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Nominated Subcontractor Proposal/Instruction Review Checklist

Nominated Subcontractor Proposal/Instruction Review Checklist as an interactive checklist for contractors; commentable and export as PDF/Excel with QR security.

Project:	
Date:	
Filled by:	

Basic Information	
1	Enter the project name exactly as in the contract data sheet; attach the client project ID cover sheet. Method: document review. Acceptance: names match records. Evidence: cover sheet reference and file link.
2	Record the package description with CSI/Uniclass code and scope narrative. Method: upload latest scope PDF. Acceptance: revision current. Evidence: PDF filename, revision, and transmittal number.
3	Capture proposed subcontractor legal name and licence/registration number. Method: registry lookup. Acceptance: licence valid through project completion. Evidence: registry screenshot and licence expiry date.
4	Note the date of proposal/instruction and issuing document reference. Method: transmittal check. Acceptance: date and ref. traceable. Evidence: scanned instruction and transmittal ID.

Scope Definition Review	
5	Validate scope against latest drawings/specifications per approved project specifications and authority requirements. Method: redline comparison. Acceptance: exceptions list = 0. Evidence: marked-up PDFs and exceptions log.
6	Document interfaces with adjacent trades (mechanical, electrical, civil, architectural). Method: interface matrix. Acceptance: each interface has a named owner. Evidence: signed interface matrix.
7	Define builder’s work in connection and temporary works ownership. Method: BWiC schedule and RAMS review. Acceptance: single accountable party per item. Evidence: BWiC schedule and RAMS responsibility log.
8	Confirm specialist design responsibility, deliverables, and approvals. Method: design responsibility matrix. Acceptance: RACI approved by stakeholders. Evidence: signed DRM and deliverables list.

Programme and Sequencing Review	
9	Verify procurement lead times from vendor quotes. Method: supplier quotations. Acceptance: float remaining ≥ 10 days. Evidence: quotations and baseline programme snapshot.
10	Validate fabrication/installation durations versus baseline capacity. Method: capacity letter and time impact analysis. Acceptance: variance ≤ 10%. Evidence: capacity letter and TIA report.
11	Identify authority approvals and target dates. Method: approvals register. Acceptance: all permits listed with predecessors. Evidence: approvals register extract.
12	Confirm access dates and dependencies with other trades; define commissioning logic. Method: schedule logic review. Acceptance: no open ends; FAT/SAT included. Evidence: Primavera logic report and sequence diagram.

Commercial and Contractual Review	
13	Confirm subcontract value reconciles with BOQ. Method: line-by-line reconciliation. Acceptance: variance ≤ 2% or explained. Evidence: signed reconciliation and BOQ extract.
14	Review LD clause and cap alignment with main contract exposure. Method: clause comparison. Acceptance: daily rate stated; cap not exceeding main exposure. Evidence: clause extract and comparison sheet.
15	Check payment terms, currency, and advance payment securities. Method: terms review and FX analysis. Acceptance: payment ≤ 45 days; hedge/guarantee in place. Evidence: draft terms and treasury note.
16	Verify insurance, indemnities, pass-through delay damages, and warranty alignment. Method: policy/contract review. Acceptance: limits ≥ main; explicit pass-through; warranties ≥ main term. Evidence: certificates and clause extracts.

Technical Capability Review	
17	Assess relevant experience on similar scale. Method: reference checks. Acceptance: ≥ 3 comparable projects in 5 years. Evidence: reference letters and project sheets.
18	Confirm resource availability within timeframe. Method: manpower/equipment histogram. Acceptance: peak demand met within ±10%. Evidence: signed histograms and mobilisation plan.
19	Evaluate QA/QC and HSE systems. Method: ISO 9001 certificate, ITP samples, TRIR/LTI data. Acceptance: certification valid; TRIR within top quartile. Evidence: certificates and safety statistics.
20	Verify authority approval track record and key personnel competency. Method: permit log and CV review. Acceptance: named liaison; CVs meet role criteria. Evidence: approval log and signed CVs.

Risk Outcome and Comments	
21	Select risk outcome checkbox: Accept, Accept with conditions, or Object. Method: single-choice selection. Acceptance: exactly one option ticked. Evidence: digital timestamp and user ID.
22	List measurable conditions for conditional acceptance. Method: numbered action register. Acceptance: each action has owner and due date. Evidence: conditions register file.
23	Record reviewer name and department. Method: digital form completion. Acceptance: e-signature applied. Evidence: signature log and workflow ID.
24	Export review and archive. Method: export to PDF/Excel. Acceptance: file includes QR hash. Evidence: stored file path and QR verification screenshot.

Comments:

Filled by:

Signature:

Introduction	How to use this checklist
Nominated Subcontractor Proposal/Instruction Review Checklist provides a structured, internal form for contractors to assess a proposed or instructed nomination before acceptance, conditional acceptance, or objection. This practical nomination review consolidates scope definition, programme and sequencing, commercial exposure, technical capability, and contractual protection in one place. Within the first pass, you will surface interface gaps, builder’s work in connection, temporary works responsibilities, lead times, authority approvals, and back-to-back obligations per approved project specifications and authority requirements. The checklist avoids common risks such as misaligned LD caps, inadequate insurance limits, weak pass-through of delay damages, unclear warranty terms, and unfunded advance payments. Outcomes are decision-ready, evidence-backed, and immediately distributable to project controls, procurement, and commercial leads. Use the interactive mode to tick items, add comments, attach proofs, and export to PDF/Excel with a QR-secured audit trail.	1. Preparation: Gather latest drawings/specifications, BOQ, vendor quotes, programme files, approvals register, insurance certificates, draft subcontract, QA/QC and HSE records, and CVs. Invite planning, commercial, engineering, and HSE leads. Enable PDF mark-up, interface matrix, reconciliation, and RACI templates in the workspace. 2. Using the Interactive Checklist: Start interactive mode, tick items as verified, and attach evidence (photos, PDFs, emails). Add comments, tag owners, and set due dates for conditions. Generate live status and variance summaries, then preview and export the review to PDF/Excel. 3. Sign-Off: Select outcome (Accept, Accept with conditions, or Object). Apply digital signatures from reviewer and department lead, distribute to stakeholders, and archive the QR-authenticated export. Store links in the project document register for traceability.