Architecture, Engineering, and Construction Division

Geotechnical Consultant and Testing Agency Agreement Instructions for Administrative Assistants and Service Providers

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All previous versions of this document are obsolete.

A copy of this document is available for download to Church Employees,

Consulting Architects and Consulting Engineers on the AEC Website located at:

* http://aec.ldschurch.org/aec/
* Select “Design Guidelines” under “Support Documents”
* Select “[Geotechnical Consultant and Testing Agency Agreement Instructions for Administrative Assistants and Service Providers](http://aec.ldschurch.org/aec/design_guidelines/SupportDocs/Geotechnical_Consultant_and_Testing_Agency_Agreement_Instructions.docx)” under “REAL ESTATE ACQUISITION” to download the document

Contact Chris Barker (email: [Chris.Barker@ldschurch.org](mailto:Chris.Barker@ldschurch.org); phone: 801-240-1667)

with questions or suggestions for improvement.

Salt Lake City, Utah

**Geotechnical Consultant and Testing Agency Agreement Instructions**

**for**

**Administrative Assistants and Service Providers**

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Geotechnical Consultants and Testing Agency Instructions for Administrative Assistants and Service Providers

# Introduction

This document contains instructions for the distribution and use of the *Agreement Between Client and Geotechnical Consultant (*Canada and US*)* and also for the distribution and use of the *Agreement Between Owner and Testing Agency* (Canada and US*).*  The following topics are covered:

* [*Geotechnical Consultant and Testing Agency Selection Guidelines*](https://teams.ldschurch.org/sites/MFD/ResourceLibrary/Geotechnical%20Consultant%20and%20Testing%20Agency%20Selection%20Guidelines.docx)
* *Agreement Between Client and Geotechnical Consultant (*[Canada](https://teams.ldschurch.org/sites/MFD/ResourceLibrary/Agreement%20Between%20Client%20and%20Geotechnical%20Consultant%20CN.docx) and [US](https://teams.ldschurch.org/sites/MFD/ResourceLibrary/Agreement%20Between%20Client%20and%20Geotechnical%20Consultant%20US.docx)*)*
* *Agreement Between Owner and Testing Agency (*[Canada](https://teams.ldschurch.org/sites/MFD/ResourceLibrary/Agreement%20Between%20Owner%20and%20Testing%20Agency%20for%20Testing%20and%20Inspection%20CN.docx) and [US](https://teams.ldschurch.org/sites/MFD/ResourceLibrary/Agreement%20Between%20Owner%20and%20Testing%20Agency%20for%20Testing%20and%20Inspection%20US.docx)*)*

# Geotechnical Consultant and Testing Agency Selection Guidelines

Once the need for a geotechnical evaluation report or testing agency has been established, the Project Manager has the responsibility to select the service provider. Within the United States and Canada, the service provider should be selected from the list of “trained” service providers. Additional service providers can be added to this list once they have been “trained” by AEC (Chris Barker). The list of “trained” service providers is available on the MFD Resource Library as [*Trained Geotechnical Consultants and Testing Agencies*](https://teams.ldschurch.org/sites/MFD/ResourceLibrary/Trained%20Geotechnical%20Consultants%20and%20Testing%20Agencies.docx)*.* This document lists the service providers’ contact information and their areas of coverage.

The Project Manager should refer to the [*Geotechnical Consultant and Testing Agency Selection Guidelines*](https://teams.ldschurch.org/sites/MFD/ResourceLibrary/Geotechnical%20Consultant%20and%20Testing%20Agency%20Selection%20Guidelines.docx) found on the MFD Resource Library for guidance and instructions. This document is also available through the *Project Management Office Manual (PMOM)* and outlines the process for selecting service providers as well as other selection guidelines.

# Master Agreement Between Client and Geotechnical Consultant

The *Geotechnical Consultant and Testing Agency Initiative* which utilized master agreements and preferred service providers has been discontinued.

