

H&R BLOCK – HRB 2 - (Upgrade - Campaign)

SCOPE OF WORK

SURVEYOR

VERSION LOG:

Version	Date:	Revision notes:
1.1	5/22/25	Update formatting. Update objective.

INTRODUCTION TO PROJECT:

Welcome to the “H&R Block - Upgrade - (Campaign)” Project with FSU!

The goal of this survey is to collect the existing conditions of the site as required by this scope of work. FSU will be acting as the client’s eyes and ears on site. Please pay attention for items that look out of the ordinary or expensive to correct. This project is typically completed in trips including multiple sites based on region. Sites are typically existing occupied H&R Blocks. A lockbox code and authorization letter will be provided. A ladder will be required to view lightbulb type and for lightbulb photos. Call the Project Manager for any issues on site.

SURVEYOR CRITICAL PROJECT INFORMATION:

Project Fee:	In QuickBase		
Turnaround/Upload Time Frame:	-AutoCAD base plan: Same day as survey – immediately following onsite documentation. -Field drawings: 24 hours following onsite documentation -Field Report: 24 hours following onsite documentation -Photos: 24 hours following onsite documentation Surveyor shall contact the Project Manager if he/she anticipates a delay in the survey and/or document delivery. This should happen early in the survey as possible.		
FSU Project Contacts			
Project Manager:	Project Manager	Project Coordination:	Project Coordinator
Project Manager Phone:	303-355-7274	Project Coordination Phone:	303-355-7274
Project Manager Email:	Project Manager’s Email	Project Coordination Email:	scheduling@fsusurveyor.com
FSU Project Escalation:	For on-site survey issues, Access Issues, Delayed Access, Lock Box is not present, Incorrect Key, Incorrect Code, Locked Rooms		
1. Project Manager:	Project Manager		
2. Vice President of Operations:	VP of operations		
3. After Hours Contact:	Project Manager’s Cell Phone		
Dress Code:	Business Casual		
Reimbursable Expenses:	<ul style="list-style-type: none"> ○ This project has reimbursable expenses. ○ Reimbursable expenses are due no later than 7 days from the date of survey. Any expenses submitted past 7 days will not be paid. ○ Surveyor will fill out the expense report through their vendor portal on QuickBase ○ Receipts are required for all expenses 		

Surveyor Responsibilities:	<ul style="list-style-type: none"> ○ Thoroughly review the Scope of Work and address any questions with the Project Manager prior to survey. ○ Coordinate the feasible survey dates with FSU scheduling, then book travel ○ Coordinate with site contact prior to survey for site visit timing & any additional requirements. ○ Contact Project Manager with any on-site issues or concerns ○ Enter “date surveyor deliverables in” in QuickBase upon uploading of deliverables. ○ Upload all documentation/deliverables to QuickBase within the required timeframe, send notification to Project Manager. Note: all deliverables must be completed in full prior to upload, partial deliverable uploads will not be accepted ○ Notify FSU Project Manager when all deliverables have been uploaded. ○ Respond to Drafters and FSU staff questions within two (2) to 24 hours
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CRITICAL PROJECT INFORMATION:

<ul style="list-style-type: none"> ○ Photos – Follow the ‘Stand Here Map’ ○ Document all elements that protrude from the wall. Document all items that are surface mounted (sm), including conduit. These elements could prevent installation of new furniture ○ Document overall dimensions in each room. This is critical for placing new furniture. ○ Provide three (3) width dimensions in the Tax Preparation Area – one near the storefront, one in the middle and one in the rear of the space. ○ Document wall finishes – especially heavy texturing and finishes other than painted drywall. ○ Document floor finishes and the transition from one flooring type to another
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SURVEYOR DELIVERABLES PACKAGE:

The following items are required to be delivered to FSU:	
<ol style="list-style-type: none"> 1. AutoCAD DWG (Surveyor CAD Saved As: HRB2_XXXXX_CityST_SurvCAD) <ol style="list-style-type: none"> a. Surveyor must provide a CAD Base Plan (Completed on Site) that shows all walls, half-walls, doors, windows, columns, bump outs, vertical floor changes, soffits, built in/casework and ceiling grid 2. Field Drawings (Field Drawings Save As: HRB2_XXXXX_CityST_FieldDrawings) <ol style="list-style-type: none"> a. To include the rest of the information listed in the scope of work for Floor Plan, MEP/FFE, RCP 3. Field Report (Completed in its Entirety) (Field Report Save As: HRB2_XXXXX_CityST_FieldReport) 4. Still Photos <ol style="list-style-type: none"> a. Photo Folder naming protocol: HRB2_XXXXX (5 digit site number)_CityST_Photos <ol style="list-style-type: none"> i. Photo naming protocol: HRB2_XXXXX (5 digit site number)_### 5. Laser Photos <ol style="list-style-type: none"> a. Folder Naming Protocol: HRB2_XXXXX (5 digit site number)_CityST_Laser <ol style="list-style-type: none"> i. Photo Naming Protocol: HRB2_XXXXX (5 digit site number)_### 	

I. FIELD DRAWING IS REQUIRED FOR THE SURVEYED SPACE

Extents/Column Dimension Plan	<ul style="list-style-type: none"> ○ Sketch of layout of space with overall dimensions front to back and side to side noted. If columns exist within space, Full placement, size, and spacing dimensions will be required as part of this drawing or as a separate drawing if necessary. Photos of the overall dimensions as shown on the laser are required for this plan. See attached examples in section VI at the end of this Scope of Work.
Field Drawings	<ul style="list-style-type: none"> ○ Field Drawings Save As: HRB2_XXXXX_CityST_FieldDrawings

II. SURVEY INFORMATION	
<p style="text-align: center;">Floor Plan</p>	<ul style="list-style-type: none"> ▪ Fully dimensioned plan. To include overall and incremental dimensions (Overalls should be taken in multiple areas, including the front, middle, and rear of the tax preparation area) ▪ ALL Walls – location and accurate thickness, typ. all walls ▪ Demising walls (locate and notate on sketch) ▪ Load-bearing walls (locate and notate on sketch) ▪ Partial walls and T.O.W. notation ▪ Columns and bump-outs – show dimensions, and distance to nearest wall on two sides. ▪ Doors and framed openings: <ul style="list-style-type: none"> • Storefront assemblies • Width and Head height AFF ▪ Windows: <ul style="list-style-type: none"> • Frame & Mullions • Sill and head height AFF ▪ Built-in Cabinetry / shelving / furniture – recessed/ anchored to the floor and/or walls. Provide size (WxHxD), AFF and exact placement. ▪ Built-up window display boxes and display platforms (exact placement, notate AFF) ▪ Finishes – floor and walls, to include millwork general location (base, chair rail, crown molding, slat walls, pegboards). Surveyor to identify flooring and material changes throughout the space. ▪ Interior handrails (exact placement and notate AFF) ▪ Floor hatches (exact placement)
<p>Mechanical, Electrical & Plumbing (MEP) (Will show on MEP/FFE Plan)</p>	<ul style="list-style-type: none"> ○ Mechanical - locate ALL mechanical elements (exact placement), to include: <ul style="list-style-type: none"> ▪ size and height AFF of HVAC registers/diffusers, thermostats, and wall-mounted HVAC registers ○ Electrical - Exactly location (from center of object to wall) and AFF of ALL recessed and surface mounted electrical elements, to include: <ul style="list-style-type: none"> ▪ Timers, telephone ports, data ports, transformers, outlets, switches, sensors, blank cover plate, Jbox, cameras, wall-Mounted lights, and doorbell ▪ Conduit in the sales floor – provide conduit material, type, length, AFF and size ▪ Panel/breaker boxes – provide size (WxDxH), height from the bottom (AFF), dimension from center to nearest wall and document whether the box is recessed or surface mounted. ▪ Telephone/Data boards (including their outlets). Provide size (WxDxH), location and AFF. Depth of the panel is the depth of the deepest item on board ○ Fire / Life Safety (may be located on the walls and/or ceiling) - true placement (location, size and AFF) of ALL items, to include: <ul style="list-style-type: none"> ▪ Fire alarm pulls, fire pin (ansul) pull panel, fire strobes, fire alarm control panels, exit signs, emergency lights, sprinkler system equipment and fire extinguisher ○ Plumbing - Exact placement of ALL plumbing elements listed below: <ul style="list-style-type: none"> ▪ Toilet room fixtures, drinking fountains, clean-outs (Diameter and AFF if applies) and Shower stalls ▪ Grab bars, document distance to wall from center of flange, AFF center to floor and length ▪ Sinks – size (applies to countertop if exists), exactly location (center of sink to nearest wall), dimension from sink rim to floor and dimension of clear knee space under sink to floor ▪ Floor Drains, clean outs and mop sinks – provide size (or diameter) and location within the room ▪ Exposed pipes – provide diameter, location, how far it protrudes and AFF if applies

