

300.3 – Phase A Checklist for the Using Agency

This checklist is to be used by the Using Agency Representative.

Instructions: The Using Agency 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"/> | Project Establishment: The project has been established in eMARS through GOPM. |
| <input type="checkbox"/> | <input type="checkbox"/> | Executive Order Approval: The Using Agency has obtained EO1 approval to proceed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Cost Estimate: An Agency Cost Estimate has been developed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Federal Funding: The Using Agency has notified the Division of Engineering and Contract Administration and the Architect-Engineer that the Project requires a federal review. |

Project Development:

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Agency Program: The Using Agency has provided an Agency program to the Project Manager, Architect-Engineer and Commissioning Authority. |
| <input type="checkbox"/> | <input type="checkbox"/> | Special Equipment and Fixtures: Lists of special equipment and fixtures required by the Agency and Owner were created /obtained. These were provided to the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Pre-Design Checklist: The Using Agency has participated with the Project Manager in completing the Pre-Design Checklist. See Section 200 - Pre-Design Checklist. |

Final Budget, Area Calculations and Scheduling Deliverables:

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Cost Estimate: The Agency Representative shall approve and sign the Phase A Estimate of Construction Cost. This form includes cost scheduling and the Space Study Statement. See Section 309 - Phase A Estimate of Construction Cost. |
| <input type="checkbox"/> | <input type="checkbox"/> | Energy Usage Cost. The Using Agency has received the projected energy usage cost from the Architect-Engineer for inclusion in their future operating budget. The Using Agency shall apply a contingency in developing their projected operating costs. See Section 302 - Phase A Responsibilities of the Using Agency. |

Phase A Submittal Review and Approval:

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Commissioning Plan: The Phase A Commissioning Plan has been reviewed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Copies: A complete set of Phase A documents has been received. |
| <input type="checkbox"/> | <input type="checkbox"/> | Review Meeting: The Using Agency has attended the Phase A Review Meeting. |
| <input type="checkbox"/> | <input type="checkbox"/> | Review: Comments, revisions and changes to Phase A documents were reviewed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Approval: The Using Agency has formally reviewed, commented upon and given approval for the Phase A Submittal prior to issuance of the Phase A acceptance letter. |
| <input type="checkbox"/> | <input type="checkbox"/> | Commissioning Process: The Using Agency participated in the Commissioning Process. |

Projects Seeking LEED Certification:

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Enhanced Commissioning: The Using Agency has participated in the Commissioning Authority design development review process if enhanced commissioning is used. |
| <input type="checkbox"/> | <input type="checkbox"/> | LEED Credits: The Using Agency has assisted the Architect-Engineer and the Project Manager in reviewing the LEED credits appropriate to the Project. |

End of Phase A Checklist for the Using Agency