

Change Management Form

CMF #	Project #	Client	Originator

COMPLETE ALL APPLICABLE PARTS OF THIS FORM REGARDLESS OF REASON FOR CHANGE

- ☐ Change Order Request
- ☐ Engineering Change Request
- ☐ Field Change Request
- ☐ Field Instruction
- ☐ Request for Information
- ☐ Subcontractor Change Request
- ☐ Design Development
- ☐ Scope Change

Routing

Routing Order	Approval Needed	Discipline	Signature	Date
1	☐ Yes ☐ No	Process		
2	☐ Yes ☐ No	Mechanical Equipment		
3	☐ Yes ☐ No	Control Systems		
4	☐ Yes ☐ No	Piping/Plumbing		
5	☐ Yes ☐ No	Electrical		
6	☐ Yes ☐ No	Civil/Structural		
7	☐ Yes ☐ No	Architectural		
8	☐ Yes ☐ No	HVAC		
9	☐ Yes ☐ No	Procurement		
10	☐ Yes ☐ No	Estimating		
11	☐ Yes ☐ No	Construction		
12	☐ Yes ☐ No	Cost Control		
13	☐ Yes ☐ No	Planning & Scheduling		
14	☐ Yes ☐ No	Startup & Commissioning		
15	☐ Yes ☐ No	Other		

Top Priority

Return to Project Controls When Completed

Change Management Form

This form is a multiple purpose form. It is inclusive of the Request for Information (RFI), Field Change Request (FCR), Field Instruction (FI), Engineering Change Notice, and Change Order Request. You must check each applicable section. Note the number assigned to the Change Management Form (CMF) is the only number assignment made. It is made by the Cost Department. Attach the appropriate drawings and/or specifications to this form.

Contractor Name	Job Site Location	Client	Project Number
Date	Location	Project Manager	Change Management Form Number
Originator / Title	Originator Email	Originator Phone	Drawing Number
Specification Number	Equipment Number	Building/Area Number	Turnover Systems
Title and Description of Change			

Cost and Schedule Impact

Is there a Cost Impact Yes ☐ No ☐ - If yes, what is the total dollar amount? \$

Is there a Schedule Impact Yes ☐ No ☐ - If yes, what is an overall impact in days?

Detail for any cost impact or schedule impact is described on the last page of the CMF

Request for Information

☐

Date Required

Generated By: ☐ Design ☐ Construction ☐ Client ☐ Subcontractor ☐ Vendor

Response By: ☐ Design ☐ Construction ☐ Client ☐ Subcontractor ☐ Vendor

Attachments Include		
Information Requested		
Reply		
Recommended By	Company	Date

Response		
Recommended By	Company	Date

Change Management Form

Work Stopped ☐

Work Cannot Begin ☐

Work required to be redirected ☐

Impacts Material Purchase/Delivery ☐

No Immediate Impact if Acceptable Response is received by Required Date ☐

Field Change Request ☐

Date Required

Generated By: ☐ Construction Error ☐ Design Error ☐ Design Omission
☐ Client Request ☐ Other

Conflict	
Recommended Action	
Contractor Representative/ Date	Engineer Representative / Date

Field Instruction ☐

☐ Client Request ☐ Design Modification ☐ Field Clarification
☐ Field Rework ☐ Backcharge ☐ Scope ☐ Non-Scope

Conflict		
Proposed Modification		
Completion Schedule Requirement	Required Material	Required Equipment
Contractor Project Manager / Date	Client Project Manager/Date	
Vendor Representative / Date	Subcontractor Representative / Date	

Change Management Form

Engineering Change Request

☐

☐ Client Request ☐ Design Modification ☐ Scope ☐ Non-Scope

Requested Change	
Proposed Modification	
Contractor Engineering Manager / Date	Client Representative / Date

Subcontractor/Vendor Change Request

☐

☐ Scope Change ☐ Design Development

Disciplines Potentially Impacted

☐ Architectural	☐ Civil	☐ Structural	☐ Controls
☐ Piping	☐ Process	☐ Fire Protection	☐ Other
☐ Electrical	☐ HVAC	☐ Material Handling	

Description of Change or Situation
Brief Scope of Change

Subcontractor/Vendor Project Manager – Signature and Date	Contractor Project Manager – Signature and Date

Change Management Form

Change Order Request

☐

Total Cost Impact \$

Schedule Impact days

The contractor expressly reserves its right to recover for additional delays, impacts, and inefficiencies suffered because of the changes, as well as the cumulative delays, impacts, and inefficiencies sustained in conjunction with other changes and inefficiencies. These are being assessed and will be submitted when that analysis is completed. The above-described change is authorized as a change in scope with the specified change in estimated engineering and/or construction costs and associated design and/or construction schedule impact.

Contractor Project Manager/ Date	Client Project Manager / Date
☐ Approved ☐ Disapproved Signature:	☐ Approved ☐ Disapproved Signature:

Schedule Impact Analysis

A detailed analysis of how this issue impacts the schedule – remember to analyze all disciplines affected. Attach any specific schedule analysis done. Analysis in workdays unless otherwise noted.

Cost Impact Analysis

Area of Costs	Type of Costs	Dollars
Design	Labor Hours:	\$
Design	Expenses	\$
Design	Other	\$
Construction	Labor Hours:	\$
Construction	Expenses	\$
Construction	Other	\$
Equipment		\$
Indirect Costs		\$
Client Costs		\$
TOTAL COSTS		\$

Change Management Process

Purpose

The purpose of this procedure is to outline the tasks that must be taken to properly address change on a project. The change can be cost, schedule, specification or clarification. There should be no exception to this process as it is the formal documentation of any type change request whether approved or not.

Task Number	Task	Primary Responsibility	Reference – Document – Forms, Checklists, and Templates
1	Change Management Form (CMF) is Identified and Logged - Any team member can identify a potential change using the Change Management Form (CMF). The Change Management Form is multi-purpose. It is a Request for Information (RFI), a Field Change Request (FCR), a Field Instruction (FI), Engineering Change Request (ECR), or Change Order (CO). The RFI, ECR, FCR, or the FI portions of the form are completed before qualifying as a Change Order. Project Controls provides the information and enters it in the Change Management Log.	Originator	Change Management Log
2	Review CMF with Supervisor - Once a CMF is identified, the originator reviews with the supervisor for verification of a possible change due to Scope Change or Design Development. You are advised to use the Change Management Checklist and Change Management Pre-Requisite Change List.	Originator	Change Management Log Change Management Pre-Requisite Checklist
3	Is this a Design Development or Scope Change? - In conjunction with the originator, the supervisor determines if the CMF is Design Development or a Scope Change. General definitions for each can be found in Terminology and Acronyms at the bottom of this page. Caution: Make sure that your specific contract does not change the general definitions. Generally, a Design Development is within Scope, and Scope Changes are NOT. Any changes about something on the project being UNSAFE, NOT WORKING, or ILLEGAL are processed immediately.	Originator	
4	Prepare CMF Form and CMF Routing Sheet - The originator completes the CMF form based on any specific contract requirements. At a minimum, the CMF Form includes a scope of work summary to support a conceptual (ROM) estimate of costs, a schedule impact analysis, and indicates other disciplines that are impacted. Relevant documentation such as meeting notes, drawings, etc. that support the CMF are included. The scope of work defines the difference between the original scope and the potential change. The originator seeks assistance from other project team members as necessary to complete the CMF relative to their disciplines. The CMF routing sheet is signed off by each discipline, indicating a review of the CMF. The CMF is completed and given to Project Controls and Management no later than 48 hours of the potential change identification.	Originator	Change Management Form
5	Update CMF Log and Change Management Authorization to Proceed (CMFAP) Form - Project controls assigned a CMF log number in step 1. Project controls complete the balance of the information on the log to track the CMF through the process. Project Controls performs a	Project Controls Manager	Change Order Authorization to Proceed Form

