

A Sample Preconstruction Conference Agenda

Excerpted and adapted from *The Architect's Handbook of Professional Practice*, 13th edition
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SUMMARY

A preconstruction conference agenda outlines key aspects of a project's construction phase. The specific agenda of a preconstruction conference depends on the needs of the project. A few common agenda items are listed below.

SAMPLE AGENDA ITEMS

Notice to proceed. The owner may issue written notice to proceed to the contractor; any questions should be discussed.

Explanation of chain of command. Includes routing of shop drawings, catalogs, samples, project reports, scheduling reports, and maintenance instructions.

Project meetings. Scheduling, agenda, and attendance at project meetings are discussed.

Duties of the owner and contractor. Includes a brief review of the general conditions of the contract and its implementation.

Insurance. Requirements for amounts and types of coverage and submittal of insurance certificates are reviewed.

Financing. Evidence of the owner's ability to meet financial obligations is provided.

Submittals. Schedules are outlined for submittal of engineering data, shop drawings and operation and maintenance manuals, tests and inspections, and other submittals (including items required, procedures, number of copies, and distribution). Contractors are asked to send project representatives an unofficial preliminary copy and to identify the specification section with each submittal. Contractors are reminded of their obligations with respect to shop drawing review and submittal as well as the language of the contractor's approval stamp.

Progress payments. A schedule of values is established for the work of all trades, as well as procedures for progress payments. These procedures cover the handling of retainage and

partial lien waivers; payment for materials on hand and materials stored off-site; inspection, insurance,

and title for stored materials; any special requirements for government agencies (e.g., the U.S. Department of Housing and Urban Development or the Federal Housing Administration) or the construction lender; scheduling of consultant's site visits; and submission of payroll records if required with requisitions for payment.

List of subcontractors. A reminder is given that the general conditions may require the contractor, after award of the contract, to notify the architect in writing of the names of subcontractors or other persons or organizations proposed for portions of the work designated in the bidding requirements. Further is the requirement that the contractor shall not employ any subcontractor about whom the architect or owner has any reasonable objection.

Employment practices. Any requirement regarding wage rates or similar issues are clarified.

Utilities. Local regulations vary. Applications for temporary and permanent electric, gas, water, and telephone services must usually be made directly by the owner to the utility furnishing the service; the owner should be notified in sufficient time for the services to be in place when they are required.

Scheduling. Job progress scheduling requirements include frequency of updates, times for submittals and approvals, and dates when owner-furnished equipment and furnishings are required.

Contract changes and clarification. Procedures are set for handling of proposals, requests for backup information for change proposals, change orders, and construction change directives. Supplemental instructions are developed, such as procedures for obtaining interpretations of the contract documents (no changes should be made without appropriate authorization in writing).

Security. Job site security during nonworking hours is determined.

Parking. Parking areas are designated.

Storage. Areas are assigned for temporary storage of equipment and materials; special protection is required for stored materials and equipment.

Permits. Licenses, permits, and inspections required by local building authorities are reviewed.

Right-of-way. Restrictions are reviewed on use of the site, access, or availability of rights-of-way, as are special requirements or cautions regarding adjacent property, protection of trees, and similar issues.

Testing. The extent of laboratory testing and inspection services is decided, as well as who will be responsible for coordinating and scheduling their services. Routing of reports is also established.

Overtime. Notice and scheduling necessary for overtime work are arranged.

Cleanup. Responsibilities for cleanup and trash removal are assigned.

Owner-furnished equipment and furnishings. Responsibilities for receipt, unloading, handling, storage, and security information on mechanical and electrical connections are clarified.

Closeout. Procedures for closing out the project are delineated, including record drawings and other required submissions.

Public relations. Policies regarding statement to the media, anticipated public interest in the project, and restrictions on construction operations and other public relations activities are discussed. Construction sign requirements are determined.

Separate contracts. Their impact on the work of the project is evaluated. Requirements for coordination with other contractors on the site are discussed.

RESOURCES

More Best Practices

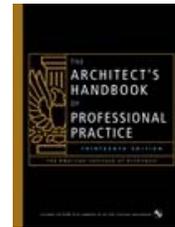
The following AIA Best Practices provide additional information related to this topic:

- 11.04.01 Quality Control: A Construction Contract Administration Checklist
- 11.02.02 Quality Control: A Working Drawings Preparation Checklist
- 11.02.06 Quality Control: A Specifications Preparation Checklist

For More Information on This Topic

See also “Contract Administration,” by Patrick Mays, AIA, *The Architect’s Handbook of Professional Practice*, 13th edition, Chapter 18, page 603.

See also the 14th edition of the *Handbook*, which can be ordered from the AIA Bookstore by calling 800-242-3837 (option 4) or by email at bookstore@aia.org.



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Key Terms

- Practice
- Project administration
- Project communications
- Project correspondence