Project Number: Date:

Prepared By: Updated:

### Action Notes

|  |  |  |
| --- | --- | --- |
| **General Objectives of Phase** | |  |
|  | Drawings and other documents indicating the scale and relationships of Project  components in conformance with program |  |
|  | Building areas and volumes demarcated |  |
|  | Project images clearly depicting existing conditions |  |
|  | Representative plan element(s) graphically complete |  |
|  | Structural grid and representative exterior modules fixed |  |
|  | Small scale building elevations graphically complete for typical areas |  |
|  | Representative wall sections graphically developed at a larger scale |  |
|  | Structural and MEP/FP systems defined |  |
|  | Project performance criteria established |  |
|  | Schematic Design estimate of the cost of the work |  |

**Phase Task Checklist**

### MANAGEMENT / QUALITY MANAGEMENT / SCHEDULES

|  |  |  |
| --- | --- | --- |
|  | Update project area and use summaries. |  |
|  | Maintain binder and check set of all work prepared during this phase. |  |
|  | Participate in weekly team meetings on an as-needed basis |  |
|  | Obtain authorization to proceed with Schematic Design Phase. |  |
|  | Coordinate the design with Owner's budget. |  |
|  | Finalize Owner/Architect agreement if not already done. |  |
|  | Finalize selection of consultants. |  |
|  | Draft Consultant agreements. Review Owner/Consultant agreements. |  |
|  | Confirm compliance with insurance requirements for the project including General Liability, Automobile Liability, Workers' Compensation and Professional Liability |  |
|  | Establish and review the role of project team members. |  |
|  | Establish communication protocol between team members; who, methods of communication, project meetings and minutes, filing structure, etc. |  |
|  | Prepare a preliminary evaluation for the Owner and discuss alternative approaches to the Owner's intended project delivery method |  |

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|  |  |  |
| --- | --- | --- |
|  | Develop a cartoon-set and drawing index for the anticipated Construction Documents drawings. To the greatest extent possible provide the drawing scale and a reasonable block-out of referenced details. Submit for review by the Owner. |  |
|  | Confirm/update project data and relation to Owner/Architect agreement. |  |
|  | Monitor design firm's fees and manpower versus actual progress. |  |
|  | Monitor design team's billings. |  |
|  | Prepare or update the project schedule; review with Owner. |  |
|  | Coordinate with the Owner’s schedule for Owner’s review period(s). |  |
|  | Submit Schematic Design package for design review. |  |
|  | Coordinate with the Owner in drafting an approval letter of the Preferred Alternative as a result of the Schematic Design phase completion. |  |
|  | Modify the checklist for the next phase per the project’s particular needs. |  |

**PROGRAM / CONSTRUCTION COSTS / REGULATORY REQUIREMENTS**

|  |  |  |
| --- | --- | --- |
|  | Review program / prepare preliminary evaluation of program/program requirements agreed upon with the Owner. |  |
|  | Determine and obtain data on any Owner special building equipment and fixtures; distribute to design team. |  |
|  | Participate in the preliminary evaluation of Owner's budget for alternatives. |  |
|  | Submit an estimate of the Cost of the Work. |  |
|  | Establish applicable zoning, codes and other regulations applicable to the project. |  |
|  | Prepare preliminary building code summary. Confirm as necessary with governing authorities. |  |
|  | Review project drawings for compliance with accessibility codes and regulations. Prepare the Accessibility Plan. |  |
|  | The designer shall participate in the Owner’s scheduled review with Authority Having Jurisdiction (AHJ). |  |

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### Action Notes

**PERFORMANCE CRITERIA**

|  |  |  |
| --- | --- | --- |
|  | Reach an understanding with the Owner regarding the performance requirements  of the project. |  |
|  | Define Structural Design Criteria. |  |
|  | Define MEP/FP Performance Criteria. |  |
|  | Define Building envelope Performance Criteria. |  |
|  | Define Acoustical Performance Criteria. |  |
|  | Define Building system durability/maintainability Performance Criteria. |  |

Project Number: Date:

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### Action Notes

**DESIGN / ARCHITECTURE**

|  |  |  |
| --- | --- | --- |
|  | Create an Evaluation Matrix indicating pros and cons of each alternative. Provide 3 alternatives at a minimum to be vetted by the Owner.  Discuss with the Owner various alternative approaches to design and construction of the project. |  |
|  | Discuss with the Owner the feasibility of incorporating environmentally responsible design approaches. |  |
|  | Prepare a geometry plan for various alternatives. |  |
|  | Prepare all major plan elements of the building for all floors, with approximate  accommodations for structure and MEP. |  |
|  | Develop Typical project functional components. |  |
|  | Verify that all project/program requirements are incorporated in the plans. |  |
|  | Develop Building sections including typical foundation details. Indicate floor-to-floor dimensions, ceiling heights, major structural elements and major MEP transfer or horizontal distribution zones. |  |
|  | Develop preliminary selections of major building systems with construction  materials noted on the drawings or described in writing. |  |
|  | Consider the value of alternative materials, building systems and equipment. |  |
|  | Develop typical exterior wall sections, typical exterior details and typical exterior wall types with sufficient detail delineated in the drawings and adequately described in the Basis of Design Project Manual so that initial system pricing can be obtained. |  |
|  | Prepare general description of finished spaces. Describe in the form of narratives and/or freehand sketches. |  |

Project Number: Date:

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### Action (Architectural Continued) Notes

|  |  |  |
| --- | --- | --- |
|  | Delineate reflected ceiling plan(s) as the basis to initiate project coordination. If possible, lay out a small representative portion to establish design intent. |  |
|  | Delineate building sections to illustrate design alternatives. |  |
|  | Delineate partition type sheet. All types of partitions should be accurately shown, noted, and dimensioned. |  |
|  | Prepare an Outline Specification with Project Description, general and regulatory requirements, preliminary building code, preliminary accessibility analysis, structural requirements, acoustical requirements, outline basic interior and exterior construction and materials, include preliminary elevator study, and include MEP outline specification. |  |
|  | Prepare Schematic Design cost estimate. |  |

**MEP / FP**

|  |  |  |
| --- | --- | --- |
|  | Develop design criteria including indoor and outdoor conditions, ventilation, air circulation, minimum exhaust, sound levels, system diversities and building envelope thermal characteristics. |  |
|  | Prepare summary of Mechanical Engineer’s approach including detailed system descriptions. |  |
|  | Prepare riser diagrams for all mechanical, fire protection and electrical systems |  |
|  | Develop preliminary layout of major mechanical components. |  |
|  | Delineate floor space requirements including electrical rooms, any mechanical rooms, major risers, chase requirements, etc., include weights of equipment, major horizontal and vertical penetrations. |  |
|  | Delineate MEP & FP distribution systems and other mechanical, fire protection and electrical systems that can impact structural, architectural plans and reflected ceiling plans. |  |
|  | Prepare Energy code analysis. |  |
|  | Coordinate Utility requirements. |  |

**OTHER CONSULTANTS**

|  |  |  |
| --- | --- | --- |
|  | Coordination with Owner's Project Manager. |  |

Project Number: Date:

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### Action Notes

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| --- | --- | --- |
| **Deliverables for Phase** | |  |
| **Drawings** | |  |
|  | In general drawings indicate the scale and relationship of Project components |  |
|  | All plans have spaces generally defined |  |
|  | Representative area plans generally graphically fixed |  |
|  | Representative wall sections delineated |  |
|  | Typical floor elevator and stair plans with preliminary sections |  |
|  | Representative area partition types defined |  |
|  | Provide if needed structural plans, foundation defined, columns sized and located |  |
|  | MEP/FP systems defined, major mechanical spaces fixed in plans, representative  plan area coordinated, initial riser diagrams |  |
| **Outline Specifications** | |  |
|  | General statement of purpose of Schematic Design Package |  |
|  | Project description |  |
|  | Outline Specifications including general description of systems and finishes  sufficient to meet the **General Objectives of Phase** |  |
|  | Project performance criteria established |  |
|  | Attachments and additional information |  |
| **Cost Estimate** | |  |
|  | Professional Schematic Design cost estimate. |  |