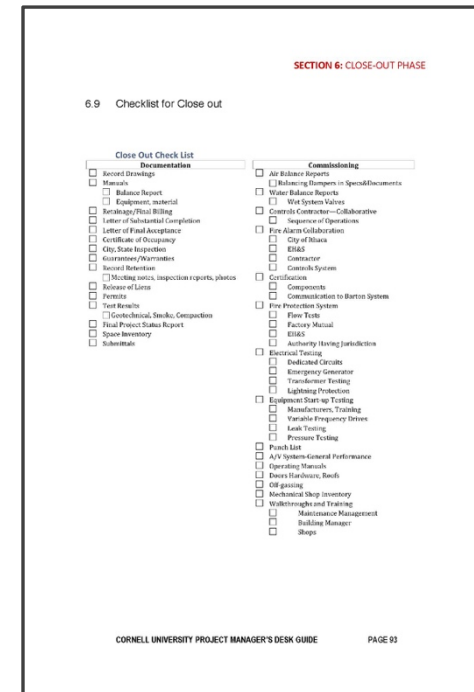
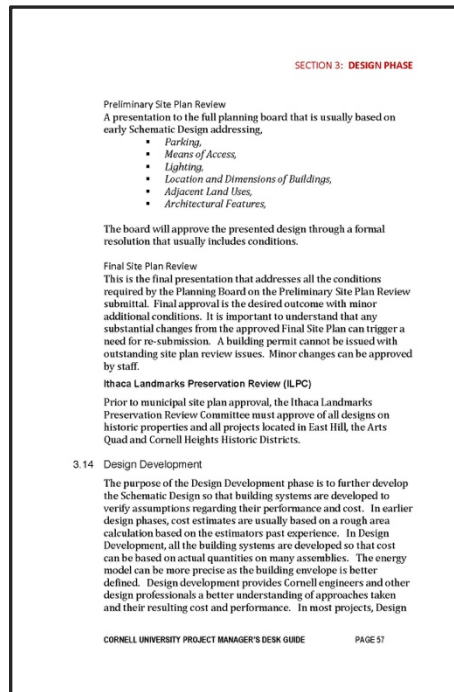
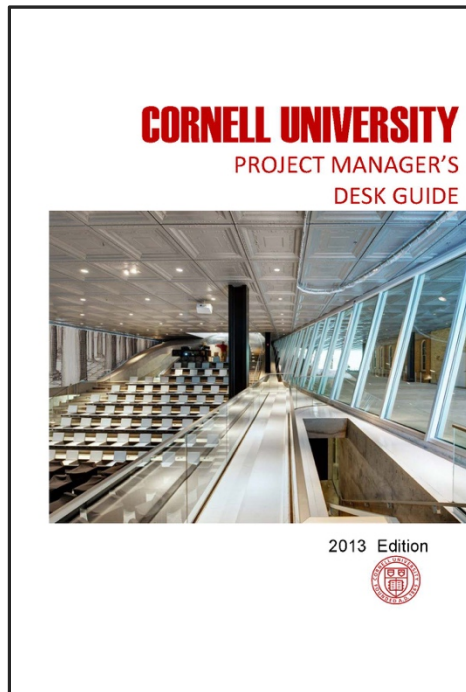


# Project Management Tools & Resources

Facilities and Campus Services  
Engineering and Project Management  
September 26, 2019

# Improve Our Game Goal



Replace PM Desk Guide with a comprehensive set of tools and resources to ensure **Consistent and Proactive** project management throughout the University.

# Project Management Tools and Resources

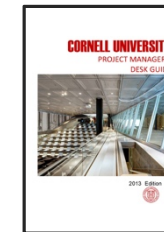
## Quantitative (*eBuilder*)

- Consistent Processes
- Approval Management
- Data Management
- Reporting
- Manage Documents



## Qualitative (*need*)

- Consistent Engagement
- Consistent Delivery
- Define Expectations
- Share Knowledge



*Develop and enhance the craft of project management*

# Inventory Phase

File Name?

Group?

Status?

Author?

Document Type?

Project Phase?

