



AIA[®] Document D200[™] – 1995

Project Checklist

PROJECT: *(Name and address)*

PROJECT NUMBER:

DATE:

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PROJECT NAME:
PROJECT NUMBER:

1. PRE-DESIGN: Project Feasibility	Notes
<input type="checkbox"/> Determine if the Owner is financially sound.	
<input type="checkbox"/> Determine if the Owner is committed to completion of the project.	
<input type="checkbox"/> Determine the impact of the following factors on project location:	
<input type="checkbox"/> Social	
<input type="checkbox"/> Economic	
<input type="checkbox"/> Growth	
<input type="checkbox"/> Climate	
<input type="checkbox"/> Solar	
<input type="checkbox"/> Views	
<input type="checkbox"/> Transportation	
<input type="checkbox"/> Parking	
<input type="checkbox"/> Support services	
<input type="checkbox"/> Security	
<input type="checkbox"/> Request information on the following:	
<input type="checkbox"/> Regulatory constraints	
<input type="checkbox"/> Variances	
<input type="checkbox"/> Special permits	
<input type="checkbox"/> Special interest groups	
<input type="checkbox"/> Deed restrictions	
<input type="checkbox"/> Pending use controls	
<input type="checkbox"/> Retroactive controls	
<input type="checkbox"/> Special site constraints	
<input type="checkbox"/> Determine general time schedule for:	
<input type="checkbox"/> Project authorization	
<input type="checkbox"/> Project staffing	
<input type="checkbox"/> Design	
<input type="checkbox"/> Cost estimating	
<input type="checkbox"/> Financing	
<input type="checkbox"/> Documentation	
<input type="checkbox"/> Design review/quality control	
<input type="checkbox"/> Permit processing	
<input type="checkbox"/> Phasing	
<input type="checkbox"/> Special order furnishings and equipment	
<input type="checkbox"/> Construction	
<input type="checkbox"/> Data and security hook-up	
<input type="checkbox"/> Move-in	
<input type="checkbox"/> Test operations	
<input type="checkbox"/> Rental/sales/leasing	
<input type="checkbox"/> Identify special financial possibilities	
<input type="checkbox"/> Analyze real estate market:	
<input type="checkbox"/> Absorption rate	
<input type="checkbox"/> Capture rate	
<input type="checkbox"/> Market rent	
<input type="checkbox"/> Cost and income projections	

PROJECT NAME:
PROJECT NUMBER:

1. PRE-DESIGN: Project Feasibility	Notes
<input type="checkbox"/> Develop estimates for total project cost including:	
<input type="checkbox"/> Property	
<input type="checkbox"/> Survey and soil reports	
<input type="checkbox"/> Site preparation	
<input type="checkbox"/> Pre-design and programming	
<input type="checkbox"/> Architectural compensation	
<input type="checkbox"/> Engineering compensation	
<input type="checkbox"/> Special consultants	
<input type="checkbox"/> On-site improvements	
<input type="checkbox"/> Off-site improvements	
<input type="checkbox"/> Permits	
<input type="checkbox"/> Testing	
<input type="checkbox"/> Inspection	
<input type="checkbox"/> Construction	
<input type="checkbox"/> Tenant improvements	
<input type="checkbox"/> Furniture	
<input type="checkbox"/> Equipment	
<input type="checkbox"/> Telecommunications systems	
<input type="checkbox"/> Security	
<input type="checkbox"/> Landscaping	
<input type="checkbox"/> Property taxes	
<input type="checkbox"/> Insurance	
<input type="checkbox"/> Mortgage loan fees	
<input type="checkbox"/> Interim loan fees	
<input type="checkbox"/> Interest payments	
<input type="checkbox"/> Closing costs	
<input type="checkbox"/> Post-design services	
<input type="checkbox"/> Leasing agent fees	
<input type="checkbox"/> Sales commission	
<input type="checkbox"/> Contingency allowances	
<input type="checkbox"/> Develop estimates for annual project operating expenses including:	
<input type="checkbox"/> Debt service	
<input type="checkbox"/> Utilities	
<input type="checkbox"/> Facilities management	
<input type="checkbox"/> Leasing	
<input type="checkbox"/> Cleaning	
<input type="checkbox"/> Maintenance	
<input type="checkbox"/> Landscaping	
<input type="checkbox"/> Exterior maintenance	
<input type="checkbox"/> Property taxes	
<input type="checkbox"/> Insurance	
<input type="checkbox"/> Accounting fees	
<input type="checkbox"/> Security	
<input type="checkbox"/> Inflation index	
<input type="checkbox"/> Contingency allowances	
<input type="checkbox"/> Operations personnel	

PROJECT NAME:
PROJECT NUMBER:

1. PRE-DESIGN: Project Feasibility	Notes
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<input type="checkbox"/> Develop estimates for gross rental, lease or sale income including:	
<input type="checkbox"/> Space or function types	
<input type="checkbox"/> Square footage	
<input type="checkbox"/> Income per square foot	
<input type="checkbox"/> Vacancy rate	
<input type="checkbox"/> Prepare cash flow statement	
<input type="checkbox"/> Obtain special tax considerations, if any, including:	
<input type="checkbox"/> Tax incentives	
<input type="checkbox"/> Building depreciation	
<input type="checkbox"/> Furniture/equipment depreciation	
<input type="checkbox"/> Deferred taxes	
<input type="checkbox"/> Interest deductions	
<input type="checkbox"/> Capital gain	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Sample

