

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>			
1. Review:			
.1 Scope of work for this phase with stakeholders:			
<ul style="list-style-type: none"> • client; 			
<ul style="list-style-type: none"> • project team, including consultants. 			
.2 Update risk register:			
<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. 			
.3 Keep design coordination meeting notes:			
<ul style="list-style-type: none"> • identify issues and their resolution; 			
<ul style="list-style-type: none"> • distribute to all project team members. 			
.4 Identify additional services as required during this phase:			
<ul style="list-style-type: none"> • obtain client agreement as to services and remuneration before executing. 			
2. Prepare final specifications and drawings to include plans (including site plan and landscaping), elevations, sections, details, notes, dimensions, and schedules, and require all consultants to do the same.			
3. Arrange for preparation of finish hardware schedule, if required.			
4. Identify components requiring alternate prices.			
5. Determine acceptable alternatives to specified materials or systems.			
6. Identify components requiring unit prices.			
7. Determine required cash allowances:			
<ul style="list-style-type: none"> • testing allowance 			

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• contingency			
• utility connections			
• other			
8. Prepare colour and finish schedules.			
9. Prepare testing and quality control program budgets and assist the client in selection of testing agencies that are not typically selected by the construction contractor.			
.1 Determine if these costs are to be included in the construction contract.			
10. Obtain the client's instructions regarding application and payment for necessary permits such as building, etc.			
.1 Consultants should not sign permit application documents. They may make applications if agreed with client, but client should sign all requisite forms. Permits are often applied for by selected contractor.			
11. Obtain the client's instructions regarding insurance and bonds.			
12. Obtain the client's instructions regarding construction contracts and bidding procedures.			
13. Review with the client the schedule for delivery and installation of client-furnished materials.			
12. Review bid period in project schedule.			
.1 Determine time, date of bid closing, and place of bid receipt.			
15. Prepare and assemble specifications concurrently with preparation of drawings. Include:			
• notice to bidders			
• advertisement or invitation to bid			
• instructions to bidders			
• bid form			
• construction contract			
• general conditions			
• supplementary conditions			
• cash allowances			
• other			

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16. Submit copies of general conditions and supplementary conditions for the client's review or obtain the client's specific contract requirements.			
17. Assist the client's legal counsel or representative, if necessary, with review of:			
<ul style="list-style-type: none"> • general conditions 			
<ul style="list-style-type: none"> • supplementary conditions 			
<ul style="list-style-type: none"> • form of construction contract 			
18. Review any client-requested supplementary conditions of construction contract with liability insurer.			
19. Coordinate documents in progress and completed documents for compliance with program, accuracy, and cross-coordination with consultants' work.			
20. Direct the consultants to carry out required coordination:			
<ul style="list-style-type: none"> • architectural 			
<ul style="list-style-type: none"> • structural 			
<ul style="list-style-type: none"> • mechanical 			
<ul style="list-style-type: none"> • electrical 			
<ul style="list-style-type: none"> • other 			
20. Revise documents as required after each check and instruct consultants to do the same:			
<ul style="list-style-type: none"> • architectural 			
<ul style="list-style-type: none"> • structural 			
<ul style="list-style-type: none"> • mechanical 			
<ul style="list-style-type: none"> • electrical 			
<ul style="list-style-type: none"> • other 			
21. Prepare final calculations of net and gross area, and volume.			
22. Obtain from each consultant further update of estimate of construction cost:			
<ul style="list-style-type: none"> • architectural 			
<ul style="list-style-type: none"> • structural 			
<ul style="list-style-type: none"> • mechanical 			
<ul style="list-style-type: none"> • electrical 			

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<ul style="list-style-type: none"> • other 			
23. Prepare final estimate of construction cost.			
24. Submit drawings, specifications, estimate of construction cost, and building calculations and analyses to the client for review.			
<ul style="list-style-type: none"> • obtain the client’s written approval; 			
<ul style="list-style-type: none"> • revise as required. 			
25. Review proposed contracting method and list of potential contractors with the client.			
26. Obtain qualification statements, if required, from interested bidders and review.			
<ul style="list-style-type: none"> • obtain assistance from consultants if separate prime contracts are to be awarded. 			
27. Stamp documents for intended purposes, either ink or electronic seal (e.g., bid, building permit, construction).			
.1 Affix the architect’s seal and signature and date on documents. Ensure that consultants seal, sign, and date documents:			
<ul style="list-style-type: none"> • architectural 			
<ul style="list-style-type: none"> • structural 			
<ul style="list-style-type: none"> • mechanical 			
<ul style="list-style-type: none"> • electrical 			
<ul style="list-style-type: none"> • civil 			
<ul style="list-style-type: none"> • other 			
29. Assist the client in filing documents for approvals and permits.			
30. Obtain the client’s written authorization to proceed to bidding or negotiation phase.			