

Consideration	N/A	✓	Notes
<p>The activities of item 1. occur continuously throughout the project. They are inserted here and at the beginning of each phase as a reminder. The beginning of each phase is always a good time for a team update and reminder about basic communications.</p>			
<p>1. Review:</p>			
<p>.1 Scope of work for this phase with stakeholders:</p>			
<ul style="list-style-type: none"> • client; 			
<ul style="list-style-type: none"> • project team, including consultants. 			
<p>.2 Update risk register:</p>			
<ul style="list-style-type: none"> • identify and analyze project risks on a regular basis; 			
<ul style="list-style-type: none"> • implement risk strategies to address project uncertainty; 			
<ul style="list-style-type: none"> • review unresolved risks whenever new team members are added and/or a new project phase is started. 			
<p>.3 Keep design coordination meeting notes:</p>			
<ul style="list-style-type: none"> • identify issues and their resolution; 			
<ul style="list-style-type: none"> • distribute to all project team members. 			
<p>.4 Identify additional services as required during this phase:</p>			
<ul style="list-style-type: none"> • obtain client agreement as to services and remuneration before executing. 			
<p>2. Review schematic design checklist to ensure phase completion and that all required data have been obtained.</p>			
<p>3. Obtain additional requirements from client and confirm additional requirements in writing.</p>			
<p>4. Review additional client requirements for impact on fees; negotiate revised fee as required.</p>			
<p>5. Assist the client in obtaining models, perspectives or professional renderings when requested and part of scope of work.</p>			
<p>.1 If requested after agreement has been executed, identify if this assistance is an additional service meriting additional fees.</p>			

Consideration	N/A	✓	Notes
6. Review program and verify compliance.			
.1 If program has changed as a result of project uncertainty, use risk register to identify any changes to program arising during schematic design.			
7. Review schematic documents for compliance with applicable codes and regulations.			
8. Select additional consultants, if required, and establish contractual relationship.			
.1 Obtain the client's written approval as required.			
9. Review other data received from the client, consultants, etc.			
.1 Request additional data if necessary.			
10. Review requirements of authorities having jurisdiction and resolve any conflicts.			
11. Develop and forward to consultants, or alternatively obtain from consultants, a list of specialized systems required, such as:			
<ul style="list-style-type: none"> • cable TV or entertainment/information system 			
<ul style="list-style-type: none"> • clock 			
<ul style="list-style-type: none"> • closed circuit TV camera, control and monitoring system(s) 			
<ul style="list-style-type: none"> • compressed air 			
<ul style="list-style-type: none"> • electronic or communication systems 			
<ul style="list-style-type: none"> • energy management system 			
<ul style="list-style-type: none"> • emergency/back-up power system 			
<ul style="list-style-type: none"> • fire detection and announcement systems 			
<ul style="list-style-type: none"> • fire suppression systems 			
<ul style="list-style-type: none"> • natural gas or propane fuel system(s) 			
<ul style="list-style-type: none"> • daylighting illumination control system(s) 			
<ul style="list-style-type: none"> • electric lighting and lighting control systems 			
<ul style="list-style-type: none"> • lightning protection 			
<ul style="list-style-type: none"> • medical oxygen and gases system(s) 			
<ul style="list-style-type: none"> • photovoltaic system 			
<ul style="list-style-type: none"> • solar hot water system 			
<ul style="list-style-type: none"> • pneumatic tube system 			
<ul style="list-style-type: none"> • remote control operations 			

Consideration	N/A	✓	Notes
<ul style="list-style-type: none"> • security system 			
<ul style="list-style-type: none"> • steam generation and distribution system 			
<ul style="list-style-type: none"> • telephone system 			
<ul style="list-style-type: none"> • vacuum system 			
<ul style="list-style-type: none"> • public address communication system 			
<ul style="list-style-type: none"> • waste, recycling and storage 			
<ul style="list-style-type: none"> • other 			
<p>12. Obtain the client's approval of list and notify consultants of approval or revisions.</p>			
<p>13. Define occupancy load for each area and forward to consultants.</p>			
<p>14. Instruct all consultants to investigate and confirm in writing a review of applicable codes and regulations.</p>			
<p>15. Instruct the civil, mechanical and electrical consultants to:</p>			
<ul style="list-style-type: none"> • contact utility companies and public authorities regarding all services, and receive written approval for all service connections 			
<ul style="list-style-type: none"> • investigate and confirm in writing consultants' review of all applicable public and utility regulations 			
<ul style="list-style-type: none"> • review architectural and structural schematic drawings to establish adequate provision for specialized systems 			
<ul style="list-style-type: none"> • prepare estimates of operating costs with recommendations 			
<ul style="list-style-type: none"> • confirm understanding, and general and continued conformance of their work to applicable/selected environmental systems such as LEED, LBC, etc. 			
<p>16. Review the consultants' estimates of operating costs and forward to the client.</p>			
<p>17. Obtain and confirm the client's approval of selected energy source.</p>			