PROJECT NAME:
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1. PRE-DESIGN: Project Presentation	Notes
<input type="checkbox"/> Identify Owner team personnel and roles.	
<input type="checkbox"/> Submit project questionnaire to Owner.	
<input type="checkbox"/> Identify Owner requirements and address prior to the presentation.	
<input type="checkbox"/> Prepare agenda and story boards for presentation.	
<input type="checkbox"/> Identify presentation site and configuration:	
<input type="checkbox"/> Lighting	
<input type="checkbox"/> Outlets/how many/where	
<input type="checkbox"/> Existing projection capabilities	
<input type="checkbox"/> Table	
<input type="checkbox"/> Seating	
<input type="checkbox"/> Size	
<input type="checkbox"/> Natural light	
<input type="checkbox"/> Blinds/curtains	
<input type="checkbox"/> Special equipment	
<input type="checkbox"/> Screen type and size	
<input type="checkbox"/> Decide on presentation format and media for this project:	
<input type="checkbox"/> Drawings	
<input type="checkbox"/> Renderings	
<input type="checkbox"/> Models	
<input type="checkbox"/> Photos	
<input type="checkbox"/> Slides	
<input type="checkbox"/> Overhead projection	
<input type="checkbox"/> Video	
<input type="checkbox"/> Computer/CAD/transport equipment	
<input type="checkbox"/> If presentation is out of the office, determine equipment required:	
<input type="checkbox"/> Slide or overhead projection	
<input type="checkbox"/> Extra lamp	
<input type="checkbox"/> Different lens	
<input type="checkbox"/> 50' extension cord	
<input type="checkbox"/> Extra slide tray	
<input type="checkbox"/> Extra support (for height adjustment)	
<input type="checkbox"/> Need to bring screen	
<input type="checkbox"/> Computer	
<input type="checkbox"/> Outlet type	
<input type="checkbox"/> Enlargement capability for projection	
<input type="checkbox"/> Table for support	
<input type="checkbox"/> Brief participants on dress, speaking roles, and seating.	
<input type="checkbox"/> Set time limit on presentation.	
<input type="checkbox"/> Request debriefing. (<i>Be specific</i>)	
<input type="checkbox"/>	
<input type="checkbox"/>	

PROJECT NAME:
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1. PRE-DESIGN: Pre-Contract	Notes
<input type="checkbox"/> Verify your ability to meet the professional liability insurance and licensing requirements of the project locality.	
<input type="checkbox"/> Determine basis of services:	
<input type="checkbox"/> Basic services agreement	
<input type="checkbox"/> Designated services agreement	
<input type="checkbox"/> Interior design services agreement	
<input type="checkbox"/> Construction management agreement	
<input type="checkbox"/> Design-build agreement	
<input type="checkbox"/> Determine what constitutes additional or supplemental services if basic services agreement is used.	
<input type="checkbox"/> Determine designated services based on AIA Document B163™, if applicable.	
<input type="checkbox"/> Ascertain method for award of construction contract:	
<input type="checkbox"/> Direct selection	
<input type="checkbox"/> Competitive bidding (open or closed)	
<input type="checkbox"/> Negotiated	
<input type="checkbox"/> Single-prime	
<input type="checkbox"/> Multiple prime	
<input type="checkbox"/> Construction management	
<input type="checkbox"/> Design-build	
<input type="checkbox"/> Review program requirements with the Owner.	
<input type="checkbox"/> Determine Owner's time schedule for bidding and occupancy.	
<input type="checkbox"/> Determine Owner's budget and determine its basis (e.g., cost estimate, available funds, fixed limit of construction cost, etc.)	
<input type="checkbox"/> Determine whether project budget, schedule and program objectives are compatible and realistic.	
<input type="checkbox"/> Determine the compensation method for all services.	
<input type="checkbox"/> Select and organize the design team, including structural, mechanical, electrical and special consultants.	
<input type="checkbox"/> Inquire regarding consultants' abilities to meet time schedule, liability insurance and licensing requirements; determine compensation.	
<input type="checkbox"/> Prepare project estimating and budget worksheet:	
<input type="checkbox"/> Time required for services	
<input type="checkbox"/> Personnel time and production cost projections	
<input type="checkbox"/> Cost of basic services for entire project	
<input type="checkbox"/> Cost of contemplated additional services	
<input type="checkbox"/> Compensation required for additional services	
<input type="checkbox"/> Estimate of reimbursable expenses	
<input type="checkbox"/> Cost of special insurance	
<input type="checkbox"/> Other costs (consultants, etc.)	
<input type="checkbox"/> Verify form of general conditions to be used.	
<input type="checkbox"/> Prepare Owner-Architect agreement form and submit to Owner. Have legal and insurance counsel review any modifications or specific provisions required by Owner.	
<input type="checkbox"/> Verify that the office has the means, space, equipment and personnel capabilities required to complete the project. Consider:	
<input type="checkbox"/> Conflicts with other projects	
<input type="checkbox"/> New hiring	
<input type="checkbox"/> Expansion	
<input type="checkbox"/> Joint venture	
<input type="checkbox"/> Branch office	

PROJECT NAME:
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1. PRE-DESIGN: Pre-Contract	Notes
<input type="checkbox"/> Review final agreement with legal and insurance counsel. Approve any modifications made by Owner, or renegotiate.	
<input type="checkbox"/> Verify that party signing for Owner is legally authorized to execute the agreement.	
<input type="checkbox"/> Prepare three originals for signature, complete execution of the agreement and schedule or initiate the first formal phase of work.	
<input type="checkbox"/> Submit initial invoice to Owner; if applicable, include reimbursable expenses.	
<input type="checkbox"/> Submit information required by the agreement.	
<input type="checkbox"/> Distribute executed originals and copies of the final agreement to appropriate parties.	
<input type="checkbox"/> Assign project number.	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Sample