Change Management Process

	completeness QC on the CMF. Upon completing the quality check, Project Controls attaches a Project Change Order Authorization to Proceed form to the CMF and forwards CMF to Contractor PM for review and approval.		
6	Contractor Project Management Review of CMF and CMFAP - The Contractor PM reviews the CMF for quality, estimated costs, and schedule impact. The PM makes the final determination whether the CMF is a Design Development or Scope Change and makes certain the CMFAP reflects this determination. The PM may consult with the client at this time.	Project Manager	
7	Does Contractor Management Approve?	Project Manager	
8	Update Change Management Log (CML) and Advise Team - Regardless of PM's direction, the CMF and CMFAP are returned to Project Controls to update the CML. If the Contractor's PM disapproves of the CMF, it can be for two reasons. The first is the PM needs additional information. In that case, the paperwork is returned to Project Controls (step 8) who updates the CML for progress, then returns to the originator for rework, this is step 4. The second reason is the PM determines that the CMF scope is included in the Project Scope, and there is no need for a CMF. In that case, the CMF is returned to Project Controls to update the CML and ends the process. If the PM approves the CMF, Project Controls updates the CML and follows the process to step 9 if it is a Scope Change or step 10 if it is a Design Development Change. In all cases, Project Controls advises team members of the CMF status with daily alerts.	Project Controls Manager	
9	If CMF is a Scope Change - if PM determines that the CMF is a scope change, it is forwarded to the client for review and approval.	Project Controls Manager	
10	If CMF is a Design Development - If the PM determines that the CMF is a Design Development, a different process path is used to determine adjustments to cost and schedule and funding usage through contingency.	Project Controls Manager	
10.1	Proceed with Design Development CMF	Project Controls Manager	
10.2	Does the PM Require a Detailed DD Analysis? If the answer is yes proceed to 10.3, if the answer is no, then proceed to 10.4	Project Controls Manager	
10.3	Prepare Detailed DD / CMF Analysis - The PM provides direction to complete a detailed analysis of the DD/CMF. Depending on the complexity, estimating support, project controls, design, or construction may be required. The CMF originator verifies the scope. Project Controls assembles the documentation and forward it to the PM for review. The PM may consult with the client at this time, ascertaining needs for future approval.	Project Manager	
10.4	Contractor Project Management Review of DD/CMF Analysis - The PM reviews the analysis for quality, cost, and schedule impacts, completes analysis with any comments before forwarding to the client for approval.	Project Manager	
10.5	Is DD/CMF Approved? After reviewing the analysis, the PM approves or disapproves. Disapproval is caused by the need for additional information or the determination that the Design Development was within the Project Scope, and proper funding is found. If that is the case, then the CMF is sent to Project Controls for Change	Project Manager	

Change Management Process

	Management Log update and ends the process. If the DD/CMF is approved by the Contractor PM, it is forwarded to the client for approval.		
10.6	Is Client approval of DD/CMF Required? This is determined by contractual requirements. If the answer is No, then proceed to 10.9. If the answer is yes, then proceed to 10.7.	Project Manager	
10.7	Client Review of DD/CMF Budget and/or Schedule Shift - Client reviews the CMF and determines whether it is a Design Development Change.	Client	
10.8	Does Client Approve the CMF? If yes, proceed to step 10.10. If not, proceed to step 10.13.	Client	
10.9	Advise Client of Scope, Cost, and/or Schedule Adjustments - If the answer to 10.6 is no, the client does not approve, the client is informed regardless of the impact of the DD/CMF. Project Controls sends CMF copy to a client advising budget shifts, contingency funding, and/or schedule impacts.	Project Controls Manager	
10.10	Update Cost Control System, Contingency Usage Log, and Execute CMF - Project controls do a final quality check on all the documents and verify required approvals.	Project Controls Manager	Contingency Usage Log
10.11	Submit CMF to Document Control for Distribution - Project Controls forwards to Document Control for Distribution.	Project Controls Manager	
10.12	Document Control Distribution - Document control distributes the CMF and associated documentation per the distribution matrix.	Document Control	
10.13	Update Change Management Log and Advise Team - Project controls to update the CM log and advise the team of the CMF status. Most changes in the DD category are funding or budget-related. Project Controls makes appropriate adjustments. Updates of adjustments are made during the monthly project reviews. Impacts on the project scope (not scope change) or to the schedule are addressed immediately upon receipt of CMF distribution by the appropriate discipline.	Project Controls Manager	
11	Update Change Management Log and Advise Team - Project Controls updates the CM log and advises the project team of the CMF status. Most changes in the DD category are funding or budget-related - in these types of cases Project, Controls makes appropriate adjustments. Updates of adjustments are made during the monthly project reviews. Impacts on the project scope (not scope change) or to the schedule are addressed immediately upon receipt of CMF distribution by the appropriate discipline.	Project Controls Manager	
12	Does Client Approve CMF?	Client	
13	Verify Client's Comments and Direction - This is when the client approves the CMF with or without exception. The direction given on the CMF is noted as it pertains to proceeding with design, construction, procurement, or a retained CMF estimate and schedule impact.	Client	
14	Update Change Management Log and Advise Team - Project controls updates the CML based on the direction as indicated by the client and advises the project team	Project Controls Manager	
15	Update Change Management Log and Advise Team - Project controls updates the CML based on the direction as indicated by the client and	Project Controls Manager	

Change Management Process

	advises the project team		
16	Does Client Require Detailed CMF Documentation? Project controls verify if the client indicated on the CMFAP the request to proceed with a detailed CMF Analysis.	Project Controls Manager	
17	Does Client Approve Detailed CMF Development Costs? If the PM indicated on the CMF a cost to provide services to complete a detailed CMF Analysis, the client needs to approve this cost before work can proceed. Project controls verify if the client indicated on the CMFAP the approval of these costs.	Project Controls Manager	
18	Secure Approval for CMF Development Costs from Client - If the client did not indicate approval on the CMFAP for detailed CMF development costs, the PM meets with the client and reviews the client's position. It is the PM's responsibility to verify contractual terms regarding this issue and provide direction accordingly to project controls.	Project Manager	
19	Does Client Approve to Proceed with CMF? If the client does not provide the approval to proceed after meeting with the PM, the CMF is canceled, indicating the end of the process.	Client	
20	Update Change Management Log and Advise Team - Project controls to update the CM log and advise the project team. This is the end of the CMF process.	Project Controls Manager	
21	Prepare Detailed CMF Estimate and Schedule Analysis - The PM provides direction to the project team for developing the required estimate and schedule analysis. Additional detail includes a detailed scope definition, detailed estimate, schedule, subcontractor pricing, preliminary design solutions, alternative solutions, schedule impact analysis, etc. It is Project Controls' responsibility to organize the documentation for project management review. Once the information is collected and prepared, project controls forwards to the PM for review.	Project Manager	CMF Detailed Estimate Form
22	Contractor Management Review of the Detailed CMF - The Contractor PM does a quality check of the CMF and its support documentation.	Project Manager	
23	Does Contractor Management Approve the CMF? The only reason for disapproval at this stage from Contractor PM is the support documentation is not complete enough to support the CMF - it is then sent back to step 21 for rework. When approved, it is returned to Project Controls.	Project Manager	
24	Update Change Management Log and Advise Team - Project Controls updates the CML and advises the project team and moves to the next step.	Project Controls Manager	
25	Submit CMF to Client for Approval - Project controls the completed CMF and CMFAP forwards, with support documentation to the client for review and approval	Project Controls Manager	
26	Does the Client Approve the CMF/CMFAP? The client provides direction on the CMF. The client approves the CO, disapproves of the CO and asks for additional information, or disapproves the CO and cancels it. The status by the client is noted on the CMFAP	Client	
27	Update Change Management Log and Advise Team - If the Client rejects the CMF Project controls updates, the CML and advises the	Project Controls Manager	

