



# PROJECT MANAGEMENT SERVICES

The foregoing is an indication of the typical services involved in the management of a Project. The schedule is intended to be a discussion document, to be tailored to meet the specific requirements of a particular project.

## General

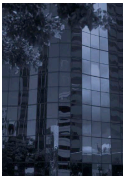
- Identify and develop the clients brief.
- Manage, co-ordinate and control all aspects of the development from the time of appointment to completion at the end of the defects liability periods and the issue of the final certificate.
- Represent the Client. Provide the link through which the Client's requirements are relayed to the project team.
- Keep the Client informed on all matters in connection with the development at all times.

## Development Finance

- Identify the clients financial position and funding requirements.
- Identify suitable funders and prepare a comprehensive funding application document to secure acquisition, fees and development finance.
- Negotiate preferential Heads of Terms on the clients behalf and secure funding.

## Design Team

- Review the responsibilities of the Consultants. Establish appropriate forms of appointment including Warranties for all Consultants, which are acceptable to the Client and Fund. Arrange for the timely execution of the forms of appointment
- Establish channels of communication between the Client, the Project Manager and the Consultants.
- Monitor the performance of the Consultants in the execution of their duties and the discharge of their responsibilities throughout the whole period of their respective appointments.



## Programming

- In conjunction with the Client and the Consultants, prepare and maintain a master programme from inception to completion, recording principal activities and identifying critical dates. Prepare and include within the master programme details of any Client direct works prior to occupation.
- Agree the programmes of work of the individual Consultants and Contractors and incorporate into the master programme.
- Check that applications for statutory consents, grants and the like are submitted in accordance with the master programme.
- Monitor and update the master programme on a regular basis.

## Reporting and Meetings

- Establish programme of meetings and their structure. Lay down procedure for convening, chairing, attendance, function, frequency and responsibility for recording of meetings and circulation of information.
- Monitor communications and distribution of information.
- Attend Design Team and site meetings and any other meetings that may reasonably be necessary to perform the duties of a Project Manager.
- Provide a progress report to the Client every month from time of appointment covering all aspects of the development including financial matters.

## Design

- Ascertain and confirm all aspects of the design brief with the Client.
- Implement value engineering principles in all design work.
- Establish and maintain channels of communication between the Consultants and Client.
- In conjunction with the relevant Consultants, review and agree on the need for soil investigation, site surveys or structural surveys and the like and make recommendations to the Client.
- Monitor the progress and development of the designs against the respective design briefs.

## Legal Services

- Liaise with the Client's legal representatives to obtain full understanding of all contracts and agreements and direct Consultants accordingly.

## Financial Management

- In conjunction with the Quantity Surveyor, set up a system to control all the costs associated with the development. Define all cost categories.
- Co-ordinate the Consultants in the preparation of preliminary cost plans for the development and present to the Client for approval.
- Obtain Client authorisation to the costs of variations if and when the limit of authority is exceeded.



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- Obtain monthly cost report from Quantity Surveyor. Review cost plan and report to Client. Provide copy of Quantity Surveyors cost report to Client.
- Arrange for the preparation and maintenance of cashflow forecasts for the overall development expenditure. Monitor all payments made against predictions.
- Monitor settlement of final accounts

### Planning and Statutory Approvals

- Co-ordinate and support negotiations with planning and statutory authorities.
- Use reasonable measures to ensure that planning requirements are implemented and fully incorporated in to the designs. Ensure that all planning permissions and other approvals are applied for and obtained.
- Check that all reserved matters under planning approvals are satisfactorily resolved and cleared.

### Tender Processes

- In conjunction with the Client and the Consultants, decide upon the method of procurement, tender procedure, selection of tenderers, means of appointment, conditions of contract and content of tender documentation for each Contract and Sub-Contract.
- Co-ordinate and monitor the preparation and assembly of tender documentation. Check form and content.
- With the Consultants, prepare initial lists of tenderers, conduct pre-qualification interviews as necessary and obtain approval to tender shortlists.
- Manage the tender actions.
- If tenders are received which are in excess of cost plan, agree method of proceeding with the Client and instruct Consultants accordingly. Monitor actions taken and report to Client.

### Commissioning and Maintenance

- Arrange for the co-ordination of the commissioning of building services and specialist installations.
- Arrange all guarantees, test certificates, operating manuals, maintenance documentation, records, diagrams, drawings and the like and pass to the Client.
- Arrange hand-over procedures; advise the Client with regard to insurance matters; advise the Client with regard to maintenance contracts and procedures.

### Sales and Marketing

- Co-ordinate the manage budgets for Sales and Marketing, agency and solicitors fees.
- Identify the main target markets given the knowledge of local market and discussions with local agents.
- Identify the key Media Proposals, including; Local Newspapers and Magazines.
- Investigate the local options for the poster advertising; 48 sheet poster advertising, large graphic banners, finger pointers, bus advertising, radio advertising...etc



## MODE PROJECT SERVICES

- Appoint an Estate Agent and coordinate the agents marketing, including; high quality professional brochure with artist impressions and 3D imagery of the completed scheme.
- Arrange the launch dates for initial launch followed by the opening of the show flat/home
- Co-ordinate and manage the design, supply and fit out of the show flat/home
- Co-ordinate and manage the conveyance solicitor

### FURTHER INFORMATION

If you would like any further information or wish to discuss in more detail, please contact Mark Whitehead, BSc (Hons) MRICS MAPM on 0113 2614241 or Fraser Clark, MAPM on 01132 745756.