Design Phase
Schematic Design Through Bid

Project: Project Name & (eB #)

☐ Update monthly status update guidance document (TBD)
☐ Update eBuilder schedule and details page
☐ Set key milestone dates (Bid, Approval, Substantial Completion)
☐ Stakeholder engagement & communication plan: Contact List, Project Meeting
 Groups Example, and Design Management RACI Guide (TBD)
☐ Design kickoff meeting agenda (TBD)
☐ Consult with municipal approvals subject matter experts and determine approach
☐ Complete Access Waivers for Consultant and Contractor
☐ Design review(s) at milestone delivery dates (D5)
☐ Review the Design Construction Standards
☐ Confirm design aligns with program requirements (manage expectations)
☐ Verify energy & sustainability goals are met at each phase
☐ Issue Consultant notice to proceed template letter after each design phase
☐ Cost control measures guidance document (TBD)
☐ Develop bid alternates strategy to ensure project remains on budget
☐ Create the submittal register
☐ Procure pre-construction services (If required)
☐ Obtain Cx services for systems and/or envelope (If required)

Note: LEED projects, Cx in Design Development (DD)
☐ Initiate FF&E design to facilitate coordination (If required)
☐ 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