<p>Furniture Plan (Will show on MEP/FFE Plan)</p>	<ul style="list-style-type: none"> ○ Locate only <i>HRB Furniture</i> (reception desk and tax preparation desks). Distance from desk to two walls. <ul style="list-style-type: none"> ▪ Not necessary to locate furniture partitions and non-HRB furniture
<p>Reflected Ceiling Plan</p>	<ul style="list-style-type: none"> ▪ <i>Surveyor to place T-Grid on base CAD</i> ▪ Ceiling grid starts in <i>each room</i> with new grid ▪ Ceiling type and height in <i>ALL</i> areas ▪ Exact location of ceiling transitions and height of the <i>Soffits and Headers</i> ▪ Locate <i>ALL</i> recessed and surface mounted elements on the ceiling. To include: <ul style="list-style-type: none"> • light fixtures (size), pendant lights (AFF), track lights (length, number of lights), cameras, outlets & switches, speakers, HVAC registers (LxW), exhaust fans (LxW), sensors, access hatches (LxW), smoke detectors, exit signs & emergency lights, sprinkler heads (notate the distance the head protrudes from the ceiling), fire strobes, ceiling fans (distance from floor to light), ceiling mounted, TV's/monitors (AFF)
<p>Photo Key</p>	<ul style="list-style-type: none"> ○ Site plan with photos grouped by area, elevation, or equipment. ○ Floor plan with photos grouped by area or room <ul style="list-style-type: none"> ▪ Surveyor deliverable for photo bubble must be clear and accurate for the actual photo location.