Change Management Process

	project team. This is the end of the CO process.		
28	Does Client Funding Equal Commitments? - If the client approves the CMF, Project Controls verifies Client's Purchase Order or approved funding value meets or exceeds currently projected commitments inclusive of recent changes. This is a quality check to make sure the Contractor does not go over the committed dollars on the project. If the funding is sufficient, proceed to step 33. If the funding is deficient, proceed to step 29.	Project Controls Manager	
29	Contractor Management Decision Required to Proceed or Stop - If Project Controls determines the current funding does not meet current project commitments, Contractor management needs to make a decision as to whether or not to proceed on the change. This may include a meeting with the client to determine actions or a meeting with Sr. Management of both companies to resolve. It takes a Contractor Officer's approval to proceed without proper funding.	Project Manager	
30	Does Contractor Management Approve to Proceed?	Project Manager	
31	Contractor Management to Advise Client - If Contractor management decides to stop the change order work because a satisfactory solution cannot be worked out, the paperwork is forward to Project Controls in Step 32. This CMF is considered rejected.	Project Manager	
32	Update Change Management Log and Advise Team - Project controls to update the CML and advise the project team. This ends the CMF process.	Project Controls Manager	
33	Update Cost Control System & Execute CMF - Update CML to reflect "approval" cost and schedule impact and updated applicable cost and scheduling systems. Advise team daily of approved CMF's.	Project Controls Manager	
34	Submit CO to Document Control for Distribution - Project Controls forwards CMF, CMFAP, and all associated support documentation to Document Control for Distribution.	Project Controls Manager	
35	Document Control Distribution - Document Control distributes the CMF and all associated support documentation per the Distribution Matrix. If the additional distribution is required, Project Controls must advise Document Control. Note return to step 32 - Project Controls "Updates CML and Advises Team" the process is ended with an approved CMF.	Document Control	

Note: Throughout this document, we reference the Change Management Form. This is purposeful, in that nothing is a change Order except Client's addendum Change Order to our Prime Contract - therefore everything else is support documentation for that. Most Owners run through changes monthly or quarterly, and their Change Orders are made up of a multitude of CMF's.

Design Schedule Review Checklist

Complete form by checking the applicable box. As this checklist is generic, you should make a standard practice of reviewing it with your project's scope and contractual requirements and make any additions or deletions as required. There are blanks at the end of the checklist to add items from that review. If the answer to any question is "NO," there should be an action item registered for follow-up. All follow-up items should appear on project Action Report until completed.

Date:

Reviewer:

Question	Yes	No		N/A	Action Required
After each weekly schedule meeting, is there a specific action list developed with assignments and distributed within 24 hours?	☐	☐		☐	
Are 30%, 60%, and 90% design reviews scheduled with adequate time?	☐	☐		☐	
Are activities arranged in a logical manner factoring their dependencies?	☐	☐		☐	
Are activities assigned to the correct calendar?	☐	☐		☐	
Are all change orders reflective of schedule impact for the single issue?	☐	☐		☐	
Are all contractually obligated meetings defined and timing integrated into the schedule?	☐	☐		☐	
Are all holidays confirmed and integrated into the schedule accordingly?	☐	☐		☐	
Are all IFC'd drawings in document control, and are they accessible to the project team? The owner should have an electronic copy as well.	☐	☐		☐	
Are all lessons learned being tracked for project and future?	☐	☐		☐	
Are all licenses and permits reflected in the schedule?	☐	☐		☐	
Are all life safety requirements defined and on critical paths of all schedules?	☐	☐		☐	
Are all liquidated damage dates reflected in the schedule, as adjusted for approved change orders?	☐	☐		☐	
Are all local government policies known and reflected in the schedule?	☐	☐		☐	
Are all milestones crucial to the completion of the overall schedule noted?	☐	☐		☐	
Are all Owner responsibilities completely understood?	☐	☐		☐	
Are all penetrations known, documented, and integrated into the schedule?	☐	☐		☐	
Are all potential change orders reflected in the project schedule?	☐	☐		☐	
Are all potential design changes reflected in the project schedule?	☐	☐		☐	
Are all potential field changes reflected in the project schedule?	☐	☐		☐	
Are all prime contract requirements passed on to subcontractors and design/build vendors?	☐	☐		☐	
Are all questions/issues addressed to the point of	☐	☐		☐	

Design Schedule Review Checklist

actionable items before leaving weekly scheduling meetings? No task shall be unassigned.					
Are all required environmental permits included in the schedule?	☐	☐		☐	
Are all requirements of the Historic Cultural Heritage Act tasks accounted for in the schedule, if applicable?	☐	☐		☐	
Are all schedule changes incorporated into the schedule as separate activities and linked logically to the activities which are predecessors and successors?	☐	☐		☐	
Are all schedule concerns transparent to the entire project team?	☐	☐		☐	
Are all schedules and associated information being retained per contract and document control procedures in association with the project retention schedule and closeout requirements?	☐	☐		☐	
Are all scheduling personnel trained in planning and scheduling software that is being used?	☐	☐		☐	
Are all the special activities that the owner wants to see in the schedule shown?	☐	☐		☐	
Are all special steel sequences, such as that for elevators, monorails, equipment support steel, etc. reflected in the schedule?	☐	☐		☐	
Are all specifications released for construction and approved?	☐	☐		☐	
Are all subcontractor bids analyzed by planning to ascertain adherence to the overall schedule, including a float for contingencies?	☐	☐		☐	
Are all subcontractors financially viable?	☐	☐		☐	
Are all subcontractors required to complete the qualification statement, if applicable, without exception?	☐	☐		☐	
Are all temporary facilities and utilities integrated into the schedule?	☐	☐		☐	
Are allowances made for changes in productivity due to compression?	☐	☐		☐	
Are alternatives identified for external input?	☐	☐		☐	
Are any outsiders involved in work effort estimation and identifying dependencies?	☐	☐		☐	
Are appropriate resources (capability and number) being used by the contractor to complete their scope on time?	☐	☐		☐	
Are area schedules developed, reviewed, and issued?	☐	☐		☐	
Are closeout requirements integrated into the schedule?	☐	☐		☐	
Are contingency plans complete for potential/anticipated late equipment delivery?	☐	☐		☐	
Are the contractual commitment dates clearly delineated and understood?	☐	☐		☐	
Are contractual start-up and testing activities realistic durations and included in the CPM schedule?	☐	☐		☐	

