MANNING
ARCHITECTURE INTERIORS PLANNING

Handbook of Core Processes

EOS®
Entrepreneurial Operating System®

May, 2021

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MANNING

Handbook of Core Processes

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MANNING

The Manning Way

We've assembled the key components of our primary business functions in *The Manning Way* to immerse you in our culture as quickly and easily as possible so that you will understand what we are about and find the place within the organization where you can shine the brightest.

When you succeed, we all succeed; the firm succeeds. This manual is the Quick Tips version of our core processes to guide your success. For many of the processes, references are given that you can explore to deepen your understanding. If you need clarification, please ask! Your project manager, principal, or team member will be happy to help.

LEADERSHIP, COMMUNICATION, AND CULTURE

GOAL:

To align and equip the firm leadership with structures for communication and accountability so that the firm continually achieves higher results in getting work, producing excellent design and services, and nurturing staff in our culture of excellence.

Leadership is largely about vision, communicating the vision, and managing the processes we use to achieve the vision. Together, these elements define our firm culture. We are intentional about our culture precisely because it's how we will build greater and greater success.

LEADERSHIP EXCELLENCE

(See *Leadership Excellence, Developing Key Competencies,* Caporaletti & Associates, March 1, 2010)

"Leadership excellence promotes the sustainable competitive advantage of an organization. In other words, a firm's success is relative to the quality of its leadership."

(Caporaletti 2010, 3)

Once you've digested the Leadership Excellence manual, the following reminders will help keep you on track.

Self-Awareness

People will judge you based on your behavior, not what you think of yourself. You need a clear view of your own strengths and weaknesses to be an effective leader. To get a true picture of your interpersonal style, including strengths and weaknesses, take the Strength Deployment Inventory. It can help you to understand how to use your strengths more effectively and to be aware of what behaviors sabotage your effectiveness.

Listening for Understanding

Effective communication is always two-way. The goal of a leader is to create dialogue, using active listening skills to improve understanding. The three principles of active listening are:

- encouraging people to express opinions by listening attentively,
- clarifying perceptions of what is said, and
- summarizing the content of the message to check validity.

Feedback

Feedback is a leader's responsibility. Leaders communicate goals and help direct employees toward them. If an employee is off track, the leader must provide feedback to get them going in the right direction as quickly as possible. It's equally important to recognize when someone is on target. Both constructive and positive feedback are important, but encouragement is most effective in inspiring greatness. Be on the lookout for greatness.

Use this sequence as a guideline for giving constructive feedback (see the Caporaletti document for receiving feedback and for giving positive feedback):

- "When you..." Describe the behavior without judgment, labeling, or assigning motives. State the facts.
- "I feel..." Say how the behavior affects you.
- "Because I..." Describe the connection between the facts you observe and the feelings they trigger in you.
- Pause for discussion. Let the other person respond.
- "I would like..." Describe the change you want the other person to consider.
- "Because..." Describe why you think the change will alleviate the problem.
- "What do you think..." Listen to their response and be open to discuss options and compromise on a solution.

Collaboration

To collaborate, or work toward a common goal, the first step is to develop ideas. Each person must feel that their ideas are valued, and your response to an idea may determine if others continue to offer them. If you agree with the suggestion, acknowledge the person. If you reject all or part of it, provide constructive criticism of the idea. If it triggers another idea, hitchhike or build on the idea.

Constructive criticism of the idea should:

- Specify the value of the idea
- Specify your concerns
- Invite/offer suggestions

Managing Conflict

Conflict is an opportunity for constructive debate that can be beneficial and even necessary. Different styles of management are appropriate in various situations in order to facilitate a positive result, and a leader will need to understand which style to use given the situation.

- A competing style is useful when quick, decisive action is needed, the issue is important and the relationship is not cooperative, and when noncompetitive behavior will be viewed as weak.
- An accommodating style is useful when the issue is more important to the other person, you need to build up credits for future issues, and when maintaining a positive relationship is especially important.
- Avoidance is useful when emotions are too high to be controlled, more information is required, the potential loss from conflict outweighs potential benefits.
- Collaboration works when the issue is important to both parties and they are willing to collaborate, and both parties are committed to the final outcome.
- Compromise when the issue and relationship are only moderately important to you both, time pressures require an expedient solution, and when collaboration or competition fails and a withdrawn position is called for.

Situational Leadership

Each situation is unique and requires a distinctive leadership approach. Any approach, however, includes both task behavior and relationship behavior. The appropriateness of the style a leader employs depends on the Task Relevant Maturity, which is the follower's knowledge of the task and their willingness to perform it. Normally, lack of knowledge calls for task behavior, lack of willingness calls for relationship behavior. After assessing the follower's knowledge and willingness, the leader can identify the specific task and relationship behaviors, or leadership style, that will achieve the desired result.

Delegation Skills

Leaders must delegate, and delegation of responsibilities must be clear to be effective. Guidelines include:

- Explain the purpose and importance of the task.
- Provide a detailed, specific description of the result you expect and the requirements.
- Explain the deadline and the reason for urgency.
- Explain why you selected the person to delegate to.
- Ask if the person has questions or concerns.
- Listen to their concerns and input.
- Agree on the performance standards/requirements for the task.
- Agree on what resources are needed and how they will be made available.
- Define the level of follow up you expect, being specific about frequency, format, etc.
- Thank them for accepting the responsibility and express optimism and enthusiasm. Describe what success will look like when the goal is achieved.

Dynamics of Change

The success of any change rests with the ability of leaders to address both the emotional and practical issues—in that order. Whatever the types of change encountered, there are certain patterns of response that reoccur. It's important for leaders to understand these patterns since they are normal outcomes of the change process. See the manual for strategies for dealing with these common patterns.

Group Problem Solving

Group problem solving most effectively occurs during strategic brainstorming sessions. A five-step model is recommended, but it does not require a linear process. You may move back and forth between steps as needed.

- Problem definition
- Fix
- Root Cause Analysis
- Corrective Action/Solution
- Solution Implementation/Evaluation

INTERNAL COMMUNICATION

To be effective, we must all be heading in the same direction, starting with the Leadership Team. The following process for meetings and communication is the way that we stay aligned, working with focus toward identified common goals.

(See Traction, Gino Wickman)

Annual Planning Session, Leadership Team (two days, off-site)

1. Prepare: bring completed V/TO, budget for upcoming year, proposed goals for upcoming year.
2. Day One:
   - Each member shares: 1) the firm's three greatest accomplishments in the previous year, 2) greatest personal accomplishment for the year, and 3) expectations for the annual planning session.
   - Review previous year's goals, numbers, and last quarter's Rocks. (Shoot for 80% or better on goals)
   - Team Health Building exercise, such as One Thing (each member gets feedback on greatest strength/most admirable ability and biggest weakness/hindrance to success of the company.
   - All share SWOT analysis for the company and list feedback for Issues List.
   - V/TO (through one-year): challenge company vision. Debate until everyone is in sync.
   - Create new Three-Year Picture.
   - Set next year's plan with revenue, profit and other numbers, then three to seven most important goals. Make sure roles and responsibilities are clear.
3. Day Two:
   - Establish next quarter's Rocks.
   - Tackle key issues.
   - Next steps.
   - Conclude.

Quarterly Leadership Meetings (one day, off-site)

1. Prepare: everyone brings issues to the table and proposed priorities. Bring V/TO.
2. List what must be accomplished in the upcoming 90 days (usually 1-20 items).
3. Discuss whether to keep, kill, or combine items until the top priorities are set (three to seven, the fewer the better).
4. Set completion dates for each (usually end of quarter) and define objectives clearly. Must be specific, measurable, and obtainable.
5. Assign owner to be accountable for each Rock.
6. After firm Rocks are set, each leader sets their own Rocks.
7. Create Rock Sheet for tracking.