III. PHOTOS

<p>Requirements & Standards</p>	<p>The photos are an essential component of the survey and should approximate an experience of <i>“Being on Site”</i>. Surveys will be considered incomplete if they do not meet the following standards:</p> <ul style="list-style-type: none"> ○ Sequence – Use the <i>“Stand Here Map”</i> as a guide when taking photos on-site. It is important that photos progress in the manner outlined in this document. All photos, including detail and unusual conditions. ○ photos are taken in sequence with all photos. Detail and unusual condition photos are not to be taken at the end of the photo sequence. ○ Quality of photos will be based on clarity, color, and composition. All photos must be well focused with ○ sharp, clearly defined edges; appropriately lit, neither excessively light nor dark; and color true to the actual component being photographed. ○ Quantity - Although it is not possible to determine the exact appropriate number of photos for each site, ○ it is the responsibility of the surveyor to fully document all site elements. ○ Contextual photos – Rooms - Before entering a room, take a photo of the door/entryway before going into the room. This contextual photo should be of a distance so that the viewer can easily identify the location of the photo and the room to be photographed.
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<p>Photos</p>	<ul style="list-style-type: none"> ○ Photo resolution: 640 x 480 pixels ○ Photos to be taken in landscape format only. ○ Exterior photos ARE NOT to be taken at night. ○ General photo array (all surveyed spaces, floors, walls, ceilings). <ul style="list-style-type: none"> ▪ As outlined in the “<i>Stand Here Map</i>” ▪ Birds-eye photos as outlined in the “<i>Stand Here Map</i>” ▪ Provide context photo before entering a new space. ▪ Detail photos of all equipment ▪ Detail photos of damaged areas ▪ Electrical panels - For each panel, provide the following photos: <ul style="list-style-type: none"> - show panel box in context. - panel door closed to show its label/name. - panel doors open (showing entire panel) - 5-7 close-up photos showing tags, labels showing amps, volts and schedule circuit breakers (may require several photos) ○ Exterior photos <ul style="list-style-type: none"> ▪ Three photos of storefront – to include adjacent tenants ▪ Three photos of each exposed side of the building ▪ Photograph any items needing attention – that detract from the store appearance ○ Interior photos <ul style="list-style-type: none"> ▪ Interior photos of all equipment ▪ Photos of all phone and data boards: All phone and data equipment must be photographed, no exceptions - even if it’s abandoned or in weird places. ▪ Photos of unusual conditions: unusual conditions include ADA heads-up items, asbestos tiles, mold, mildew, sloped floors, damage to floor/wall/ceiling finishes, things that need repair or special attention, items that protrude from walls and interfere with furniture placement, stairs, power poles, etc. ‘Unusual condition’ photos are taken in the room in which the conditions occur and retain that location in the photo sequence – not at the end of the photos. <ul style="list-style-type: none"> ▪ Detail photos of conduit, surface-mounted elements, protrusions ▪ Photos of wall outside of restroom – showing the condition of the wall ▪ Photos of restroom door and flooring transition into restroom ▪ Lighting photos – <ul style="list-style-type: none"> -Tax Preparation Area – the Surveyor shall open the lens of one light fixture in each row, near the entry and take two photos, 1) Context photo taken from the floor that shows the fixture with open lens and the ladder beneath, and 2) Photo of the light bulb label -Back of House (BOH) – the Surveyor shall open the lens of one light fixture in each space within the BOH and take 1) Contextual photo and 2) take photo of the light bulb label ○ Photo Folder naming protocol: HRB2_XXXXX (5 digit site number)_CityST_Photos ○ Photo naming protocol: HRB2_XXXXX (5 digit site number)_###
<p>Laser Photos</p>	<ul style="list-style-type: none"> ○ <u>Laser photos are to be delivered separately from regular site photos</u> ○ Folder Naming Protocol: HRB2_XXXXX (5 digit site number)_CityST_Laser ○ Photo Naming Protocol: HRB2_XXXXX (5 digit site number)_###

IV. FIELD REPORT	
Field Report	<ul style="list-style-type: none"> ○ <u>Surveyor to fill out the Field Report in its entirety</u> ○ <u>Field Report should be completed on-site.</u> ○ <u>“Unable to Determine” or “See hand drawing” is not an acceptable answer</u> ○ <u>If you are unable to answer a question, provide an explanation as to why</u> ○ <u>Contact project manager in case of examples and questions.</u> ○ <u>Once completed, the surveyor will upload the Field Report to MS Teams in the Excel format. Do not convert the Field Report into a PDF file.</u>
Important Field Report Information – Please read thoroughly	<ol style="list-style-type: none"> 1. Do not reference the AutoCAD plan – the field report is viewed independently from the CAD file. Never respond to a question with ‘See Plan’. 2. Surveyor to verify that all items required by the field report to be shown on the plans, are shown on the plans. 3. Dimensions – feet and inches should be written as 2’-6”. Inches should be written as 6”. Avoid leading zeros. 4. NA – means ‘Not Applicable’ Do not use this unless the question does not apply to this site. If you are unable to verify something, state why. The surveyor should be communicating with the PM to discuss items that he/she is unable to verify. 5. Field reports must be completed electronically, in their entirety. Be aware that if an incomplete field report is uploaded to QuickBase, the QC department will contact the surveyor and require that the report be completed and re-upload.
Field Report Deliverable	<ul style="list-style-type: none"> ○ Save Field Report as: HRB2_XXXXX_CityST_FieldReport

