A CHECKLIST FOR PROJECT PLANNERS

Predesign

draft 30 March 2009/FT

☐ Project summary: one page description

☐ Find start up money, set up accounts

☐ Collect info from previous studies, capital construction requests, etc.

☐ Identify management group, start weekly check-ins (meet or phone)

☐ Check site:
  - review of utilities map
  - environmental hazards (Level 1 EA?), coordinate with EHS
  - order site survey, or develop other planning base for this phase
  - assemble geotechnical information from CPRE library

☐ Initial scoping meeting with project sponsor
  - identify “alligators”
    - neighboring users
    - neighborhood groups
    - City code, building code, fire code issues
  - identify “go-to” person on user side for management & const. meetings
  - map out process: procedure manual, this checklist. review/adjust as needed
  - map out project schedule through final occupancy
  - monitor legislative limitation issues

☐ Build pre-design project budget
  - distribute to Facilities Services, project sponsor, VPFA?, review meeting,
  - conduct or confirm cost/scope assumptions to guide programming process
    (avoid “week before Christmas” syndrome)
  - develop financial pro-formas, cash flow analyses, etc. as needed

☐ Develop or commission project program

☐ State Energy Efficient Design program (SEED)
  - notify Facilities energy staff (Jeff Madsen)
  - notify Office of Energy (Jeff Madsen)
  - establish process and timeline for hiring energy analyst (planner + Jeff)

☐ For CPC meeting 1:
  - identify patterns and policies
  - identify preferred site
  - identify user group, name chair

☐ Establish communication parameters:
  - advance info one day ahead of meetings
  - brief notes or summary within one week of meetings, by whom?
- Write project description for hiring architects

- Hire architects
  - draft RFQ
  - write/update contract template
  - screen, rank qualification submittals
  - invite firms for interview
  - select preferred firm
  - negotiate contract

- Map out design process with architect: scope goals, tasks & mtgs through SD

- Hire CM/GC

- Sustainability scoping (can be earlier)
  - establish participants and map process
  - identify environmental issues, relevant UO and State policies, laws
  - set goals and priorities
  - discuss opportunities and strategies
  - establish metrics and performance targets
  - document in project intentions paper

- Check in with Planning staff for project review

- Historic designation check of existing site & buildings

- Check in with City plan review staff, land use staff, if appropriate

- Identify construction project manager, planner and PM develop work plan, review

- Conduct value-setting session among users, design team, contractor

- Conduct quarterly financial review (funding, budget) or as end-of-phase activity
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Schematic Design

- If not already achieved, check off
  - predesign sustainability items, above
  - SEED items, above
  - sustainability items, above
  - ongoing weekly management check-in (w/ architect, contractor)

- Notify Oregon Arts Commission re % for art process

- Update budget based on program understanding

- Set up user group meeting schedule

- Set up focus groups, departmental users, and other input methods, as needed

- Conduct information session early in SD with other UO entities:
  - Facilities maintenance zone
  - Network Services/Telecom
  - Facilities central plant
  - Departmental or College support and/or technical staff
  - EHS
  - DPS
  - neighboring programs

- Conduct quarterly financial review (funding, budget) w/ planning, Facilities, VPFA

- Value analysis: establish value points, areas needing more study

- When concepts begin to jell, schedule
  - informal CPC review/discussion
  - CPRE internal review (and invite FS?)
  - mid-SD cost/scope review

- Code check-in with City (with EHS)
  - fire and life safety narrative
  - fire access mapped
  - distribute notes within one week from CPRE

- SEED meeting one: establish appropriate time in process with FS, ODOE

- Near end of SD
  - get cost estimate
  - review draft SD report with all stakeholders
  - schedule CPC meeting

- SD signoff of SD report by user group, including resolved cost estimate, budget, etc.

- When all of above checked, authorize launch of Design Development phase
[post construction: debrief, record drawings, POE, etc.]