Quarterly State-of-the-Company Meetings (45 minutes, off-site if possible)

1. Prepare: bring V/TO and Rocks.
2. Share V/TO.
3. Share Rocks with entire organization.
4. Challenge each department to set their Rocks.

Weekly Leadership Meetings, Level 10 (90 minutes)

1. Prepare: Rock Sheet and Scorecard complete; Issues Solving Track understood. Requires meeting leader and someone to move team through the agenda.
2. Seque (5 min). Share good news.
3. Scorecard (5 min). Review numbers and drop any that aren't on track to IDS portion of meeting.
4. Rock review, company and staff level (5 min). Report on or off track. Move off-track rocs to IDS.
5. Customer/employee headlines (5 min). Report good or bad headlines. Drop any concerns to IDS.
6. To-Do List (5 min). Review from last week and accountable party reports "done" or "not done." Completed items are dropped from list. To-Dos are 7-day commitments.
7. IDS (Issues List) (60 min). Rank list and start with top priority. Use Issues Solving Track.
8. Conclude (5 min). Recap To-Do List; discuss what needs to be communicated to the firm; rank meeting from 1-10 for effectiveness.

Weekly Meeting Rollout, Level 10 (30-60 minutes)

1. Use same agenda as Level 10 Leadership meeting, using at least 50% of the time for discussing issues.

FINANCE

GOAL:

To accurately understand and report current cash position, 60/90 day cash flow picture, and to manage financial tasks to maintain data accuracy. To monitor project profitability and improve the balance sheet for the firm.

OVERVIEW

1. Compile
   - Dashboard Metrics
     - Financial
     - Project Management
     - HR
     - Business Development
2. Organize Electronic Filing Conventions for location and naming (e.g. 20200330_logical name.filetype)
3. Collaborate with Stambaugh Ness Consulting Services (Accounting Firm)
   - Tax Services
   - Financial Statement Services
   - Ajera Support Services
   - Invoice Assist Services
   - Consultant Invoices
   - Client Invoices
4. Share
   - Accounting Reports
   - Project Management Reports

TASKS – Daily

1. Reconcile Primary Bank Account
   - Enter Transactions
   - Change Transactions
   - Delete Transactions
   - Void a transaction
   - Void a deposit
   - Void a paycheck
   - Reconcile the register
2. Check Finance email account for Invoices | Client Remittance Notices | Misc. Correspondence
3. Check Mail | Scan & File
4. Enter Client Receipts
   - Apply Pre-Payments
   - Enter Client receipts
   - Enter miscellaneous receipts
   - Enter credit memos
   - Change a Client Receipt
   - Void a Client Receipt
5. Enter Vendor Invoices
   - Enter Vendor Invoices upon receipt
   - Change or delete vendor invoices as needed
6. Pay Consultants and Vendors on the 15th and 30th
   - Write off Vendor Invoices as required

Weekly

1. Provide Weekly Financial Status Reports to Leadership Team
   - Bank Register, AR, AP, Vendor Payment Look Ahead, Employee Expense Reports
2. Provide/Review Weekly Project Management Reports to Leadership Team
   - Provide Project Profit Loss Report
   - Review Project WIP Reports (Level 10 meeting)
   - Review Employee Utilization Report (Level 10 Meeting)
3. Approve Employee Timesheets
4. Approve Employee Expense Reports

Bi-Monthly

1. Process Payroll
   - File Reports on server: Check Activity Report, 941 Report, State Withholding Report, Check Copy Report
2. Enter Vendor Invoices for Payroll Taxes
   - United States Treasury
   - Louisiana Department of Revenue
3. Pay Payroll Taxes
   - File Payment Confirmation Report on server
4. Email Payroll Tax Confirmations to Tax Consultant and Leadership Team

Monthly

1. Reconcile Bank statements (multiple accounts)
   - 2 Operating Accounts (Chase)
   - 3 Joint Venture Accounts (Chase)
   - Credit Card Statements (Am-Ex, Wells Fargo)
2. Coordinate Stambaugh Ness Financial Statements
   - Respond timely to any questions
   - Confirm all Vendor Invoices are entered during the first 10 days of the month
3. Coordinate Revenue projections report with Principals

Quarterly

1. Coordinate Payroll Quarterly Tax Returns with Stambaugh Ness
2. File all Quarterly Reports on server
3. Pay any Taxes due, Federal, State, FUTA, LA SUTA, TX SUTA

Annually

1. Coordinate with Stambaugh Ness | SharePoint site: upload requested documentation, fill out compliance forms, answer RFI's (request for information)
2. Create Operating Budget for following year (begin in September)

On-Call

1. Setup / edit new employee in Ajera
2. Setup / edit Clients in Ajera
3. Setup / edit Vendors in Ajera
4. Setup / edit Ajera Contacts
5. Terminate Employee: Ajera, Unemployment forms, onboard COBRA / Insurances
6. Report request

Manning is managed on a cash basis centered around billings, collections, and expenses. This can make it difficult for the firm's leadership and staff to carry out their responsibilities for overall financial performance and the execution of projects and business development. The firm's financial goals budgets and metrics are not well understood by all members of the firm.

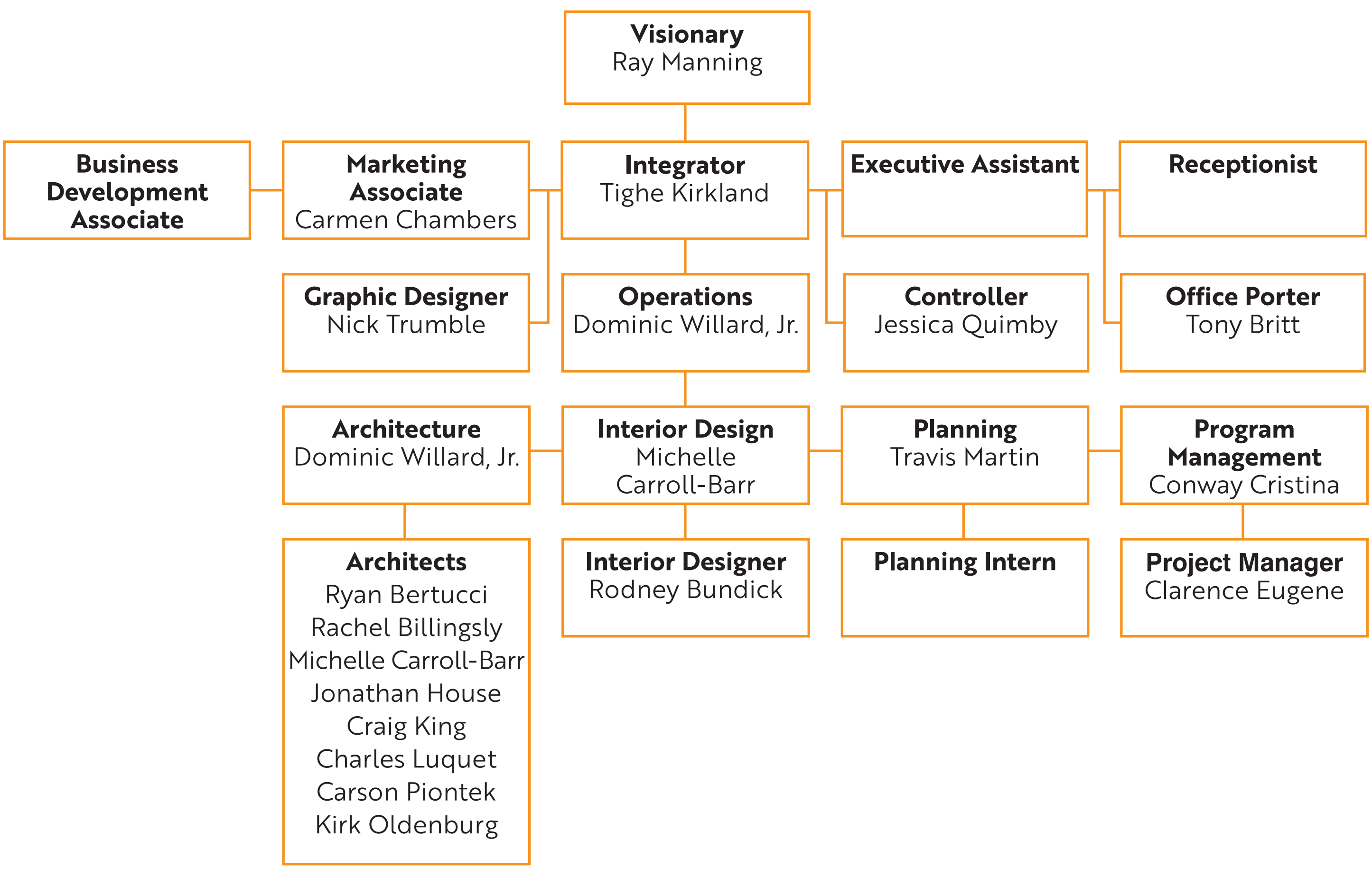
With that in mind, every member of the firm should understand how he or she can contribute to Manning's financial success. For project managers, architects, and team members, this may be focused on project resource plans-achieved with clear budgets, effective work plans, and efficient design and project delivery. Firm Leadership must demonstrate their accountability to manage the resources of the firm. Meeting net profit targets will enable the firm to be sustainable and create a culture of good design and innovation.