V. SURVEYOR CAD	
Surveyor CAD	<ul style="list-style-type: none"> ○ <u>CAD Floorplan Orientation: Main entry facing right or bottom depending on space layout</u> ○ Surveyor must provide a base plan CAD (<u>Completed on Site</u>) that shows all walls, half-walls, doors, windows, columns, bump outs, vertical floor changes, soffits, built in/casework and ceiling grid starts in each room ○ Surveyor must guarantee the accuracy of their CAD to ¼ inch ○ Completed surveyor CAD must be saved in AutoCAD compatible format saved to version 2013 ○ Object snaps must be used, and lines must be straight (unless actual conditions differ) ○ Surveyor must use the correct <u>project template</u>, with blocks and layers – do not modify the template. ○ <u>Door</u> openings must be cut into walls ○ <u>Window mullion</u> detail must be drawn in the CAD base plan. ○ Surveyor CAD must show exterior and demising wall thickness (Be sure to note if demising wall thickness is assumed) ○ <u>Surveyor CAD requested to annotate the title block with the following: Address, Site Number, North Arrow, Date, and Surveyor Name</u> <p><u>DO NOT DELETE THE EXAMPLE DRAWING, SYMBOLS AND BLOCKS LOCATED IN THE CAD FILE</u></p>
Surveyor CAD Deliverable	<ul style="list-style-type: none"> ○ Save CAD as: HRB2_XXXXX_CityST_SurvCAD

VI. REQUIRED HAND DRAWING EXAMPLES

Extents Dimension Plan

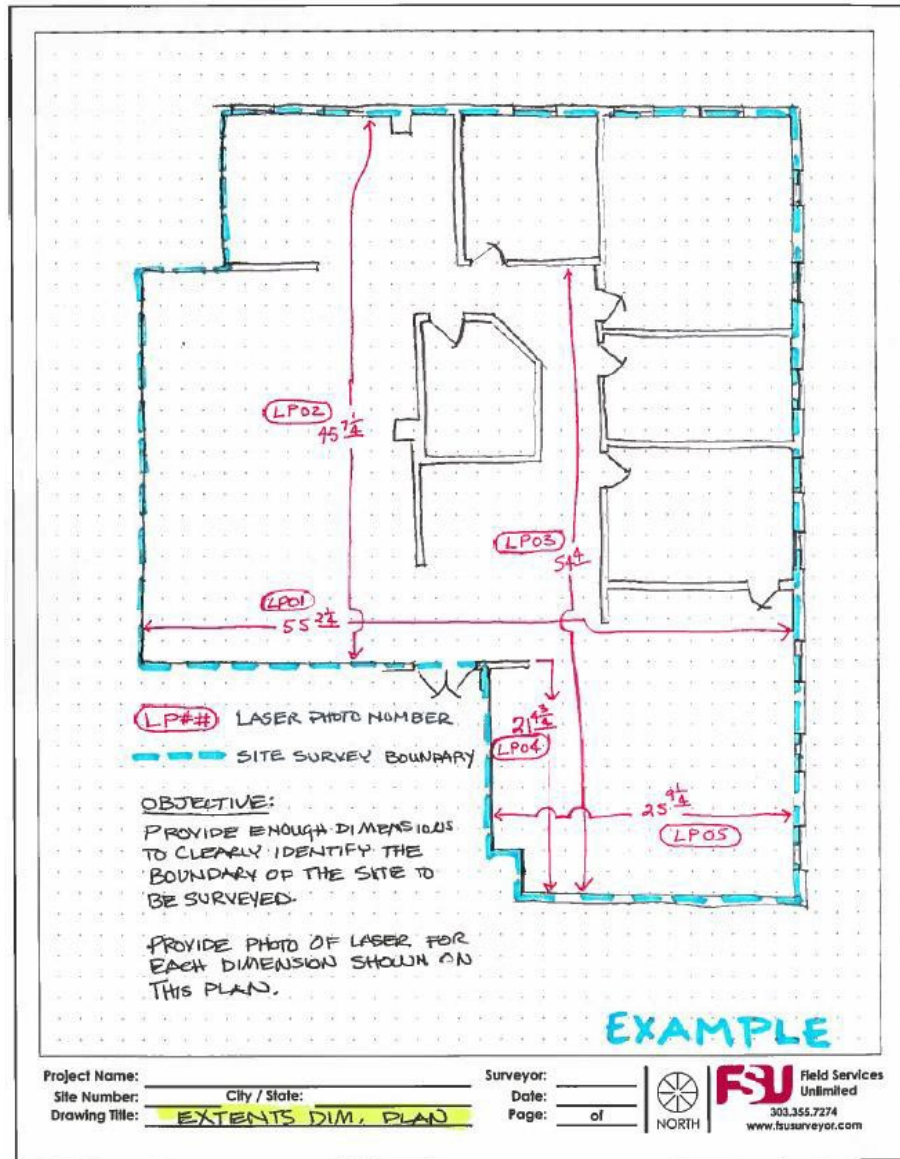
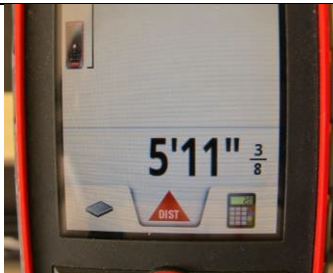


