

# Technical Direction Review Service Specification

*Independent Review of Engineering Direction  
and Priorities*

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## **THORNRIDGE INDUSTRIAL — SERVICE SPECIFICATION**

This document establishes the scope, approach, deliverables, and general commercial framework for the service described herein. It is provided as a service specification and does not constitute a contract, statement of work, or authorization to perform services.

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## Executive Summary

The Technical Direction Review is a defined engineering leadership engagement used to examine a current engineering effort, technical problem, or product-development initiative and establish the direction and level of control appropriate to the circumstances.

Thornridge reviews available technical and program information and, as appropriate, consults with engineering leadership, organizational leadership, technical personnel, and other relevant stakeholders. The review considers the engineering objectives, current activities and priorities, decisions and dependencies, available technical evidence, and conditions affecting progress or performance. Technical, organizational, process, informational, supplier, contractual, and other constraints may be considered where they affect the engineering effort.

The primary deliverable is a Technical Direction Review documenting the conditions identified within the agreed scope, matters requiring attention, unresolved decisions or constraints, and recommended priorities and next steps. The review may also identify the need for continued technical direction and control, additional technical investigation, engineering support, or other work outside the original engagement.

The engagement is performed on a fixed-scope, fixed-price basis established through a proposal or statement of work. The Technical Direction Review does not, by itself, constitute ongoing engineering management, detailed technical investigation, engineering design or analysis, project execution, or implementation of recommendations. Any additional responsibilities or work identified through the review are separately defined and authorized.

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## 1. Purpose

This specification defines the scope, approach, deliverables, client responsibilities, limitations, and general commercial framework for a Technical Direction Review engagement.

The purpose of the review is to establish an informed understanding of the current engineering situation, identify conditions affecting engineering progress or performance, and document the decisions, actions, priorities, or additional work required to advance the effort. The review may also determine whether continued technical direction, technical investigation, engineering support, or other intervention is warranted.

The review provides an independent engineering perspective on a defined engineering effort, technical problem, or product-development initiative. The specific purpose, scope, information to be reviewed, and expected level of participation are established with the client before work begins.

Service philosophy: **Determine the optimal direction and control for maximum effect.**

## 2. Scope

The review begins with an examination of technical, program, and organizational information made available within the agreed scope. This may include engineering documentation, requirements, schedules, plans, analyses, decisions, technical correspondence, program information, and other records relevant to the effort.

Thornridge will conduct discussions with engineering leadership, organizational leadership, and relevant engineering personnel and other stakeholders as appropriate to the scope of the engagement. These discussions will be used to establish the current state of the effort, understand applicable objectives and constraints, and identify differences between intended and actual conditions.

The review will consider current engineering priorities, decisions, activities, dependencies, and areas of responsibility. Technical, organizational, process, informational, supplier, contractual, and other constraints may be considered where they affect the engineering effort. Unresolved decisions, dependencies, assumptions, and conditions that may affect progress, performance, cost, schedule, or technical risk may also be identified.

Engineering activity will be considered in relation to the intended project or product outcomes. The review will identify matters requiring leadership attention, decisions requiring resolution, priorities requiring adjustment, and issues that may warrant additional investigation or engineering work.

The specific scope of the review, including the information to be examined, personnel to be consulted, and activities to be performed, will be established with the client before work begins.

### 3. Client Participation

The review requires reasonable access to the information and personnel necessary to understand the engineering effort and its technical, programmatic, and organizational context. The client will provide access to relevant technical and program information, existing engineering documentation, schedules, requirements, decisions, and other records identified as necessary within the agreed scope.

The client will make relevant engineering, program, organizational, and other personnel reasonably available for discussions concerning the effort. Participants may include engineering leadership, project or program management, technical personnel, operations personnel, or other stakeholders whose knowledge or responsibilities are relevant to the review.

Thornridge will identify the information and personnel reasonably needed to conduct the review based on the circumstances and agreed scope. The client will designate a leadership representative to serve as the primary point of coordination for the engagement. This representative will facilitate access to personnel and information, provide organizational and program context as necessary, and participate in discussions concerning findings and recommended actions.

The client remains responsible for the accuracy and completeness of information provided to Thornridge. Where information is unavailable, incomplete, inaccurate, or subject to access restrictions, Thornridge may identify the limitation and consider its effect on the review and resulting findings or recommendations.

### 4. Review Principles

The review will be conducted using the following principles. The applicability and depth of each principle will depend on the agreed scope and circumstances of the engagement.

- **Understanding Before Directing** — The review will first establish an understanding of the product or program objective, engineering effort, organizational responsibilities, applicable constraints, available evidence, decisions already made, and assumptions affecting the work. Conclusions and recommendations will be based on information obtained during the review rather than on predetermined causes or solutions.
- **Control Critical Decisions** — The review will identify decisions that materially affect performance, cost, schedule, risk, or technical integrity. Consideration will be given to decision ownership, available supporting information, unresolved issues, and whether decisions are being made, deferred, or revisited in a manner that affects the engineering effort.
- **Outcomes Alignment** — Engineering activities will be considered in relation to the intended technical and program outcomes. The review will consider whether current priorities, resources, decisions, and activities are aligned with those outcomes and whether identified work is addressing the conditions that materially affect progress.