*Is it the right tool for the task?*

#	File Name	Status	Document Type	Group	Author	Project Phase	Comments	Link
1	Bid Abstract	In use	Guidance Document	E&PM		Bid Phase		<a href="https://cornell.app.box.com/file/453677053612">https://cornell.app.box.com/file/453677053612</a>
2	Capital Project Approval Authorities	In use	Guidance Document	Budget & Planning		All Phases		
3	Capital Project Funding Guidelines_2017_August	In use	Guidance Document	Budget & Planning	MLC	All Phases		<a href="https://cpb-us-e1.wpmucdn.com/blogs.cornell.edu/dist/b/6138/files/2017/09/Capital-Project-Funding-Guidelines_2017_August-1xww6co.pdf">https://cpb-us-e1.wpmucdn.com/blogs.cornell.edu/dist/b/6138/files/2017/09/Capital-Project-Funding-Guidelines_2017_August-1xww6co.pdf</a>
4	Change Request Checklist	In use	Checklist	E&PM		Construction		<a href="https://cornell.app.box.com/file/453690651266">https://cornell.app.box.com/file/453690651266</a>
5	Checklist - Project Launch AMG Draft.pdf	Draft	Checklist	E&PM	Andrew G	Pre-Design		<a href="https://cornell.app.box.com/file/435965032191">https://cornell.app.box.com/file/435965032191</a>
6	Checklist Pre-bid conference.docx	For Consideration	Checklist					<a href="https://cornell.app.box.com/file/452844576295">https://cornell.app.box.com/file/452844576295</a>
7	Checklist Preconstruction v2.pdf	In use	Checklist	E&PM	Paul	Bid Phase		<a href="https://cornell.app.box.com/file/435957661391">https://cornell.app.box.com/file/435957661391</a>
8	Checklist Red Zone.pdf	In use	Checklist	E&PM	Paul	Construction		<a href="https://cornell.app.box.com/file/435966795979">https://cornell.app.box.com/file/435966795979</a>
9	Construction Readiness Checklist	In use	Template	E&PM		Construction		<a href="https://cornell.app.box.com/file/453690653666">https://cornell.app.box.com/file/453690653666</a>
10	COR Calc Worksheet	In use	Template	E&PM		Construction		<a href="https://cornell.app.box.com/file/453690659666">https://cornell.app.box.com/file/453690659666</a>
11	Cornell University Access Waiver	In use	Contracts Document	Contracts	?	Design Phase	Need better name for file. Why use this?	<a href="https://cornell.app.box.com/file/452851850284">https://cornell.app.box.com/file/452851850284</a>
12	Design Kick-Off Meeting Agenda	In use	Template	E&PM	Deb Melanson	Design Phase		<a href="https://cornell.app.box.com/folder/75872779378">https://cornell.app.box.com/folder/75872779378</a>
13	eBuilder Cost Code Budget SUCF Funded Project Spreadshee	In use	Template	E&PM	Deb Melanson	Pre-Design		<a href="https://cornell.app.box.com/file/453682291460">https://cornell.app.box.com/file/453682291460</a>
14	eBuilder Cost Code Budget Template.xlsx	In use	Template	E&PM	?	All Phases		
15	ebuilder process- draft 6-26.pdf	For Consideration	Guidance Document	E&PM	Paul	All Phases	Rename file, how will this be used?	<a href="https://cornell.app.box.com/file/438228284559">https://cornell.app.box.com/file/438228284559</a>
16	Guidelines for Structuring the CF&PC Agenda and Materials	In use	Guidance Document	Budget & Planning	MLC	All Phases		<a href="https://cpb-us-e1.wpmucdn.com/blogs.cornell.edu/dist/b/6138/files/2015/07/Guidelines_Structuring-CFPC-Agenda_2019_Jan-1ptgz9n.pdf">https://cpb-us-e1.wpmucdn.com/blogs.cornell.edu/dist/b/6138/files/2015/07/Guidelines_Structuring-CFPC-Agenda_2019_Jan-1ptgz9n.pdf</a>
17	Kick Off Meeting Sign In Sheet	In use	Template	E&PM	Alex Chevallard	Construction		<a href="https://cornell.app.box.com/file/453690652466">https://cornell.app.box.com/file/453690652466</a>
18	Managing Capital Activity	In use	Guidance Document	Budget & Planning	MLC	All Phases		<a href="https://cpb-us-e1.wpmucdn.com/blogs.cornell.edu/dist/b/6138/files/2017/09/Managing-Capital-Activity_2017_August-2a4nkzn.pdf">https://cpb-us-e1.wpmucdn.com/blogs.cornell.edu/dist/b/6138/files/2017/09/Managing-Capital-Activity_2017_August-2a4nkzn.pdf</a>

