### Engineering Consultant / Project Review Check List

**Client / Business Unit:**  
**Client Project Manager:**  
**Prime Consultant:**  
**Consultant Project Manager:**  
**Phone / email:**  
**Date:**  
**File:**

**Project Name/Reference:** [Click here and type a reference]

(Nota User: This Check List is provided as a “reference guide” and is intended for facilitating regular communication between the Consultant Project Manager and the Client’s Project Manager. The Consultant and Client PM’s should discuss the appropriate use of this form as part of the project initiation meeting and customize the categories to suit the Consultant’s Assignment at hand and agree on the appropriate frequency of review.)

<table>
<thead>
<tr>
<th>Engineering Consultant / Project Review</th>
<th>Acceptable</th>
<th>Action Required</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Management</strong></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>• Project Definition / Scope of Work</td>
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<tr>
<td>o Reviewed at Project Initiation Meeting</td>
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<tr>
<td>o Sign-off by Client &amp; Consultant</td>
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<tr>
<td>o Milestone Reviews &amp; Updates documented &amp; signed-off</td>
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<tr>
<td>• Project Management Plan (PMP):</td>
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<tr>
<td>o Reviewed with Client Project Manager &amp; Project Team</td>
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<tr>
<td>o Copy issued to Client Project Manager (if requested)</td>
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<tr>
<td>o Revisions &amp; Updates Distributed to team</td>
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<tr>
<td>• Schedule Status Reporting</td>
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<tr>
<td>o Initial Project Schedule Reviewed and Agreed to</td>
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<tr>
<td>o Schedule Revisions Reviewed and Agreed to (in writing)</td>
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<tr>
<td>o Appropriate Reporting Frequency</td>
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<tr>
<td>• Risk Management</td>
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<tr>
<td>o Potential Risk Issues Identified at Project Initiation</td>
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<tr>
<td>o Risk Mitigation Plan developed &amp; distributed</td>
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<tr>
<td>o Risk Mitigation Plan monitored and updated frequency</td>
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<tr>
<td>• Communication Management</td>
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<tr>
<td>o Communication Plan / Protocol Developed &amp; Distributed (eg: Lines of Communication between: Client, Consultant, Subconsultants, Regulatory and Public (if required))</td>
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<tr>
<td>o Communication Frequency &amp; Protocol being followed</td>
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<tr>
<td>• Consultant Performance Evaluation</td>
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<tr>
<td>o Performance Evaluation Criteria Defined and Agreed to</td>
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<tr>
<td>o Milestone Performance Evaluations</td>
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</tbody>
</table>
## Financial Management

- **Budget Status Reporting**
  - Engineering Budget
  - Capital Project Budget
- **(Scope) Change Management**
  - Written approvals received prior to proceeding
    - Consultant Scope
    - Project Scope
- **Invoicing Status**
  - Appropriate Invoice Detail
  - Project Status Report Format and Content
  - Earned Value Reporting
  - A/R Status
  - Subconsultant payments are kept current

## Quality Management

*(QA/QC Completed at Appropriate Milestones)*

- **QA:**
  - Project Definition – Goals & Objectives
  - Study Phase
  - Conceptual Design
  - Preliminary Design
  - 30% Design
- **QC:**
  - Preliminary Design
  - 30% Submission
  - 60% Submission
  - 90% Submission
  - Pre-Tender Submission
  - Construction Documents
  - Addenda / Field Changes
  - Record Documents
- **Lessons Learned**

## Resource Management

- Appropriate Resources Being Maintained
- Appropriate Levels of Staff Experience Maintained
- Pre-Approvals for Proposed Staff Changes

## Project Deliverables Check List

*(expand to suit assignment)*

- Design Basis Report
- Preliminary Design Report
- Development Permit (Liaison) Application
- Building Permit (ABC) Schedules
- Tender Package (authenticated)
- Executed Contract Documents (authenticated)
- Record Drawings (authentication requirement to be agreed to)
- Operations Manual
  - Process Narrative (if applicable)
- Maintenance Manuals
- Completion Certificates