- **Constraint Identification** — The review will seek to identify the sources of material constraints affecting the engineering effort. Such constraints may be technical, organizational, procedural, informational, supplier-related, contractual, or related to unresolved decisions or dependencies.
- **Proportional Direction and Control** — The level of direction and control identified by the review will be appropriate to the circumstances. The review will consider the level of visibility, decision ownership, accountability, technical oversight, and management involvement necessary within the defined scope without assuming responsibilities not assigned to Thornridge.
- **Organizational Capability** — Where applicable to the engagement, the review will identify opportunities to establish clearer priorities, decision ownership, technical understanding, or operating structure that can be maintained by the client's organization following completion of the engagement.

## 5. Deliverable

The primary deliverable will be a **Technical Direction Review** documenting Thornridge's findings and conclusions regarding the engineering effort within the agreed scope. The Technical Direction Review will document the relevant conditions identified during the engagement and may include observations concerning technical, organizational, programmatic, and process matters. As applicable, it will identify unresolved decisions, dependencies, constraints, risks, information deficiencies, and other conditions requiring attention.

The review will document the priorities and actions identified as necessary to advance the effort. Recommendations may address decision ownership, priorities, required actions, resource coordination, additional technical investigation, changes in direction, or other activities within the scope of the review.

Where the review identifies matters requiring additional technical direction, technical investigation, engineering support, or other work outside the agreed scope, those matters will be identified for consideration as separate activities. The review may also document circumstances in which additional Thornridge involvement is not indicated.

The engagement will conclude with a technical discussion with the client's designated leadership representative and other appropriate participants. Thornridge will review the principal findings, conclusions, priorities, recommendations, and identified next steps. The discussion will provide an opportunity to clarify the findings and address questions concerning the completed review.

## **6. Schedule & Commercial Basis**

The Technical Direction Review will be performed as a fixed-scope, fixed-price engagement based on an agreed scope of work. The scope will identify the principal activities, information to be reviewed, personnel expected to participate, and deliverable to be provided.

The schedule and level of effort will be established in the proposal or statement of work based on the nature and complexity of the engineering effort, the agreed scope, the availability and accessibility of required information and personnel, and the level of review required.

The fixed-price basis applies to the agreed scope. Requests for additional investigation, expanded review, additional meetings or participants, or other activities outside the agreed scope may be addressed through a mutually agreed change to the engagement or a separate scope of work.

Where circumstances encountered during the engagement materially affect the agreed scope, schedule, or information required to complete the review, any resulting changes will be addressed with the client before additional work is performed.

## **7. Confidentiality & Data Security**

Client-provided technical information, proprietary data, analysis models, documentation, findings, and evaluation results will be treated as confidential in accordance with the applicable agreement between the parties.

Before proprietary technical information is exchanged, a mutual or client-provided Non-Disclosure Agreement will be executed when required by the client or applicable circumstances. Client information will not be disclosed to third parties except as authorized by the client or as required by applicable law, regulation, or contractual obligation.

The client is responsible for identifying export-control, security-classification, controlled-information, or other handling requirements applicable to information provided to Thornridge. Thornridge will comply with applicable handling requirements that have been communicated and agreed upon.

## **8. Boundaries**

The Technical Direction Review is limited to establishing an understanding of the engineering situation, identifying matters requiring attention, and documenting appropriate direction or next steps within the agreed scope. The engagement does not, by itself, transfer responsibility for the client's engineering organization, project execution, technical decisions, or business decisions to Thornridge.

Unless expressly included in the agreed scope, the Technical Direction Review does not constitute ongoing engineering management, fractional engineering leadership, detailed technical investigation, engineering design or analysis, program or project execution, production support, or implementation of recommendations.

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Identification of a technical issue, organizational constraint, or required action does not constitute completion of the underlying work. Where additional engineering, investigation, management, or implementation is required, that work will be separately defined and authorized before Thornridge undertakes any responsibility for it.

Recommendations provided by Thornridge are intended to inform the client's decision-making. Responsibility for business decisions, organizational actions, engineering approvals, implementation of recommendations, and resulting project outcomes remains with the client unless a separate scope of work expressly assigns additional responsibility to Thornridge.

The review is based on the information, access, and participation made available during the engagement. Where material information is unavailable, incomplete, inaccurate, or subject to limitations, Thornridge may identify those limitations and consider their effect on the findings and recommendations. The review does not constitute an audit or provide assurance that all technical, organizational, or programmatic issues have been identified.

Additional work identified during the review may be performed under a separate scope of work. The nature, responsibilities, deliverables, schedule, and commercial basis of such work will be established before the additional work begins.

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