OPERATIONS

GOAL:

This Accountability charts provides clarity about who owns the major functions within the firm and organization as well as identifies the primary roles and responsibilities for which they are accountable. This differs from an organizational chart in that organizational charts are focused on who reports to who, but they typically don't address one of the major issues most companies struggle with: a lack of clarity around what the major functions of the organization are, and who is accountable for what.

ACCOUNTABILITY CHART



STRATEGIC PLAN-EOS Model

(See Vision/Tracker Organizer – Vision)

Core Values (Who)

1. Balance: we align vision with context
2. Curiosity: we use imagination to look deeper and more closely
3. Gratitude: we value each situation and relationship
4. Humility: we listen first and listen again

Core Focus (What)

1. Passion: Improve quality of life through collaboration and informative design solutions
2. Niche: Transportation, Education, Civic, Corporate, Healthcare, Hospitality

5-Year Target (Where we're going)

1. Future date: 12/31/24
2. Award-winning, ENR Top 500 firm

Marketing Strategy (Which customers)

1. Target Markets: Southeastern region and national; public, institutional, and corporate clients.
2. Three Uniques: Community Leader and Relationship Builder, Honest Broker, MBE-led
3. Proven Process: Execution of large, complex urban projects
4. Guarantee: Each project is precisely executed to assist each client to achieve their vision, goals, and objectives

HUMAN RESOURCES

Human Resources – Hiring and Recruitment Plan

1. Recruitment
   - Poll current staff for talent to recruit, people they know
   - Develop job description that shows passion. Highlight collaboration, values, special benefits
   - Post job description on website, Indeed, Glassdoor, etc.
   - Attend job fairs at universities to find interns and generate brand awareness
2. Interview
   - Develop questions for behavioral interview in advance. See www.inc.com/keyword/scienceofhiring.
   - At least two people should interview prospect
   - Ask what the prospect wants to get out of the job (creative challenge, money, etc.)
3. Pre-hire Assessments
   - Kolbe A Index. https://kolbe.com/kolbe-a-index/
   - Clifton Strengths Assessment https://www.gallup.com/cliftonstrengths/en/253676/how-cliftonstrengths-works.aspx
   - Sigma Personnel Assessment Form https://www.sigmaassessmentsystems.com/assessments-category/employee-selection/
4. Pre-hire checks: Background, References.
5. Important—let a seat go unfilled before you fill it with the wrong person. Trust your instincts, but err on the side of skepticism and patience.
6. If it's a match, make offer quickly, contingent on assessments and checks. Leave room for negotiation in offer. Document offer and benefits.

Human Resources - Onboarding Process

1. Update checklist for all on-boarding tasks—assign team member(s) who will be responsible.
2. Develop training schedule—assign team member(s) who will be responsible.
3. The Week Before
   - Employee Information Package submitted electronically, onboard Ajera, health and dental Insurance, disability Insurance, TASC-COBRA.
   - Organize: Computer, phone, office supplies, keys, parking pass if applicable.
   - Prepare the office space: Welcome gift/note; be sure office space is clean and in good working order.
   - Inform the team: Name of new hire, their role/responsibilities, name of supervisor, work hours, start date.

4. The Day Before
    - Create a two-week training schedule
    - Gather orientation resource. Create orientation package to include:
    - History and synopsis of firm
    - Core values & vision
    - Synopsis of the business,
    - Information about owner
    - Team descriptions: Review Accountability Chart
    - Review Firm Process Manual
    - Professional service descriptions
    - Firm Employee Manual
    - Confidentiality Agreements
    - Preparation: Prepare for new team member's orientation meeting. Include the orientation package, initial two-week training schedule, any necessary paperwork that needs to be filled out/signed, benefits and payroll information, a confidentiality agreement and any other reference or training materials.
5. The First Day
    - Welcome and conduct the orientation schedule (2 hours recommended)
    - Have new staff member sign handbook receipt and confidentiality agreement
    - Tour the office and introduction to entire team
    - Communicate firm values
    - Introduce mentor/shadow partners
6. The First Two Weeks
    - Train on phone and computer: Utilize Shoretel Communicator For Windows.
    - Define key activities: Use free, focus and buffer time model—align with the results they need to create for the firm. Discuss the types of behaviors that are rewarded in an entrepreneurial firm such as taking initiative, being growth oriented, learning how to handle intense emotions, focusing on solutions and being open to change; what it means to be an entrepreneurial firm in a results-driven economy.
    - Check in daily: Discuss observations of staff member.
7. Training--Weeks 3 – 12
    - Conduct on-the-job training: software, processes, protocols (filing, timesheets, forms, etc.), unique ability assessment.
    - Set up job shadowing

Human Resources – Retention

1. Education
    - Lunch and Learn: Establish topics with studio that are in line with values; schedule; CEU credits
    - CEUs for professional staff
    - Opportunities for unlicensed staff
    - Training: new software, new certificates/licenses
    - Targeted opportunities for sector education: conferences, etc.
    - Staff to provide education internally (L&L) and externally (conferences, etc.)
2. Constructive Feedback
    - Performance reviews: structure critiques around core values (5-5-5)
        - Define unique ability (See earlier assessments)
        - Create action plan for growth
        - Score GWC: are they in the right seat?
    - Additional Compensation/Appreciation Options: bonuses, comp-time, flex-time, telecommuting, awards, praise, feature on website.
3. Termination
    - First, give the person a chance to find the "right" seat
    - If you must let them go, do it with grace and dignity
    - Review of personnel incongruencies

COMMUNICATIONS GUIDELINES

1. Intraoffice protocol between New Orleans and satellite offices
2. Transparency in BD operations with studio
3. Technology

BUSINESS PREPAREDNESS PLAN

1. Plan for Catastrophe
    - Identify a coordinator and/or team with defined roles.
    - Identify which processes are mission-critical to the survivability of the business.
    - Determine acceptable levels of service during the recovery period and what processes need to be maintained or restored first to keep the business running.
    - Identify essential employees and other critical inputs (sub-contractors, services, logistics, etc.) required to maintain business operations by location and function during the event.
    - Inventory technology assets and document the mission critical technology components, their locations, how they're configured, and who is responsible for management.
    - Determine what measures should be taken to protect and recover assets.
    - Understand the rules or regulations governing our business operations. If we have a business disruption (either a complete disruption or one that changes how we operate for the short-or long-term), would we be able to maintain compliance? (Sarbanes-Oxley, HIPAA, GDPR, privacy, etc.).
    - Understand customer or business partner performance metrics/service level agreements to assess risk for breach of contract or to put in place performance remedies for our customers.
    - Identify a budget: Quantify the potential costs of downtime or total business failure. Develop a business case to optimally invest in risk mitigation.
    - Evaluate additional insurance coverage options/riders that could potentially cover disruptions to business operations by currently excluded factors such as pandemics, war, etc.

