

300.2 – Phase A Checklist for the Project Manager

This checklist is to be used by the Project Manager during Phase A of the Project.

Instructions: The Project Manager will mark the appropriate check-off box below to indicate completion of each action in accordance with the requirements in the Procedures Manual (including applicable laws, regulations, and requirements) or that the action is not applicable to the Project.

Project Administration:

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Initial Project Meeting: The initial project meeting has been scheduled. |
| <input type="checkbox"/> | <input type="checkbox"/> | Review: The requirements in Chapter 3 Phase A Schematic Design of the Capital Construction Project Procedures Manual have been reviewed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Authorization: The Project Manager has coordinated with the Executive Director and authorization to proceed has been given to the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Subsurface, Topographic and Other Surveys: The Project Manager has coordinated subsurface, topographic and other surveys necessary to the Project. These services were obtained under contract to the Division of Engineering and Contract Administration. See Sections 210, 211 and 212. |
| <input type="checkbox"/> | <input type="checkbox"/> | Pre-Design and Phase A Checklists: The Project Manager has reviewed the Pre-Design and Phase A Checklists to determine the appropriate items to be addressed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Federal Funding: Notification that the Project requires a federal review has been received and coordinated with the Using Agency to schedule appropriate meetings. |
| <input type="checkbox"/> | <input type="checkbox"/> | Agency Program: The Project Manager has reviewed the Agency program with the Using Agency and presented it to the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Meetings: Phase A Progress and Design Review Meetings with Architect-Engineer, Owner, Using Agency and Design Team have been attended. |
| <input type="checkbox"/> | <input type="checkbox"/> | Commissioning Meetings: The Project Manager has attended Phase A Commissioning Team Meetings. |
| <input type="checkbox"/> | <input type="checkbox"/> | Project Program: The revised Project Program and/or Owner's Project Requirements have been reviewed as appropriate and necessary. |
| <input type="checkbox"/> | <input type="checkbox"/> | Schematic Design Documents: The Project Manager has verified that the Schematic Design documents comply with the Project Program and/or Owner's Project Requirements. |
| <input type="checkbox"/> | <input type="checkbox"/> | Surveys: Completed preliminary geotechnical, topographic and survey documents have been provided to the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Additional Data: All other data received from Owner, Using Agency or consultants has been reviewed. If necessary, additional data has been requested. |
| <input type="checkbox"/> | <input type="checkbox"/> | Pre-Submittal Meeting: The Project Manager has attended the pre-submittal commissioning review and coordination meeting. |
| <input type="checkbox"/> | <input type="checkbox"/> | Single Source Procurement: The use of any single source procurements or restrictive specifications (i.e. less than 3 Manufacturers) of materials or services have been authorized. |
| <input type="checkbox"/> | <input type="checkbox"/> | Total Estimate of Funds through Design - Form B-210-12 has been completed
See Section 202.1 |

Phase A Review and Approval:

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Review Meeting: The Project Manager and Architect-Engineer have scheduled the Phase A Review Meeting. |
| <input type="checkbox"/> | <input type="checkbox"/> | Phase A Submittal Review: The Project Manager has reviewed the Phase A Submittal and determined that it contains the components outlined in Section 300.1 - Phase A Architect-Engineers Checklist and Section 303 - Phase A Responsibilities of the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Acceptance Letter: The Project Manager issues the Phase A acceptance letter. |

End of Phase A Checklist for the Project Manager