# What we Discovered

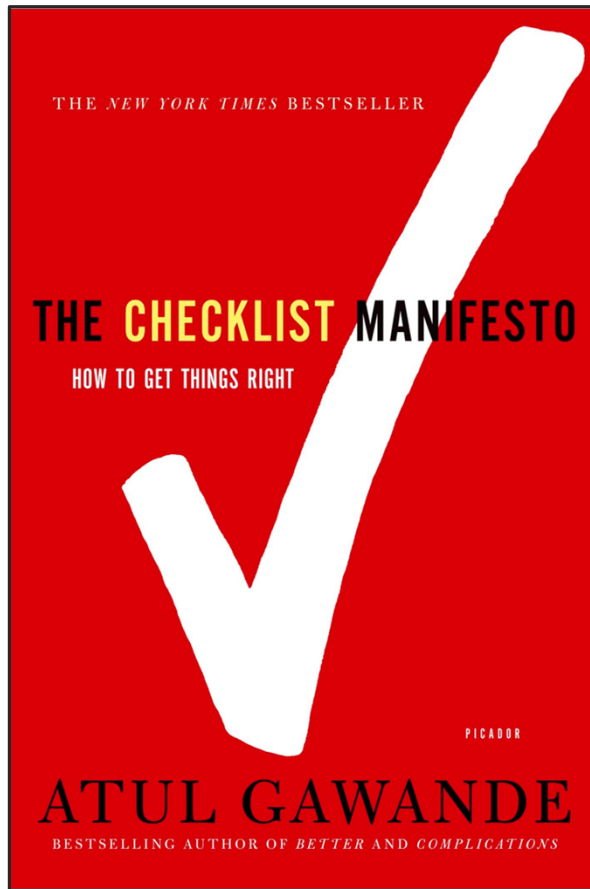
- Over 40 documents and resources
- Many excellent tools and templates
- Redundancies
- Inconsistent formatting
- Lack of organizing structure
- Stored in several locations
- Expectations for use not clear

The collage displays various project management artifacts:

- Gantt Charts:** Multiple horizontal bar charts showing project schedules with color-coded tasks and dependencies.
- Flowcharts:** Hierarchical diagrams with decision diamonds and process boxes, likely representing approval workflows.
- Project Kick-Off Checklist:** A structured list of tasks and responsibilities, including sections for 'Project Kick-Off', 'Project Preparation', and 'Project Execution'.
- Project Team Rosters:** Tables listing team members, their roles, and contact information for specific projects.
- Project Information Pages:** Standardized forms containing project details like name, number, dates, and sponsor information.

*What is the best First Point of Interface for PMs?*

# Checklists as a Qualitative Tool



## Key Takeaways:

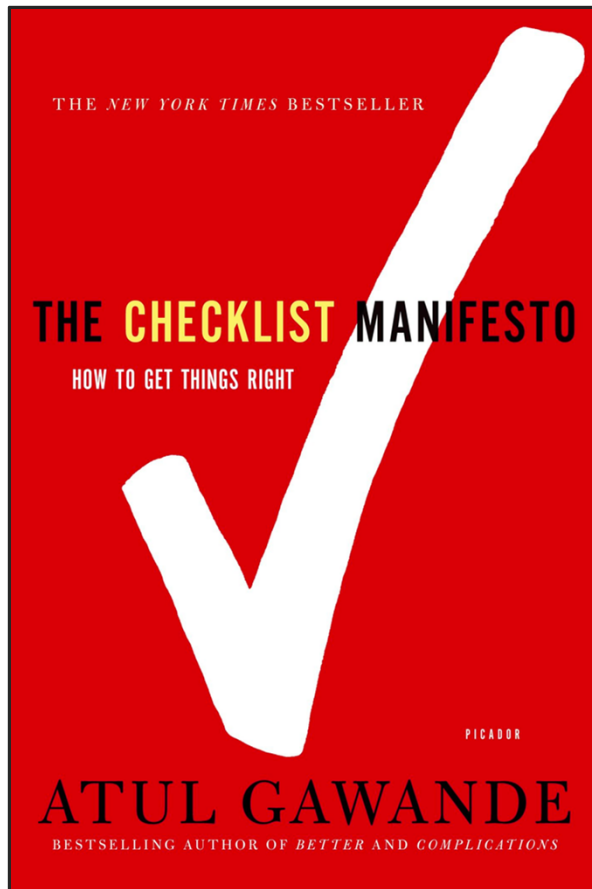
- Power of Checklists
- Complexity & # of Tasks
- Avoidable Failure
- Two Types of Checklists

DO-CONFIRM

READ-DO

*Interactive checklist most useful for PMs.*

# A Checklist for Checklists



## Does the Checklist:

- Utilize natural breaks in workflow (pause points)?
- Use simple sentence structure and basic language?
- Have a title that reflects its objectives?
- Have a simple, uncluttered, and logical format?
- Fit on one page?
- Minimize the use of color?