2. Assessing data and technology needs in the event of a failure in business operations
    - Determine vulnerability of our organization's technology infrastructure to natural disasters, including floods, fires, earthquakes, pandemics, etc.
    - Set clear recovery time objectives for each of our business/technology areas.
    - Determine the need for off-site data storage and backup.
    - Develop a technology plan that includes hardware, software, facilities, and service vendors.
    - Secure clear understanding and commitment from vendors on our plan. Secure a backup vendor, if necessary, to perform that critical function if our primary vendor is impacted by a business failure.
    - Perform security risk assessments around specific threats where possible. Examples of data security include virus protection, intrusion detection, hacker prevention, network events, component failures, and systems crashes.
    - Assess, if possible and based on prior events, how quickly and accurately our business and technology were restored by existing staff. What were the lessons learned so they can be addressed in future planning?
    - Determine the effectiveness of our data backup and recovery policies and procedures. Are the procedures fully documented and is an appropriate staff member responsible for the maintenance of that documentation?
    - Perform a data recovery test. Was the test successful?
    - Prepare an incident plan for mitigating a security breach. Audit annually, as security threats can change.

3. Communicating the Plan to Employees and Vendors
    - Determine who needs to be contacted with critical information. Build distribution lists and maintain for accuracy. Assign points of contact for each mission-critical operation (e.g. technology, client contact, file maintenance, etc.)
    - Develop a contact plan to reach employees: SMS text, home, email, etc. Secure alternate contact person for each employee in the event of communications failures.
    - Ensure employees know where to receive information and updates about whether they can return to work or if they are to report to a different location (internet, conference bridges, etc.).
    - Ensure mission-critical employees know their roles in the plan and that they have access from remote locations (i.e., home Wi-Fi, phone, VPN for security).
    - Make sure the plan can be executed by alternate employees who are not necessarily the "experts" in cases where those employees cannot be reached.
    - Determine locations for staff to resume work. Plan for communications, data connectivity, computers, and workspaces at home offices or corporate sites.

- If you require support from vendors, ensure they also have a documented plan that complements your needs. Review periodically to keep the plan current.

4. Coordinating with External Organizations
    - Collaborate with our local government agency to share our plans and understanding of their capabilities in the event of a business-impacting catastrophe.
    - Share our plan with your building management, so they have a clear understanding of their role in safely securing the building and our employees.
    - Share best practices with other business leaders in our community, chambers of commerce, and business associations to improve community response efforts.

PROFESSIONAL SERVICES

(See B203_2017 and *Many Voices* for detail)

GOALS

Know the client and proactively develop a closer and more trusted relationship

Manage project expenditures and revenue

Know the scope of work intimately and track any changes

Monitor the project schedule

PROJECT MANAGEMENT (applies to all disciplines) <PIC/PM unless otherwise noted>

1. Review Owner-Architect Agreement
   - Understand scope, budget, schedule, invoicing methodology, etc.
2. Setup new projects/proposals in Ajera Project Command Center. Project budgets, phases, schedule, consultants, contacts and other relevant project information should be entered at the outset and monitored and updated on a weekly basis.
3. Create project directory
4. Coordinate with owner on their expectations for frequency of meetings with various project stakeholders as well as presentations that the design team is responsible for through the course of the project
5. Coordinate with consultants and prepare consultant agreements
6. Initial team meeting with assigned resources to cover: client information, contact protocols, scope, schedule, budget. Schedule site review.
7. Site review with team and consultants (coordinate with owner)
8. Enter time daily <all team members>
9. Weekly review project data entered in Ajera for accuracy. Update dates, status, budget. Review WIP reports including time logged.
10. Update Reported Percent: complete bi-monthly
11. Weekly Level 10 meetings with project team: review WIP and Employee Utilization Reports.
12. Upon completion, closeout project information in database. Complete project data sheet and request letters of recommendation from client.
13. Continuously update firm history of project delivery. With the help of management* software, history should include data on project aspects, scope and statistics. These statistics should be those that will best show cost of production. Use this in making a proposal for a potential project.

PROJECT INVOICING <PIC/PM unless otherwise noted>

1. Monitor staff timesheets daily for content and accuracy.
2. Approve timesheets weekly and notify Finance for approval.
3. Consultants emails and invoices directly to Stambaugh Ness (SN) by the 22nd of each month.
4. SN enters consultant Invoices into Ajera for each project by the 25th and posts draft invoices in Ajera for Principal review by the end of the month.
5. Principals either "approve" or "edit and resubmit for approval" using Ajera's automated billing system.
6. SN creates final invoice in Ajera for Principal to send to client.
7. Invoices that are not Ajera standard and require custom formatting by the client are created by Principal and sent by Principal.
8. Send all invoices by the 10th of each month.

9. Follow up within a week of sending the invoice to the Client to confirm receipt. All notes regarding collection activities shall be entered into Ajera utilizing the automated billing "Collections" screen. Principals are to update collection activities no less that every two weeks.
10. Review accounts receivable aging report weekly to assist with timely collections.

PREDESIGN SERVICES

Facility Assessment

1. Visit the project site once or more to become familiar with the structures being evaluated.
    - Visit with client to understand objectives and scope
    - Obtain access for return visits
    - Take photographic survey and key photos to plans
2. Assess the building foundation, structure, envelope, roof, openings, interiors, MEP systems, building, Life Safety and ADA code compliance.
3. Prepare Facility Assessment document for submission to client. Alternatively, if budget allows, enter information into an electronic database accessed via computer or tablet.
4. Update CAD floor plans provided by client.
5. Rate building systems and components from Good to Fair, Poor and Needs Immediate Attention. Include repair cost information, prioritization according to the rating and cost and a maintenance/repair schedule.

Facility Program

1. Interviews
    - Goal-setting meeting with client contact with authority. Obtain budget, organization chart, plans of existing facilities
    - Detailed space interviews with user contacts. Use pre-prepared questionnaires and active listening techniques.
    - Develop list of spaces per department and preliminary adjacency diagrams
2. Site Visit(s) - Tour site with user groups to understand what works and what doesn't.
    - Photograph extensively for reference.
3. Develop initial spaces, sizes, budget, and overall adjacency diagram (departmental level)
    - Develop room sizes based on conceptual layout of FF&E
4. Review with client and prioritize spaces and systems based on budget allowances.
5. Repeat this step until scope and budget are aligned and approved by client
6. Documentation
    - Statement of the Project – establish the goals of the project that the design can satisfy. Address key issues that need to be resolved (security, parking, separation of users, sustainability goals, etc.)
    - Systems Descriptions – work with consultants to describe all major systems to be incorporated into the design: architectural, engineering, technology, security, etc.
    - Space Standards – describe standards for similar spaces, such as finishes in all classrooms, or locking for all offices.
    - Area Summary – Spreadsheet that lists all spaces with net and gross square footages.
    - Adjacency Diagrams – include an overall diagram showing relationships between departments, and a detailed one showing each space within a department. Alternately, this could be a matrix.
    - Cost Estimate based on square foot costs
    - Project Schedule
    - Other optional sections:
        - Precedent Analysis
        - Agency Requirements (Codes and other authorities having jurisdiction)
        - Conceptual Design
        - Documentation of Sources of Information
7. Distribute draft for review, then finalize incorporating review comments
8. Get approval of program before moving to Schematic Design

