuss with owner the need for appropriate site observations for determining conformance and completion
- Discuss with owner the difference between “observations” and “inspections”
- Provide a Site Observation Report with each site visit

Submittal Review:

- Check state regulatory requirements for submittal review
- Require a submittal schedule from the contractor
- Discuss submittals in the Preconstruction Conference
- Review only specified submittals
- Log and track submittals independently from the contractor

Request for Information:

- Use AIA form G714, Request for Information
- Discuss RFIs in the Preconstruction Conference
- Send RFIs to the owner and contractor for contract required information that is not provided
- Log and track RFIs independently from the contractor

Change Processing:

- Prepare and sign all change documents
- Log and track changes independently from contractor
- Do not certify payment for changes until the change documents are executed
- Qualify your change order signature as, “Not for Cost Approval”
- Send an RFI to the contractor if change order pricing is not timely

Payment Certifications:

- Use AIA document G702, Application and Certificate for Payment
- Use AIA document G703, Continuation Sheet
- Require notarized contractor signatures on the application
- Do not certify payment for owner’s separate consultants or separate contractors
- Use an enclosure letter or letter of transmittal when sending certification to owner
- Consider qualifying architect’s certification language in the enclosure letter or on the certificate itself
- Address any special administrative requirements in the preconstruction conference

Substantial and Final Completion:

- Use AIA document G704, Certificate of Substantial Completion
- Check to be sure the date of substantial completion is clearly indicated
- Note if the punch list is attached or under separate cover
- Check to be sure the designated portion of the project is clearly indicated
- Include the note, “all remaining areas of the project,” on the last certificate issued
- List all known owner accepted nonconforming work
- Only certify work required under the issuing party’s services agreement
- DO NOT ISSUE A CERTIFICATE OF FINAL COMPLETION OR ACKNOWLEDGE FINAL COMPLETION IN WRITING

Project Meetings:

- The Preconstruction Conference is the primary construction phase planning meeting
- The Contractor’s Work Plan should include contractor managed meetings
- Mock-up Review Meetings should be included in the Project Construction Schedule
- All meetings should be reported in writing
- Attendees should take notes in all meetings
- Inaccurate published meeting minutes should be rebutted in writing before the next meeting