PROJECT NAME:
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1. PRE-DESIGN: Project Administration	Notes
<input type="checkbox"/> Determine the first phase of work as defined in the executed Owner-Architect agreement:	
<input type="checkbox"/> Feasibility/market studies	
<input type="checkbox"/> Financial feasibility	
<input type="checkbox"/> Budget feasibility	
<input type="checkbox"/> Assistance in preparing financing applications and/or any other special applications	
<input type="checkbox"/> Assistance in preparing initial agency permit applications	
<input type="checkbox"/> Assistance in selecting consultant for EIR report	
<input type="checkbox"/> Assistance in special studies or analysis prior to programming	
<input type="checkbox"/> Programming	
<input type="checkbox"/> Allocate architectural fee:	
<input type="checkbox"/> Profit	
<input type="checkbox"/> Direct expenses	
<input type="checkbox"/> Indirect expenses	
<input type="checkbox"/> Consultants	
<input type="checkbox"/> Compare architectural fee with office's hourly costs and establish the number of work hours for each phase of work:	
<input type="checkbox"/> Programming	
<input type="checkbox"/> Site Analysis	
<input type="checkbox"/> Schematic Design	
<input type="checkbox"/> Design Development	
<input type="checkbox"/> Construction Documents	
<input type="checkbox"/> Bidding or Negotiation	
<input type="checkbox"/> Contract Administration	
<input type="checkbox"/> Post-Construction services	
<input type="checkbox"/> Prepare a project schedule based on the project objectives and architectural fee.	
<input type="checkbox"/> Distribute the project schedule to all project participants.	
<input type="checkbox"/> Create a project record book in accordance with office standards.	
<input type="checkbox"/> Develop project accounting procedures.	
<input type="checkbox"/> Maintain weekly project expense reports.	
<input type="checkbox"/> Determine monthly calendar date for submittal of invoices from consultants.	
<input type="checkbox"/> Create project filing system in accordance with office standards.	
<input type="checkbox"/> Prepare project directory.	
<input type="checkbox"/> Distribute project directory.	
<input type="checkbox"/> Distribute copies of the Owner-Architect agreement to all project consultants for review.	
<input type="checkbox"/> Verify consultant professional liability coverage.	
<input type="checkbox"/> Prepare consultant agreements and obtain signatures.	
<input type="checkbox"/> Distribute executed consultant agreements.	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

PROJECT NAME:
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1. PRE-DESIGN: Project Programming	Notes
<input type="checkbox"/> Determine the extent of Owner, Architect and consultant responsibilities relative to the building design program.	
<input type="checkbox"/> Reconcile the building design program with the Owner's budget. Advise the Owner if budget and program are not compatible.	
<input type="checkbox"/> Verify the Owner's list of building functions and spaces.	
<input type="checkbox"/> Verify the Owner's list of equipment and furnishings.	
<input type="checkbox"/> When applicable, propose to the Owner the implementation of user surveys.	
<input type="checkbox"/> Identify the Owner's requirements for growth projections.	
<input type="checkbox"/> Identify the Owner's representative responsible for functional relationships and their hierarchies.	
<input type="checkbox"/> Identify specific departmental and room occupancies.	
<input type="checkbox"/> Create room function and relationship criteria and proceed with a user survey.	
<input type="checkbox"/> Create a departmental interaction matrix.	
<input type="checkbox"/> Create a room-by-room interaction diagram.	
<input type="checkbox"/> Create a bubble diagram of the departmental and room-by-room interaction matrix with important relationship rankings.	
<input type="checkbox"/> Determine the Owner's spatial requirements.	
<input type="checkbox"/> Determine preliminary structural, mechanical, electrical and other engineering systems	
<input type="checkbox"/> Create horizontal and vertical diagrammatic block plans with relative spatial requirements. Identify all rooms, corridors, and vertical circulation; provide exit analysis.	
<input type="checkbox"/> Review the diagrammatic block plans and program with the Owner.	
<input type="checkbox"/> Obtain the Owner's written authorization to proceed.	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

PROJECT NAME:
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2. SITE ANALYSIS: Site Evaluation	Notes
<input type="checkbox"/> Request land survey from the Owner.	
<input type="checkbox"/> Review the topographic and boundary survey. Check major features through on-site observation.	
<input type="checkbox"/> Determine zoning requirements.	
<input type="checkbox"/> Secure photographs showing major site features and surrounding influences.	
<input type="checkbox"/> Secure available USGS maps of the site.	
<input type="checkbox"/> Secure any maps or photos produced by local or state agencies of the site.	
<input type="checkbox"/> Secure an aerial photograph of the entire site and its surroundings.	
<input type="checkbox"/> Obtain seasonal climate and microclimate data from the weather service.	
<input type="checkbox"/> Obtain seasonal solar orientation data.	
<input type="checkbox"/> Prepare solar orientation diagrams.	
<input type="checkbox"/> Determine drainage, erosion control and storm water detention requirements.	
<input type="checkbox"/> Obtain consultant site data requirements.	
<input type="checkbox"/> Prepare a list for the Owner's review of testing companies and laboratories that may be used to analyze the site.	
<input type="checkbox"/> Assist the client in securing necessary soil and related site tests and required investigations.	
<input type="checkbox"/> Determine availability, quantity and quality of existing site utilities.	
<input type="checkbox"/> Verify from local and state agencies what special site investigations are required.	
<input type="checkbox"/> Have the design team and all consulting staff visit and examine the site. Confirm that all site data has been reviewed by all responsible parties prior to proceeding with site design.	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

