





**Agenda of Orientation Meeting**  
**State University of New York {CAMPUS}**  
**SUCF Project No. XXXXX**  
**{PROJECT TITLE}**

Notice of Award Date:	XXXX
Addendum:	XXXX
Contract Amount:	XXXX
All Work, except Schedule III	XXXX
Schedule III	XXXX
Total Contract Amount:	XXXX
Completion Date:	XXXX
Effective Date of Permit :	XXXX
Expiration Date of Permit:	XXXX

**I. INTRODUCTIONS**

1. Meeting was opened with introductions, roles and responsibilities.
2. The status of the Contract was reviewed. The Contractor **has/has not** received the executed Contract.
3. The Contractor's Certificate of Insurance **is/is not** in order.
4. This project **is** a permitted project. The Contractor shall conspicuously post the building permit.
5. All correspondence shall be directed to XXXX with XXXXX. The correspondence shall bear the Project title and number. The Fund Coordinator shall be copied concurrently on all correspondence. Shop drawings will not be submitted to the Fund, only a copy of the transmittal (unless otherwise requested).
6. The "Management of Construction Projects" Manual was made available electronically to the Contractor and Architect/Engineer. The manual describes administrative responsibilities of the various parties on the project. The Fund Project Coordinator will assist the Contractor and Architect/Engineer in understanding any and all items.

## II. CERTIFICATION of DRAWINGS, ADDENDA and SPECIFICATIONS

Two (2) sets of bidding documents (drawings and project manuals) were provided by the consultant for certification directly after the meeting; one (1) set retained by SUCF, one (1) set to the General Contractor.

## III. PAYMENT

1. A CMR Access Request Form and CMR Quick Reference Guide was provided to the contractor along with a set of SUCF Forms including the CF-C1, C1, C3, C4-A1, C4-A2, C4-A3, C5, C7A, C8, C11, DC-5, Labor Rate Breakdown and Certification of Monthly Payment. The forms and related procedures were briefly reviewed for the benefit of the contractor. The forms are available on the SUCF Website ([www.sucf.suny.edu](http://www.sucf.suny.edu)).
2. The Department of Labor, in an effort to enhance the contractor's awareness of their compliance requirements as it pertains to the prevailing wage labor law, has requested each agency remind them of their responsibilities. Certain requirements noted were: the Contractor and Subcontractors have to keep certified payrolls three years from the project's date of completion. All subcontractors and sub-subcontractors must be given a copy of the current prevailing wage rates and be provided the respective Wage Rate Certification form for acknowledgement of receipt. All other related Labor Department requirements must also be adhered to. Certified Payrolls are to be filed with the SUCF every 30 days and shall be addressed to:

**State University Construction Fund**  
State University Plaza  
Albany, New York 12246  
Attention: Debra White, Facilities Program Coordinator

3. Wage Rate Certification forms and filing requirements were reviewed with the Contractor. The Prime Contractor is required by law to obtain and collect the certifications. **It is recommended that Wage Rate Certification be received by the Contractor prior to permitting any subcontractor or sub-subcontractor to engage in work on the project.** At final payment a CF-C7A form (Summary of Wage Rate Certification) will be required, and the original certifications from the subcontractors and sub-subcontractors listed must be attached. Final payment will not be made without these certifications, and it is

recommended that two originals be obtained promptly, with the Prime Contractor retaining an original, and the other original sent to the Fund at the time of certification. Please note that sending the Fund a copy at the time of certification does not relieve the Prime Contractor from the responsibility of attaching all original certifications to the final payment.

4. Work completed under this contract is tax exempt. The tax-exempt number for the project is the contract number prefixed with the letter "T".
5. Payment requisitions are typically presented at a bi-weekly project meeting for final review by the Consultant and the Fund. Prior to the submittal at the meeting, the Contractor shall have discussed the requisition with the designated site representative and agree upon said requisition. Five fully executed (original signatures) requisitions shall be submitted. In addition, the Contractor shall submit two copies of the Requisition Work Sheet, (Form No. DC-5) to accompany the requisition for review.
6. The Contractor may choose to submit the first Payment Application for billing of bonds and prepaid insurances only (copy of invoices required). This will set up the initial project accounting so that future payments will be processed more quickly. The Contractor may contact the Office of the State Comptroller to arrange for electronic payment directly to the Contractor's bank account at <http://www.osc.state.ny.us/epay/about.htm>
7. Prior to approval of the first payment application, the following items must be submitted and approved:
  - A fully executed contract
  - Certificates of insurance
  - Approved Contract Breakdown (CF-C2)
  - Preliminary CPM schedule ( if applicable)
8. The Contract breakdown was discussed. The Contractor will submit a copy to the Architect/Engineer and the Fund for review and approval. The contract requires a guarantee item of 1/2 of one percent up to \$5,000.00. The guarantee shall be shown as a separate item in the contract breakdown sheet. The Field Order Allowance shall also be listed as a separate item (if applicable).
9. Each payment application shall include Details of Payments to MBE/WBE Subcontractors and Suppliers entered into CMR via the MWBE tab. The Contractor shall transfer all information into CMR relative to MBE/WBE subcontractors and suppliers from the approved plan listing furnished by the Fund. All requested data on the MWBE tab must be accurately recorded. By signing the CF-C1, the contractor is certifying that this information is correct and completed. If no payment is due to one or more

