

## 500.3 - Phase B Checklist for the Using Agency

This checklist is to be used by the Using Agency during Phase B of the Project.

**Instructions:** At the time of the Phase B submittal, the Using Agency representative will mark the box below indicating 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"/> | <b>Review:</b> The requirements in Chapter 5 – Phase B Design Development, of the Capital Construction Project Procedures Manual have been reviewed. |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Pre-Design and Checklist:</b> Items remaining on the Pre-Design and Phase A Checklist have been reviewed.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Unresolved Issues:</b> Unresolved or incomplete issues from Phase A were reviewed.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Meetings:</b> Phase B Progress and Design Review Meetings with Owner, Architect-Engineer and Design Team have been attended                       |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Commissioning Meetings:</b> Phase B Commissioning Team Meetings were attended.  |

### Project Development: The Using Agency has:

- | YES                      | N/A                      |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Project Program and Owner's Project Requirements:</b> The Project Program and/or Owner's Project Requirements have been reviewed as appropriate and necessary.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Design Development Documents:</b> The Design Development documents have been verified as complying with the Project Program and/or Owner's Project Requirements. |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Additional Data:</b> All other data required from the Using Agency was provided to the Architect-Engineer.   |

### Final Budget, Area Calculations and Scheduling Deliverables:

- | YES                      | N/A                      |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Cost Estimate:</b> The Agency Representative shall approve and sign the Phase A Estimate of Construction Cost. This form includes cost scheduling and Space Study Statement. <b>See Section 508 - Phase B Estimate of Construction Cost.</b>                |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Energy Usage Cost.</b> 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 budget. |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Commissioning:</b> The Using Agency has participated in the Commissioning Process.  |

### Phase B Submittal Review and Approval:

- | YES                      | N/A                      |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Copies:</b> A complete set of Phase B documents has been received.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Review Meeting:</b> The Using Agency attended the Phase B Review Meeting.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Review:</b> Comments, revisions and changes to Phase B documents were reviewed.                                       |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Approval:</b> The Using Agency issued approval prior to the Phase B acceptance letter being issued by Project Manager |

### Projects Seeking LEED Certification:

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

## End of Phase B Checklist for the Using Agency