PROJECT NAME:
PROJECT NUMBER:

2. SITE ANALYSIS: Environmental Impact Report	Notes
<input type="checkbox"/> Determine format and content requirements:	
<input type="checkbox"/> Legal requirements of format and content	
<input type="checkbox"/> Public agency checklists	
<input type="checkbox"/> Samples of similar reports in public records	
<input type="checkbox"/> Determine the structure of the report; include general and specific environmental issues.	
<input type="checkbox"/> Report on topics relating to:	
<input type="checkbox"/> Aesthetic enhancement	
<input type="checkbox"/> Neighborhood and local enhancement	
<input type="checkbox"/> Enhancement of neighborhood or local economy	
<input type="checkbox"/> Land use improvements	
<input type="checkbox"/> Traffic flow and parking improvements	
<input type="checkbox"/> Site accessibility including ADA compliance	
<input type="checkbox"/> Air quality protection or improvements	
<input type="checkbox"/> Microclimate, air motion and humidity improvements	
<input type="checkbox"/> Water quality protection or improvement	
<input type="checkbox"/> Improved surface water flow	
<input type="checkbox"/> Improved ground water retention	
<input type="checkbox"/> Earth slide and erosion prevention	
<input type="checkbox"/> Animal life preservation or enhancement	
<input type="checkbox"/> Plant life protection or enhancement	
<input type="checkbox"/> Historic preservation	
<input type="checkbox"/> Archaeological protection	
<input type="checkbox"/> Noise abatement	
<input type="checkbox"/> Hazardous materials	
<input type="checkbox"/> Glare and reflectance prevention	
<input type="checkbox"/> Natural resource development	
<input type="checkbox"/> Tax revenue increase	
<input type="checkbox"/> Improved market for utility services	
<input type="checkbox"/> Improved market for local services	
<input type="checkbox"/> Neighborhood or local security improvement	
<input type="checkbox"/> Health and recreation enhancements	
<input type="checkbox"/> Local ethnic values recognition	
<input type="checkbox"/> Identify environmental impact considerations relating to:	
<input type="checkbox"/> Acquisition of property	
<input type="checkbox"/> Relocation of tenants or Owners	
<input type="checkbox"/> Effect of the project on other real property	
<input type="checkbox"/> Demolition of existing structures/tree salvage and removal	
<input type="checkbox"/> Construction	
<input type="checkbox"/> Operation of the facility	
<input type="checkbox"/> Future related or contiguous development	
<input type="checkbox"/>	
<input type="checkbox"/>	

PROJECT NAME:
PROJECT NUMBER:

2. SITE ANALYSIS: Permits	Notes
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<input type="checkbox"/>	Prepare a directory of governing agencies and their representatives' names, addresses, and phone numbers. Include a section that lists applicable codes, regulations and ordinances that pertain to this project.	
<input type="checkbox"/>	Identify applicable revisions or changes to codes, regulations and ordinances.	
<input type="checkbox"/>	Identify the full approval process and prepare a sequential schedule indicating each agency's approval, timeframe and deadline.	
<input type="checkbox"/>	Identify team members responsible for governing agency contact.	
<input type="checkbox"/>	Meet with agency representatives to identify special problems.	
<input type="checkbox"/>	Meet with the Owner to review all ambiguities and contradictions in the applicable codes, regulations and ordinances. Map out a strategy to address these issues. Assist the Owner in completion of applications for approval.	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Sample

PROJECT NAME:
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3. SCHEMATIC DESIGN	Notes
<input type="checkbox"/> Periodically review internal office budgets and production schedules; compare with actual progress.	
<input type="checkbox"/> Submit monthly or periodic invoices to the Owner for payment; include reimbursable expenses.	
<input type="checkbox"/> Obtain the name of the Owner's authorized representative.	
<input type="checkbox"/> Update and distribute project directory.	
<input type="checkbox"/> Assign staff to the project.	
<input type="checkbox"/> Distribute project schedule to Owner, project staff and consultants.	
<input type="checkbox"/> Review all data furnished, including building design program, budget, project budget, legal, site, code, space and special Owner requirements.	
<input type="checkbox"/> Prepare functional space plans.	
<input type="checkbox"/> Provide engineers and consultants with pertinent program data and functional space plans.	
<input type="checkbox"/> Analyze comparative systems with engineers and consultants; select systems to be used in the project. Determine system space and location requirements.	
<input type="checkbox"/> Structural	
<input type="checkbox"/> Mechanical	
<input type="checkbox"/> Electrical	
<input type="checkbox"/> Other consultants	
<input type="checkbox"/> Require all consultants to produce their schematic plans following the same format, scale, and drawing positioning as the architectural drawings.	
<input type="checkbox"/> Create or obtain lists of special building equipment and fixtures required by the Owner that may affect consultants' work; distribute the lists to appropriate consultants.	
<input type="checkbox"/> Review architectural schematic diagrams with consultants. Conduct one or more consultant coordination meetings regarding system compatibility.	
<input type="checkbox"/> Confirm that the selected engineering and construction systems are compatible with one another.	
<input type="checkbox"/> Prepare basic Schematic Design documents to include:	
<input type="checkbox"/> Site plan with diagrammatic indications showing horizontal relationships	
<input type="checkbox"/> Sections through the site showing vertical relationships	
<input type="checkbox"/> Principal floor plans	
<input type="checkbox"/> General descriptive views or elevations	
<input type="checkbox"/> Illustrative sketches, models or renderings, if required	
<input type="checkbox"/> Calculate areas and volumes, and analyze plan efficiency of the design by usable area, area per person or other method.	
<input type="checkbox"/> Prepare a general description of the project, including materials and equipment outlines.	
<input type="checkbox"/> Begin research on materials, equipment, fixtures and building a systems. Create products and materials file.	
<input type="checkbox"/> Start project outline specifications.	
<input type="checkbox"/> Obtain and review statements of probable construction cost from each consultant.	
<input type="checkbox"/> Prepare an estimate of probable construction cost based on all available data. Include appropriate contingency to cover future development of the project. If requested by Owner, provide a detailed estimate and/or life cycle costing as additional service.	
<input type="checkbox"/> Select construction cost estimating system:	
<input type="checkbox"/> Square foot unit cost	
<input type="checkbox"/> Square foot cost according to building type	
<input type="checkbox"/> Volume unit cost	
<input type="checkbox"/> Systems estimate	
<input type="checkbox"/> Quantity survey	

