



Company Overview

Trillium Consulting, LLC offers professional services for construction and development projects. We act as an Owner's Representative for clients who are constructing or leasing industrial, commercial, or institutional buildings or developing land.

We consult during all phases of a project, including programming, approval, designer and contractor selection, contract, design, construction, and close-out. We act on behalf of the client's interests and advise them in decision making throughout the project process. Our purpose is to inform the client of their options so they are positioned at all times to make the best decisions, advise them on contractual responsibilities and industry standards, and ensure that they are receiving the services and products that they are owed. Our approach is to be fair, but firm, with the parties that the client contracts with.

Trillium Consulting, LLC works with a network of real estate brokers, architects, and engineers who can be utilized on a full-service basis or consulted as needed during any stage of the project.

The scope of our professional services is customized for each project. The general services offered include:

- Meet with the Owner to review detailed program requirements
- Inspect prospective sites and analyze due diligence information
- Make presentations to governmental approving bodies
- Meet with building officials to determine permit requirements
- Manage the designer and contractor selection processes
- Review the draft contract documents and make content recommendations
- Review design documents, including plans and specifications, to ensure that they comply with the program requirements
- Attend job progress meetings
- Observe the construction and monitor the schedule
- Analyze and make recommendations for issues requiring client decisions
- Monitor and update project budget and actual cost
- Review, analyze and negotiate change orders
- Review payment requests
- Prepare the punch list
- Review contract closeout documents

A detailed description of each phase of service is as follows:

Programming

- Inspect current facilities

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- Interview client to determine program requirements
- Inspect prospective sites
- Review due diligence information, including:
 - site soil boring report
 - topographic survey
 - phase I environmental assessment
 - ALTA survey
 - title search
 - covenants, conditions, and restrictions

Approval

- Present plans to governmental approving bodies
- Review project with building officials to determine local permit requirements
- Determine which permits and approvals are required from non-local agencies

Designer and Contractor Selection

- Recommend bidding strategies
- Develop bid specifications
- Issue bid packages
- Interview bidders and research references
- Review bids, provide analysis, and recommend award

Contract

- Recommend contract form to be used
- Review the draft contract and make content recommendations
- Recommend and review contract attachments
- Make recommendations regarding process work
- Make recommendations regarding future expansion accommodations

Design and Permit

- Attend design meetings to monitor the design development
- Ensure that the program requirements are fulfilled by the design documents, including drawing and specifications
- Compare the design to the project budget
- Assist the Owner throughout the permit review process

Construction

- Attend job progress meetings
- Observe the construction
- Monitor the schedule

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- Analyze and make recommendations on issues requiring Owner decisions
- Monitor the project cost
- Review testing agency observation and test reports
- Analyze scope changes
- Negotiate change orders
- Review payment applications
- Provide monthly progress reports with pictures
- Assist the Owner in coordinating the General Contractor's work with that of other Owner contractors and vendors

Close Out

- Perform final inspection and issue punch list
- Review record documentation for accuracy and completeness, including warranties, O&M manuals, and as-built drawings
- Oversee the commissioning of equipment and operating and maintenance training
- Review final payment application