

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

## SCOPE OF WORK

### CAD DRAFTER

#### 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.

#### CAD DRAFTER CRITICAL PROJECT INFORMATION:

<b>Project Fee:</b>	Fee on QuickBase		
<b>Turnaround/Upload Time Frame:</b>	<ul style="list-style-type: none"> <li>• The drafter has 2.5 hours to complete the drafting assignment, unless arranged otherwise with the PM.</li> <li>• The final CAD file is due to be uploaded within 24 hours after the download of surveyor documents.</li> <li>• Assignments made on Fridays are still due within the 24-hour timeframe.</li> </ul>		
FSU Project Contacts			
<b>Project Manager:</b>	Project Manager	<b>Project Coordination:</b>	Project Coordinator
<b>Project Manager Phone:</b>	303-355-7274	<b>Project Coordination Phone:</b>	303-355-7274
<b>Project Manager Email:</b>	Project Manager’s Email	<b>Project Coordination Email:</b>	scheduling@fsusurveyor.com
<b>FSU Project Escalation:</b>	Surveyor missing Field Drawing Information, Surveyor’s Deliverables are incomplete, Deliverables are missing or are not uploaded, etc.  Always CC Project Manager on all communications and associated parties assigned to this site.		
<b>1. Project Manager:</b>	Project Manager		
<b>2. Vice President of Operations:</b>	VP of Operations		
<b>3. After Hours Contact:</b>	Project Manager’s Cell Phone		

<p><b>CAD Drafter Responsibilities:</b></p>	<ul style="list-style-type: none"> <li>○ Thoroughly review the Scope of Work and address any questions with the Project Manager prior to CAD Drafting</li> <li>○ Download and review Surveyor CAD, Field Drawings, and Photos</li> <li>○ Make sure to use the latest CAD Template, (On QuickBase)</li> <li>○ Contact Project Manager with any delays, issues, or concerns.</li> <li>○ CAD drafters must contact surveyors to address survey questions or missing data.</li> <li>○ CAD drafters are encouraged to reference the photos while drafting.</li> <li>○ 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</li> <li>○ Enter amount of time it took to complete CAD Drafting</li> <li>○ Enter “date CAD Drafter deliverables in” in QuickBase upon uploading of deliverables. CAD is to be completed to 100%, as if the CAD was going to be sent straight to the client</li> <li>○ Field Services Unlimited assures the quality of its survey deliverables through maintaining strict protocols and review procedures. <b>The CAD Drafter shall include all surveyed items on the CAD file. The list provided in this document is for the drafter’s benefit, however, there may be site specific items documented by the surveyor that are not listed here that should be included in the CAD file.</b> The CAD drafter guarantees the quality and thoroughness of their work while adhering to FSU’s drafting standards.</li> </ul>
<p><b>CAD Drawing Standards</b> <i>(Review these standards before you begin drafting)</i></p>	<ul style="list-style-type: none"> <li>○ Download the Surveyor CAD (base plan) file from MS Teams. Add all elements, according to the Drafter’s SOW, to this base plan. The annotation scale is set to 1/8”. Do not change the annotation scale.</li> <li>○ Turn all layers on (LAYON). Thaw all layers (LAYTHW). Place lower left corner of plan at 0,0,0.</li> <li>○ Rotate drawing as required so that the entry door is either on the right side of the drawing or the bottom of the drawing, depending on the shape of the surveyed space.</li> <li>○ Use only the blocks and symbols provided within model space. Do not explode the blocks/symbols.</li> <li>○ Use ‘Ortho’ to draw straight lines. Draw angled lines only when existing conditions require it.</li> <li>○ Use Object snaps when necessary to ensure clean line intersections.</li> <li>○ Place notes and leaders in the best possible location. Avoid overlapping with other drawing information.</li> <li>○ Notes and leaders – the arrow of the leader should touch the object in which the note applies. No floating arrows. Floating arrows are used for labeling an area, such as carpet or other finish material. Areas are best notated with ‘dots’ instead of arrows.</li> <li>○ Place dimensions as required by this scope of work. Align dimensions in a neat and orderly fashion.</li> <li>○ Label surface-mounted items with (SM).</li> <li>○ <b><i>CAD DRAFTER requested to annotate the title block with the following: Address, Site Number, North Arrow, Date, and Surveyor Name</i></b></li> <li>○ <b><i>DO NOT DELETE the example drawing, symbols and blocks located in the CAD file. These will be removed by the Quality Control team. Thank you.</i></b></li> </ul>
<p><b>Deliverables</b></p>	<ul style="list-style-type: none"> <li>○ The CAD drafter deliverable includes ONLY the CAD file. File requirements are: Save CAD file in AutoCAD v2013. Name the CAD file HRB2_XXXXX_CAD (XXXXX = Site Number) Compress (zip) file prior to uploading into your QuickBase vendor portal</li> </ul>