PROJECT NAME:
PROJECT NUMBER:

3. SCHEMATIC DESIGN

Notes

<input type="checkbox"/> Submit Schematic Design documents to the Owner. <i>(These documents may include, but may not be limited to, drawings, descriptions, calculations, outline specifications, colors, materials and statements of probable construction cost.)</i>	
<input type="checkbox"/> Plan appropriate presentation media.	
<input type="checkbox"/> Prepare presentation of optional design features and variations.	
<input type="checkbox"/> After presentation, evaluate changes and comments.	
<input type="checkbox"/> Document revisions to scope of the work and review with the Owner.	
<input type="checkbox"/> Obtain Owner's written approval of Schematic Design documents.	
<input type="checkbox"/> Obtain Owner's written authority to proceed to the Design Development phase.	
<input type="checkbox"/> Submit monthly or periodic invoice to the Owner for payment; include reimbursable expenses.	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Sample

PROJECT NAME:
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4. DESIGN DEVELOPMENT	Notes
<input type="checkbox"/> Review unresolved issues on Schematic Design checklist.	
<input type="checkbox"/> Periodically review internal office budgets and production schedules; compare with actual progress.	
<input type="checkbox"/> Review and update schedule of completion dates for this and all subsequent phases. Inform the project team and Owner of any revisions.	
<input type="checkbox"/> Review and update staff time and production cost projections.	
<input type="checkbox"/> Adjust number and type of staff as required.	
<input type="checkbox"/> Distribute updated project schedule to Owner, staff and consultants.	
<input type="checkbox"/> Update and distribute project directory.	
<input type="checkbox"/> As documents develop, confer with and obtain preliminary review from regulatory agencies such as:	
<input type="checkbox"/> Building department	
<input type="checkbox"/> Fire marshal (state & local)	
<input type="checkbox"/> Dept. of Health	
<input type="checkbox"/> Dept. of Education	
<input type="checkbox"/> Zoning commission	
<input type="checkbox"/> Planning commission	
<input type="checkbox"/> Design review board	
<input type="checkbox"/> Other:	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/> Identify all documents with project number and date.	
<input type="checkbox"/> Submit monthly or periodic invoice to the Owner for payment; include reimbursable expenses.	
<input type="checkbox"/> Obtain Owner's approval of expenditures for any models, perspectives or renderings required for the project.	
<input type="checkbox"/> Review the building design program and verify compliance.	
<input type="checkbox"/> Re-check Schematic Design documents for code compliance.	
<input type="checkbox"/> Obtain Owner's approval in the event that additional consultants are required.	
<input type="checkbox"/> Receive results of all investigations and tests, including soil borings and analysis. If necessary, request additional information. Forward final information to appropriate consultants.	
<input type="checkbox"/> Review all other data received from the Owner and consultants. If necessary, request additional data.	
<input type="checkbox"/> Obtain Owner's standards and requirements, if any, for document format and other presentation materials.	
<input type="checkbox"/> In consultation with the Owner and consultants, develop a checklist of special systems.	
<input type="checkbox"/> Define actual occupancy for each area, check against program, and forward to consultants.	
<input type="checkbox"/> Request that the structural engineer(s) investigate and report on their review of applicable regulations.	
<input type="checkbox"/> Request that the mechanical and electrical engineers	
<input type="checkbox"/> contact utility companies and public authorities for all services and initiate approval process;	
<input type="checkbox"/> investigate and report on their review of all applicable local, public and utility regulations;	
<input type="checkbox"/> notify the Architect of space and location requirements for systems; and	
<input type="checkbox"/> prepare estimates of probable operating costs with recommendations for implementation.	
<input type="checkbox"/> review engineers' estimates of probable operating costs and forward to Owner. Obtain Owner's approval of the selected fuel source(s).	