Site Analysis

1. Confirm accuracy of major features of the site survey by observation and measurement
2. Obtain on-site photographs showing major site features
3. Obtain panoramic photographs of off-site views and surroundings
4. Assist Owner in obtaining land survey and geotechnical survey as needed.
5. Obtain civil and structural engineer's requirements for site test data needed for their work and the testing laboratories they recommend

6. Confirm that all consultants have the site data needed
7. Perform full Zoning analysis for project site. Analysis should identify zoning classification & associated requirements including permitted uses, required setbacks, buildable areas, max heights, parking requirements, etc.
8. Meet with staff of relevant regulatory agencies
9. Prepare site analysis plan for presentation using desktop publishing

ARCHITECTURE

(See AIA D200 project checklist for Basic Services)

Schematic Design

1. Analyze owner's program and site
   - Understand scope, budget, schedule, site constraints
2. Coordinate dates of meetings and presentations to stakeholders during SD with owner.
   - Document existing conditions if required (additional service)
3. Establish design goals if not part of program
4. Coordinate with consultants and ensure they have project information
5. Establish schedule for regular internal team and consultant meetings
6. Develop organizing principals, design vocabulary, and basic systems to incorporate
7. Initiate code analysis (see code analysis form)
8. Consider sustainability options and identify owner's sustainability goals including commissioning
9. Evaluate alternatives
10. Prepare drawings and outline specifications
    - Cover, Information Sheets, Drawing Index
    - Code Analysis and Life Safety plans
    - Site plan
    - Principal floor plans (demolition if applicable and new)
    - Ceiling plans (demolition of applicable and new)
    - Building section(s)
    - Exterior elevations
    - Renderings (possible additional service)
11. Compare space allocations to program and get owner's approval for any deviation
12. Prepare preliminary estimate of construction cost. Include contingency
13. Update project schedule
14. Obtain owner's approval for SD before moving to Design Development

Design Development

1. Resolve/review comments from Schematic Design
2. Coordinate dates of meetings and presentations during DD with owner.
3. Develop code analysis and develop list of all authorities having jurisdiction
4. Develop sustainability strategies
5. Develop design drawings including:
   - Cover, Information Sheets, Drawing Index
   - Code Analysis and Life Safety Plans
   - Site plan
   - Floor plans (demolition if applicable and new)
   - Floor finish plans
   - Ceiling plans (demolition if applicable and new)
   - Exterior elevations
   - Building sections
   - Select building details
   - Select enlarged plans
   - Select interior elevations
   - Select interior details
   - Schedules and notes
   - Others needed to set the design and scope
6. Develop preliminary Project Manual with outline specifications. Coordinate front end with owner.
7. Collect building and interiors material samples for review with owner
8. Determine locking and security requirements for door hardware

9. Coordinate work of consultants and integrate into architect's work
10. Confirm compatibility of engineering and construction systems
11. Update preliminary cost estimate of construction cost including consultant's estimates
12. Update project schedule
13. Compare DD areas to program and any approved changes. Document any changes and get owner's approval
14. Submit DD documents to owner and obtain approval before initiating CDs.

Construction Documents

1. Prepare mock-up of drawing set and coordinate team responsibilities
2. Resolve review comments from DD
3. Coordinate dates of meetings and presentations during CD with owner.
4. Schedule preliminary reviews with appropriate authorities (Health Dept., Zoning, etc.) and establish final submission schedule and protocol
    - Include checklist for owner's applications and permits with fees
5. Develop detailed drawings
6. Submit information request to owner relative to General Conditions (insurances, bonds, bid procedures, etc.)
7. Establish unit prices, allowances, owner-furnished items
8. Submit General and Supplemental Conditions for Owner's review or obtain owner's contract requirements
9. Perform constructability review and follow QA/QC procedures
10. Finalize Project Manual and coordinate drawings
    - Coordinate door hardware sets and types
11. Coordinate consultants' drawings with architectural documents
12. Perform final code review and submit for permits
13. Review permit comments upon receipt, draft and send review response letters to AHJ's
14. Update drawings to incorporate permit comments and coordinate any required changes with consultants
15. Assemble bid documents
16. Update project schedule
17. Update cost estimate
18. Prepare final calculation of areas and compare to program and previously approved modifications. Coordinate with owner
19. Prepare final calculation of areas and compare to program and previously approved modifications. Coordinate with owner
20. Obtain owner's approval to proceed to B/N.

Bidding/Negotiations

1. Coordinate with Owner as required to advertise for bids in accordance with Owner's procedures, jurisdictions or for public work
2. If applicable, perform prequalification of bidders using AIA Doc, Contractor's Qualification Statement
3. Establish schedule for bid advertisements, pre-bid meeting date(s), dates of deadlines for substitution requests, bidder inquiries, addenda issuances, and bid date
4. Advertise for bids in accordance with jurisdictions, for public work, and owners procedures
5. Assist owner in preparing bid form
6. Assist owner in preparing all required bid documents and make available for viewing by contractors either physically or electronically
7. Hold pre-bid conference and distribute meeting summary
8. Document RFIs, prepare addenda, and document distribution
9. Open bids. If it's a public project, opening is public
10. Bids arriving after specified time are not opened
    - All bids read aloud and documented
    - Bid must include all required documentation such as bonds, securities, attachments
11. Evaluate alternatives and substitutions where allowed, notify bidders by addendum of accepted items
12. Tabulate bid results, evaluate, and consult with owner to determine lowest responsive bidder
13. Notify bidders of apparent low bidder. Bids may ultimately be:
    - Rejected
    - Selected
    - Negotiated
    - Re-bid
14. Assist the owner in preparing the owner-contractor agreement and notice to proceed

Construction Administration

1. Update project directory
2. Review contractor's list of subcontractors and suppliers and notify consultants
3. Review contractor's submittal schedule and construction schedule
4. Review and approve contractor's schedule of values
5. Establish time for preconstruction meeting, site observation and project meeting schedule
6. Send or verify owner has sent notice to proceed to contractor
7. Perform site visits and prepare field reports
8. Respond to contractor's applications for payment
    - Verify retainage requirements
    - Have contractor submit surety documentation
9. Obtain and review test reports
10. Respond to submittals and maintain log, including shop drawings and samples
11. Respond to RFIs and maintain log
12. Respond to contractor's change requests and maintain Change Order record and justification
13. Review and approve contractor's pay application drafts monthly
14. Issue ASIs as necessary throughout construction process
15. Coordinate with AHJs to schedule inspections and obtain Certificates of Occupancy
16. Receive contractor's notification of substantial completion and list of items to be completed or corrected
17. Perform substantial completion inspection and respond to punch list
18. Prepare Certificate of Substantial Completion when appropriate
19. Coordinate record drawings with contractor
20. Request close-out documents and review
21. Verify contractor has obtained Certificate of Occupancy
22. Conduct final inspection and prepare final field report
23. Review final application for payment
24. Issue final certificate for payment
25. Conduct inspection prior to expiration of one-year period of corrections with owner's authorization

Post-Construction (as per contract)

1. Record Drawings
2. Post-construction evaluation
3. Conduct exit interview with Owner to ensure all details of contract have been satisfied and determine any "lessons learned" (wouldn't this be a part of post-construction eval? Also, I'd be careful about using owner as the determiner if the contract has been satisfied.)
4. Warranty walk one year after Substantial Completion

INTERIOR DESIGN

(See AIA B152)

Tasks in support of architectural or interior projects in addition to above phases:

1. Provide space planning assistance during design phases
2. Provide conceptual furniture layouts at each phase of design to ensure interior spaces can function as intended
3. Consult on selection of exterior materials and finishes
4. Select interior materials and finishes
    - Prepare materials/finishes board(s) during DD and present for owner's approval
    - Final selections during CDs for owner's approval if changed from DD. Incorporate into drawings and specifications
5. FF&E selections
    - Determine method of procurement with Owner – will FF&E selections be ordered as specified or bid, would bid be open to substitutions or to be as specified, are there any preferred manufacturers or lines?
    - Proposed FF&E layout during SD
        - Develop overall & enlarged furniture floor plans to establish type and quantity of each furniture piece desired in each space, delineating each piece with furniture codes and schedules
        - Coordinate results of FF&E layout exercise with electrical engineer to ensure accuracy of electrical needs

- Preliminary selections during DD
    - Update overall & enlarged furniture floor plans & schedules per comments received during SD
    - Reach out to furniture dealers to present options of manufacturer and model for each furniture type as established in SD
    - Develop cost estimate (budget pricing to come from furniture dealers in mid-grade finish selections)
    - Present to owner to confirm final manufacture and model selections and obtain approval
- Final selections and specifications during CDs
    - Update overall & enlarged furniture floor plans & schedules per comments received during DD
    - Determine furniture finish selections on furniture specifications as established in DD (Interiors) and coordinated with approved interior finish selections as established in DD (Arch)
    - Present to owner to confirm final finish selections
    - Develop final cost estimate (update budget pricing with furniture dealers to reflect approved finish selections)
    - Develop final FF&E specifications (coordinate with Owner on any front end requirements)
        - Cover Sheet & Table of Contents
        - Manufacturer List
        - Furniture Legend
        - Furniture Specification Sheets & Bill of Materials
        - Custom furnishings and casework design
- Preliminary design drawings during DD
    - Develop cost estimate in collaboration with furniture manufacturer or dealer rep
    - Present to owner and obtain approval
- Final drawings and specifications during CDs
    - Include bill of materials in FF&E specifications

Additional specialized interior design services

1. Facility planning/space utilization
    - Analysis and documentation of leasable space per client unit (department, company, etc.)
        - Prepare CAD drawings with lease lines according to client's standards (use BOMA standards if client has none)
        - Tabulate square footages in spreadsheet
        - Calculate SF/person
    - Master planning of space locations and layout of departments/units
    - Phasing recommendations
    - Schedule preparation
    - Budget estimates
2. Space planning
3. Development of space standards for office sizes, cubicles, etc.
4. Inventory of existing FF&E
5. FF&E procurement
6. Move coordination

MASTER PLANNING

Discovery

1. Kickoff meeting
    - Establish goals and identify project-specific needs
    - Brainstorm necessary steps to collect data and best way to display it
    - Identify audience for stakeholder engagement and determine public communication methods
    - SWOT exercise – strengths, weaknesses, opportunities, threats
    - Establish project schedule
2. Data collection / base mapping – identify research questions related to project. Sources should be reliable (i.e., peer-reviewed journal articles) and cited in a consistent manner
    - Quantitative data can include statistics, models, maps, simulations, previous plans, studies, and surveys
    - Qualitative data can include stakeholder dialogue, reports, articles, or other types of research
    - Meet with stakeholders to ascertain needs / priorities
3. Site Visit and Primary research, which can include charts, graphs, photographs, data callouts, and maps

Analysis - Needs assessment based on the previously gathered information. Identify existing conditions and opportunities by analyzing the following components:

1. Mobility for all users, including:
   - Pedestrians
   - Bikes
   - Transit
   - Vehicles
2. Existing Buildings
   - Assessment of physical condition
   - Space utilization
   - Use
3. Public Open Space
4. Infrastructure
5. Natural features, including landscaping and stormwater
6. Opportunities for partnerships with area stakeholders

Idea Generation – Approx. 3 alternative planning concepts responding to the following questions:

1. Sustainability – Is it both environmentally and economically sustainable?
2. Equity – Is it inclusive and does it benefit the wider community?
3. Public Health – Does it encourage an active lifestyle and alternative modes of transportation?
4. Connectivity – How does it relate with the surrounding community?
5. Actionable – Can it be implemented?

Refinement

1. Public workshop – Invite all residents, businesses, and institutions within a 300'-600' radius of the site. Local neighborhood associations and area political representatives should also be invited. The workshop can take the form of a town hall meeting or charrette-style with breakout groups.
2. Follow-up meeting with client
3. Revise alternatives based on feedback received
4. Prepare draft report document

Final Master Plan document

1. Executive Summary
2. Project background that includes development history, demographic and economic trends, and identifies pertinent local and state plans
3. Existing conditions that include market assessment, physical assessment (land use/development patterns, multi-modal mobility linkages, accessibility, streetscape/parking, infrastructure), financial assessment (funding mechanisms/P3 opportunities)
4. Vision, which includes outline of stakeholder engagement process, challenges/opportunities, and Master Plan Alternatives
5. Recommendations, which consists of preferred Master Plan alternative and Implementation Matrix
6. Cost Estimate
7. Appendix with any documents prepared as a part of the planning process including traffic study, utilities, stormwater and/or market analysis by subconsultants, and public workshop meeting minutes

PROGRAM MANAGEMENT

1. The Program Manager is the Owner's agent and representative responsible for assisting the Owner in managing its construction projects from assisting with securing funding/grants management, design phases, and construction through post-occupancy
2. Responsible for assisting the Owner in the procurement and direct management of professional design consultants, emphasizing on time and within budget performance and ensuring compliance with design guidelines and contract terms
3. Schedule and preside over all meetings the Program Manager deems necessary related to managing the construction contract and/or the project
4. Responsible for all project financial decisions: funding, commitments, changes, and payments
5. Procure, review, and provide pre-planning project data including surveys, hazmat studies, traffic analysis, etc. for projects
6. Consult with clients, design consultants, contractors and vendors

7. Monitor scheduling against agreed completion dates and milestones
8. Establish, control, manage and report on the project budget
9. Review building plans and specs for compliance with the project scope and established standards and requirements
10. Review all Purchase Orders, Change Orders, pay apps, and invoices against the project budget
11. Create/review contracts and amendments to the standard of the Owner in coordination with owner and owner's legal team
12. Manage bid phase requirements for selection of contractors including but not limited to preparing bid packages, establishing bidder interest and pre-qualifications, conducting pre-bid conferences, evaluating bids and recommending successful bidder, and assisting with negotiation and award of contract for construction
13. Provide Construction Administration as the owner's designated representative
14. Perform routine field visits, review and recommend contractor payment requests, RFI/RFPs, Change Orders, and review and track claims
15. Monitor the progress of the work, and test results, and inspection reports. The Project Manager will direct the GC to correct any defects that are observed
16. Develop punchlist alongside design professional
17. Manage the FF&E contracting process
18. Coordinate vendor procurement, delivery, and installation

QUALITY ASSURANCE AND QUALITY CONTROL

Process Philosophy

1. Manning Standard of Quality Assurance and Quality Control (QA and QC) uses a combination of templates as tools in the QA/QC process. These templates are each focused upon specific aspects of quality in the architectural practice and in project delivery:
   - American Institute of Architects (AIA) D200 Project Checklist (Adaptation of D200 tasks focused on quality techniques in project management, project production and project delivery);
     - Red-Yellow-Green Review. (This is a Cross Check by each Discipline of other intersecting Disciplines with Broad focus on Interdisciplinary Coordination);
     - RediCheck (Focused on Specific In-Depth Process of Coordination);
     - Manning Document Standards (This QA/QC template focuses on in-house consistency and completeness.)
2. Through quality in Manning products of service, we reflect and exemplify our client commitment, the additional strengths that we empower together with our clients, and pride in our delivered product directed at the client's goals
3. Continuously refine QA and QC templates through vetting new concepts and through a single point of implementation – the QA/QC Manager. The standards are ever evolving and consistently updated.
4. Customize the templates to each project for optimum focus and results relative to specific project scope, client goals and expectations
5. Attend, evaluate and synthesize continuous education into the firm's QA/QC standards
6. In all aspects of the professional practice, consider a level of quality that meets standards.
7. Educate all firm members to the Process Philosophy initially as new hires, and update on a semi-annual basis