## CRITICAL PROJECT INFORMATION:

- 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
- Photos – Follow the ‘Stand Here Map’

## SURVEYOR DELIVERABLES PACKAGE:

The following items are required to be delivered to FSU:

1. AutoCAD DWG (Surveyor CAD Saved As: *HRB2\_XXXXX\_CityST\_SurvCAD*)
  - 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*)
  - 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
  - a. Photo Folder naming protocol: *HRB2\_XXXXX (5 digit site number)\_CityST\_Photos*
    - i. Photo naming protocol: *HRB2\_XXXXX (5 digit site number)\_###*
5. Laser Photos
  - a. Folder Naming Protocol: *HRB2\_XXXXX (5 digit site number)\_CityST\_Laser*
    - i. Photo Naming Protocol: *HRB2\_XXXXX (5 digit site number)\_###*

## CAD DRAFTER DELIVERABLES PACKAGE:

The following items are required to be delivered to FSU:

1. AutoCAD DWG (Save CAD as: *HRB2\_XXXXX\_CityST\_FirstCAD*)
  - a. Completed CAD Drawing to include, Floor Plan, MEP/FFE, and RCP
  - b. CAD Drafter to confirm correct Layers and Blocks are utilized
  - c. Title Block to be Filled Out in its Entirety

## I. FIELD DRAWING IS REQUIRED FOR THE SURVEYED SPACE

### Extents/Column Dimension Plan

**(CAD Drafter will use this information to complete CAD)**

- 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.

## II. CAD DRAFTER INFORMATION

<p style="text-align: center;"><b>Floor Plan</b></p>	<ul style="list-style-type: none"> <li>▪ 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)</li> <li>▪ <b>ALL</b> Walls – location and accurate thickness, typ. all walls</li> <li>▪ <b>Demising walls</b> (locate and notate on sketch)</li> <li>▪ <b>Load-bearing walls</b> (locate and notate on sketch)</li> <li>▪ Partial walls and T.O.W. notation</li> <li>▪ Columns and bump-outs – show dimensions, and distance to nearest wall on two sides.</li> <li>▪ Doors and framed openings:             <ul style="list-style-type: none"> <li>- Storefront assemblies</li> <li>- Width and Head height AFF</li> </ul> </li> <li>▪ Windows:             <ul style="list-style-type: none"> <li>- Frame &amp; Mullions</li> <li>- Sill and head height AFF</li> </ul> </li> <li>▪ Built-in Cabinetry / shelving / furniture – recessed/ anchored to the floor and/or walls. Provide size (WxHxD), AFF and exact placement.</li> <li>▪ Built-up window display boxes and display platforms (exact placement, notate AFF)</li> <li>▪ 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.</li> <li>▪ Interior handrails (exact placement and notate AFF)</li> <li>▪ Floor hatches (exact placement)</li> </ul>
<p><b>Mechanical, Electrical, &amp; Plumbing (MEP)</b> <b>(Will show on MEP/FFE Plan)</b></p>	<ul style="list-style-type: none"> <li>○ Mechanical - locate <b>ALL</b> mechanical elements (exact placement), to include:             <ul style="list-style-type: none"> <li>▪ size and height AFF of HVAC registers/diffusers, thermostats, and wall-mounted HVAC registers</li> </ul> </li> <li>○ Electrical - Exactly location (from center of object to wall) and AFF of <b>ALL</b> recessed and surface mounted electrical elements, to include:             <ul style="list-style-type: none"> <li>▪ Timers, telephone ports, data ports, transformers, outlets, switches, sensors, blank cover plate, junction box, cameras, wall-Mounted lights, and doorbell</li> <li>▪ Conduit in the sales floor – provide conduit material, type, length, AFF and size.</li> <li>▪ 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.</li> <li>▪ 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.</li> </ul> </li> <li>○ Fire / Life Safety (may be located on the walls and/or ceiling) - true placement (location, size and AFF) of <b>ALL</b> items, to include:             <ul style="list-style-type: none"> <li>▪ Fire alarm pulls, fire pin (ansul) pull panel, fire strobes, fire alarm control panels, exit signs, emergency lights, sprinkler system equipment and fire extinguisher.</li> </ul> </li> <li>○ Plumbing - <b>Exact placement</b> of <b>ALL</b> plumbing elements listed below:             <ul style="list-style-type: none"> <li>▪ Toilet room fixtures, drinking fountains, clean-outs (Diameter and AFF if applies) and Shower stalls.</li> <li>▪ Grab bars, document distance to wall from center of flange, AFF center to floor and length.</li> <li>▪ Sinks – size (applies to countertop if exists), exact location (center of sink to nearest wall), dimension from sink rim to floor and dimension of clear knee space under sink to floor.</li> <li>▪ Floor Drains, clean outs and mop sinks – provide size (or diameter) and location within the room.</li> <li>▪ Exposed pipes – provide diameter, location, how far it protrudes and AFF if applies</li> <li>▪ applies</li> </ul> </li> </ul>

