

Attachment L – Consultant Agreement Closeout Checklist

**MILWAUKEE COUNTY
DEPARTMENT OF ADMINISTRATIVE SERVICES, FACILITIES MANAGEMENT DIVISION
CONSULTANT AGREEMENT CLOSEOUT CHECKLIST**

Consultant: _____

Project Title: _____

Project No.: _____

Agreement (Contract) No: _____ Effective Date: _____

Type Agreement: _____

Consultant Selection Documentation in File: Yes _____ No _____

**These deliverable items from the consultants must be in the FACILITIES MANAGEMENT DIVISION
Project (Job) File:**

___ Final Project Program Report (*Scope of project as agreed by all parties*)

*From Interviews, research, and study the consultant shall prepare a program and an Estimate of Probable Construction Costs for the project. **Elements of the program** shall include a full description of each of the following:*

- .1 Exterior and interior functional areas and spaces of the Project, with technical and equipment requirements on each;*
- .2 Comparisons between existing and proposed facilities and systems;*
- .3 Diagrams to describe proposed circulation and relationships between functional areas and departments;*
- .4 Descriptions of provisions for future changes and growth;*
- .5 Narrative of the rationale for proposed program and prioritized options to maintain Project budget.*

After review, the CONSULTANT shall incorporate necessary corrections and additions into the final report and submit three (3) copies to OWNER for approval.

___ Final Estimate of Probable Construction Costs (Submitted before bid process begins)

When the documents are one hundred percent (100%) complete, the CONSULTANT shall submit three (3) copies to OWNER for approval of completed Bidding Documents and an updated Estimate of Probable Construction Costs.

___ Copies of all State and Local Plan Examination approvals and receipts for paid application fees

*CONSULTANT shall: Make Application for required **plan approvals**. Pay local and state Examination Fees and be reimbursed at cost (fee for General Building Permit to be paid by Contractor).*

___ Project Manual and all addendum originals

When the documents are one hundred percent (100%) complete, the CONSULTANT shall submit three (3) copies to OWNER for approval of completed Bidding Documents and an

Attachment L – Consultant Agreement Closeout Checklist

updated Estimate of Probable Construction Costs.

CONSULTANT shall: Prepare necessary Addenda copies for distribution required to amend or clarify Bidding Documents. Complete Addenda so Bidders have access to them at least five (5) working days prior to bid opening. OWNER will mail out Addenda copies if they are delivered no later than seven (7) working days prior to bid opening.

___ Written recommendation as to Substantial Completion and final acceptance of the project (AIA Form G704)

The CONSULTANT shall provide administration; coordination and on-site observation of the work in compliance with Wis. Stats. Chapter 443; confirm compliance with Contract Documents; determine quality and acceptability of materials provided and interpret Contract Documents; observe required tests; make recommendations regarding Change Orders and payments to contractors; and make recommendations as to Substantial Completion and final acceptance of the Project.

Wis. Stats. Chapter 443: <https://docs.legis.wisconsin.gov/statutes/statutes/443>

Final Payment shall be made after the following have been accomplished: OWNER is in receipt of CONSULTANT's signed Certification of Substantial Completion (A.I.A. Document G704) in conformance with Contract Documents (for each contract).

___ Written confirmation of compliance of the Work with Contract Documents (WI Commercial Bldg. Code, Form SBDB-9720)

The CONSULTANT shall provide administration, coordination and on-site observation of the work in compliance with Wis. Stats. Chapter 443; confirm compliance with Contract Documents; determine quality and acceptability of materials provided and interpret Contract Documents; observe required tests; make recommendations regarding Change Orders and payments to contractors; and make recommendations as to Substantial Completion and final acceptance of the Project.

Wis. Stats. Chapter 443: <https://docs.legis.wisconsin.gov/statutes/statutes/443>
WI Commercial Bldg. Code, Form SBDB-9720

___ Final submitted schedule

___ Record documents (in accordance with Attachment I) are accessible and useable _____
(FCAP Records)

___ Consultant approved Operation and maintenance manuals and data, warranties, Owner Training, Attic Stock, and other required closeout documents

___ Confirmation of Site Clean-Up (i.e. environmental or geotechnical soil cuttings, purge water)

___ TBE/DBE Participation (Attached Approved Final Utilization Report): TBE/DBE-18 Form

All of the above items applicable to this project have been submitted

Prime CONSULTANT Signature: _____

County Project Manager Approval: _____ Date: _____