Design Phase
Schematic Design Through Bid

D2

Project: Project Name & (eB #)

☐ Update *monthly status update guidance document*

☐ Update eBuilder schedule and details page

☐ Set key milestone dates (Bid, Approval, Substantial Completion)

☐ Stakeholder engagement & communication plan: *Contact List,* *Project Meeting* and *Groups Example*

☐ Consult with municipal approvals subject matter experts and determine approach

☐ Orchestrate meetings and/or input from SME's during design at most opportune times to facilitate a linear process. (Including ADA, FM, FE, EHS, E&S, Trades, etc.)

☐ Design review(s) at milestone delivery dates (*D5)*

☐ OUA engagement for proposed Campus aesthetic changes

- ☐ Feasibility or space study supporting future Capital Project
- ☐ Drawing review at milestone delivery
- ☐ Material and finish selections (Exterior or interior public spaces)
- ☐ Exterior envelope or site impacts
- ☐ Preservation/restoration approach

☐ 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*

☐ 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 (Including impacts to accessible route, restrooms, etc.)

☐ Start front-end documents and draft construction authorization PAR early

☐ Review the *Project Hazmat Procedures Guidance Document* which outlines procedures, resources, and expectations for Project Managers with regard to hazmat waste (asbestos, lead, mercury, PCBs, chlorofluorocarbons, radioactive sources, chromium, other toxic metals, mold, contaminated PPE, used oil, solvents, etc.)