Design Schedule Review Checklist

Are control level schedules updated?	☐	☐	☐	☐
Are Critical Path areas of the Level III schedule updates being reviewed by Project Management?	☐	☐	☐	☐
Are dependencies from other projects clearly shown?	☐	☐	☐	☐
Are dependent activities identified for each small deliverable?	☐	☐	☐	☐
Are the design and procurement schedules construction driven?	☐	☐	☐	☐
Are the design hold dates integrated into schedule showing immediate impact?	☐	☐	☐	☐
Are the design releases integrated into the schedule?	☐	☐	☐	☐
Are the detailed schedules received by all contractors and approved before contract signing?	☐	☐	☐	☐
Are earned value methodologies defined for design?	☐	☐	☐	☐
Are employee's vacations taken into account if they impact critical activities?	☐	☐	☐	☐
Are equipment purchases incorporated into the design schedule?	☐	☐	☐	☐
Are external dependencies considered while constructing the schedule?	☐	☐	☐	☐
Are grounding drawings scheduled to be issued before or in conjunction with civil drawings?	☐	☐	☐	☐
Are hardware-software dependencies understood and shown on schedule?	☐	☐	☐	☐
Are HAZOP reviews complete, and all effects integrated into the schedule?	☐	☐	☐	☐
Are incentive plans a viable concept for subcontractors for schedule adherence?	☐	☐	☐	☐
Are iterations included for multiple design/document drafts and reviews as appropriate?	☐	☐	☐	☐
Are labor productivity actuals applied to schedule when updated?	☐	☐	☐	☐
Are lessons learned from this project, which can still affect this project, taken into context with the balance of the schedule?	☐	☐	☐	☐
Are Owner system walkdown dates integrated into the schedule?	☐	☐	☐	☐
Are performance bonds required on the project?	☐	☐	☐	☐
Are permanent hangers and supports scheduled for early design and fabrication? It should include all associated materials to be delivered before the arrival of pipe spools. This permits specialty crews to install supports ahead of erection crews.	☐	☐	☐	☐
Are permits obtained that pertain to artifacts or relics on the project site?	☐	☐	☐	☐
Are plans developed to mitigate the slippage of completion dates?	☐	☐	☐	☐
Are plans updated at an appropriate frequency to formulate workarounds for equipment delivery changes?	☐	☐	☐	☐

Design Schedule Review Checklist

Are prices obtained for estimate valid to support the project execution schedule?	☐	☐	☐	☐
Are procedures developed and implemented for a two-week look-ahead schedule?	☐	☐	☐	☐
Are progress measurements monitored by schedulers?	☐	☐	☐	☐
Are prohibitions excluded against the sequestering of float? e.g., by artificially extending activity durations	☐	☐	☐	☐
Are project photographs being taken on a regular basis to substantiate progress?	☐	☐	☐	☐
Are project tasks associated and connected with appropriate task owners?	☐	☐	☐	☐
Are project tasks identified as parallel or successive and set out in chronological order?	☐	☐	☐	☐
Are the project work hours abnormal in any way? If so, are they noted in the calendars?	☐	☐	☐	☐
Are the quality and content definitions set for milestones?	☐	☐	☐	☐
Are reserve resources available?	☐	☐	☐	☐
Are resources available to achieve design goals?	☐	☐	☐	☐
Are schedule action items being met as required?	☐	☐	☐	☐
Are schedule LD's tied to facility performance, which also may have LDs?	☐	☐	☐	☐
Are schedule meetings clear, concise, and actionable?	☐	☐	☐	☐
Are schedule mitigation plans developed, monitored, and updated as the project progresses?	☐	☐	☐	☐
Are schedule steering committee meeting notes integrated into the schedule?	☐	☐	☐	☐
Are scheduled durations verified by both designers and contractors?	☐	☐	☐	☐
Are shift rotation schedules set to minimize the disruption of workers' circadian rhythms?	☐	☐	☐	☐
Are slide bases and other supports designed and procured to coincide with the foundation installation schedule?	☐	☐	☐	☐
Are special craft personnel needed for any of the materials or equipment beyond the norm?	☐	☐	☐	☐
Are specialty schedules used for critical items?	☐	☐	☐	☐
Are specialty schedules used for workarounds?	☐	☐	☐	☐
Are subcontractor/vendors schedules integrated into the overall schedule?	☐	☐	☐	☐
Are subcontractor schedule concerns alleviated before the signing of the contract?	☐	☐	☐	☐
Are subcontractors/vendors scheduling systems able to be electronically loaded to an integrated schedule?	☐	☐	☐	☐
Are subcontractors establishing recovery plans in a timely fashion?	☐	☐	☐	☐
Are system interface points aligned with the project master schedule?	☐	☐	☐	☐
Are the activities for acquiring the City Sewage	☐	☐	☐	☐

Design Schedule Review Checklist

System Connection Permit included in the schedule?	☐	☐	☐	☐	
Are the critical design reviews shown as key milestones?	☐	☐	☐	☐	
Are the detailed schedules from contractors immediately integrated into the overall project schedule? Look for conflicts.	☐	☐	☐	☐	
Are the details of the Change Management process understood well by all parties?	☐	☐	☐	☐	
Are the details of the schedule addressed in the subcontractor kickoff meeting?	☐	☐	☐	☐	
Are the milestones measurable and specific?	☐	☐	☐	☐	
Are the number of activities that are behind in the design schedule known?	☐	☐	☐	☐	
Are the revised schedule of values completed and approved by all parties?	☐	☐	☐	☐	
Are the rights of the contractor being reserved, either in the contract or change order, for the accumulative effect of change orders?	☐	☐	☐	☐	
Are the schedule contingency plans for major risk items in place?	☐	☐	☐	☐	
Are the systems and planning in place to define realistic schedules and hold external providers accountable for commitments?	☐	☐	☐	☐	
Are the vendors that are delayed on getting approved submittals reflected in the schedule?	☐	☐	☐	☐	
Are there absolute criteria definitions for the 30%, 60%, and 90% design reviews?	☐	☐	☐	☐	
Are there activities to acquire a Business License included in the schedule?	☐	☐	☐	☐	
Are there activities with an excessive float?	☐	☐	☐	☐	
Are there any financial situations with vendors or subcontractors that are preventing them from meeting the schedule?	☐	☐	☐	☐	
Are there any general conditions from the Prime contract that need to be integrated into the schedule?	☐	☐	☐	☐	
Are there any material items in the HVAC system/contract which are long delivery and not reflected in the schedule?	☐	☐	☐	☐	
Are there any special conditions from the Prime contract that need to be integrated into the schedule?	☐	☐	☐	☐	
Are there any special country holidays that need to be integrated into the schedule?	☐	☐	☐	☐	
Are there any special steel sequences, such as that for elevators, monorails, equipment support steel, etc.? If so, are they noted on the schedule?	☐	☐	☐	☐	
Are there back-up plans for risky areas and the associated trigger points for deciding to go to a back-up plan?	☐	☐	☐	☐	

