



# Construction Management Services Overview

CM Services by Project Phase  
Pre-Construction (Design) Services  
Construction Services

Objective, Goals & Tasks of GCS as a CM

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# Pre-Construction (Design) Phase Services

## Conceptual Planning Phase

- Interface with the Owner to develop an economic cash flow analysis for the project.
- Develop construction dates in order to accomplish the stated objectives.
- Review the Owner's construction objectives and assist the project team in establishing budget and define the scope of work.
- Participate, to the extent required by the Owner, in the procurement of the special surveys, soil borings, and other related work to identify the characteristics of the property and coordinate these characteristics into the design parameters.

## Schematic Design Phase

- Monitor evolving design and make suggestions to the Architect / Engineer and Owner with regard to equipment, material, and system selections.
- Analyze systems and components and interface with the Architect / Engineer as to their effect upon time, cost, availability, and constructibility.
- Prepare trade-off studies and conduct value analysis of the evolving designs to assure budget adherence and optimum return on investment.
- Determine opportunities for phased construction to accelerate the project and / or to deal with all schedule constraints.
- Pinpoint opportunities for the direct purchasing of materials to accelerate the schedule and to generate savings.
- Determine the impact on cost and time of any changes from the design previously agreed to.
- Identify constraints and arrange bid packaging most responsive to market conditions.
- Review plans and specifications as developed for completeness and clarity with regard to bid packaging.
- Prepare cash flow analysis for design and construction phases of the project.

## Design Development Phase

- Develop a plan for the demolition of existing structures on the site.
- Contracting of the demolition work.
- Prepare a market analysis regarding materials, methods, and potential bidders and suppliers to ensure competition.
- Advise the Architect / Engineer on construction means and methods.
- Provide a construction schedule for issuance with specifications.

- Prepare a site use plan for construction operations considering staging, erosion control, traffic control, storage, parking, temporary facilities, etc.
- Generate interest of qualified bidders. Should it be found that insufficient competition is available in the local market, generate interest outside of the immediate area to ensure competition on all phases of the work.

## Construction Documents (Working Drawings)

- Review plans and specifications as developed for completeness and clarity with regard to bid packaging.
- Develop requirements for bid package specifications including: time extension rulings, calendar date schedules, progress payments, liquidated damages, superintendent requirements, change order processing, scheduling, and reporting.
- Prepare detailed construction schedule.
- At 50% working drawings, prepare a 16 division estimate to assure that the design conforms to the budget.
- Bid and award foundation and structure contract (or other preliminary phased construction).
- Obtain applicable permits (phased construction).

## Bidding and Awards

- Provide for advertising (or inviting bidders) and the distribution of bidding documents.
- Schedule and conduct pre-bid conferences in conjunction with the Architect / Engineer, so as to review specifics of the bidding documents.
- Assist Architect with receipt of questions from bidders and issuance of addenda.
- Monitor bidder activity to assure that those who have committed to bid the job are in fact doing so.
- Receive, review and analyze bids with the Owner and Architect / Engineer.
- Discuss the schedule with the low bidders in all areas of work before awarding any contracts and receive positive evidence from them that they can meet or better the job schedule.
- Receive approval of the construction sub-contracts by the Owner prior to execution.
- Write, award, and mail contracts.
- Update budget and schedule to assure consistency with bids received and awarded.
- Prepare cash flow schedule.
- Update master schedule.