listed subcontractors or suppliers, check the box on the appropriate line.

10. Any requests for payment for material stored off site must be made in strict accordance with the Agreement, Section 4.14. Use SUCF insurance form No. CISM 5/04. The contractor **does/does not** anticipate requesting payment for materials stored off site.
11. The General Contractor is required to submit a complete list of subcontractors including name, address, phone number, contact person, past projects (of similar nature) with respective contacts (preferable owner or Architect/Engineer) for review within 30 days of the signing of the Contract (**submit by: XXXX**). The Architect/Engineer shall review and submit their recommendation to the Fund for concurrence with the exception of the subcontractors designated by the Fund in the Notice to Award.

#### **IV. CHANGE ORDERS/CHANGE PROPOSALS**

1. Direction to the General Contractor in all matters of change, whether add, deducts, or no change in cost to the Contract amount will be given only by the Fund. The Architect will maintain an Open Item Tracking Log in a form established by the Fund.
2. If a change to the contract is necessary or desirable as determined by the Fund, the Architect/Engineer shall request the proposal, and the Contractor shall submit a proposal in accordance with Article IV Payment Section 4.01 and 4.02. The proposal shall include a statement as to the scope of work and complete breakdown for the work including number of hours estimated and material estimates and quotes for review and approval. Lump sum items are not acceptable. After receiving written Fund approval of its recommendation, the Architect/Engineer must initiate a formal change order. For field orders, the Fund will issue an authorization letter permitting payment to the contractor for completed work.
3. The Labor rate breakdown form was reviewed. The Contractor is required to submit labor rate breakdowns from the G.C. and each subcontractor. Backup information may be required to substantiate the Workman Compensation and B.I.P.D. rates recognizing the contractor's experience modifier and premium discounts.

#### **V. SUBMITTALS**

1. Any proposed substitution must be directly brought to the attention of the Architect and Fund within 90 days of the Notice of Award (**submit by: Date**) and must conform to all applicable conditions of the Agreement Section 2.20. The contractor **does/does not** anticipate a substitution at this time.

2. All Shop Drawings and/or samples shall be submitted to the Architect/Engineer for review and/or approvals. A minimum of - (X) copies of each submittal is required. (Architect X copies, contractor X copies, Site Representative X copies, Commissioning Authority X copies if applicable). All correspondence shall bear the proper SUCF Project No. and Title. All shop drawings shall bear the General Contractor stamp for proof of review.
3. State University Construction Fund projects require a full time Superintendent (Agreement, Section 2.06). The Contractor will submit to the Architect/Engineer and the Fund for approval the name of the proposed superintendent prior to beginning work along with a resume and emergency phone numbers for off hours. Superintendent's qualifications should list previous experience of similar nature. List of past projects shall also include contacts (preferably owner or Architect/Engineer).
4. The Contractor shall designate a person to be the Fire Prevention Program Superintendent, who shall be responsible for the fire prevention program and ensure that it is carried out through completion of the project.
5. All Contractors installing fire alarms are to be licensed by the State of New York, Department of State. The Contractor is required to submit proof of the license to the Consultant and the Fund.
6. The superintendent shall maintain a complete set of contract documents and approved shop drawings, submittals and samples at the site. No work shall progress which requires a shop drawing until the shop drawings have been approved. The superintendent shall maintain a set of as-built drawings on site.
7. The Contractor shall provide the College/University with a complete set of Manufacturer's Safety Data Sheets. The superintendent shall maintain a complete set on site.
8. Within sixty (60) calendar days after the date specified for the commencement of work, the Contractor shall submit a shop drawing and sample schedule to the architect for approval (Agreement Section 2.19(1) **submit by: XXXX**). A respective shop drawing log will be developed by the Architect/Engineer. The contractor may keep their own submittal log. The Architect/Engineer log will be reviewed and updated at job progress meetings. The Contractor shall give consideration to lead time requirements of critical equipment when submitting their schedule.