Design Schedule Review Checklist

Are there many unique critical paths or branches to the critical paths?	☐	☐	☐	☐
Are there milestones every 2-4 weeks for tracking?	☐	☐	☐	☐
Are there restrictions in place until the permit is granted, and is this represented in the schedule?	☐	☐	☐	☐
Are there schedule contingency plans for major risk items?	☐	☐	☐	☐
Are there specific meetings to track milestones, whether critical or non-critical?	☐	☐	☐	☐
Are three-month intermediate-range bar charts developed?	☐	☐	☐	☐
Are vendor representatives scheduled for on-site presence during their equipment installation? This should be part of all contracts if needed.	☐	☐	☐	☐
Can design support the early release of critical masonry areas? This alleviates congestion.	☐	☐	☐	☐
Can the design schedule support the early release of drawings and specifications for permanent stairways, platforms, and ladders to minimize the need for temporary items?	☐	☐	☐	☐
Can the elevator specification be completed early? This allows for early order, delivery, and potential use during construction.	☐	☐	☐	☐
Can the paving design be finished early to allow construction to install base course and utilize during construction?	☐	☐	☐	☐
Can the project monitor and manage the schedules of critical activities adequately?	☐	☐	☐	☐
Do all change orders give absolute approval dates for schedule analysis to be valid?	☐	☐	☐	☐
Do all subcontracts include the detailed baseline schedule?	☐	☐	☐	☐
Do any of the local government requirements and or guidelines give concern to the schedule?	☐	☐	☐	☐
Do any security-related schedule delays need to be included in the schedule?	☐	☐	☐	☐
Do any special tools need to be designed for field installation, and has time been allowed in the schedule for the development of the same?	☐	☐	☐	☐
Do change orders include the price of assimilating the schedule impact?	☐	☐	☐	☐
Do the systems have the ability to hold external providers to their commitments?	☐	☐	☐	☐
Does design and fabrication of large transfer lines, slide valves, and like items support schedule installation of associated structure and vessel?	☐	☐	☐	☐
Does the design of the roof and floor drain support construction sequence? This helps to minimize temporary drainage systems.	☐	☐	☐	☐
Does the design schedule allow adequate time for	☐	☐	☐	☐

Design Schedule Review Checklist

the review of vendor equipment drawings where equipment interfaces with piping, electrical, and instrumentation systems? Items to be considered are pipe diameter, schedule, material, and location of the connection.					
Does the design schedule allow for all design calculations for the high and low voltage relay settings to be done to support the substation checkout schedule?	☐	☐		☐	
Does the design schedule support the early release of lighting plans to minimize the need for temporary lighting?	☐	☐		☐	
Does the design schedule support ordering of underground valves and hydrants early?	☐	☐		☐	
Does the design schedule support the early installation of the sanitary sewer system to minimize the use of chemical toilets?	☐	☐		☐	
Does the design scope include a security-keying plan for ease of installation in the field?	☐	☐		☐	
Does design scope include cabinetry schedule for ease of installation in the field?	☐	☐		☐	
Does design scope include coating schedules for ease of installation in the field?	☐	☐		☐	
Does design scope include door and hardware schedules for ease of installation in the field?	☐	☐		☐	
Does design scope include room finish schedule for ease of installation in the field?	☐	☐		☐	
Does design scope include window schedule for ease of installation in the field?	☐	☐		☐	
Does the design scope of work include producing a heat-tracing schedule?	☐	☐		☐	
Does the design scope of work include providing a joint expansion schedule?	☐	☐		☐	
Does the design scope of work include providing cut length schedules for a power cable? Lengths are to include allowances for terminations.	☐	☐		☐	
Does each person's availability percentage for actual technical work reflect the time they'll spend as technical team leads? (Make sure those technical leads aren't spread too thin.)	☐	☐		☐	
Does each person's availability percentage reflect the time they'll spend attending each other's design reviews?	☐	☐		☐	
Does each person's availability percentage reflect the time taken up by attending training?	☐	☐		☐	
Does electrical design schedule support underground drawings in concert with civil drawings for support of construction underground?	☐	☐		☐	
Does the entire team understand the project schedule?	☐	☐		☐	

Design Schedule Review Checklist

Does the P&ID completion support schedule?	☐	☐		☐	
Does the project have a design schedule, and is it integrated into with construction schedule to give the total project schedule?	☐	☐		☐	
Does the project have all permits necessary from the FAA?	☐	☐		☐	
Does the project have Owner directives for vendors or subcontractors? There are to be included in the schedule if impactful.	☐	☐		☐	
Does the project have reputable data on owner-supplied materials and equipment?	☐	☐		☐	
Does the project have the Railroad permit for the local rail line?	☐	☐		☐	
Does the cost loading match the contract amount?	☐	☐		☐	
Does the design of the HVAC for control rooms, rack rooms, and MCC rooms support the early environmental control before installing DCS and variable speed drive cabinets?	☐	☐		☐	
Does the design production of piping isometrics support the construction schedule?	☐	☐		☐	
Does the design schedule include the design and scheduling levels? (30%, 60% and 90%) This is to support the material needed at these approval stages.	☐	☐		☐	
Does the design scope of work include a fireproofing schedule for ease of construction?	☐	☐		☐	
Does the specification indicate that the critical path needs to be determined by the schedule logic and not by any constraints or manipulations?	☐	☐		☐	
Does the trend analysis include critical activities?	☐	☐		☐	
Does the trend analysis include an early start / late start?	☐	☐		☐	
Does the trend analysis include quantified performance progress?	☐	☐		☐	
Does your trend analysis include an early start / late start?	☐	☐		☐	
Has a 3rd party analyzed the schedule as a sanity check at critical junctures of the project?	☐	☐		☐	
Has a 3rd party done at least a summary level sanity check on the schedule and specific critical path?	☐	☐		☐	
Has a constructability session been held to establish delivery sequencing of major equipment and materials? The design will have to support.	☐	☐		☐	
Has a learning curve for work activities been incorporated into schedule activities?	☐	☐		☐	
Has a monthly reconciliation of the project cost forecast and the schedule resource loading been completed?	☐	☐		☐	
Has a risk assessment of the project been completed and action plans set in place?	☐	☐		☐	

Design Schedule Review Checklist

Has a summary schedule been included with specific schedule requirements for each subcontractor and vendor? All pertinent milestones should be shown.	☐	☐	☐	☐	
Has a training schedule been developed for Owner technician training?	☐	☐	☐	☐	
Has all Force Majeure been noted in the schedule update?	☐	☐	☐	☐	
Has all historical information been solicited for all aspects of schedule, especially critical or special installations?	☐	☐	☐	☐	
Has any industry average of defects analysis been applied to schedule durations?	☐	☐	☐	☐	
Has the Design firm approved all schedules before issuance?	☐	☐	☐	☐	
Has each risk from the Risk Model been integrated into the schedule in the best and worst-case scenarios to see the potential impact?	☐	☐	☐	☐	
Has field supervision participated in the development of the estimate and resource loading?	☐	☐	☐	☐	
Has General Contractor approved all schedules before issuance?	☐	☐	☐	☐	
Has Management Team approved WBS (Work Breakdown Structure) for the project?	☐	☐	☐	☐	
Has the owner approved all schedules before issuance?	☐	☐	☐	☐	
Has the project scheduled formal constructability or value engineering reviews?	☐	☐	☐	☐	
Have the Building Permit (county or city) tasks been included in the schedule?	☐	☐	☐	☐	
Has the construction schedule been verified to the complete scope of work?	☐	☐	☐	☐	
Has the estimate for the duration to complete been done accurately for each in-progress activity?	☐	☐	☐	☐	
Has the General Contractor approved all schedules before issuance?	☐	☐	☐	☐	
Has the owner addressed his sensitivity priorities to schedule, cost, quality, and safety?	☐	☐	☐	☐	
Has the quality of the in-place work been reconciled with the schedule?	☐	☐	☐	☐	
Has the resource planning effort maximized the leveling of critical crafts?	☐	☐	☐	☐	
Has the schedule been verified against missing milestones? Special attention should be given to 3rd party and Owner commitments.	☐	☐	☐	☐	
Has the Subcontractor / Vendor submitted a baseline schedule within 30 days of the execution of the contract or purchase order?	☐	☐	☐	☐	
Has time been allowed in the design schedule for Owner maintenance reviews? This should be done earlier in the design process.	☐	☐	☐	☐	