PROJECT NAME:
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4. DESIGN DEVELOPMENT	Notes
<input type="checkbox"/> Prepare site plan indicating building location(s) and site improvements.	
<input type="checkbox"/> Prepare other necessary documents to include: plans, elevations, sections, schedules and notes.	
<input type="checkbox"/> Prepare area calculations (net and gross).	
<input type="checkbox"/> Prepare building volume calculations.	
<input type="checkbox"/> Prepare a preliminary Project Manual.	
<input type="checkbox"/> Update materials, equipment, fixtures and building systems file.	
<input type="checkbox"/> Direct consultants to prepare design documents as required to illustrate and describe their portions of the project.	
<input type="checkbox"/> Require all consultants to produce their design documents following the same format as the architectural drawings.	
<input type="checkbox"/> Conduct one or more group coordination meetings with consultants.	
<input type="checkbox"/> Reach agreement on structural, mechanical, electrical, and other building systems.	
<input type="checkbox"/> Confirm that the selected engineering and construction systems are compatible.	
<input type="checkbox"/> Direct consultants to provide preliminary construction cost estimates for their portions of the project.	
<input type="checkbox"/> Update the statement of probable construction cost. If specifically requested by the Owner, provide a detailed cost estimate as an additional service.	
<input type="checkbox"/> Submit Design Development documents.	
<input type="checkbox"/> Obtain Owner's written approval of Design Development documents.	
<input type="checkbox"/> Obtain Owner's written authorization to proceed to Construction Documents phase.	
<input type="checkbox"/> Submit monthly or periodic invoice to the Owner for payment; include reimbursable expenses.	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

PROJECT NAME:
PROJECT NUMBER:

5. CONSTRUCTION DOCUMENTS	Notes
<input type="checkbox"/> Review unresolved issues on the Design Development checklist.	
<input type="checkbox"/> Periodically review internal office budgets and production schedules; compare with actual progress.	
<input type="checkbox"/> Review and update schedule of completion dates for this and all subsequent phases. Inform the project team and Owner of any revisions.	
<input type="checkbox"/> Establish a clear chain of command and response for the Construction Documents phase.	
<input type="checkbox"/> Review and update staff time and production cost projections.	
<input type="checkbox"/> Adjust number and type of staff as required.	
<input type="checkbox"/> Distribute updated project schedule to Owner, project staff and consultants.	
<input type="checkbox"/> Schedule training sessions for personnel who are not experienced in applicable production methods.	
<input type="checkbox"/> Update and distribute project directory.	
<input type="checkbox"/> Identify all documents with project number and date.	
<input type="checkbox"/> As documents develop, confer with and obtain further review from regulatory agencies such as:	
<input type="checkbox"/> Building department	
<input type="checkbox"/> Fire marshal (state & local)	
<input type="checkbox"/> Dept. of Health	
<input type="checkbox"/> Dept. of Education	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/> Check with the applicable regulatory agencies and establish schedule for submission and/or review.	
<input type="checkbox"/> Coordinate the work of all team members, including consultants.	
<input type="checkbox"/> Coordinate drawings with Project Manual.	
<input type="checkbox"/> Update preliminary construction cost estimate and advise the Owner of any	
<input type="checkbox"/> Submit monthly or periodic invoice to the Owner for payment; include reimbursable expenses.	
<input type="checkbox"/> Review the program and verify compliance.	
<input type="checkbox"/> Re-check Design Development documents for code compliance.	
<input type="checkbox"/> Develop a list of required drawings; check requirements of the Owner and governing bodies.	
<input type="checkbox"/> Prepare a one-fourth size mock-up of all project drawings, their sequence, and the information to appear on each sheet. Distribute copies to concerned parties for review, then distribute final copies to all staff as a supervisory guide.	
<input type="checkbox"/> Determine the final printing system.	
<input type="checkbox"/> Determine specific drafting systems appropriate to parts or all of the project and include them in the mockup set.	
<input type="checkbox"/> Computer text and/or CAD graphics	
<input type="checkbox"/> Manual drafting	
<input type="checkbox"/> Photo drafting	
<input type="checkbox"/> Overlay drafting	
<input type="checkbox"/> Keynotes	
<input type="checkbox"/> Linked notes and/or details with CSI numbers (ConDoc)	
<input type="checkbox"/> Full sheets of reusable standard or typical file data	
<input type="checkbox"/> Paste-up	

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5. CONSTRUCTION DOCUMENTS	Notes
<input type="checkbox"/> Review the completed working drawing index with all concerned parties. Obtain feedback and make revisions as necessary.	
<input type="checkbox"/> Determine the completion date of the limited architectural floor plan base sheet(s) for consultants' use.	
<input type="checkbox"/> Develop title block format (check requirements of Owner, licensing laws and governing bodies).	
<input type="checkbox"/> Develop format for door, window and finish schedules.	
<input type="checkbox"/> Establish a checklist and timetable for the client's applications for approvals and permits from governing bodies.	
<input type="checkbox"/> If applicable, determine alternates, cash allowances and unit prices.	
<input type="checkbox"/> Obtain Owner's instructions on insurance, bonds, construction agreements and bidding procedures.	
<input type="checkbox"/> Submit copies of General and Supplementary Conditions for Owner's review, or obtain Owner's specific contract requirements.	
<input type="checkbox"/> Determine what items, if any, are to be furnished by the Owner, and those items not to be included in the contract.	
<input type="checkbox"/> Verify Owner's acceptance of the proposed designs for mechanical and electrical systems.	
<input type="checkbox"/> Monitor approval and permit process.	
<input type="checkbox"/> Obtain schedule for delivery and installation of Owner-furnished materials.	
<input type="checkbox"/> Assemble final drawings and specifications for coordination.	
<input type="checkbox"/> Conduct team meetings to resolve coordination issues.	
<input type="checkbox"/> Revise documents as required.	
<input type="checkbox"/> If project will be bid, assemble bidding documents.	
<input type="checkbox"/> Determine whether prevailing wage rate statutes apply in project jurisdiction.	
<input type="checkbox"/> Prepare final calculations of net and gross areas and volumes.	
<input type="checkbox"/> Obtain each consultant's final construction cost estimate for their portion of the project.	
<input type="checkbox"/> Prepare final construction cost estimate.	
<input type="checkbox"/> Prepare testing and quality control program budgets and assist Owner in selection of testing agency.	
<input type="checkbox"/> Submit drawings, Project Manual, construction cost estimate and area calculations to the Owner.	
<input type="checkbox"/> Review list of potential bidders with the Owner.	
<input type="checkbox"/> Obtain and review qualification statements from interested bidders.	
<input type="checkbox"/> Place Architect's and engineers' seals on the documents and obtain signatures required by reviewing authorities.	
<input type="checkbox"/> Assist Owner in filing documents for final approvals and permits.	
<input type="checkbox"/> Obtain Owner's written authorization to proceed to the Bidding or Negotiation phase.	
<input type="checkbox"/> Submit monthly or periodic invoice to the Owner for payment; include reimbursable expenses.	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

