Checklist for SNF consultants:

SNF staff and consultants assembled this list of best practices for performing fee-for-service work at SNF. This checklist is provided as a tool for guiding discussions between consultants and customers.

1. Project Scope
   a. Define project goals with customer
   b. Evaluate project complexity with customer –
      i. New materials, New process, PROM needs
      ii. Integration challenges
   c. Be realistic in estimating “cycles of learning” that may be required to achieve the project goals
   d. Compare your experience level versus project needs and support available from customer
   e. Assess time required versus project timeline – Can the project be completed on time?
   f. Estimate costs
   g. Discuss risks, information/details required for successful implementation of project

2. Establish responsibilities
   a. Responsible for procuring and maintaining liability insurance at your own expense for the duration of the agreement (refer to agreement form).
      i. Agreement form for "For Profit" organizations
      ii. Agreement Form for "Not-For-Profit" Organizations
   b. Go over the forms and other requirements with customers / hiring organization
   c. Explain SNF’s intellectual property/proprietary information policies
   d. Discuss with customers their financial obligations and responsibilities
   e. Explain SNF fee structure (including overhead) and your charges to customers
   f. Manage paperwork – make sure customers know what forms to fill out and follow-up
   g. Review and update customers periodically the charges incurred

3. Project planning
   a. Prepare process flow and run sheet and discuss with customer
   b. Establish deliverables
   c. Factor in process qualifications/characterization / Monitors required
   d. New material – PROM / contamination requirements
   e. Build in “cycles of learning” that increase with project complexity

4. Defensive processing
   a. Equipment checks and conditioning requirements
   b. Inspections and evaluations during process
   c. Anticipate integration challenges
   d. Discuss with customers incoming / outgoing requirements
   e. Process monitoring and documentation

5. Communication, communication
   a. Better informed -> better chances of success – Meet with customers/ hiring organization regularly and discuss progress, cost and time line.
   b. Meet with SNF staff as needed to report, enquire about equipment problems/ process interactions etc.
   c. Devil is in details - What you communicate, when you communicate is very important in solving problems
   d. Establish working relationships with customers

6. Documentation
   a. Process steps, recipes, protocols etc.
   b. Run sheets
   c. Tests
   d. Results