## Is the font:

- Sans serif?
  - Upper and lower case text?
  - Large enough to be read easily?
  - Dark on a light background?
- 
- Are there fewer than 10 items per pause point?
- 
- Is the date of creation (or revision) clearly marked?

*Checklist should be easy to use.*

# New Checklist Format & Structure

The image displays 20 checklist cards, organized into five columns representing project phases:

- Pre-Design (4 cards):** PD1 (Project Launch Checklist), PD2 (AE Selection Checklist - CU Funded), PD3 (AE Selection Checklist - State Funds), PD4 (PAR Approval Checklist).
- Design (6 cards):** D1 (Master Checklist), D2a (Municipal Approvals Checklist), D2b (State Agency Approval Checklist), D2c (Post-dec Checklist), D3 (Design Submission Checklist), D4 (Design Review Checklist), D5 (Table of Contents).
- Bid (4 cards):** B1 (Master Checklist), B2 (Municipal Review/Preparation Checklist), B3 (Pre-Construction Checklist), B4 (Master Communication Plan / Checklist).
- Construction (3 cards):** C1 (Master Checklist), C2 (Pay App Review Checklist), C3 (Red Zone Checklist).
- Close Out Phase (3 cards):** CL1 (Master Checklist), CL2 (Post Occupancy Check List), CL3 (Initiate Contractual Closeout).

Each card includes a header with the phase and checklist name, a project name field, and a list of tasks with checkboxes. The cards are color-coded by phase: Pre-Design (red), Design (orange), Bid (blue), Construction (green), and Close Out Phase (grey).

*Consistent format and structure to encourage use.*





# Checklist Example

Pre-Design Phase  
Project Launch Checklist
PD1

**Project:** Project Name (eB #)

- Immediately notify Project Contact you are the PM & begin dialogue
- Engage with key stakeholders per eBuilder project details page
- Schedule project launch meeting [Agenda](#)
- Review PIR & supporting doc. for completeness, accuracy, success criteria, etc.
- Determine AE procurement options
- Determine required Cornell Approvals [Capital Project Approvals Authorities](#)
- Refer to [Project Approval Calendar](#) to determine schedule constraints
- Input draft project schedule in eBuilder
- Develop high level project timeline in Pincello and distribute to stakeholders
- Develop detailed AE procurement schedule
- Lock in meeting dates in advance for key stakeholders
- Draft project budget using [eBuilder Cost Code Budget Template](#)
- Draft project management [Contact List](#) and [List of Committees](#)
- Initiate AE selection checklist for Cornell funded projects [PD2](#)
- Initiate AE selection checklist for State funded projects [PD3](#)
- Initiate PAR Approval Checklist [PD4](#)

---

Engineering and Project Management | Cornell University  
Facilities and Campus Services

Last updated 8.21.19

## Why use this check list?

- Stay on task
- Reminder of process
- Delegate work
- Various meetings
- Track progress

*These checklist are for you (Project Leaders).*

## Pre-Design Phase Project Launch Checklist

# PD1

### Project: Project Name (eB #)

- Immediately notify Project Contact you are the PM & begin dialogue
- Engage with key stakeholders per eBuilder project details page
- Schedule project launch meeting [Agenda](#)
- Review PIR & supporting doc. for completeness, accuracy, success criteria, etc.
- Determine AE procurement options
- Determine required Cornell Approvals [Capital Project Approvals Authorities](#)
- Refer to [Project Approval Calendar](#) to determine schedule constraints
- Input draft project schedule in eBuilder
- Develop high level project timeline in Pincello and distribute to stakeholders
- Develop detailed AE procurement schedule
- Lock in meeting dates in advance for key stakeholders
- Draft project budget using [eBuilder Cost Code Budget Template](#)
- Draft project management [Contact List](#) and [List of Committees](#)
- Initiate AE selection checklist for Cornell funded projects [PD2](#)
- Initiate AE selection checklist for State funded projects [PD3](#)
- Initiate PAR Approval Checklist [PD4](#)

