500.2 - Phase B Checklist for the Project Manager

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

Instructions: At the time of the Phase B submittal, the Project Manager 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:

Fee: The Project Manager has coordinated with the Executive Director to negotiate the Architect-Engineer’s fee. An Advice of Change has been executed to amend the contract.

Review: The requirements in Chapter 5 – Phase B Design Development of the Capital Construction Project Procedures Manual have been reviewed.

Pre-Design and Phase A Checklist: The Pre-Design and Phase A Checklist have been reviewed and carry forward items that must be addressed in Phase B of the Project have been noted. All carry forward items have been brought to the attention of the Architect-Engineer.

Unresolved Issues: All unresolved or incomplete issues from Phase A have been reviewed and discussed with the Architect-Engineer, Using Agency, and Owner.

Authorization: Written Phase B authorization has been provided to the Architect-Engineer.

Federal Funding: The status of permit review on projects with Federal funding has been identified.

Project Directory: An updated Project Directory has been received from the Architect-Engineer.

Regulatory Review: The Project Manager has conferred with the Architect-Engineer to obtain preliminary review from regulatory authorities.

Project Program and Owner’s Project Requirements: The Project Manager has reviewed the revised Project Program and/or Owner’s Project Requirements as appropriate and necessary.

Design development Documents: The Design Development documents have been verified to comply with the Project Program and/or Owner’s Project Requirements.

Surveys: Completed preliminary geotechnical, topographical and survey documents have been provided to the Architect-Engineer.

Subsurface Investigations: All final subsurface investigations and any other survey information based on the current plan has been provided to the Architect-Engineer.

Additional Data: All other data received from Owner, Using Agency or consultants has been reviewed. If necessary, additional data has been requested.

Commissioning Meeting: The Project Manager has attended the pre-submittal commissioning review and coordination meeting.

Single Source Procurement: The Project Manager has authorized the use of any single source procurements or restrictive specifications (i.e., less than 3 manufacturers) of materials or services.

Total Estimate of Funds through Design - Form B-210-12 has been updated. See Section 202.1
Phase B Review and Approval:

☐ ☐ Review Meeting: The Project Manager and Architect-Engineer have scheduled the Phase B Review Meeting.

☐ ☐ Completeness Review: The Project Manager has reviewed the Phase B Submittal and determined it to contain the components outlined in Section 500.1- Phase B Architect-Engineers Checklist and Section 505 - Phase B Responsibilities of the Architect-Engineer.

☐ ☐ Acceptance Letter: The Project Manager issues the Phase B acceptance letter.

End of Phase B Checklist for the Project Manager