



Design Development Phase Start-Up Meeting Agenda

Purpose:

To provide a phase milestone review for team organization, personnel resource allocation and project work planning as the project progresses into Design Development in order to fix the size and character of architectural, mechanical, electrical, plumbing, and structural systems, sections and key details and to develop outline specifications.

Instructions:

Fill out known information and distribute to the project team members prior to the meeting. Participants should become familiar with the issues as soon as possible and contribute to the full discussion.

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[Project Name, Location]

[Meeting Location]

[Date]

Attendees: Project Team [list architects, engineers, interiors, other]
 Operations Leader
 BIM Leader
 Market Practice Leader

Facilitator: Project Manager [name]

Agenda

1. Project Status – Design, Scope, Cost	
1.1	Owner authorization to proceed with DD phase
1.2	Status of SD documents, BIM model progression, confirm completion (refer to firm standard design deliverables list, MPS, contract schedules, Owner’s document standards)
1.3	Review of SD Phase QA review: identify and discuss issues remaining to be addressed
1.4	Status of construction/ project cost estimate
1.5	Updates to project/design/construction schedule, potential change conditions
1.6	Additional Owner-provided information required, deadline to provide
1.7	Outstanding schematic design and scope issues – Owner decisions needed, potential change conditions
1.8	Outstanding design, scope and technical issues – design team internal decisions

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1.9 Outstanding code issues, communication with/input received from AHJs	
1.10 Outstanding sustainable design issues, LEED, energy model	
1.11 BIM and design/technical production issues	
1.12 Consultant design progress, BIM integration	
1.13 Other issues	
2. DD Phase Project Delivery Tasks, Staffing	
2.1 Review upcoming DD activities priority tasks, interim deadlines (from Project Delivery Process, project schedule)	
2.2 Review required DD deliverables and schedule for production	
2.3 Define and schedule design team coordination expectations and meetings	
2.4 Project plan: update staffing assignments and personnel/expense budget, schedule	
2.5 Upcoming milestone reviews, presentations (review contract for quantity of meetings and presentations that may justify additional services)	
2.6 Update to project BIM Execution Plan, model element table, coordination, alignment with Owner's/Client's BIM standards	

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2.7 DD design critique, pin-up for team review	
2.8 Code issues resolved; preliminary AHJ reviews, issues identified	
2.9 Schedule QA/QC mid-phase, end of phase reviews and assign reviewer	
2.10 Outline specifications preparation	
2.11 Consultant performance concerns	
2.12 Other issues	
3. Financial, Contract, Client Relationship	
3.1 Financial performance through SD; expectations for DD	
3.2 Invoicing, Accounts Receivable status	
3.3 Change Management: additional services identified, notifications, authorizations, change documents	
3.4 Client relationship management: status, activities	
Other Issues	

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Berkley Design Professional was started in 2013 by a team of people with deep roots in underwriting, loss prevention and claims handling for the Design Professional community. The genesis of Berkley DP was the combination of our team's passion for bringing fresh ideas to the products and services Design Professionals need together with W. R. Berkley Corporation's desire to commit its superior financial strength and A+ rated paper to this industry segment. Berkley DP's motto is: "Better by Design." By this we mean that our policyholders are better businesses because we've designed comprehensive coverage and current risk management solutions that make their practice less susceptible to loss.

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