Pre-Contract

1. Use Initial Project Information Checklist to evaluate information attained from a potential client in project information gathering
2. With initial information gathering, ensure completeness of the scoping data, including:
   - Specific Project Goals
   - Project Scope
   - Construction Budget
3. Ensure that project information is listed with goals, scope and budget in the pre-design services proposal/ agreement and the future owner-architect agreement
4. Confirm project data with Project Manager (PM) to the extent that parties can explain "WHY" each aspect is a part of the project.
5. Confirm PM has identified any authorities having jurisdiction (AHJ) matters of concern.
6. Review project feasibility with PM

Pre-Design / Programming Phase

1. Evaluate completeness of the project program and discuss findings with the PM
2. Review with PM the offer to the owner for services to establish or complete the program

3. Check that information from the Owner is complete and includes utility, vertical and horizontal survey, hazmat, geotechnical, and other requested information
4. See that project team is established with clear responsibilities including the project QA/QC Manager
5. Prior to signing arch-consultant agreements, review and confirm project scope, design software, client goals and expectations with potential consultants with appropriate language included in consultant agreements
6. Review project manhour budget as planned by PM
7. Check the critical path as determined by PM's design schedule
8. Give assignments to design team members including the project schedule
9. Further define the project specific QA/QC process in project-specific terms, then discuss so that it's understood by all team members
10. With the Project Initiation, confirm that the customized templates are implemented
11. Establish project performance criteria

Schematic Design Phase

(See AIA D200, AIA Best Practices & RediCheck Interdisciplinary Coordination.)

1. Glance over all sheets, spending no more than one minute per sheet to become familiar with the project
2. Review MA document standards as applicable to project
3. Confirm, in general, drawings indicate the scale and relationship of project components
4. Review plans to confirm they all have spaces generally defined
5. Verify representative area plans are generally graphically fixed.
6. Verify full building elevations generally are graphically fixed for typical areas
7. Verify representative wall sections are drawn early in the project production
8. Verify typical floor elevator and stair plans with preliminary sections
9. Verify representative area partition types are defined
10. Verify preliminary civil and landscape drawings are included at a schematic level
11. Compare architectural grid with consultant drawings
12. Verify structural plans and foundation are defined, columns are sized and located, and lateral design is defined.
13. Verify Mechanical Electrical Plumbing / Fire Protection (MEP/FP) systems are defined, major mechanical spaces are fixed in plans, as well as representative plan area, and initial riser diagrams
14. Verify outline specifications include general description of systems and finishes sufficient to meet the general objectives of the phase
15. Evaluate project performance criteria
16. Spot check code analysis
17. Attach additional information as available and as project requires
18. Distribute drawings between each discipline and have each identify interface areas with other disciplines (general Red-Yellow-Green cross-checking)
19. Check phase-appropriate statement of probable cost (SPC) and contingency
    - Compare to budget
    - Recommend necessary adjustments
20. Review documents prior to phase presentation to owner
21. Confirm, with PM, owner's written approval to proceed with the next phase
    - Review any qualifications to the approval or requests of Owner for modification
22. Assist PM with distribution of project directional changes to consultants
23. Confirm PM's preliminary discussions with the AHJs relative to changes in scope

Design Development Phase

1. Attend Interdisciplinary coordination meeting to discuss potential changes in drawings and specifications and schedule when all-discipline check sets are due for coordination review
2. Verify structural plans are generally complete; columns, beams, slabs, lateral design elements scheduled and detailed
3. Review civil plans, landscape plans and architectural site plans for general completeness
4. Review all other plans for completeness and coordination
5. Confirm reflected ceiling plans of typical areas drawn and coordinated
6. Verify partial elevations are drawn with dimensions, notes and sections are referenced
7. Review all sections, partition types, schedules for typical areas
8. Verify primary consultant coordination effort is well underway
9. Verify MEP/FP plans show scope, major components, equipment scheduled, riser diagrams and items for coordination

10. Verify specialty consultant coordination has begun
11. Review draft of project manual
12. Verify outline specification are expanded or edited down as draft, full sections are included
13. Review draft of select full specification sections for format and general use as a template
14. Distribute drawings between each discipline and have each identify interface areas with other discipline (Red-Yellow-Green cross-checking)
    - Compare plans and specs with the Consolidated RediCheck Checklist during preparation of plans and specifications. (RediCheck Book, Part B Section 11)
    - Compare PM Project Checklist (AIA D200) with Design Development (DD) documents
    - Preform RediCheck Mark-up at 50% DD Phase documents (Refer to RediCheck Book for mark-up guidelines and standards)
    - Compare DD Phase documents with RediCheck Concepts to combat inconsistencies in documents. (refer to RediCheck Book, Part C)
15. Project performance criteria is evaluated
16. Spot check code analysis
17. Attach additional information as available and as project requires
18. Check phase-appropriate SPC and contingency
    - Compare to budget
    - Recommend necessary adjustments
19. Review documents prior to phase presentation to Owner
20. Confirm, with PM, Owner's written approval to proceed with the next phase
    - Review any qualifications to the approval or requests of Owner for modification
21. Assist PM with distribution of project directional changes to consultants
22. Confirm PM's discussions with the AHJs relative to changes in scope

Construction Document Phase

1. Attend Interdisciplinary Coordination Meeting to discuss potential changes in drawings and specifications and schedule when all-discipline check sets are due for coordination review
2. Compare Plans and Specs with the Consolidated RediCheck Checklist during preparation of plans and specifications, and, if necessary, for a final quality assurance review at the end of production. (RediCheck Book, Part B Section 11)
3. Compare PM Project Checklist (AIA D200) with construction documents
4. Verify consultant interdisciplinary coordination reviews and RediCheck mark-up is completed and compared at 15%, 30% and 60% of the construction documents (CD) phase (refer to RediCheck book for mark-up guidelines and standards)
    - Compare CDs with RediCheck concepts to combat inconsistencies in documents. (refer to RediCheck book, Part C)
5. Review structural plans for completion: grid, columns, beams, slabs, lateral design elements should be fully detailed and coordinated
6. Review civil plans, landscape plans and architectural site plans for completeness and coordination
7. Verify MEP/FP plans are complete, equipment scheduled, riser diagrams complete with no conflicts
8. Confirm that specialty consultant coordination documents do not conflict with other design team members documents
9. Review all other plans for completeness and coordination
10. Confirm reflected ceiling plans, finish plans of all areas drawn, show correct details and are coordinated fully
11. Verify all elevations are drawn with dimensions, notes and sections referenced
12. Review all sections, partition types; schedules for all areas should be shown and coordinated with other disciplines
13. Review project manual
14. Confirm liquidated damage amount – (if any) is properly established
15. Assist with front end meeting
16. PM should acquire all necessary information from owner and confirm/review with owner
17. Verify full specifications are completed and coordinated with drawings
18. Distribute drawings among each discipline and have each identify interface areas with other discipline (Red-Yellow-Green cross-checking)
    - Perform RediCheck as per above.
19. Evaluate project performance criteria.
20. Spot check code analysis
21. Attach additional information as available and as project requires
22. Check phase-appropriate SPC and contingency

    - Compare to budget
    - Recommend necessary adjustments
23. Review documents prior to phase presentation to owner
24. Confirm PM's discussions with the AHJs relative to changes in scope
    - Confirm, with PM, Owner's written approval to proceed with the next phase.
    - Review any qualifications to the approval or requests of Owner for modification