Photo of Laser




Column Dimension Plan

WHEN COLUMNS ARE LOCATED WITHIN THE SPACE, PROVIDE A COLUMN DIMENSION PLAN AND DIMENSION AS SHOWN.

LASER PHOTO NOT REQUIRED FOR THIS PLAN.

EXAMPLE

Project Name: _____ Surveyor: _____
 Site Number: _____ City / State: _____ Date: _____
 Drawing Title: COLUMN DIMENSION PLAN Page: _____ of _____

 NORTH **FSU** Field Services Unlimited
 303.355.7274
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VII. TABLE SUMMARY

Summary Table ○ The following SOW tables define required elements and placements in greater detail.

	MAJOR FLOOR PLAN ELEMENTS: (REQUIRED IN SURVEYOR CAD)	Placement		Required Measurements					Notes
		Exact	General	L	W	H	DIA	AFF	
	ALL walls and Partial Walls	✓		✓	✓	✓			-Include wall thicknesses & T.O.W. if applies -Notate all demising walls -Notate all load-bearing walls
	Bump-outs, Recesses, Niches	✓		✓	✓	✓		✓	
	Wall openings/Pass-Through/ access panels	✓		✓	✓	✓		✓	-to include Sill & Header/Soffit height
	Columns, Embedded Columns	✓		✓	✓	✓	✓		-note dimensions -note distance to nearest wall on two sides
	Doors/openings	✓			✓	✓			-Include Storefront assemblies -Note width & Header
	Windows	✓		✓	✓	✓		✓	-Include Frame & Mullion Details -Include Sill Height -Include Head Height
	Vestibules	✓		✓	✓	✓			
	Storefront assembly	✓		✓	✓	✓		✓	-including mullions and glazing

	MINOR FLOOR PLAN ELEMENTS: (NOT REQUIRED IN SURVEYOR CAD)	Placement		Required Measurements					Notes
		Exact	General	L	W	H	DIA	AFF	
FSU Default	Steps, Ramps, Stairs, Changes in Level	✓		✓	✓	✓			-Include # and height of risers -Include floor to floor heights
	Wall finishes		✓						-Indicate finishes in ALL rooms -Indicate location of material changes
	Floor finishes		✓						-Indicate ALL locations -Indicate location of material changes -Floor Hatch
	Floor hatches	✓		✓	✓				
	Baseboards		✓						-Indicate ALL locations
	Chair rails	✓						✓	-Indicate ALL locations
	Crown Moulding		✓						-Indicate ALL locations
	Interior Handrails	✓						✓	
	Built-in Cabinetry	✓		✓	✓	✓		✓	
	Built-up window display boxes and display platforms	✓		✓	✓	✓		✓	

	FURNITURE:	Placement		Required Measurements					Notes
		Exact	General	L	W	H	DIA	AFF	
FSU Default	HRB Furniture: Reception desk and tax preparation desks	✓		✓	✓	✓			Not necessary to locate furniture partitions and non-HRB furniture

