

Description	N/A	✓	Notes
1. Before beginning negotiations with potential agencies, prepare clear definition of expected performance for each specialty, including:			
a. extent of participation by agency during design/documentation stages			This is more relevant to some specialties than others, such as design consultation from a roofing inspector.
b. knowledge of/commitment to current practice in specialties such as sustainable design or embodied energy			
c. contract administration procedures:			
i. site attendance:			
(1) on demand:			
(a) expected notification			
(b) normal/emergency response time			
(2) regularly scheduled for work continuing over extended time period			
(3) off-site locations, fabricating/manufacturing plants			
ii. reporting, including:			
(1) frequency of reports (some agencies may accumulate reports and submit them monthly, unless instructed otherwise)			
(2) measuring quantities additional excavation/backfilling			
(3) procedures when emergencies occur			
iii. site instructions, including policy for prior authorization/approval			
iv. review of change quotations as requested			
2. Review past performance of previously engaged agencies. Review unsolicited offers of service from agencies not previously engaged			
3. Seek confidential recommendations on unfamiliar agencies from colleagues/clients			Some clients may have ongoing service contracts with specific agencies and will instruct architect accordingly. Concern for due diligence may indicate that seeking independent recommendations on the client's selected agency is advisable. In this case, the client's approval should be obtained in advance, and all information obtained reported to the client. Confidentiality of comments received must be respected; therefore, the architect is obliged to obtain original source's permission to report their comments, or maintain confidentiality of source, if so requested.
4. Prepare short list of agencies selected ( <i>formerly engaged/new</i> ) to interview			
5. Develop score sheet for use during first interviews for consistent recording/rating of agencies' responses			