# Checklist Example

Design Phase Master Checklist
D1

**Project: Project Name & (eB #)**

- Monthly status update [guidance document](#)
- Update eBuilder schedule
- Set key milestone dates (Bid, Approval, Substantial Completion)
- Stakeholder engagement & communication plan: [Contact List](#), [List of Committees](#)
- Design kickoff meeting [agenda](#)
- Municipal approvals non-State [D3a](#) or State [D3b](#) (If required)
- Design review(s) at milestone delivery dates [D4](#)
- Confirm design aligns with program requirements (manage expectations)
- Verify energy & sustainability goals are met at each phase
- Issue A/E notice to proceed letter after each design phase
- Cost control measures [guidance document](#)
- Set bid alternates strategy ensuring awardable project
- Procure pre-construction services (If required)
- Obtain Cx services for systems and/or envelope (If required)
- Initiate FF&E design to facilitate coordination (If required)
- Confirm communication with partners is effective
- Identify long lead items that could impact schedule
- Determine project delivery approach
- Determine swing/surge space requirements & project sequencing
- Identify site staging and logistics strategy
- Start front-end documents and draft construction authorization PAR early

---

**Engineering and Project Management | Cornell University  
Facilities and Campus Services**

Last updated 9.12.19



Stakeholder	Design Topics	Participation
Architect	Design, Construction, Logistics	Participates in all meetings
City	Design, Construction, Logistics	Participates in all meetings
County	Design, Construction, Logistics	Participates in all meetings
State	Design, Construction, Logistics	Participates in all meetings
Federal	Design, Construction, Logistics	Participates in all meetings
Other	Design, Construction, Logistics	Participates in all meetings

This is a 'Newly Acquired Building - City, State, Substantial' form from Cornell University. It includes fields for 'Building Name', 'Address', 'City', 'State', and 'Substantial'. There are also checkboxes for 'City', 'State', and 'Substantial'.

Design Phase Municipal Approvals Checklist - Endorse D2a

**Project: Project Name & (eB #)**

- Determine required approvals and integrate with P&R, Schedule + AE contract
- Determine approval or Tier/II/Planner (Site Plan Approval, Zoning Variance)
- Planning Commission/Board Approval
- Review project in early Design or A/E (City/County or locally, Town/County)
- Review project in early Design or (DMS) if the Department and the Department
  - Both Town & City of those require PD approval/signature in writing
- Complete required zoning application(s) if required
- BEQR 2013 Environmental Quality Review Act [www.doe.ny.gov](#)
  - BEQR or BEQR Final Act Report
  - Typically, only required for discretionary approvals, Site Plan or Zoning
- BEQR 2013 Environmental Quality Review Act [www.doe.ny.gov](#)
  - Typically, only required for discretionary approvals, Site Plan or Zoning
- State Landmark Preservation Commission (SLPC) if required - City of Ithaca
- State Historic Preservation Office (SHPO) - (Statewide) if required - (State - Ithaca)
- Security & Bombsafe Protection Procedure Plan (SBPP)
- City and Town (SHPO) requirements: contact State - make AE aware
- Complete SBPP and Tier/II/Planner approval and plan of Record/Board
- Conditions or Transfer of Control (Energy Requirements for New Construction
  - State Building Code after (FDMS) - set up requirements
  - Typically, when project is near municipal boundary (DMS)

Design Phase Municipal Approvals Checklist - State D2b

**Project: Project Name & (eB #)**

- Determine required approvals and integrate with P&R, Schedule + AE contract
- Determine approval or Tier/II/Planner (Site Plan Approval, Zoning Variance)
- Planning Commission/Board Approval
- Review project in early Design or A/E (City/County or locally, Town/County)
- Review project in early Design or (DMS) and P&R Department (International only)
  - Approval needs from both State/County - P&R has been investigated and
  - Document P&R meeting volume and send meeting minutes to P&R & the
  - Use local municipal approach (not public utility) when have been advised
- BEQR 2013 Environmental Quality Review Act [www.doe.ny.gov](#)
  - BEQR or BEQR Final Act Report
  - Typically required for discretionary, BEQR, 10,000 GSP, etc.
- State Historic Preservation Office (SHPO) - 16 NYCRR
- Security & Bombsafe Protection Procedure Plan (SBPP)
- Typically, only required for discretionary approvals, Site Plan or Zoning
- SBPP is not approved by local agencies - State of NY
- State Historic Preservation Office (SHPO) - 16 NYCRR
- Security & Bombsafe Protection Procedure Plan (SBPP)
- City and Town (SHPO) requirements: contact State - make AE aware
- Complete SBPP and Tier/II/Planner approval and plan of Record/Board
- Conditions or Transfer of Control (Energy Requirements for New Construction
  - State Building Code after (FDMS) - set up requirements
  - Typically, when project is near municipal boundary (DMS)

