



**AIA**<sup>®</sup>

# Document B204<sup>™</sup> – 2007

## *Standard Form of Architect's Services: Value Analysis, for use where the Owner employs a Value Analysis Consultant*

for the following PROJECT:  
*(Name and location or address)*

THE OWNER:  
*(Name, legal status and address)*

THE ARCHITECT:  
*(Name, legal status and address)*

THE OWNER'S VALUE ANALYSIS CONSULTANT:  
*(Name and address)*

### THE AGREEMENT

This Standard Form of Architect's Services is part of or modifies the accompanying Owner-Architect Agreement (hereinafter, the Agreement) dated the \_\_\_\_\_ day of \_\_\_\_\_ in the year \_\_\_\_\_  
*(In words, indicate day, month, and year.)*

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This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

This document provides the Architect's scope of services only and must be used with an owner-architect agreement. It may be used with G802<sup>™</sup>-2007, Amendment to the Professional Services Agreement, to create a modification to any owner-architect agreement.

## ARTICLE 1 INITIAL INFORMATION

The Architect's performance of the services set forth in this document is based upon the following information. Material changes to this information may entitle the Architect to Additional Services.

*(List below information, including conditions or assumptions, that will affect the Architect's performance.)*

## ARTICLE 2 VALUE ANALYSIS SERVICES

§ 2.1 The Architect shall consult with the Owner, research applicable criteria, attend meetings, communicate with members of the Project team and issue progress reports. The Architect shall coordinate the services provided by the Architect and the Architect's consultants with those services provided by the Owner and the Owner's consultants.

§ 2.2 The Architect shall coordinate the Project schedule with the Owner's Value Analysis Consultant's schedule and advise the Owner of changes required to the Project schedule.

§ 2.3 The Architect shall consider the value of alternative materials, building systems and equipment, together with other considerations based on program, budget and aesthetics in developing the responses to Value Analysis Proposals.

§ 2.4 The Architect shall submit value analysis documentation to the Owner at intervals appropriate to the process for purposes of evaluation and approval by the Owner. The Architect shall be entitled to rely on approvals received from the Owner to complete the Value Analysis Services.

### § 2.5 Pre-Workshop Services

§ 2.5.1 Subject to Section 3.1, the Architect shall participate in a coordination meeting conducted by the Owner's Value Analysis Consultant prior to each Value Analysis Workshop.

§ 2.5.2 The Architect shall assemble and provide copies of the Project data to the Owner's Value Analysis Consultant at least 14 days before each Value Analysis Workshop. Project data includes technical and cost data appropriate to the progress of the Design Services at the time each Value Analysis Workshop is conducted, which may include the Owner's functional space program, engineering reports, design alternatives and calculations, phasing and scheduling information, drawings and specifications, cost estimates and any special cost studies.

§ 2.5.3 The Architect shall review the Value Analysis Workshop Plan prepared by the Owner's Value Analysis Consultant and prepare for Workshop Services.

### § 2.6 Workshop Services

§ 2.6.1 The Architect shall present a description of the Project's goals, design parameters, rationale, evolution, and alternatives for the major design components at the beginning of each Value Analysis Workshop.

§ 2.6.2 Subject to Section 3.1, the Architect shall participate in each Value Analysis Workshop in accordance with the Value Analysis Workshop Plan prepared by the Owner's Value Analysis Consultant.

§ 2.6.3 The Architect shall arrange for the key personnel of the Architect and the Architect's consultants to participate in the Value Analysis Workshop.

§ 2.6.4 The Architect shall attend the presentation of the Value Analysis Proposals made by the Owner's Value Analysis Consultant at the end of each Value Analysis Workshop.

### § 2.7 Post-Workshop Services

§ 2.7.1 Subject to Section 3.1, the Architect shall review and evaluate each Value Analysis Proposal on the basis of Project goals, technical considerations, implementation consequences, and initial, operational, and life cycle cost savings.

- § 2.7.2 The Architect shall prepare a Value Analysis Implementation Report, for review by the Owner, that
- .1 summarizes the action proposed by the Architect on each Value Analysis Proposal,
  - .2 provides an explanation for any Value Analysis Proposal that is modified or rejected by the Architect, but not for any accepted Value Analysis Proposal,
  - .3 advises the Owner of any changes to the Project schedule and the estimate of the Cost of the Work resulting from the implementation of the accepted Value Analysis Proposals, and
  - .4 advises the Owner of any Change in Services of the Architect resulting from the implementation of the accepted Value Analysis Proposals.

§ 2.7.3 The Architect shall review the Value Analysis Implementation Report with the Owner and issue a Final Value Analysis Implementation Report incorporating all Value Analysis proposals accepted by both the Owner and the Architect.

### ARTICLE 3 ADDITIONAL SERVICES

§ 3.1 The Architect shall provide Value Analysis Services exceeding the limits set forth below as Additional Services. When the limits below are reached, the Architect shall notify the Owner:

- .1 ( ) Pre-workshop coordination meetings
- .2 ( ) Value Analysis Workshops
- .3 ( ) Value Analysis Proposals reviewed and evaluated
- .4 ( ) meetings with the Owner to review the results of the workshops
- .5 ( ) revisions to the Value Analysis Implementation Report

### ARTICLE 4 OWNER'S RESPONSIBILITIES

§ 4.1 The Owner shall furnish the services of a Value Analysis Consultant who shall organize, manage, and conduct the value analysis process, including making arrangements for facilities for the workshops and meetings and preparation of the team members for each workshop.

§ 4.2 The Owner shall require its Value Analysis Consultant to set forth the Owner's objectives, constraints and criteria in a Value Analysis Workshop Plan and provide a detailed schedule for the value analysis process.

§ 4.3 The Owner shall require its Value Analysis Consultant to provide Value Analysis Proposals and clarifications that are accurate and complete and the Architect shall be entitled to rely on their accuracy and completeness.

### ARTICLE 5 COMPENSATION

§ 5.1 For the Architect's Value Analysis Services described under Article 2, the Owner shall compensate the Architect as follows:

*(Insert amount of, or basis for, compensation.)*

§ 5.2 For Additional Services that may arise during the course of the Project, including those under Section 3.1, the Owner shall compensate the Architect as follows:

*(Insert amount of, or basis for, compensation.)*

§ 5.3 Compensation for Additional Services of the Architect's consultants when not included in Section 5.2, shall be the amount invoiced to the Architect plus \_\_\_\_\_ percent

( \_\_\_\_\_ %), or as otherwise stated below:

**ARTICLE 6 SPECIAL TERMS AND CONDITIONS**

Special terms and conditions that modify this Standard Form of Architect's Services: Value Analysis, if any, are as follows:

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