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The TEXT indicated with < > is to be selected or filled in by the Specifier to meet the requirements of the project.

If any of the SECTIONS (i.e. 1.02, 1.03, etc.) below are not required for the project do NOT delete the Section, but rather change the title of the Section to “NOT USED” (i.e. 1.02 NOT USED) so that numbering of specification references is preserved, and delete the specification language in this Section below the title.

PART 1 GENERAL

1.01 SECTION INCLUDES

- A. Requirements.
- B. Form and content.
- C. Cross-reference listing.
- D. Changes to schedule of values.

1.02 REQUIREMENTS

- A. CONTRACTOR shall submit all required documents via PM SaaS, as specified in Section 01 33 12 - PM SaaS.
- B. CONTRACTOR shall assign prices to Major Items of Work in the Schedule of Values which aggregate to the Contract Price. CONTRACTOR shall base prices on costs associated with scheduled activities based on the Construction Schedule for each Major Item of Work. Multiple scheduled activities may aggregate to a single scheduled value; however, single scheduled activities cannot be split across multiple scheduled values. The initial Schedule of Values shall be submitted by the date established in the Contract Documents.
- C. CONTRACTOR shall submit to UTILITIES <and Engineer> any revisions to the Schedule of Values allocated to various portions of Work within <21> days after issuance of the Notice to Proceed by UTILITIES.
- D. In response to comments from UTILITIES <and Engineer>, CONTRACTOR shall submit a corrected Schedule of Values within <10> days of receipt of the comments from UTILITIES <and Engineer>, but no later than <10> days prior to anticipated submittal of first Application for Payment.
- E. Upon the request of UTILITIES <or Engineer>, CONTRACTOR shall support values with data which will substantiate their correctness.
- F. The CONTRACTOR and UTILITIES <and Engineer> shall meet and jointly review the Schedule of Values, and make any adjustments in value allocations if, in the opinion of UTILITIES <and Engineer>, these are necessary to establish a fair and reasonable allocation of the Contract Price for the Major Items of Work.
- G. The Schedule of Values will be the basis of payment for early procurement of materials with onsite verification.

- H. The Schedule of Values, unless objected to by UTILITIES <or Engineer>, shall be used as a basis for CONTRACTOR's Applications for Payment and for verifying amounts associated with any deductive changes to the Contract Price.
- I. The Schedule of Values shall be arranged with sufficient detail and breakout to facilitate continuous evaluation of project work progress and status.
- J. The Schedule of Values shall provide a breakdown of the Contract Sum in sufficient detail to facilitate continued evaluation of Applications for Payment and progress reports. CONTRACTOR shall break principal subcontract amounts down into several line items within the Schedule of Values.
- K. CONTRACTOR shall round amounts off to the nearest whole dollar in the Schedule of Values.
- L. For each part of the Work where an Application for Payment may include materials or equipment, purchased or fabricated and stored, but not yet installed, CONTRACTOR shall provide separate line items on the Schedule of Values for initial cost of the materials, for each subsequent stage of completion, and for the total installed value of the completed part of the Work.
- M. CONTRACTOR shall coordinate preparation of its Schedule of Values for its part of the Work with preparation of the CONTRACTOR's Construction Schedule, as follows:
 - 1. Correlate line items in the Schedule of Values with other required schedules and forms, including:
 - a. CONTRACTOR's construction schedule.
 - b. Application for Payment form.
 - c. List of subcontractors.
 - d. Schedule of allowances.
 - e. Schedule of alternates.
 - f. List of products.
 - g. List of principal suppliers and fabricators.
 - h. Schedule of submittals.
 - 2. Submit the Schedule of Values to UTILITIES <and Engineer> at the earliest feasible date, but in no case later than <10> days from Notice to Proceed.

1.03 FORM AND CONTENT

- A. The format of the Schedule of Values shall follow current PM SaaS requirements identified in section 01 33 12 – PM SaaS.
- B. The Schedule of Values shall list installed value of component parts of Work in sufficient detail to serve as a basis for computing values for progress payments during construction.
- C. For each major line item in the Schedule of Values, CONTRACTOR shall list sub-values of major products or operations under that item.
- D. For various portions of Work:
 - 1. Each item in the Schedule of Values shall include a directly proportional amount of CONTRACTOR's overhead and profit.
 - 2. For items for which progress payments will be requested for stored materials, break down value into:
 - a. Cost of materials, delivered and unloaded at Site, with taxes paid.
 - b. Cost of onsite material storage facilities.
 - c. Cost of storing materials offsite.
 - d. Total installed value, including CONTRACTOR's overhead and profit.

1.04 CROSS-REFERENCE LISTING

- A. To assist in the correlation of the Schedule of Values and the <Critical Path Method Schedule> <Construction Progress Schedule>, provide a cross-reference listing of when schedule activities are

finalized, provide a report that shows the cross reference between the Schedule of Values and the detailed progress Schedule activities.

- B. In the case where a number of progress schedule items make up the total cost for a Schedule of Values item, indicate the total cost for each Schedule of Value item.
- C. Update and submit these listings in conjunction with the <Critical Path Method Schedule> <Construction Progress Schedule> monthly submittals.
- D. Incorporate approved Change Orders reflected in the <Critical Path Method Schedule> <Construction Progress Schedule> into the Schedule of Values as a single unit identified by the Change Order number.

1.05 CHANGES TO SCHEDULE OF VALUES

- A. Changes to the <Critical Path Method Schedule> <Construction Progress Schedule> with additional activities not included in the original schedule but included in the original Work (schedule omissions) and cause a change to the Schedule of Values shall have values assigned as approved by UTILITIES.
- B. CONTRACTOR shall reduce other activity percentage values in the Schedule of Values in order to provide equal value adjustment increases for added activities, as approved by UTILITIES.
- C. In the event the CONTRACTOR and UTILITIES agree to make adjustments to the original Schedule of Values, increases and equal decreases to values for activities may be made and accepted by UTILITIES using the Contract Change process defined in the General Conditions.

PART 2 PRODUCTS

NOT USED

PART 3 EXECUTION

NOT USED

END OF SECTION