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

A CHECKLIST FOR PROJECT PLANNERS　　　　**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.]