9. The Architect/Engineer and the Contractor shall develop a testing log, identifying the different systems to be tested, including testing required by NYS Building Code. The Contractor may submit a testing report form for tests to be performed if one is available. If none are available, the Architect/Engineer will develop one which lists the test, requirements, locations, date performed, who present and result. The form shall have spaces for the sign-off of the Contractor's superintendent and site representative/architect.

## **VI. SCHEDULE**

1. Within fifteen (15) calendar days after receipt of the Notice of Award, the Contractor shall submit to the Fund and the Architect for their approval its proposed working plan and schedule for the first ninety (90) calendar days of operation (**submit by: XXXX**).
2. Within y (90) calendar days after receipt of the Notice of Award , the Contractor shall submit to the Fund and Architect for their approval its proposed working plan and schedule for all work covered by the contract. (**submit by: XXXX**).
3. This schedule should show all primary activities with respective durations. The contract completion date should be shown as the completion of work with at least one activity terminating there. This Progress Schedule will be reviewed by all parties and revisions made as required. If necessary, the Contractor may be required to provide a supplemental detailed schedule showing the extent of work to be completed on an area-by-area basis with emphasis or completion dates for each sub-area.
4. Activities that may disrupt the Campus shall be scheduled through the Site Representative for this project (**XXX**, reached at **XXX**).

## **VII. PROJECT ADMINISTRATION/GENERAL**

1. The Contractor shall be responsible for locating all existing utilities in an effort not to disturb them during construction. The Contractor shall study the Campus's utility drawings prior to beginning work.
2. Access to Site/Barricades/fencing
3. Staging area/storage of materials on site:



4. The superintendent shall maintain a set of drawings on site to annotate any field changes. The drawing will be reviewed concurrent with the Contractor's submission of his payment requisition. At the end of the project, the Contractor will utilize the drawings to develop the required Record Drawings (Agreement, Section 2.24).
5. In addition to any instructional periods specifically required by the specification, the Contractor shall provide a minimum of three complete sets of operating instructions and manuals as identified in the Agreement, Section C - Special Conditions. The manuals must be completed approved and made available to the University a minimum of six weeks prior to the completion of the project. **This item must be finalized prior to a final acceptance of the project.**
6. Harassment of students or faculty by the Contractor will not be tolerated. If an incident arises, the Contractor will be asked to permanently remove the employee from the site.
7. It is the Contractor's responsibility to receive their own materials delivered to the job site.
8. The contractor **was/was not** given sufficient quantities of documents.
9. Daily work hours are anticipated from **7:00 AM** to **4:00 PM**.
10. If the Contractor is on site intermittently, they shall notify the Site Representative prior to leaving the site. Once the Contractor has mobilized, it is assumed they will be on site daily and notification is not necessary.
11. Temporary power arrangements will be coordinated with the Architect, Fund and University.
12. Water **may** be taken from existing hose bibs located throughout the site.
13. Toilet facilities will be provided by **XXXX**.
14. There **are/are not** other contracts on site.
15. For any warranty requiring the identification of the owner, the Contractor shall use "**State University College at XXXX**".
16. If roofing is involved, a preroofing meeting will be scheduled when all shop

submittals have been approved and prior to any work commencing. A copy of the SUCF preroofing agenda will be provided for this meeting.

17. If asbestos abatement is involved, a separate meeting will be held after all shop submittals have been approved and prior to work commencing. Submit subcontractor's insurance certification on Fund form.
18. Identify any other special required pre-work meetings
19. Lead abatement and disposal shall be in accordance with all applicable regulations.
20. A brief review and questions were entertained on the contract documents by the Architect/Engineer.
21. It will be necessary to maintain emergency exiting from the buildings at all times. Exits may be closed to routine pedestrian traffic during the duration of work with Fund/Campus concurrence. The Contractor and Campus will work together to properly sign and to redirect personnel.
22. Parking within the Contractor staging area shall be limited. Parking regulations were discussed.
23. Pursuant to NYSDEC, SPEDES General Permit for stormwater discharges from construction activity, signatory requirements for reports, certifications or information required by the aforementioned permit **are/are not** required.
24. A review of the scope of work and details of the commissioning process were reviewed as applicable.

**VIII. The Next Meeting Will Be Scheduled On XXXXXXXXXXXXXXXX**

cc: All in Attendance  
Other