



BERKLEY DESIGN PROFESSIONAL UNDERWRITERS  
a W. R. Berkley Company

*Better by Design*

## Project Delivery Process: 50 Key Activities

*In this promotional version, hyperlinks to Berkley DP policyholder-exclusive materials have been disabled.*

### Project Delivery Process

A successful project starts with a thoughtful plan for project delivery. Effective project delivery is an integrated process, with thorough communication and robust collaboration among the design disciplines and project team leaders—and a customized project plan to provide a roadmap for the key activities, deliverables and schedule in the context of the budgeted fees for each project.

While each project plan will be different, depending on the scope of design services, complexity of the project, client-mandated process requirements and project delivery method, it is important to have a consistent approach. We have outlined 50 Key Activities for a “traditional” design-bid-build project to help you get started.

Use the Berkley DP Project Delivery Process as a reference guide to establish a baseline of service and framework for project planning that facilitates the sequential activities and quality management throughout the entire delivery process. Once you create a standard structure for your firm, you can adapt it for individual project plans.

“Plan your work for today  
and every day,  
then work your plan.”  
~Margaret Thatcher

The design and project teams will benefit from clear expectations and communication—and the ability to make informed decisions from an integrated and collaborative approach. Quality will be improved, risk will be reduced and team members will be more engaged in the successful implementation of your projects.

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# Project Delivery Process: 50 Key Activities



## Pre-Design Phase

1. Execute Letter of Authorization to proceed with preliminary design services including interim schedule, meetings, deliverables, fees and payment terms.
2. Conduct kick off meeting or visioning session to develop or confirm Client's project requirements and expectations for scope, schedule, budget and quality, and sustainability or performance objectives.
3. Determine Project Delivery Method with Client. Identify Client's consultants and contractor(s) to be involved with pre-construction services, if any.
4. Establish communication plan with Client including regular meeting schedule, presentation and approval process and change management protocol.
5. Receive and confirm Client's functional space program; if none, develop program as additional service.
6. Conduct comprehensive internal design team kick-off (project initiation) meeting to understand and discuss Client's and design firm's goals and expectations. (See sample [Project Initiation Meeting Agenda](#).)
7. Develop design team work plan including budget and schedule for staff, schedule, deliverables, QA/QC, contingency, expenses and profit plan.
8. Develop [BIM \(CAD\) execution plan](#) including use of firm standards and design team protocols.
9. Draft and negotiate Client-Consultant Agreement and Consultant-Subconsultant agreements. Refer to [BDP Contract Review Guide](#).
10. Procure existing facility documents and other Client-provided information (survey, geotechnical).
11. Assess and document existing conditions to supplement Client-provided documents.
12. Conduct and document building code report and establish other requirements of authorities having jurisdiction (AHJ).



## Schematic Design Phase

13. Complete negotiations and execute agreements with Client and Subconsultants. Refer to [BDP Contract Review Guide](#) and [Contract Terms Summary](#) tool.
14. Meet with design team to review project status, communication plan, work plan, use of firm standards, phase deliverables and team assignments.
15. Prepare schematic design options (number of options per contract) for Client's review.
16. Develop strategy to implement project sustainability objectives including [LEED checklist](#), if applicable. Discuss material and system considerations with Client and receive consent as to direction to achieve sustainable objectives.
17. Finalize building and zoning code review based on selected design option.
18. Conduct and document regular design team meetings, not less than bi-weekly, [per established agenda](#) including document progress, outstanding issues and team financial performance.
19. Prepare information for and meet with cost estimator.
20. Conduct and document regular (as defined in contract) meetings with Client and Client's consultants and contractors, if any, presenting design progress documents, discussing key decisions and providing cost estimate for review and approval.
21. Implement ongoing QA/QC program and [SD phase milestone reviews](#).
22. Submit SD deliverables and attain SD phase approval from Client and authorization to proceed to DD phase.

*For efficiency, consider  
consolidating SD-DD-CD into two phases:  
SD/DD and DD/CD*

# Project Delivery Process: 50 Key Activities



## Design Development Phase

23. Conduct **DD phase start-up meeting** with design team to review project status, changes and outstanding Client issues/decisions.
24. Prepare detailed analysis of required deliverables (cartoon set), update work plan and staffing
25. Confirm and implement project/firm standards and CAD/BIM protocol.
26. Conduct regular team meetings to coordinate and resolve issues between disciplines, not less than bi-weekly **per established agenda**, including document progress and team financial performance.
27. Prepare information for and meet with cost estimator.
28. Conduct and document regular meetings with Client and Client's consultants and contractors, if any, presenting design progress and cost estimate documents for review and approval.
29. Implement ongoing QA/QC program, **DD phase milestone reviews** and document control.
30. Submit DD deliverables and attain DD phase approval from Client and authorization to proceed to CD phase.



## Construction Documents Phase

31. Conduct CD phase start-up meeting and regular meetings with design team **per established agenda** to review project status, changes, and outstanding Client issues-decisions.
32. Confirm and update detailed analysis of required deliverables; confirm work plan and staffing.
33. Finalize QA/QC, project documentation reviews and document control protocol (including archiving construction documents for bidding, permit and construction).
34. Submit CD deliverables and attain CD phase approval from Client and authorization to proceed to BN phase.



## Bidding & Negotiation (Construction Procurement Phase)

35. Assist Client in preparation of bidding documents, list or qualifications of bidders, and protocol.
36. Participate in pre-bid meetings and prepare addenda.
37. Review bid results with Client and issue recommendations.
38. Prepare submittals to authorities having jurisdiction (AHJ).



## Construction Administration Phase

39. Conduct pre-construction meeting **per standard agenda**.
40. Provide input to Client in preparation of construction contract.
41. Provide documents and reasonable assistance for contractor submittal to AHJ for permit.
42. Process submittals, **RFIs** and change order requests in a timely manner in accordance with contract requirements.
43. Conduct and document **field observation**.
44. Participate in monthly **Q-A-C meetings** and carefully review meeting minutes.
45. Review and certify payment requests on a monthly basis.
46. Review change management conditions and metrics in accordance with company standards.
47. Conduct **substantial completion** and final completion reviews.
48. Manage project close-out activities.



## Post Occupancy

49. Conduct post occupancy assessment and evaluation.
50. Perform review of warranty items.

*This BDP Risk resource is offered for your reference and use. An editable Word file is available upon request.*