

**PF B
Pre-Project Evaluation**

Project: _____
 Location: _____
 Client / Owner: _____
 Type of Contract: _____

Proj. No.: _____
 Date: _____
 Est. Fee: _____
 Eval. By: _____

| PROJECT TEAM MEMBERS | Client | | Owner | | CM | |
|--|--------|------------------|-------|------------------|-----|------------------|
| | Yes | No or Don't Know | Yes | No or Don't Know | Yes | No or Don't Know |
| 1. Does this project team have sufficient experience for this type of project? | | | | | | |
| 2. Is this party financially stable and/or do they have a clear credit rating? | | | | | | |
| 3. Does this party have a relatively claims-free history? | | | | | | |
| 4. Does this party have a good reputation in the community? | | | | | | |

| PROJECT CONSIDERATIONS | Yes | No or Don't Know |
|---|-----|------------------|
| 5A. Does our Team have experience with this project type? | | |
| 5B. Does our firm have a proven track record with this client? | | |
| 6. Is the fee determined by negotiations rather than bidding? | | |
| 7. Do we have adequate human resources? | | |
| 8. Is there an adequate scope of services? | | |
| 9. Is construction review included? | | |
| 10. Is the project free of unfamiliar code requirements? | | |
| 11. Is the project located in a geographic area where we have experience? | | |
| 12. Is the schedule realistic? | | |
| 13. Will the project design be completed before construction begins? | | |

| FUNDING | Yes | No or Don't Know |
|---|-----|------------------|
| 14. Is this project adequately funded? | | |
| 15. Are funds for unexpected contingencies included? | | |
| 16. Can this project be realistically designed within budget? | | |

| KNOWLEDGE OF CONTRACT WITH OWNER | Yes | No or Don't Know |
|---|-----|------------------|
| 17. Is a mediation clause included? | | |
| 18. Is a limitation of liability clause included? | | |
| 19. Are any clauses with special insurance requirements reasonable? | | |
| 20. Is there a requirement for sub's insurance? | | |
| 21. Are the end-users' requirements clearly stated? | | |

HIGH RISK PROJECTS

Check the types of projects that apply

| | | |
|-----|---|--|
| 22. | a. Condominiums. | |
| | b. Production housing. | |
| | c. Developer project commercial building over nine stories. | |
| | d. Commercial building over nine stories. | |
| | e. Renovation project. | |
| | f. For inspection only. | |
| | g. Municipal building. | |
| | h. New technology is needed. | |

RISK IDENTIFICATION RESULTS

| | |
|----------------------------------|---|
| PROJECT TEAM MEMBERS | Number of checks under "No or Don't Know" |
| PROJECT CONSIDERATIONS | |
| FUNDING | |
| KNOWLEDGE OF CONTRACT WITH OWNER | |
| HIGH RISK PROJECTS | Number of checks |
| TOTAL | |

OTHER RESISTANCES

From 1 to 5 (low to high) rate the Project:

| | 1 | 2 | 3 | 4 | 5 |
|--|---|---|---|---|---|
| Wrong type -- Perfect type | | | | | |
| Too small -- Perfect size | | | | | |
| Too large -- Perfect size | | | | | |
| Unprofitable -- Profitable | | | | | |
| No fun -- Exciting | | | | | |
| Low status -- High status | | | | | |
| Aesthetic embarrassment -- Aesthetic opportunity | | | | | |
| Too far away -- Geographically perfect | | | | | |
| Opposite to goals -- Ideal for firm | | | | | |
| Heavy competition -- No competition | | | | | |
| Pipe dream -- Real and specific | | | | | |

TOTAL SCORE (of 55)

Considering the score, and if there are checks in any category, consider.

- 1 Take the project as offered.
- 2 Take the project only after negotiating any mitigating factors
- 3 Turn down the project

Describe how the identified risks will be mitigated.