# Construction Phase Services

## Construction Administration

- Provide proper professional liability insurance.
- Establish proper chain of command and establish construction administration procedures.
- Receive contractor's certificates of insurance, worker's compensation, etc. and forward to Owner and Architect with contract.
- Provide administrative management and related services to coordinate scheduled construction activities between multiple contractors.
- Schedule and conduct meetings to discuss procedures, progress, and scheduling.
- Prepare and distribute weekly meeting minutes to Owner, Architect, and all contractors.
- Monitor project construction schedule.
- Coordinate sequence of construction and assignment of space in areas where contractors are working.
- Endeavor to obtain satisfactory performance from each contractor.
- Recommend course of action to Owner when requirements of the contract are not met.
- Monitor estimate of construction cost.
- Meet with Owner monthly to update them on schedule, progress, changes, cost updates, etc.
- Maintain accounting records (disbursement summary).
- Review and certify contractor's application for payments and forward to Architect for certification.
- Review safety programs developed by contractors.
- Monitor work of contractors to determine that work is being performed in accordance with contract documents.
- Assist Architect with claims.
- Coordinate contractor dispute issues.
- Review shop drawings for contract compliance, transmit to architect for design intent review.
- Record project progress.
- Maintain record copy of contracts, drawings, specs, change orders, etc. at jobsite.
- Arrange for delivery and storage of Owner purchased items.
- Prepare pre-final punchlist – assist Architect with pre-final inspection.
- Observe contractor's final testing and start up of utilities, systems and equipment.
- Post construction and warranty phase.
- Assist Architect with final inspection.
- Coordinate the correction and completion of the work.
- Secure and transmit to the Architect warranties, keys, manuals, etc. for Owner's use.
- Establish project close-out procedures.
- Obtain Certificate of Substantial Completion and Certificate of Occupancy.
- Establish move in date of Owner.
- Settle all outstanding claims and change orders.

*"Whether collaborating with the design team or Trinity's building committee or finding creative and cost-effective solutions to address the complexities involved with our renovation, their attention to detail and flexibility have proved to be invaluable...We have been particularly impressed by the responsiveness of Gehrtz's on site foreman. He has been in ready communication with us throughout the project, which has been incredibly important as our ongoing ministry has continued during construction.*

*To be sure, this is the third such building project I have undertaken in my thirty-five years of ministry, and despite being the most complicated, this has been by far the smoothest. I cannot recommend their work enough."*

*- Rev. Simon Fenson, Trinity Lutheran Church Moorhead*

# GCS Objectives, Goals & Tasks

## Goals & Objectives

- Foster positive working relationships between all parties through mutual respect, trust and open communication.
- Manage the day to day work of all entities involved in the project.
- Serve as the liaison between the Owner and design team, soils, concrete, and special inspections consultants.
- Ensure that each member of the Owner's team of specialists discharges its responsibilities in a manner that serves the Owner's overall interests.
- Coordinate, on behalf of the Owner, the major elements of design and construction with the Owner's schedules and activities to minimize disruption to the Owner's operations.
- Schedule and coordinate the procurement, delivery and installation of owner furniture, fixtures, equipment, and any networking interfaces.
- Maintain and monitor a project construction schedule to ensure the contractor is able to deliver the project in the specified time frame as dictated in the project specifications.
- Maintain quality that meets or exceeds the Owner's standards.
- Maintain accountability with all designers, consultants, and contractors to ensure the project is delivered as per the construction documents.
- Manage and review all changes for the project to ensure the Owner interests are being protected and enhanced at all times during the course of the building project.
- Work with the contractor and Owner to ensure that occupancy, substantial completion, punchlists, closeout, and all warranty items are completed in a timely manner.

## Communication

GCS maintains the policy that open and effective communication is essential to being successful in all endeavors. We work diligently to make sure all parties fully understand and grasp the issues that are encountered through the construction process. We have successfully applied a firm but fair approach to dealing with issues as they arise in a project. This is done by communicating the overall objective clearly. GCS is firm with parties, so they clearly understand the Owners' position. GCS treats people fairly and with respect. We have found that by implementing these skills, our clients get results both from a timing standpoint and pricing standpoint. Collaboration with all affected parties brings solutions to problems that could not otherwise be mutually solved.

## Conflict Resolution

We apply our leadership skills to plan and direct your project team towards success. Our proactive approach encourages designers, contractors, and vendors to work together to

achieve the Owners' quality, cost, and schedule objectives. By building positive working relationships among the project team members, we facilitate timely resolution of conflicts that is essential to the design and construction process.

## Schedule

We have provided professional project management services on various schedule sensitive projects. Our clients have learned to come to GCS when they have a project that must be completed on a very short schedule. Concordia College in Moorhead, MN recently completed a \$4.3 million dollar renovation project on two of their dormitories. This project could only be completed during the summer recess. This project took 13 weeks to be completed and was delivered within the time frame that the college needed. This was done by having a very detailed construction schedule and ensuring that all trades working on the project knew the importance of their duties. We were able to meet this demanding schedule because of our experience in scheduling and coordinating construction projects.