Design Schedule Review Checklist

Has time been allowed in the schedule to obtain work visas for various foreign workers? Analyze by country.	☐	☐		☐	
Has verification been confirmed that the integration time didn't get artificially shortened to reduce a project schedule?	☐	☐		☐	
Have all applicable constructability issues been ratified and included in the schedule?	☐	☐		☐	
Have all change orders been reflected in the schedule?	☐	☐		☐	
Have all fireproofing requirements been defined and understood by construction? This needs to be done as early as possible during the project, so the effect is understood.	☐	☐		☐	
Have all materials for a tie-in event been verified as available before tie-in activity begins?	☐	☐		☐	
Have all owner supplied materials and equipment information been provided for scheduling?	☐	☐		☐	
Have all process system boundaries been reviewed?	☐	☐		☐	
Have all religious or cultural customs been integrated into project productivity?	☐	☐		☐	
Have all schedule risks been assigned to responsible parties, as outlined in the Risk Model?	☐	☐		☐	
Have all schedule risks been built into the Project Risk Profile?	☐	☐		☐	
Have all security-related schedule delays been included in the schedule?	☐	☐		☐	
Have all sole-source providers been identified for delays, and can the project completion still be met?	☐	☐		☐	
Have all special insulation applications been identified and appropriately scheduled?	☐	☐		☐	
Have all tie-ins that will require facility outage been identified and scheduled for minimal plant impact?	☐	☐		☐	
Have all trade-specific issues (efficiency, production) been accounted for in the schedule?	☐	☐		☐	
Have any subcontractors or vendors given concern regarding meeting required shop drawing dates?	☐	☐		☐	
Have any subcontractors or vendors given concern regarding meeting the required submittal dates?	☐	☐		☐	
Have approval cycle times been verified in the schedule? This must go hand in hand with the notification requirement as well.	☐	☐		☐	
Have equipment arrangements been verified against construction sequencing to verify that equipment installation will not close haul routes due to height, width, length, and weight restrictions? Equipment orientation should accommodate haul routes.	☐	☐		☐	
Have government or regulatory groups had input into the schedule?	☐	☐		☐	
Have industrial engineering movement studies been	☐	☐		☐	

Design Schedule Review Checklist

used on the project, and if so, are they included in the schedule?					
Have mobile equipment time studies been used on the project to track optimum usage?	☐	☐		☐	
Have Owner directives for vendors or subcontractors been integrated into the schedule?	☐	☐		☐	
Have partial occupancy requirements been integrated into the schedule?	☐	☐		☐	
Have permitting requirements been identified for tie-ins to existing facilities and/or equipment?	☐	☐		☐	
Have progress measurements been monitored by the project scheduler?	☐	☐		☐	
Have the activities been reviewed to ensure that there is not an excessive amount of work happening at any one time?	☐	☐		☐	
Have the equipment supports that use slide bases been verified to be in conjunction with the foundation installation schedule?	☐	☐		☐	
Have the project conditions been adequately defined?	☐	☐		☐	
Have the production rates been adequately defined?	☐	☐		☐	
Have all changes to the original durations been documented?	☐	☐		☐	
If 3rd party inspectors are used on the project, are their daily reports transmitted to the scheduling department for effect evaluation on schedule?	☐	☐		☐	
If a 3rd party approves the environmental design, has this activity been included in the schedule?	☐	☐		☐	
If a 3rd party approves the SHE design, has this activity been included in the schedule?	☐	☐		☐	
If a cold weather plan has been developed, has it been included in the schedule?	☐	☐		☐	
If a Commercial Entrance Permit for the State Highway Department is required, is this included in the schedule?	☐	☐		☐	
If a Dam Safety Permit is required, are the appropriate activities included in the schedule?	☐	☐		☐	
If a Dredge and Field Permit is required, has it been included in the schedule?	☐	☐		☐	
If a Fire Safety Permit is required by the Fire Marshall, are the activities included in the schedule?	☐	☐		☐	
If a Flood Control Permit (Army Corps of Engineers) is required, are the activities included in the schedule?	☐	☐		☐	
If a Gas Permit is required, have the activities been included in the schedule?	☐	☐		☐	
If a Monte Carlo simulation has been performed, were the results acceptable?	☐	☐		☐	
If an NPDES Permit is required by the State, have the activities been included in the schedule?	☐	☐		☐	
If a Plumbing permit (county or city) is required, is it	☐	☐		☐	

Design Schedule Review Checklist

included in the schedule?					
If a Prevention of Significant Deterioration Permit (Federal EPA) is required for this project, are the activities included in the schedule?	☐	☐		☐	
If a Public Water System Permit is required, has it been included in the schedule?	☐	☐		☐	
If a Roofing permit required and has it been included in the schedule?	☐	☐		☐	
If a Sheet Metal Permit is required, is this activity included in the schedule?	☐	☐		☐	
If a warm-weather plan has been developed, has it been included in the schedule?	☐	☐		☐	
If a Waste Water Treatment Facilities Construction Permit is required, is it included in the schedule?	☐	☐		☐	
If a Water Intake Permit (Corps of Engineers/State) is required for the project, has it been included in the schedule?	☐	☐		☐	
If a Water Runoff permit is required, is it included in the schedule?	☐	☐		☐	
If a Water Ways Discharge and Dredging Permits (Army Corps of Engineers) is required, has it been included in the schedule?	☐	☐		☐	
If a Zoning Classification Permit (County or City), has it been included in the schedule?	☐	☐		☐	
If an Air Admissions Permit is required, is it included in the schedule?	☐	☐		☐	
If an Electrical permit is required, has it been included in the schedule?	☐	☐		☐	
If an Erosion and Settlement Control Permit is required, is it noted in the schedule?	☐	☐		☐	
If an insulation schedule has been developed, has it been weaved into the schedule?	☐	☐		☐	
If irrigation for planting is going to be done by a landscaping contractor, has this been included in the schedule?	☐	☐		☐	
If Landfill permits (offsite, on-site) are required for the project, have the activities been included in the schedule?	☐	☐		☐	
If the Coastal Area Facility Review Act Permit (Army Corps of Engineers) is required, is it included in the schedule?	☐	☐		☐	
If the elevator can be used during construction, has that benefit been integrated into the schedule?	☐	☐		☐	
If the owner approves the SHE design, has this activity been included in the schedule?	☐	☐		☐	
If the project plan may change based on information learned during later activities, are corresponding key decision points called out as important milestones to be tracked?	☐	☐		☐	
If the project requires an Air Admissions Permit, is	☐	☐		☐	

