

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. Obtain name and contact information for the client's authorized representative:</p>			
<p>.1 Confirm any changes to the project directory that occur during the project.</p>			
<p>.2 Distribute updated project directory to in-house team and consultants.</p>			
<p>.3 Remind consultants that all client communications flow through architect.</p>			
<p>3. Obtain the client's final project brief.</p>			
<p>.1 Include client-furnished items and client technical requirements.</p>			
<p>.2 Compare to documentation obtained during proposal stage – review and refine agreements and fees if needed.</p>			
<p>.3 Confirm the client's space needs and other program requirements.</p>			

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.4 Distribute client requirements to project team for their review and analysis.			
4. Establish project document management system:			
.1 File organization, archiving and retrieval protocols.			
.2 Communicate office standards to client, in-house team and consultants.			
.3 Review client document management system and identify variations from current office systems.			
5. Assign personnel to the project:			
• project architect			
• designer			
• technical staff			
• other			
6. Assemble and review all applicable requirements of authorities having jurisdiction (e.g., site plan control, applicable zoning or land use, and code requirements).			List here.
.1 Review with authorities (see Chapter 2.4).			
7. Establish project schedule, including completion dates for each phase of project.			
.1 Advise the client, staff, and all consultants.			
8. Finalize consultant agreements:			
.1 Negotiate, prepare and execute consultant agreements. When required, obtain the client's approval of consultants:			
• structural			
• mechanical			
• electrical			
• other			
9. Request and receive from each consultant proof of professional liability insurance coverage:			From each consultant required to sign any form of assurance letter or letter of understanding.
• structural			
• mechanical			
• electrical			
• other			

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10. Where consultants are contracting directly with client, obtain and review proposed agreements. Identify and resolve any conflicts or omissions.			
11. Distribute client-architect agreement to staff and consultants. Redact as necessary.			
12. Distribute architect-consultant agreements to staff members. Redact as necessary.			
13. Confirm units of measurement:			
• imperial			
• metric			
14. Obtain from the client the following surveys:			
• legal			
• topographical			
• other			
.1 Assist the client in securing surveys when necessary.			
.2 Advise the client to obtain adjacent building condition survey when necessary.			
15. Obtain the consultants' requirements for investigation and testing necessary for proper execution of their work and request approval from the client.			
.1 Assist the client in securing proposals for this work.			
16. Instruct appropriate staff members to review site information and examine site.			
17. Instruct consultants to review site information and report(s):			Identify issues and risks and proposed resolution/mitigation.
• geotechnical			
• structural			
• mechanical			
• electrical			
• civil			
• other			
18. Instruct appropriate staff to review and record existing conditions for existing building(s) being renovated or added to.			Identify issues and risks and proposed resolution/mitigation.

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19. Instruct consultants to review and record existing conditions for existing building(s) being renovated or added to.			
20. Determine preliminary space requirements (area and volume) using the client's functional program.			
21. Prepare functional program, if part of architectural services.			
22. Obtain the client's requirements for phased occupancy or other special requirements.			
23. Determine items or work to be furnished by the client, or not to be included in the construction contract.			
24. Review functional program with the client to determine if construction budget and functional program requirements are aligned.			
25. Obtain the client's written authority to proceed.			