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6. BIDDING OR NEGOTIATION	Notes
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<input type="checkbox"/> Investigate whether other major projects have concurrent bid dates, or if other factors require bid date modification.	
<input type="checkbox"/> Consult with the Owner's legal counsel on the existence of any special laws regarding the bidding process, construction documents and forms of agreement.	
<input type="checkbox"/> Identify the Architect's and Owner's respective responsibilities in advertising for bids, receiving bids, bid evaluation and negotiation.	
<input type="checkbox"/> For open bidding, publish advertisement for bids (in some cases, Owner may publish). If separate prime contracts are to be awarded, separate advertisements may be necessary.	
<input type="checkbox"/> Obtain and review qualification statements from interested bidders.	
<input type="checkbox"/> For bidding by invitation, notify selected bidders.	
<input type="checkbox"/> If the construction contract is based on negotiation, assist the Owner in negotiating with prospective Contractor(s).	
<input type="checkbox"/> Prepare register of bid documents.	
<input type="checkbox"/> Distribute bidding documents to bidders and obtain deposits.	
<input type="checkbox"/> Issue documents to plan rooms.	
<input type="checkbox"/> Hold a pre-bid conference, prepare a report and distribute copies.	
<input type="checkbox"/> Record responses to bidders' requests for clarification in the form of a written addendum distributed to all bidders.	
<input type="checkbox"/> Upon return of documents, refund bid security to bidders who either withdraw or are disqualified.	
<input type="checkbox"/> Evaluate proposed substitutions and requests for product approval; notify bidders of accepted substitutions by addendum.	
<input type="checkbox"/> Confirm participation of prospective bidders.	
<input type="checkbox"/> Prepare a bid tabulation form.	
<input type="checkbox"/> Assist the Owner in the receipt, tabulation and analysis of bids; check bids for irregularities.	
<input type="checkbox"/> Advise the Owner on selection of alternates and obtain Owner's approval.	
<input type="checkbox"/> Assist the Owner in the process of acceptance or rejection of bids.	
<input type="checkbox"/> Notify bidders of acceptance or rejection; obtain return of bidding documents from unsuccessful bidders. Return their deposits and bid securities. <i>(Hold bid security of lowest bidders until execution of the contract).</i>	
<input type="checkbox"/> Request and receive submission of post-bid information.	
<input type="checkbox"/> Assist Owner's legal counsel in preparation of construction contract(s). If separate prime contracts are to be awarded, obtain assistance of consultants.	
<input type="checkbox"/> Schedule times for confirmation of required Owner and Contractor insurance coverages.	
<input type="checkbox"/> Obtain from the Contractor performance bonds, labor and material payment bonds, and any contract bonds required by statute. Review and forward copies of bonds to the Owner.	
<input type="checkbox"/> Obtain the Contractor's certificate of insurance. Review and forward copies of the certificate to the Owner.	
<input type="checkbox"/> Obtain a copy of the property insurance policy from the party responsible for obtaining such coverage. Review and forward copies to the other party.	
<input type="checkbox"/> Identify and review any atypical insurance arrangements between Owner and Contractor. Include descriptions of such arrangements in the contract.	
<input type="checkbox"/> Assist the Owner in preparing and sending to the Contractor(s) notices to proceed with the work.	
<input type="checkbox"/> Provide the Contractor with all necessary contract documents.	
<input type="checkbox"/> Obtain Owner's written approval to proceed with Construction Contract Administration phase.	
<input type="checkbox"/> Submit monthly or periodic invoice to the Owner for payment; include reimbursable expenses.	
<input type="checkbox"/>	
<input type="checkbox"/>	