We feel that for this project to be successful, key dates must be established early and effectively communicated with the contractors. While the Critical Path Method (CPM) will give you an overall project picture, we feel bar charts are very effective in communicating to the various contractors on the project. These charts are updated weekly and are effective in looking ahead to the up-coming 3-4 weeks.

Success in the scheduling portion of the work description relies on experience, realistic completion dates, collaboration with the contractor's work forces, and continuous monitoring of the construction activities. We feel you must always be dealing with issues 4, 6, and 8 weeks ahead of the activity that is happening on the site in order to be ahead of the curve. Work on next month's problems before they become today's crisis.

## Cost Control

As you review value engineering options, we are able to price out the various components to assure that you are getting dollar for dollar exchange for the materials that you are substituting.

We strive to keep change orders to an absolute minimum. When changes are necessary, we first make certain that they are warranted and properly priced. We are able to analyze the costs of changes during construction to make certain that the Owner is getting bid prices instead of change order pricing.

GCS uses a Contract Disbursement Summary (CDS) worksheet to track all construction costs. The CDS clearly lists all contract amounts, amounts paid to the contractor, construction

# GCS Objectives, Goals & Tasks cont.

changes, and the balance of the remaining contract. A copy of this worksheet is given to the Owner on a monthly basis with all approved pay requests from contractors. We also keep an accurate log of processed and pending change orders so at any given time the Owner may know where the project stands from a financial standpoint.

## Quality Control

Our experience in working with colleges, nursing homes, large public school districts, and owners is a testament that we understand their goals and expectations when it comes to their own internal standards. Sophisticated owners know what elements are key to giving them a building that will last 75 to 100 years. We know that life cycle costs are key to long lasting structures. Capital dollars are one thing to raise, but controlling operational dollars are important in keeping budgets in check. This all starts with quality control.

We will ensure that the industry standards are strictly adhered to during construction. Building envelope detailing and quality is one of the single most important issues to ensure long lasting, low maintenance costs of a project.

## Information Technology

GCS will utilize technology in all aspects of their contract documentation. Electronic files will be maintained for all emails, shop drawing logs, requests for information, requests for proposals, daily logs, phone logs, pay requests, contract changes, contract disbursements, etc. These records can be made available through our FTP site for the Owner to access and utilize at all times.

## On-Site Supervision

Our on site project management staff will be involved daily during construction activities.

We will conduct regularly scheduled project meetings to represent the Owners' interests. We will monitor the contractors' performance and the quality of the construction. The on-site project manager will be the main contact to assure that special consultants are given adequate notice for their inspection services.

Our on-site project manager will take photos of the work as well as completing daily logs and communication records. These photos and logs will be kept on file at the jobsite for the Owner to review. At the end of the project the photo log will be assembled and turned over to the Owner for their records.

Our on-site project manager will make certain that the contractor has the proper safety plans in place to meet all state and federal safety standards.

## Project Close-Out

Finishing strong is as important on a project as starting strong. Like all projects, the excitement of starting a project is intense, but as months go by and the project heads for completion, contractors start to look ahead to the next project. We have a saying that it takes 5% of the effort to get the first 95% of the project done and it takes 95% of the effort to get the last 5% of the project completed.

As the project nears completion, we will walk through the building with the contractor to prepare a pre-final punch list, which is a list of items we know will not be acceptable to the Owner or Architect. We will ensure that these items are corrected prior to the final inspection.

Commissioning of mechanical systems is paramount to having a mechanical system that functions properly upon completion. If you choose to hire a commissioning agent, we will work with the commissioning agent to assure that the work is accomplished. Any deficiencies will be reported to the contractor for repair and correction.

We will assemble all shop drawings, warranties, etc. for the owner's records. We will assist and schedule the training sessions for the owner's staff for the systems and equipment installed.

Project close out is not fully completed until all punch list items are satisfactorily resolved, testing completed, and the owner's staff is properly trained on the equipment and systems.

*"Gehrtz Construction Services has consistently provided creative design solutions and project management that prioritize the needs of Moorhead Public Schools. They have a proven track record of delivering projects on time and within budget and have saved our district substantial dollars by completing portions of the most recent referendum project a year in advance. The Moorhead Public Schools wholeheartedly endorse Gehrtz Construction Services and recommend them."*

*-Dr. Brandon Lunak, Superintendent Moorhead Area Public Schools*