

DFM Preliminary Schematic Review Checklist

Project Title: _____

Project Number: _____

Project Manager: _____

The A/E acknowledges that the following information or status has been included as part of their submittal package for Preliminary Schematic (PS) review by the Division of Facilities Management. No design or bid document shall be reviewed without the following “**Required**” checklist items initialed and signed by the Registered Professional in responsible charge for the project to confirm compliance with DFM submittal requirements. All “**Recommended**” and “**Conditional**” item status shall be indicated herein and addressed accordingly prior to bid.

Required = Required for submission

Conditional = DFM approval conditional on compliance prior to bid

Recommended = DFM recommended prior to bid

Transmittal Documents

Initial

Letter of Transmittal

- A Letter of Transmittal identifying all items included in the submittal package and signed by the Registered Professional in responsible charge. (**Required**)

Information and Documents

Initial

- Kick-off Meeting Minutes – Approved -- (**Required**)
- Owner’s Project Requirements – Approved -- (**Required**)
- Performance Criteria – Approved -- (**Required**)
- Schedule of Performance -- Proposed -- (**Required**)
- Design Narrative – Proposed -- (**Required**)
- Owner’s Project Budget -- (**Required**)
- Preliminary Life Cycle Cost Analysis Documentation – (**Required**)
- Energy Model Documentation, as available – **for Comment**
- Study/Digital Models and Renderings as available – **for Comment**

Yes___ No___

Yes___ No___

Drawings & Specifications

Initial

- Preliminary Schematic Design Level Sketches, Diagrams, &/or Drawings– Proposed (**Required**)
 - Cover Sheet / Drawing Index
 - Symbols Legend, Abbreviations, & Notes
 - Architectural and MEP Sheets
 - Preliminary Schematic Design Level Calculations
- Preliminary Schematic Design Level Project Manual / Specifications (**Required**)
 - Project Title Page - Proposed
 - Table of Contents - Proposed
 - List of Drawings - Proposed
 - Project Specific Division 00 Documents
 - Division 01 - Proposed
 - Division 02-49 Specifications, As Available

As the Registered Professional in responsible charge for this Project, I herewith affirm and attest that we are in full compliance with the requirements of this checklist and have included the necessary information with the Preliminary Schematic Design submittal package.

Signed: _____

Company: _____

Date: _____

Having completed my review on _____ (date), I return this document along with my review comments to the assigned Project Manager for inclusion in the Project File.

Signed: _____

Project Engineer