Design Schedule Review Checklist

this activity been included in the schedule?					
If the project requires environmental permits, are they included in the schedule?	☐	☐		☐	
If the specification indicates that the critical path needs to be determined by the schedule logic and not by any constraints or manipulations- is this being followed?	☐	☐		☐	
If the specification indicates that the float values need to be limited (based on the length and type of project) - is this being followed?	☐	☐		☐	
If the specification indicates that there can only be two open ends in the schedule- the first and last activities- is this being followed?	☐	☐		☐	
If the specification indicates the maximum activity duration allowed- is it being followed?	☐	☐		☐	
If the specification provides a requirement for resource loading the schedule- is it being followed.	☐	☐		☐	
If the specification provides the requirements for a monthly report- were the requirements met?	☐	☐		☐	
If there is a maximum task duration required by the contract, has it been followed?	☐	☐		☐	
If using multiple design execution locations, are they all aware of schedule requirements?	☐	☐		☐	
In the detailed discipline schedules, does the design schedule support the sequencing of construction?	☐	☐		☐	
Is a frame protection plan developed and implemented to minimize all door marring and scratching?	☐	☐		☐	
Is a minimum task duration required?	☐	☐		☐	
Is a plan for shift work complete to relieve overload problems with either equipment or people?	☐	☐		☐	
Is a special expeditor/shop inspector assigned to a piping fabricator to assure schedule delivery?	☐	☐		☐	
Is adequate time allotted for team meetings and discussions?	☐	☐		☐	
Is the cable-pulling schedule been in the overall schedule, and are there any conflicts? The schedule should include the method of pulling.	☐	☐		☐	
Is Change Management Process being used to reflect all changes to the scope of work, regardless?	☐	☐		☐	
Is construction (including subcontractors) using quantity surveying to measure progress? This should include marked-up drawings for verification.	☐	☐		☐	
Is the contractor required to submit a fragnet analysis of each delay for which a time extension is requested and if so it is being done?	☐	☐		☐	
Is the Critical Chain technique being used to avoid schedule conflicts?	☐	☐		☐	
Is the delivery of concrete and sequence of delivery scheduled to allow continuous placement to prevent	☐	☐		☐	

Design Schedule Review Checklist

cold joints?					
Is design using earned value on drawings, specifications, submittals for progress measurement?	☐	☐		☐	
Is ductwork, requiring installation before piping and electrical, identified and ordered early to alleviate delays or expensive construction?	☐	☐		☐	
Is each offsite fabrication vendor required to and supplying a weekly schedule update, and are the results incorporated into the overall schedule?	☐	☐		☐	
Is each subcontractor required to resource load their schedule to obtain proper craft density and optimize productivity?	☐	☐		☐	
Is each submittal in the schedule shown as two activities? Requirement date and approval date.	☐	☐		☐	
Is the final cleaning of the interior an activity on the schedule?	☐	☐		☐	
Is integration time sufficient in the schedule? It didn't get shortened arbitrarily to reduce a project schedule.	☐	☐		☐	
Is it clear who should participate in various schedule reviews, and is it being followed? (delineated in a schedule, in a responsibility matrix, or in project meeting guidelines)	☐	☐		☐	
Is it determined who will be responsible for software development, and is this activity included in the schedule?	☐	☐		☐	
Is lack of site access during certain times of the day incorporated into the schedule?	☐	☐		☐	
Is out-of-sequence work being corrected with the progress schedule?	☐	☐		☐	
Is owner-supplied materials delivery data integrated into the schedule?	☐	☐		☐	
Is a preventative maintenance schedule in place to ensure the reliability of safety-critical equipment and instrumentation?	☐	☐		☐	
Is the process in place for justification of time extension analysis?	☐	☐		☐	
Is proper curing time allocated in the schedule? (concrete, grouting, roofing, coatings, fiberglass welding, etc.)	☐	☐		☐	
Is the required project reporting part of purchase orders or subcontracts for all vendors, consultants, and subcontractors to facilitate timely project reporting?	☐	☐		☐	
Is the resource-leveling technique being used in the schedule to avoid conflicts?	☐	☐		☐	
Is schedule incentive based on milestones, and if so, have these milestones been included in the schedule?	☐	☐		☐	
Is the schedule reflective of the proper detail to allow	☐	☐		☐	

Design Schedule Review Checklist

for a complete evaluation of schedule progress?					
Is schedule updating for plans versus actual done weekly by each subcontractor?	☐	☐		☐	
Is scheduling monitoring frequency often enough to identify schedule issues at the earliest possible point?	☐	☐		☐	
Is the Scope of Work complete with all proposal adjustments?	☐	☐		☐	
Is steel design in alignment with construction sequencing?	☐	☐		☐	
Is substantial completion defined as "beneficial occupancy," and has this been included in the scheduled activities?	☐	☐		☐	
Is substantial completion defined as "upon Owner's acceptance," and has this been included in the schedule?	☐	☐		☐	
Is the critical path reasonable?	☐	☐		☐	
Is the current budget adequate to develop a trusted schedule?	☐	☐		☐	
Is the date of the Notice to Proceed recorded appropriately in the schedule? The schedule is adjusted for its delay.	☐	☐		☐	
Is the design priority of piping design for the large bore to be first, allowing the early ordering of prefabricated pipe spools?	☐	☐		☐	
Is the foundation schedule coordinated with equipment that requires slide bases?	☐	☐		☐	
Is the frequency of the "schedule variance analysis" defined in the prime contract?	☐	☐		☐	
Is the Owner meeting all of their contractual obligations regarding approvals?	☐	☐		☐	
Is the Owner meeting all of their contractual obligations regarding budget and schedule deviations?	☐	☐		☐	
Is the Owner meeting all of their contractual obligations regarding documentation?	☐	☐		☐	
Is the Owner meeting all of their contractual obligations regarding Notifications?	☐	☐		☐	
Is the Owner meeting all of their contractual obligations regarding overtime approvals?	☐	☐		☐	
Is the Owner meeting all of their contractual obligations regarding project personnel?	☐	☐		☐	
Is the Owner meeting all of their contractual obligations regarding reports?	☐	☐		☐	
Is the owner responsible for shutting down all systems during the shutdown, and if so, has this been noted on the schedule as an owner task?	☐	☐		☐	
Is the project including a summary schedule with specific schedule requirements for each subcontractor and vendor? All pertinent milestones should be shown.	☐	☐		☐	