# Agreement Between Client and Geotechnical Consultant

This agreement is used in the United States and Canada with all geotechnical consultants. It is available on the MFD Resource Library. It is also accessible through the *Project Management Office Manual (PMOM)*. The following applies to the agreement before it is sent to the geotechnical consultant:

* Terms and Conditions. The Administrative Assistant completes:
  + The name of the geotechnical consultant’s firm.
  + The information for the “Project Site” (Property Number, Project Address, Project Type, Project Name, Project Description).
  + The information for the CLIENT, excluding signatures and the effective date.
  + The information for the CONSULTANT, excluding signatures, in the signature block.
* Attachment A (Geotechnical Evaluation Report Template). The Administrative Assistant does not complete any portion of Attachment A. The geotechnical consultant prepares a proposal based upon Attachment A and procures the [*Geotechnical Evaluation Report Template*](http://aec.ldschurch.org/aec/design_guidelines/SupportDocs/Geotechnical_Evaluation_Report_Template.docx) for use from the AEC Website.
* Attachment B (Compensation Rates Schedule). The Administrative Assistant does not complete any portion of Attachment B. It is completed by the geotechnical consultant.

The Administrative Assistant sends the entire agreement to the geotechnical consultant (Terms and Conditions, Attachment A and Attachment B).

The geotechnical consultant creates a proposal and sends it back to the Administrative Assistant with the entire agreement (Terms and Conditions Attachment A and the completed Attachment B).

The Project Manager reviews the proposal and if the proposal is acceptable, the Administrative Assistant:

* Inputs the fee amount into the Terms and Conditions under “Compensation”
* Inputs the time allowed for the geotechnical evaluation report to be prepared into the Terms and Conditions under “Time of Performance”
* Sends the entire agreement (Terms and Conditions, Attachment A and Attachment B) back to the geotechnical consultant for the signature of the authorized representative
* The geotechnical consultant prints the entire agreement, signs and returns the entire agreement (Terms and Conditions, Attachment A and Attachment B) to either the Administrative Assistant or Project Manager as directed

When the Administrative Assistant receives the entire agreement from the geotechnical consultant or the Project Manager, the Administrative Assistant:

* Terms and Conditions:
  + Obtains the signatures of the Owner’s designated representative if not already received, and inputs the effective date
* Provides a scanned copy of the signed agreement to the geotechnical consultant

# Master Agreement Between Owner and Testing Agency

The *Geotechnical Consultant and Testing Agency Initiative* which utilized master agreements and preferred service providers has been discontinued.

# Agreement Between Owner and Testing Agency

This agreement is used in the United States and Canada with all testing agencies. It is available on the MFD Resource Library. It is also accessible through the *Project Management Office Manual (PMOM)*. The following applies to the agreement before it is sent to the geotechnical consultant:

* Terms and Conditions. The Administrative Assistant completes:
  + The name of the testing agency’s firm.
  + The information for the “Project Site” (Property Number, Project Address, Project Type, Project Name, Project Description).
  + The information for the CLIENT, excluding signatures and the effective date.
  + The information for the CONSULTANT, excluding signatures, in the signature block.
* Attachment A (Project Scope of Work):
  + The Administrative Assistant completes the information for the Property Number, Property Address and Project Name at the beginning of the Attachment
    - The Administrative Assistant does not complete any other portion of Attachment A. It is completed by the testing agency
  + The testing agency will complete Attachment A to create a proposed project scope of work based upon the requirements of the project contract documents
    - The testing agency must be provided access to the project contract documents
* Attachment B (Compensation Rates Schedule). The Administrative Assistant does not complete any portion of Attachment B. It is completed by the testing agency

The Administrative Assistant sends the entire agreement to the testing agency (Terms and Conditions, Attachment A and Attachment B). The testing agency completes Attachment A and Attachment B and sends the entire agreement (Terms and Conditions, the completed Attachment A and completed Attachment B) back to the Administrative Assistant.

The Project Manager and the Project Architect review the proposal of Attachment A and if the proposal is acceptable, the Administrative Assistant:

* Sends the entire agreement (Terms and Conditions, Attachment A and Attachment B) back to the testing agency for the signature of the authorized representative. The testing agency prints the entire agreement, signs and sends the entire agreement back to whom they were directed, the Administrative Assistant or the Project Manager.

When the Administrative Assistant receives the entire agreement from the testing agency or the Project Manager, the Administrative Assistant:

* Terms and Conditions:
  + Obtains the signatures of the designated representative if needed and inputs the effective date.
* Provides a scanned copy of the signd agreement to the testing agency.

The service provider is to contact the Owner when 80% of the estimated contract fee has been used to discuss the status of the testing and inspection services being provided. The service provider shall not exceed the arranged fee without prior authorization from the Project Manager.