Stakeholder	General Design Topics	Participation												
		PM	CM	IAO	IE	IF&S	Construction	OT	FM	CU/PP	SH/PS	MS	PM Global	
PM	All topics													
CM	Cost, Site Logistics, Constructability													
IAO	Site, Building, Landscape, Sustainability, Furniture													
IE	A, S, C, M, L, P, A, P, V, U, S, S, R, S, Sustainability													
IF&S	IA, Sustainability, Utilities													
Construction	Cost, Site Logistics, Constructability													
OT	HVAC, Envelope, Acoustics													
FM	Hardware, Locks, Safety, Site Logistics, Generator, FA													
CU/PP	IT, AV													
SH/PS	Hardware, Locks, Safety, Site Logistics, Walkways													
MS	Lock Shop, Controls, FA													
PM Global	Control, City/Team, PD													

\* Represents PM engagement with Stakeholder  
 # Represents maximum number of meetings between Architect and Stakeholder

Key resources at your fingertips.

## Design Phase Master Checklist

# D1

### **Project: Project Name & (eB #)**

- Monthly status update [guidance document](#)
- Update eBuilder schedule
- Set key milestone dates (Bid, Approval, Substantial Completion)
- Stakeholder engagement & communication plan: [Contact List](#), [List of Committees](#)
- Design kickoff meeting [agenda](#)
- Municipal approvals non-State [D3a](#) or State [D3b](#) (If required)
- Design review(s) at milestone delivery dates [D4](#)
- Confirm design aligns with program requirements (manage expectations)
- Verify energy & sustainability goals are met at each phase
- Issue A/E notice to proceed letter after each design phase
- Cost control measures [guidance document](#)
- Set bid alternates strategy ensuring awardable project
- Procure pre-construction services (If required)
- Obtain Cx services for systems and/or envelope (If required)
- Initiate FF&E design to facilitate coordination (If required)
- Confirm communication with partners is effective
- Identify long lead items that could impact schedule
- Determine project delivery approach

# Checklist Example - Document Review

Design Phase  
Design Review Checklist Table of Contents D5

**Project: Project Name (eB #)**

Design Review Checklist Table of Contents:

- [D4G – General](#)
- [D4D – Demolition](#)
- [D4U – Utilities](#)
- [D4C – Civil](#)
- [D4A – Architectural/Code Sheets](#)
- [D4L – Landscape](#)
- [D4S – Structural](#)
- [D4M – Mechanical/Energy](#)
- [D4F – Fire Protection](#)
- [D4P – Plumbing](#)
- [D4E – Electrical/Lighting](#)
- [D4P – Power/Data](#)
- [D4I – Information Technology](#)

---

**Engineering and Project Management | Cornell University**  
Facilities and Campus Services

Last updated 8.21.19

Design Phase  
Drawing Sheets - General D5G

**Project: Project Name (eB #)**

- Title Blocks: Verify spelling, project name, address
- Verify that sheet title/name and numbers located in lower right corner correspond with Sheet Index on Cover Sheet drawing and Project Manual
- Verify all drawings have correct based date and last updating revision. (Schematic Design, Design Development, 50% Construction Document Review, Construction Documents, etc.)
- Seal, Signature and Date: Verify all drawings are sealed and signed prior to tabling. Sometimes all drawings, graphic register drawings are not signed but controlled by licensed professional - attempt to have Project Engineer or Architect stamp these documents.
- Drawing Sheet Titles: Verify that sheet title/name and numbers located in lower right corner corresponds with Sheet Index on Cover Sheet drawing and Project Manual.
- Verify that architectural notes and graphic symbols (ID engineering notes) are not duplicated or conflicting with consultants notes and graphic symbols. Verify that appropriate notes and symbols are added and cover project scope.