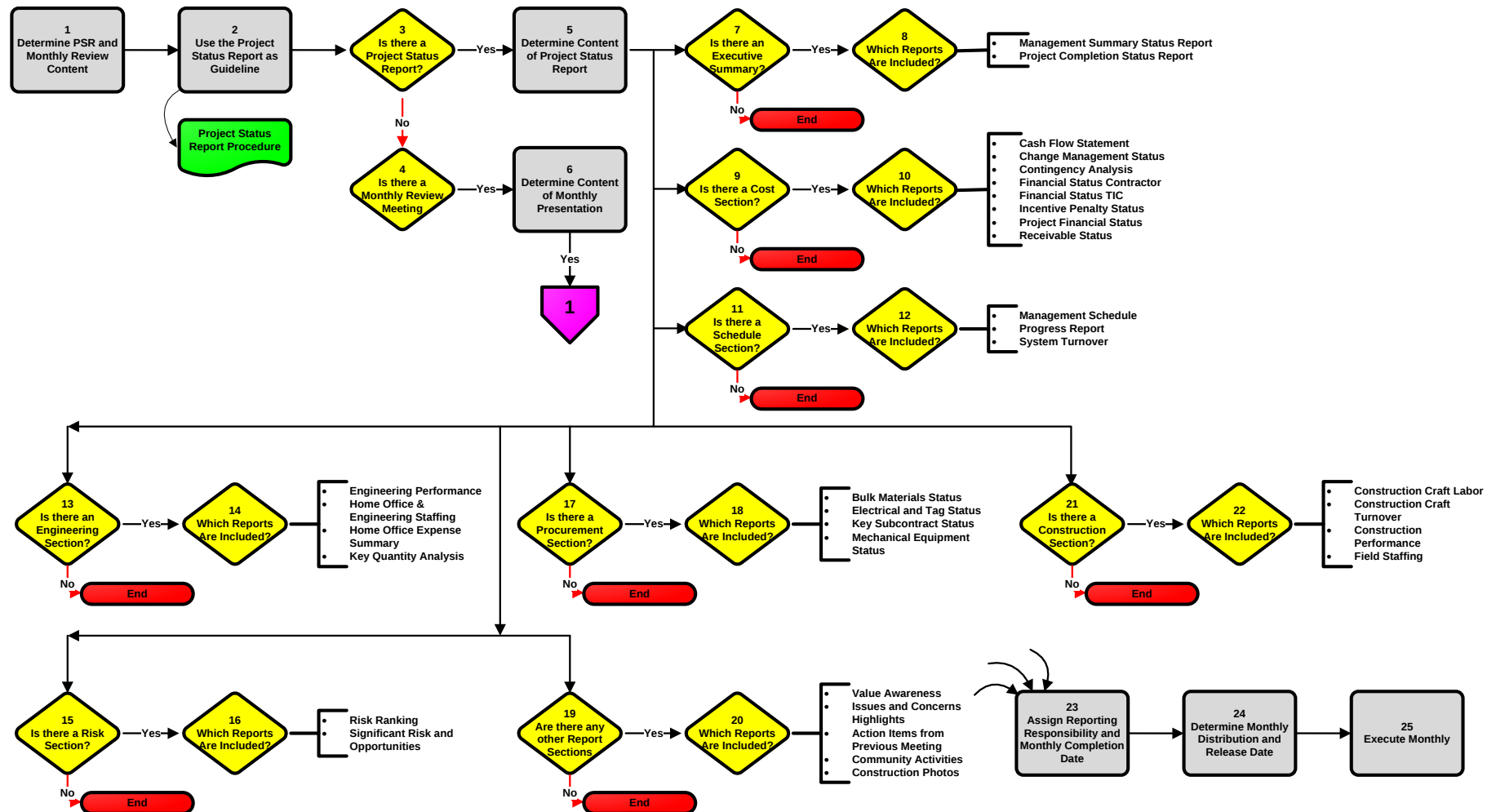
Design Schedule Review Checklist

Is the project location at an existing working facility, and if so, have all conditions been considered?	☐	☐		☐	
Is the Project Risk Register integrated into the schedule, using probabilities of risk mitigation at 80% or above? The balance is reflected in worst-case scenarios.	☐	☐		☐	
Is the project schedule based on a set amount of overtime, and if so, has this been documented in the write-up?	☐	☐		☐	
Is the project schedule being reviewed to check for any discrepancies in the subcontractor kickoff meetings?	☐	☐		☐	
Is the project schedule checked regularly for proper sequencing? Sequencing may have to change as the project progresses.	☐	☐		☐	
Is the project team being realistic and not just trying to "please" and make a release date requested by management or marketing?	☐	☐		☐	
Is the proposal budget adequate to develop a trusted schedule?	☐	☐		☐	
Is the scheduling effort on the job sufficient to support the project?	☐	☐		☐	
Is the scope of work supported by clear, concise, and comprehensive narratives?	☐	☐		☐	
Is the scope of work supported by exceptions in the proposal?	☐	☐		☐	
Is the scope of work supported by minutes of meetings, and if so, have they been included in the schedule?	☐	☐		☐	
Is the scope of work supported by schematics?	☐	☐		☐	
Is the scope of work supported by specifications?	☐	☐		☐	
Is the specification being followed for resource loading if required?	☐	☐		☐	
Is there a contractual requirement to use specific scheduling software, and if so, has it been done?	☐	☐		☐	
Is there a defined "neutral Zone" between the end of the period when the project would earn an incentive on the schedule and the start of LDs?	☐	☐		☐	
Is there a method for covering risks that are not a specific activity on the schedule?	☐	☐		☐	
Is there a minimum task duration defined in the contract, and if so, is it being followed?	☐	☐		☐	
Is there a periodic planning hot list in existence referencing equipment, design, and construction problems?	☐	☐		☐	
Is there a published schedule for when designs are initiated and delivered with accountability?	☐	☐		☐	
Is there a time contingency between the supplier's forecast date and the contractor's commitment date to ensure an adequate allowance for material and	☐	☐		☐	

Design Schedule Review Checklist

deliveries?					
Is there an expediting and communication process for updating the status of the owner supplied materials?	☐	☐		☐	
Is there clear accountability for publishing and achieving the design schedule?	☐	☐		☐	
Is there time for a quick post-mortem or lessons learned at the end of each phase, to identify and correct problems as early as possible?	☐	☐		☐	
Is there time for adequate system regression test during SQA, Alpha testing, and beta periods?	☐	☐		☐	
Is there time in the schedule for a constructability analysis before start?	☐	☐		☐	
Is this project in a jurisdiction that defines different substantial completions based on trade- and if so, is there a way to track this in the schedule?	☐	☐		☐	
Is time allowed in the schedule for land acquisition for Greenfield projects?	☐	☐		☐	
Is time included for team building activities and celebrations later in the project (plan ahead for them, so people will have time to go?)	☐	☐		☐	
Is time scheduled to train any contractors if they are entering the project mid-stream?	☐	☐		☐	
Once a conflict is recognized, are "what-if" scenario analysis being used to find the best solution?	☐	☐		☐	
Was the schedule modeled after the previous project of the same type? If so, have previous lessons been incorporated?	☐	☐		☐	
When subcontractors and vendors are being chosen, is schedule adherence being weighed heavily in the decision making and not just on price?	☐	☐		☐	
Will any special chemicals that require licensed disposal to be used for the cleaning of equipment before startup?	☐	☐		☐	
Will off shift resources be used for electrical terminations?	☐	☐		☐	
Will off shift resources be used for instrument installation?	☐	☐		☐	
Will off shift resources be used for specialty welding?	☐	☐		☐	
Will the design of heat tracing support the installation schedule of traceable piping systems to allow for the single use of scaffolding?	☐	☐		☐	
Will there be a quality check from the P&ID's to the final piping drawings to assure all valves have been ordered and will meet schedule requirements?	☐	☐		☐	
	☐	☐		☐	
	☐	☐		☐	
	☐	☐		☐	
	☐	☐		☐	
	☐	☐		☐	

Process Review Process Flow



Process Review Process Flow