PROJECT NAME:
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7. CONSTRUCTION CONTRACT ADMINISTRATION	Notes
<input type="checkbox"/> Review unresolved issues from Bidding or Negotiation phase.	
<input type="checkbox"/> Update project directory.	
<input type="checkbox"/> Review and update project schedule.	
<input type="checkbox"/> Develop and implement a system of routing and distribution for project correspondence and submittals.	
<input type="checkbox"/> Create construction contract administration files to include:	
<input type="checkbox"/> Correspondence and meeting reports	
<input type="checkbox"/> Schedules	
<input type="checkbox"/> Field reports	
<input type="checkbox"/> Project photography	
<input type="checkbox"/> Phone log	
<input type="checkbox"/> Requests for Information (RFIs)	
<input type="checkbox"/> Requests for Proposals (RFPs)	
<input type="checkbox"/> Construction Change Directives (CCDs)	
<input type="checkbox"/> Change Orders	
<input type="checkbox"/> Supplemental instructions	
<input type="checkbox"/> Quality control reports	
<input type="checkbox"/> Submittals	
<input type="checkbox"/> Agency inspections, permits and approvals	
<input type="checkbox"/> Applications for payment	
<input type="checkbox"/> Owner-Architect agreement	
<input type="checkbox"/> Owner-Contractor agreement(s)	
<input type="checkbox"/> Consultant agreement(s)	
<input type="checkbox"/> Schedule of Values	
<input type="checkbox"/> Observations of contractor performance	
<input type="checkbox"/> Certificates of insurance	
<input type="checkbox"/> Property insurance policy	
<input type="checkbox"/> Contract bonds	
<input type="checkbox"/> Project close-out	
<input type="checkbox"/> Assign contract administration and site observation responsibilities.	
<input type="checkbox"/> With the Owner, review and approve or take other appropriate action on Contractor's list of subcontractors and suppliers.	
<input type="checkbox"/> Notify the consultants of selected prime contractor(s) and subcontractors.	
<input type="checkbox"/> Obtain and review Contractor's submittal schedule.	
<input type="checkbox"/> Establish a time for the preconstruction meeting.	
<input type="checkbox"/> Establish site observation and project meeting schedules; coordinate with agency inspection requirements.	
<input type="checkbox"/> If required, notify the Owner to submit applications for permanent gas, electric, water, telephone and other services.	
<input type="checkbox"/> Have Owner file a copy of all property insurance policies with Contractor.	
<input type="checkbox"/> If the Owner does not intend to purchase property insurance, have Owner notify Contractor in writing. If the Contractor elects to purchase such insurance, initiate appropriate change order.	
<input type="checkbox"/> Review construction budget (including contingencies) with the Owner.	
<input type="checkbox"/> Review Owner-supplied labor and materials.	
<input type="checkbox"/> If required, send the notice to proceed to the Contractor.	
<input type="checkbox"/> Keep Owner informed on the progress of the work. Prepare a field report for each visit to the site.	
<input type="checkbox"/> Obtain and review the Contractor's updated progress schedule and advise the Owner of potential revisions to anticipated occupancy date.	

PROJECT NAME:
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7. CONSTRUCTION CONTRACT ADMINISTRATION	Notes
<input type="checkbox"/> Prior to the first application for payment, receive, review and approve, if appropriate, Contractor's schedule of values.	
<input type="checkbox"/> Receive and review the Contractor's applications for payment; respond appropriately.	
<input type="checkbox"/> Verify requirements, if any, for reduction in retainage and have Contractor submit consent of surety documentation.	
<input type="checkbox"/> Submit monthly or periodic invoice to the Owner for payment; include reimbursable expenses.	
<input type="checkbox"/> List tests required for the project and note their approximate dates in accordance with current construction schedule.	
<input type="checkbox"/> Obtain and review required test reports.	
<input type="checkbox"/> Receive submittals; review, take appropriate action, and return to the Contractor.	
<input type="checkbox"/> Maintain submittal log.	
<input type="checkbox"/> Review Contractor's proposed cost for changes and respond appropriately.	
<input type="checkbox"/> Receive from the Contractor notification of substantial completion and list of items to be completed or corrected.	
<input type="checkbox"/> Inspect the project to confirm substantial completion.	
<input type="checkbox"/> Respond to the Contractor's punch list of remaining work to be repaired or completed.	
<input type="checkbox"/> If applicable, review Contractor's request for a reduction of retainage.	
<input type="checkbox"/> When the project is judged to be substantially complete, prepare a Certificate of Substantial Completion.	
<input type="checkbox"/> If reproducible record drawings are required, provide the Contractor with appropriate media.	
<input type="checkbox"/> Request that the Contractor submit project close-out documents.	
<input type="checkbox"/> Review the close-out submittals for completeness.	
<input type="checkbox"/> Verify that the Contractor has obtained a certificate of occupancy or occupancy permit.	
<input type="checkbox"/> Review the Contractor's request for final inspection and conduct a field inspection of the project to confirm completion.	
<input type="checkbox"/> Prepare a final field inspection report.	
<input type="checkbox"/> Review the Contractor's application for final payment, including required attachments such as waivers of lien and consent of surety documentation.	
<input type="checkbox"/> Issue a final certificate for payment.	
<input type="checkbox"/> Submit [final] monthly or periodic invoice to the Owner for payment; include reimbursable expenses.	
<input type="checkbox"/> Assemble and file for future reference complete project and cost records for both construction and professional services.	
<input type="checkbox"/> Archive project information and materials according to type; indicate duration for archival retention (prior to discard).	
<input type="checkbox"/> Prior to expiration of the one-year period of corrections, obtain the Owner's authorization to conduct an inspection to determine if any work is required by the Contractor to remedy defects.	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

PROJECT NAME:
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8. POST-CONSTRUCTION SERVICES	Notes
<input type="checkbox"/> Perform post-construction services in accordance with the Owner-Architect agreement. Such services may include:	
<input type="checkbox"/> Maintenance and operational programming	
<input type="checkbox"/> Start-up assistance	
<input type="checkbox"/> Record drawing	
<input type="checkbox"/> Warranty review	
<input type="checkbox"/> Post-contract evaluation	
<input type="checkbox"/>	
<input type="checkbox"/>	
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Sample