---

**Engineering and Project Management | Cornell University**  
Facilities and Campus Services

Last updated 8.21.19

Design Phase  
Drawing Sheets – Architectural/Code D5A

**Project: Project Name (eB #)**

- Code Review: Verify applicable code requirements and code consultant's narrative is included. Code chapters and tables are derived from applicable codes used by the Authority Having Jurisdiction (Typically NY State unless local).
- Overall Floor Plan: Scale of drawing needs to be small enough to convey overall building layout. Verify that each wall/door/diaphragm displays all occupied load numbers per room, and means of egress, as well as gravitationally defined paths of egress for each level.
- U.L. Design: Verify that all rated assemblies (Door, Balustrading, wall, and roof/ceiling) are properly referenced on the drawings with U.L. numbers on other standard listed assemblies) and with the appropriate hourly rating. Coordinate this information with the structural sections, architectural wall sections, and applicable specifications sections (drafting, etc.)
- Floor Plans: Verify correct walls, the and locate errors are shown on plans. Verify that each space/partition is clearly marked with designation (Machine Room) and referencing them to U.L. Design Schedule. Examples include elevator shafts, storage rooms, rooms of not needed on each floor level, corridors (not typically in fully conditioned buildings), areas of assembly (when this total area per floor exceeds 50% of business occupancy, storage rooms (depending on total), mechanical rooms (depending on equipment).
- Door Swings: Verify that each door along the Path-of-Egress clearly swings in the direction of exit. (This also applies to rooms classified as assembly).
- Egress Elements: Verify that egress partitions, barriers and equipment to be located along the Path-of-Egress does not impact exit widths. (Partitions, bar-cast walls, fuel barriers, etc.)

---

**Engineering and Project Management | Cornell University**  
Facilities and Campus Services

Last updated 8.21.19

Design Phase  
Drawing Sheets – Electrical D5E

**Project: Project Name (eB #)**

**Definition Plans:**

- Project requires temporary electrical service for construction (lighting, power, temporary office buildings, etc.)
- Provisions need to be made for continuity of power. (Power sources remain accessible or circuits need to be re-routed or power rerouted)
- Special lockout/tag out procedures required.
- Existing wiring, conduit, devices and equipment should be demarcated versus abandoned in place. (Schematic, Schematics, Rerouting, relocations are documented correctly in formal drawings as necessary)
- Exhausts and devices to remove vapors produced from construction activity. Will they require testing or re-ventilation upon project completion?
- All dimensions and physical relationships in service are double-checked/confirmed. (During construction, Customer Service, Utilities, Shop, O&M, and Occupants will need to be notified)

**Lighting Plans:**

- Proposed lighting fixtures coordinated with ceiling type and available plenum space.
- Energy Code requirements met with lighting selection and controls. (Is this a NYSESDA project with additional requirements and incentives)
- Proposed lighting fixtures accessible for maintenance and re-wiring. (Fire-rated lecture halls and auditoriums, lab spaces and others)
- Minimum task levels needs met per basis of design.
- Inadequate terms are discouraged (Energy and re-wiring cycle). Consider permanent computer and train, and eventually more LED.

---

**Engineering and Project Management | Cornell University**  
Facilities and Campus Services

Last updated 8.21.19

Capture institutional knowledge for document reviews.

# Checklist Example – Bid Phase

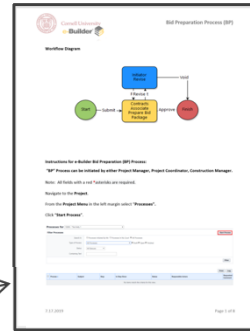
Bid Phase Master Checklist
B1

**Project: Project Name (eB #)**

- Receive Bid Documents from A/E
- Update/Activate BID section of e-Builder Project Schedule
- Set BID schedule expectations with Client and Facilities Contracts
- Review & Prepare Bid Package [B2](#)
- Capital Project - Initiate e-Builder Bid Preparation Process [Bid Preparation Project Manager Guide](#)
- Small Project – Initiate e-Builder Self-Pricing Bid Document Review Process [Self-Pricing for Construction](#)
- Initiate Pre-Construction Checklist [B3](#)
- Attend Pre-Bid Meeting
- Collaborate with A/E & Facilities Contracts on RFI/Q&A responses and Addenda
- Attend Bid Opening / Receive Bid Tabulation
- Analyze Bids / Perform Scope Validation
- Initiate e-Builder Construction Project Approval Request [PAR Process Help](#)
- Initiate e-Builder Contract Request & Preparation Process Award Contract [CRP Process Help](#)

