

Consideration	N/A	✓	Notes
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.			
1. Collect and review proposal documents			
.1 Review scope of work for this phase with in-house project team and consultants.			
.2 Assess and manage project risks:			
• create risk register;			Establish with project team (in-house, consultants and client) how coordination notes are to be kept, distributed, reviewed (time frames) and accepted.
• manage each identified risk to resolution;			
• review unresolved risks whenever new team members are added and/or a new project phase is started.			
.3 Keep design coordination meeting notes:			
• identify issues and their resolution;			
• distribute to all project team members.			
2. Determine if other architects are or were involved with the project.			Review provincial & territorial associations for specific requirements.
.1 If “yes,” comply with provincial association requirements.			
.2 Address issues pertaining to copyright, credits, liability.			
3. Assign project number.			
4. Determine scope and type of project.			
5. Verify ability to provide professional services, including professional liability insurance requirements and licensing.			
6. Evaluate client and opportunity.			Research client: financial strength; expertise to undertake project.
7. Make preliminary assessment of project viability:			
.1 special considerations			
.2 financing			
.3 economics			

Consideration	N/A	✓	Notes
.4 social or community groups			
.5 zoning/development approval			
.6 environmental impact			
.7 heritage designation			
.8 sustainable targets			
.9 other			
8. Determine required professional services.			Refer to <i>RAIC Document Six</i> "Schedule A" for a comprehensive list of services.
9. Determine type of professional services agreement:			
.1 Standard Form of Agreement (<i>RAIC Document Six</i>);			
.2 client's form of agreement			
.3 other contract form			
.4 identify special provisions which may require input of legal counsel or professional liability insurers			
10. Ascertain method of construction contract.			
.1 traditional bid process:			
• single bid package			
• multiple bid packages (how many?)			
• direct selection by the client			
• invited bidders			
• open bidding			
.2 construction management			
.3 design-build			
.4 other			
11. Review the client's budget and resources.			
Determine if budget includes:			
.1 general			
• land or site acquisition			
• demolition			
• renovation			
• real estate fees			
• legal fees and/or title search			
• legal survey			
• environmental audit			
• environmental remediation			
• financing			

Consideration	N/A	✓	Notes
• property taxes, levies, etc.			
• project management fees			
• professional fees (architecture and engineering)			
• permits			
• estimated construction costs:			
• off-site utilities			
• on-site utilities			
• demolition			
• base building			
• tenant improvements			
• furniture/equipment			
• landscaping			
• items purchased by the client			
• allowances:			
• artwork			
• hardware			
• interior finishes (e.g., carpet)			
• exterior finishes (e.g., brick)			
• landscaping			
• service connection costs			
• other			
.2 authorities having jurisdiction			Identify requirements specific to this project, including time frames.
• official plan amendment			
• zoning or land use amendment			
• by-law variance or development appeal			
• site plan agreement			
• demolition permit			
• construction permit(s)			
• municipal/regional fees (utility connections, park levies)			
• other			
.3 consultants' fees			
• planning			
• civil engineering			
• architecture			
• structural			
• mechanical			
• electrical			

Consideration	N/A	✓	Notes
• landscape architecture			
• interior design			
• cost consultant or quantity surveyor			
• other			
.4 special consultants' fees			
• acoustical			
• architectural conservation			
• arborist			
• art			
• building code			
• building envelope			
• commissioning			
• construction management			
• energy			
• environmental contaminate			
• food service			
• furniture/equipment			
• geotechnical			
• hardware			
• marketing			
• security			
• seismic			
• signage — graphics			
• special lighting			
• surveyor			
• sustainability			
• traffic			
• wind/snow studies			
• other			
.5 miscellaneous costs			
• contingency			
• inspection and testing:			
• soil			
• concrete			
• steel			
• roofing			
• asphalt paving			
• building audit (condominiums)			
• other			

Consideration	N/A	✓	Notes
• adjacent building damage survey			
• geotechnical report/inspection			
• models/professional renderings			
• full-size mock-ups			
• inflation			
• financing costs			
• client disbursements			
• consultant disbursements			
• other			
.6 insurance			
• excess professional liability			
• property damage			
• builder's risk insurance			
• other			
12. Determine whether project will use building information modeling/management (BIM) approach and software.			
13. Determine the client's requirements for:			
• approvals			
• CADD , if any, drawings and other information formats and software			
• unit of measurement (imperial/metric)			
• language translation			
• building information modeling and management (BIM)			
• other			
14. Determine whether project budget, project time schedule and project program are reasonable and acceptable.			
15. Organize teams (structural, mechanical, electrical and special consultants).			
.1 Negotiate tentative compensation in accordance with basis of services determined above.			
.2 Verify consultants' abilities to meet the client's requirements:			
• time schedule			
• liability insurance			
• licensing requirements			
• construction cost estimates			
• other			

Consideration	N/A	✓	Notes
16. Prepare project estimate in accordance with agreement:			
<ul style="list-style-type: none"> • internal office budgets 			
<ul style="list-style-type: none"> • production schedules 			
<ul style="list-style-type: none"> • personnel 			
17. Determine fee (refer to the RAIC's <i>A Guide to Determining the Appropriate Fees for the Services of an Architect</i> and fee calculation form in Chapter 3.9			
18. Having identified acceptance of the client, project requirements, and appropriate fee, make GO/ NO GO decision to proceed with project.			
19. Prepare written proposal:			
<ul style="list-style-type: none"> • review before issuing 			
<ul style="list-style-type: none"> • review with client 			
<ul style="list-style-type: none"> • obtain client agreement to proposal 			
20. Prepare and forward interim letter of agreement if formal contract cannot be executed immediately upon award.			
21. Prepare client-architect agreement and forward to the client for review.			
<ul style="list-style-type: none"> • Direct legal counsel and professional liability insurer (as appropriate) to review any modifications or specific provisions required by the client. 			
22. Review final agreement with own legal counsel and professional liability insurer (if necessary). Approve any modifications made by the client or renegotiate.			
23. Verify authority of party signing for the client (required for public agency, institutional, and corporate clients).			
24. Execute the agreement.			
25. Collect retainer.			
26. Create project directory, including all stakeholders and contact information (see Chapter 5.2).			