Bidding or Negotiating

1. Asist PM with any outstanding issues with the AHJs to enable issuance of the building permit
2. Confirm with PM, compliance with state bid law as applicable to the project
3. Confirm with PM:
    - Publish, advertise bid documents
    - Address bidder questions
    - Receive and analyze bids
    - Make a recommendation including alternates
    - Obtain all post-bid documents from successful bidders
4. Perform CD phase QA/QC on all drawing revisions issued via addenda

Construction Contract Administration Phase

1. Attend pre-construction meeting and confirm that PM includes the agenda found in the project manual
2. Receive, review and comment on documents required from the successful bidder including, bonds, schedule of values, construction schedule
3. Regularly review maintenance of logs, including those for
    - Submittals,
    - Request for Information (RFI),
    - Request For Change (RFC)
    - Proposed Change Order (PCO)
    - Change Order (CO)
4. Spot evaluate the work & field observation reports
5. Review record drawings with PM and Construction Contract Administrator for completeness
6. Assist with review of close-out documents

MARKETING

GOAL:

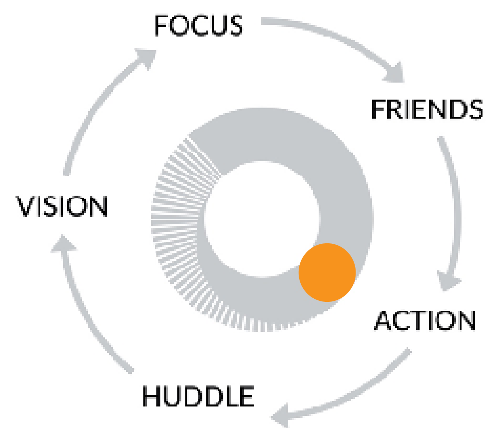
To build the Manning reputation and brand regionally and nationally and to consistently and effectively develop and implement annual marketing plan to spur Manning's growth to a position of ENR's top 5 company by 2025.

DISCOVERY DRIVEN CLIENT DEVELOPMENT

(Leadership Team assisted by Marketing Associate)

Vision (update semi-annually)

1. Review existing plans: strategic, marketing, business, communications
2. Complete Vision worksheet in Client Development Workbook_Manning Architects workbook. Write value proposition statement for each sector. Develop ideal project descriptions for sectors
3. Identify stories and key messages MA will use to initiate discovery-driven conversations to learn about client concerns and how they define value
4. Keep updated with information about where the firm is going and how to communicate with target markets



Focus (Quarterly)

1. In Focus worksheet in Client Development Workbook_Manning Architects, list all prospective client organizations (past, current, future) the firm might consider working with to achieve vision and goals.
2. Define three to five Affinity Factors and weight if needed
3. Score client organizations and sort from high to low
4. Determine time and resources available to engage in proactive client development. Choose a finite number of client organizations to focus on depending on bandwidth, assuming each technical professional can garner three to ten clients
5. Develop One List of top-scoring organizations and copy them to the Friends worksheet and the Action worksheet

Friends

1. In Friends worksheet, list all people who are essential to pursuing, winning, and delivering work with One List clients, especially decision-makers and influencers. Include colleagues within the firm
2. List people who are references and Manning champions, regardless of whether they are connected to One List clients
3. Establish referral system

Action (Weekly)

1. Default to Action! Complete the minimum amount of planning in Vision, Focus, and Friends, needed to connect with clients in a meaningful way
2. Use the Action worksheet in your Client Development Workbook as your "One List Action Plan." Working through each organization on the list, enter relevant details for the following:
   - AFFINITY: Enter the score from the Affinity Matrix
   - WRANGLER: Enter the name of one person who is responsible for shepherding the Manning resources and leading the development of a deep client understanding and the ability to deliver exceptional value.
   - CLIENT NEEDS: survey the team and whatever other resources are available (e.g., capital plans); enter details regarding client needs that Manning is capable of responding to (AKA, "project opportunities")
   - VALUE PROPOSITION: interview the wrangler about how Manning can help the client with needs and develop a compelling value proposition likely to resonate with the client
   - PROSPECTIVE NEW WORK ($): enter potential net fee

- FRIENDS: list names of individuals who are likely to be influential and helpful to pursuing, winning, and delivering work for the client organization
- LAST CONTACT: Enter very brief details about last client contact; only enter information that is needed to understand the current context
- NEXT STEPS: Think about the specific context of the relationship between Manning and the One List organization and between the seller-doer(s) and individuals in the client organization. What Friends might be able to help with insight or referrals? How might seller-doers engage and test assumptions about the prospective value to the client through one-to-one client contact? Based on the current context, strategize with your team and plan an activity that will help foster an incrementally closer and more trusted relationship. Enter the name of the person responsible, the action they will take, and the date by which the action will be complete.
- ID leads and set up as opportunity in Ajera and Hubspot. Track pipeline weekly. Refer to Principal In Charge once lead becomes a project
- NOTES: Use this space for background information that does not fit elsewhere

Huddle/Departmental Level 10 Meeting

1. Set a date and time to have a periodic Huddle to assesses progress against desired outcomes
2. Develop and share Huddle agenda, including a brief review of the five client development stages, but focus primarily on strategic next steps and the One List Action Plan. Use the time to strategize and aim to foster a culture of continual learning. (Don't use the Huddle to provide updates that can be handled through reports people can read on their own)
3. Emphasize teamwork! Get together regularly with your team to review progress, refine your plan, and share knowledge emerging market opportunities, and celebrate success

MARKETING TASKS

(Marketing Associate)

1. Review daily procurement agency watch list, IMS notices and Lead Generation Matrix
2. Monitor governmental, community and industry media outlets and communicate findings to the leadership team (Daily News Articles)
3. Update Ajera and Hubspot to manage next steps or follow up with principals on leads and opportunities
4. Work with principals to assist in One List updates and activities
5. Create letter campaigns with principals and develop follow up protocols
6. Manage social media platforms
7. Manage hit rate reporting

MARKETING RESOURCES

1. Staff Opportunities
    - Look for speaking opportunities for staff, author thought leadership articles, etc.
    - Identify community engagement and volunteer opportunities
    - Participate in industry professional organization events: AIA/ASID/IIDA/ASLA/APA/SMPS
    - Engage with local schools of Architecture/Interior Design/Urban Design
    - Support colleagues in community causes
    - Participate in high school career days and other programs
2. Marketing Materials
    - Ensure website is kept current with news, blogs, happenings, current projects. Review monthly.
    - Prepare/update collaterals: brochures for each sector and mini-sector (e.g. concessions), project sheets, resumes, etc.
    - Ensure project database is updated monthly.
    - Develop submittals for RFQs and RFPs.
        - Run go/no go process upon discovery of new RFQ's/RFP's
        - Create an RFQ Check list
        - Inform Senior Leadership and establish Principal in Charge
        - Work with Principal in Charge to establish consultant team
        - Reach out to consultants for teaming and collateral collection
        - Work with graphic designer to establish format according to the request requirements
        - Curate, create and review narrative. Work with PIC should request specific materials be required i.e. Project Approach, Schedule, Fees

REFERENCES

1. AIA B152 - Standard Form of Agreement Between Owner and Architect for Interior Design and Furniture, Furnishings, and Equipment (FF&E) Design Services
2. AIA B203 - Standard Form of Architect's Services: Site Evaluation and Planning
3. AIA D200 Project Checklist
4 *Leadership Excellence, Developing Key Competencies,* Caporaletti & Associates, March 1, 2010
5 *Many Voices, One Vision*
6. RediCheck Checklist
7. *Traction, Get a Grip on Your Business,* Gino Wickman
8. Vision/Tracker Organizer

FIRM READING LIST

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ACRONYMS

PM	Project Manager
PIC	Principal in Charge
V/TO	Vision / Traction Organizer
SWOT	Strengths Weaknesses Opportunities Threats
EOS	Entrepreneurial Operating System