Engineering and Project Management | Cornell University  
Facilities and Campus Services

Last updated 9/13/2019



Bid Phase Pre-Construction Checklist
B3

**Project: Project Name (eB #)**

**Notifications**

- Transmittals
- CRQs
- Grounds
- Surrounding buildings
- Director of assigned schedule and disruptions

**Authority Having Jurisdiction**

- Contact Town/City/State before requesting building permit
- Verify building permit has been issued

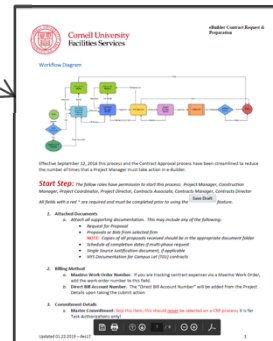
**Verifications/Assignments/Scheduling**

- GC team members assigned to proper roles on project in eBuilder
- Assign A/E submittal coordinator in eBuilder
- Submit emergency control list to COPS, Customer Service, and EMCIS
- Upload conforming drawings into eBuilder (7/8)
- Schedule construction kick-off meeting
- Complete & upload submittal register to e-Builder (A/E & PM) [Submittal Help](#)
- Class Schedule of Values (SOV) via Submittal Module
- Complete SOV Process in e-Builder
- Submit contractor safety plan (must be approved by EHS prior to starting work)

Documents \ User Resources \ PAR - Project Approval Request Process Help

Name	Date Uploaded	Uploaded By	Company
Download (28.6K)   Redline   Compare With   Send   Properties   Edit	06.26.19 11:28AM	Donna Sutiff	Cornell University
Download (339.8K)   Redline   Stamp   Compare With   Send   Properties   Edit	07.01.19 03:55PM	Donna Sutiff	Cornell University
Download (36.4K)   Redline   Compare With   Send   Properties   Edit	05.21.19 10:23AM	Donna Sutiff	Cornell University
Download (1.0K)   Redline   Compare With   Send   Properties   Edit	06.27.18 09:11AM	Donna Sutiff	Cornell University
Download (543.3K)   Redline   Compare With   Send   Properties   Edit	06.27.18 08:34AM	Donna Sutiff	Cornell University
Download (83.3K)   Redline   Stamp   Compare With   Send   Properties   Edit	06.26.17 01:30PM	Nancy Phelps	Cornell University
Download (16.5K)   Redline   Compare With   Send   Properties   Edit	04.06.16 09:46AM	Donna Sutiff	Cornell University
Download (187.4K)   Redline   Compare With   Send   Properties   Edit	02.15.16 01:52PM	Donna Sutiff	Cornell University
Download (474.4K)   Redline   Stamp   Compare With   Send   Properties   Edit	06.26.15 10:50AM	Nancy Phelps	Cornell University

1 - of 9 documents



Quick links to key documents and resources.

## Bid Phase Master Checklist


# B1

### **Project: Project Name (eB #)**

- Receive Bid Documents from A/E
- Update/Activate BID section of e-Builder Project Schedule
- Set BID schedule expectations with Client and Facilities Contracts
- Review & Prepare Bid Package [B2](#)
- Capital Project - Initiate e-Builder Bid Preparation Process [Bid Preparation Project Manager Guide](#)
- Small Project – Initiate e-Builder Self-Pricing Bid Document Review Process [Self-Pricing for Construction](#)
- Initiate Pre-Construction Checklist [B3](#)
- Attend Pre-Bid Meeting
- Collaborate with A/E & Facilities Contracts on RFI/Q&A responses and Addenda
- Attend Bid Opening / Receive Bid Tabulation
- Analyze Bids / Perform Scope Validation
- Initiate e-Builder Construction Project Approval Request [PAR Process Help](#)
- Initiate e-Builder Contract Request & Preparation Process Award Contract [CRP Process Help](#)



# Timeline

- Roll out Checklists at Sept 26<sup>th</sup> PMPD 
- Pilot Drafts in eBuilder Folder Oct 8<sup>th</sup>
- Three Month Pilot Phase to Gather Feedback
- Explore Intranet Access Opportunities
- Go Live with Final Version Jan 1<sup>st</sup> (*six month update cycle*)
- Next Phase: Guidance Docs & Templates (*Jan – Mar*)