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

<h3>III. PHOTOS</h3>	
<p><b>Photo</b> <b>(Drafter must review photos)</b></p>	<ul style="list-style-type: none"> <li>○ Photo resolution: 640 x 480 pixels</li> <li>○ Photos to be taken in landscape format only</li> <li>○ Exterior photos <u>ARE NOT</u> to be taken at night</li> <li>○ General photo array (all surveyed spaces, floors, walls, ceilings).               <ul style="list-style-type: none"> <li>▪ As outlined in the “<i>Stand Here Map</i>”</li> <li>▪ Birds-eye photos as outlined in the “<i>Stand Here Map</i>”</li> <li>▪ Provide context photo before entering a new space</li> <li>▪ Detail photos of all equipment</li> <li>▪ Detail photos of damaged areas</li> <li>▪ Electrical panels - For each panel, provide the following photos:                   <ul style="list-style-type: none"> <li>- show panel box in context</li> <li>- panel door closed to show its label/name</li> <li>- panel doors open (showing entire panel)</li> <li>- 5-7 close-up photos showing tags, labels showing amps, volts and schedule</li> </ul> </li> </ul> </li> <li>○ Exterior photos               <ul style="list-style-type: none"> <li>▪ Three photos of storefront – to include adjacent tenants.</li> <li>▪ Three photos of each exposed side of the building</li> <li>▪ Photograph any items needing attention – that detract from the store appearance.</li> </ul> </li> <li>○ Interior photos               <ul style="list-style-type: none"> <li>▪ Interior photos of all equipment</li> <li>▪ 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.</li> <li>▪ 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 occurred and retain that location in the photo sequence – not at the end of the photos.                   <ul style="list-style-type: none"> <li>▪ Detail photos of conduit, surface-mounted elements, protrusions</li> <li>▪ Photos of wall outside of restroom – showing the condition of the wall</li> <li>▪ Photos of restroom door and flooring transition into restroom</li> <li>▪ Lighting photos –                       <ul style="list-style-type: none"> <li>-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</li> <li>-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</li> </ul> </li> </ul> </li> <li>○ Photo Folder naming protocol: HRB2_XXXXX (5 digit site number)_CityST_Photos</li> <li>○ Photo naming protocol: HRB2_XXXXX (5 digit site number)_###</li> </ul> </li></ul>
<p><b>Laser Photos</b> <b>(Drafter must review photos)</b></p>	<ul style="list-style-type: none"> <li>○ <u>Laser photos are to be delivered separately from regular site photos</u></li> <li>○ Folder Naming Protocol: HRB2_XXXXX (5 digit site number)_CityST_Laser</li> <li>○ Photo Naming Protocol: HRB2_XXXXX (5 digit site number)_###</li> </ul>

<b>IV. CAD DRAFTER DELIVERABLES</b>	
<p><b>CAD Drafter's CAD Basics</b>  <b>(Review CAD Drafters Responsibilities and Standards Before Submitting)</b></p>	<ul style="list-style-type: none"> <li>○ CAD Floorplan Orientation: Main entry facing right or bottom depending on space layout</li> <li>○ Completed surveyor CAD must be saved in AutoCAD compatible format saved to version 2013</li> <li>○ Object snaps must be used</li> <li>○ Surveyor and Cad drafter must use the correct project template and layers</li> <li>○ CAD draft must show exterior and demising wall thickness (Be sure to note if demising wall thickness is assumed)</li> <li>○ CAD drafter requested to annotate, if surveyor have not filled in, the title block with the following: Address, Site Number, North Arrow, Date, Surveyor Name and Drafter Name.</li> </ul>
<p><b>CAD DRAFTER Deliverable</b></p>	<ul style="list-style-type: none"> <li>○ Save CAD as: <i>HRB2_XXXXX_CityST_FirstCAD</i></li> </ul>

#### IV. 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	✓		✓	✓	✓			<b>Not necessary to locate furniture partitions and non-HRB furniture</b>

	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 Keypad
	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	✓		✓	✓			✓	
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	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	✓						✓		