	PLUMBING ELEMENTS:	Placement		Required Measurements					Notes
		Exact	General	L	W	H	DIA	AFF	
FSU Default	Plumbing fixtures(toilet, hand sink, mop sink, utility sink, urinals, etc)	✓		✓	✓			✓	-Provide CL dim to closest wall -Provide sink AFF and clear Knee space distance to floor
	Floor drains, floor sinks	✓					✓		Provide CL dim to closest wall
	Cleanouts (floor and wall mounted)	✓					✓	✓	Provide CL dim to closest wall -Provide AFF if applies
	Exposed plumbing (stub-outs, shut-offs)	✓					✓	✓	Provide CL dim to closest wall
	Grab bars	✓		✓				✓	Provide CL dim to closest wall
	Drinking Fountains	✓						✓	Provide CL dim to closest wall
	Water heaters/Insta-Hots	✓					✓	✓	-Provide CL dim to closest wall -Provide AFF if applies
	Water meters	✓						✓	
Shower stalls	✓		✓	✓					

	ELECTRICAL ELEMENTS:	Placement		Required Measurements					Notes
		Exact	General	L	W	H	DIA	AFF	
FSU Default	Electrical Panels	✓			✓	✓		✓	
	Electrical Meters	✓						✓	-Provide depth if SM
	Tele/Data boards	✓			✓	✓		✓	-Provide depth of the deepest item on board
	Timers	✓						✓	
	Disconnect switches	✓						✓	
	Control Panels	✓						✓	
	Key Pads	✓						✓	-Indicate type of Key pad
	Transformers	✓		✓	✓			✓	
	Outlets	✓						✓	-Indicate typ. AFF -Indicate if surface mounted (SM)
	Switches	✓						✓	-Indicate typ. AFF -Indicate if surface mounted (SM)
	Tel./Data ports	✓						✓	
	Sensors	✓						✓	
	Cameras	✓						✓	
	Conduit	✓			✓		✓	✓	
	Wall-mounted lights	✓						✓	
	Doorbell	✓						✓	-Indicate type of control panel
Electrical boxes	✓						✓		
Blank cover plate	✓						✓		
D-marc/MPOE			✓						

	LIFE SAFETY ELEMENTS:	Placement		Required Measurements					Notes
		Exact	General	L	W	H	DIA	AFF	
FSU Default	Fire extinguishers		✓					✓	
	Fire alarm pulls	✓						✓	
	Fire pin (ansul) pull panel	✓						✓	

	Fire strobes	✓						✓	
	Fire alarm control panels	✓						✓	
	Exit signs	✓						✓	
	Emergency Lights	✓						✓	
	Sprinkler system equipment	✓		✓	✓			✓	

	MECHANICAL ELEMENTS:	Placement		Required Measurements					Notes
		Exact	General	L	W	H	DIA	AFF	
FSU Default	HVAC equipment	✓		✓	✓	✓			-To include RTU's, HVAC, Condenser, etc -To include above ceiling HVAC equipment
	Compressors	✓		✓	✓				
	Evaporative coolers	✓		✓	✓				
	Gas meters		✓						
	Thermostats	✓						✓	-Indicate Typ. AFF
	Wall-mounted HVAC registers	✓			✓	✓		✓	
	Ductwork	✓		✓	✓				

	REFLECTED CEILING PLAN	Placement		Required Measurements					Notes
		Exact	General	L	W	H	DIA	AFF	
FSU Default	Ceiling heights	✓						✓	Provide ceiling ht. in all areas
	Soffits	✓		✓	✓			✓	Provide all soffit heights
	Headers	✓						✓	Provide all headers heights
	T-grid	✓						✓	Provide start dims at all grids
	Lights	✓						✓	Provide AFF to suspended lights
	Camera	✓							
	Mirror Panels	✓							
	Outlets	✓							
	Speakers	✓							
	HVAC registers (supply/return/exhaust fan)	✓		✓	✓				
	Switches	✓							
	Sensors	✓							
	Access Hatches	✓		✓	✓				
	Smoke detectors	✓							
	Exit signs	✓							
	Emergency lights	✓							
	Sprinkler heads	✓						✓	Notate distance the head protrudes from the ceiling
	Fire strobes	✓							
	Ceiling fans	✓						✓	
Ceiling mounted TV's/Monitors	✓						✓		