

300.1 – Phase A Checklist for the Architect-Engineer

This checklist is to be used by the Architect-Engineer and shall be included in the Phase A submittal.

Instructions: The Architect-Engineer will mark the box below indicating completion of each action in accordance with the requirements in the Procedures Manual (including applicable laws, regulations, and requirements) or that the action is not applicable to the Project.

Project Administration:

- | YES | N/A | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Architect's-Engineer's Contract: The Contract has been received and the Phase A fee reviewed by the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Pre-Design Checklist: The Architect-Engineer has reviewed the Pre-Design Checklist and has included an updated version as an attachment.
Note: This Pre-Design Checklist shall be discussed at the Initial Meeting. |
| <input type="checkbox"/> | <input type="checkbox"/> | Federal or other Grant Funding: The Using Agency has notified CCPA and the Architect-Engineer as to the entity required for federal or other review of the Project. If the Architect-Engineer has contacted the reviewing entity then documentation of the meeting is required in the submittal. |
| <input type="checkbox"/> | <input type="checkbox"/> | Initial Project Meeting: The initial project meeting, scheduled by the Project Manager and conducted/documented by the Architect-Engineer, has been held. Documentation of the meeting has distributed to all attendees. |
| <input type="checkbox"/> | <input type="checkbox"/> | Phase A Commissioning Meeting: This meeting has been scheduled, conducted and documented by Commissioning Authority. Documentation of the meeting has been distributed to all attendees. |
| <input type="checkbox"/> | <input type="checkbox"/> | Project Directory: The Project Directory has been prepared and distributed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Correspondence Distribution: The Architect-Engineer has developed and implemented a system of routing and distribution of Project correspondence. Documentation of the system is included in the Phase A submittal. |
| <input type="checkbox"/> | <input type="checkbox"/> | "As-Built" or "Record Drawings": The Architect-Engineer and/or the Project Manager has obtained and distributed existing "as-built" or "record drawings" to the Design Team. |
| <input type="checkbox"/> | <input type="checkbox"/> | Rendering: The need for a rendering been determined with the Using Agency, negotiated with CCPA, and included it in the Phase A submittal. A rendering is a requirement for all new facilities. |
| <input type="checkbox"/> | <input type="checkbox"/> | Rendering for a Renovation: The Architect-Engineer has determined a need for a rendering with the Using Agency, negotiated with CCPA, and included a sketch perspective of major project feature(s) in the Phase A submittal. The Architect-Engineer has included in the Phase A submittal. |
| <input type="checkbox"/> | <input type="checkbox"/> | Subsurface, Topographic and other Surveys: The Architect-Engineer has coordinated and received subsurface, topographic and other surveys necessary to the Project. These services were obtained under contract to CCPA. See Section 210 Survey Requirements, Section 211 Subsurface Investigations and Section 212 Hazardous Materials. |
| <input type="checkbox"/> | <input type="checkbox"/> | Facilities Services MEP Submittal: See Section 303.3 for submittal requirements. |

Code and Regulatory Requirements:

- | YES | N/A | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Code and Regulatory Requirements: A list and status of all code and regulatory requirements applicable to the Project has been provided in the Phase A submittal. |
| <input type="checkbox"/> | <input type="checkbox"/> | Occupancy Load: The Architect-Engineer has defined the occupancy load for each building area or space and forwarded this information to sub-consultants. |
| <input type="checkbox"/> | <input type="checkbox"/> | Seismic Issues: The services of a Structural Engineer have been obtained to investigate seismic issues. The Structural Engineer has prepared a report on their review of applicable seismic regulations. |
| <input type="checkbox"/> | <input type="checkbox"/> | Preliminary Storm Water Pollution Prevention Plan: For Projects that are one acre or greater, the Architect-Engineer has developed a preliminary SWPPP for the Project (See Section 220). |

Project Development:

- | YES | N/A | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Requirements in Chapter 3: The requirements in Sections 301, 304, 305, 306, 307, 308 and 309 have been reviewed by the Architect-Engineer have been incorporated into the Phase A Documents. |
| <input type="checkbox"/> | <input type="checkbox"/> | Project Program and/or Owner's Project Requirements: The Architect-Engineer has defined the Project Scope of work in conjunction with the Commissioning Authority. The Project Program and the Owner's Project Requirements are included in the Phase A submittal. |
| <input type="checkbox"/> | <input type="checkbox"/> | ADA Review: The Architect-Engineer has consulted with the University's ADA Compliance Office (Office of Disabilities) and completed a list of Design/Renovation suggestions to be considered for the project (See Section 310). |
| <input type="checkbox"/> | <input type="checkbox"/> | Functional Space Plans: The Architect-Engineer has prepared functional space plans for the Project along with pertinent program information and distributed this to all engineers and consultants. |
| <input type="checkbox"/> | <input type="checkbox"/> | Consultant Coordination: Architectural schematic functional space plans have been reviewed with all consultants and conducted consultant coordination meetings as necessary. |
| <input type="checkbox"/> | <input type="checkbox"/> | MEP Systems: The Architect-Engineer has analyzed comparative MEP systems with engineers and consultants. Systems have been selected to be used in the Project. Systems space and location requirements have been determined. |
| <input type="checkbox"/> | <input type="checkbox"/> | Systems Compatibility: The selected MEP and structural systems have been determined to be compatible. |
| <input type="checkbox"/> | <input type="checkbox"/> | Special Equipment or Fixtures: The Architect-Engineer has created or obtained lists of special equipment and fixtures required by the Using Agency and Owner. These have been distributed to consultants |
| <input type="checkbox"/> | <input type="checkbox"/> | Site Design: Phase A Schematic Site Design documents have been prepared that adhere to the project requirements and ADA requirements. |
| <input type="checkbox"/> | <input type="checkbox"/> | Phase A Schematic Design: Phase A Schematic Design documents have been prepared that adhere to Project requirements and construction budget. |
| <input type="checkbox"/> | <input type="checkbox"/> | Regulatory Reviews: Status of all regulatory review and permitting requirements has been updated. |
| <input type="checkbox"/> | <input type="checkbox"/> | Rendering: A rendering has been obtained if required by the Contract. |

Initial Budget and Scheduling:

YES N/A

Project Budget: The construction budget amount has been received from CCPA.

Project Schedule: The Architect-Engineer has received the anticipated design and construction time upon which the Project Schedule is to adhere.

Final Budget, Area Calculations and Scheduling Deliverables:

YES N/A

Construction Cost Estimate: An estimate of probable construction cost has been prepared based upon schematic design and all available data. The Phase A Estimate of Construction Cost estimate incorporates each consultant's estimate. **See Section 309 - Phase A Estimate of Construction Cost.**

Area Calculations: Gross area calculations have been prepared and included in the Space Study Statement of the Phase A Estimate of Construction Cost. **See Section 309.**

Project Schedule: The Architect-Engineer has developed a project schedule. It is included in the Phase A Estimate of Construction Cost. **See Section 309.**

Energy Usage Cost: The projected energy usage cost has been determined and provided to the Using Agency for inclusion in their future operating budget. The Using Agency shall apply a contingency in developing their projected operating costs. See Phase A Using Agency Responsibilities **Section 302.**

Projects Seeking LEED Certification

The following actions are required for Projects seeking LEED Certification. The Architect-Engineer shall mark the appropriate box identifying whether the submittal contains each item or whether the item is not applicable to the Project.

YES N/A

Registration: The Project has been registered as a LEED project with the USGBC.

Checklist: A proposed LEED checklist has been developed with the proposed LEED credits appropriate for the Project.

Energy Model: The Preliminary Energy Model has been developed documenting compliance with the required number of points for Energy and Atmosphere Credit 1.

Basis of Design: The Basis of Design (BOD) based on the Owner's Project Requirements (OPR) has been developed.

Phase A Review and Approval

YES N/A

Copies: Three hard copy sets and one electronic set of Phase A documents have been submitted to the Project Manager.

Review Meeting: The Architect-Engineer has conducted the Phase A Review Meeting.

Comments from the Review Meeting: Revisions and changes from the Review Meeting have been incorporated into Phase A Documents.

Approval of MEP Services Submittal: The Architect-Engineer has obtained the approval of the MEP Services submittal from Facilities Services. **See Section 303.3 for submittal requirements.**

Phase A Submittal Checklist

The following documents are required to be provided in the Phase A submittal unless they are not applicable. The Architect-Engineer shall mark the appropriate box identifying whether the submittal contains each item or whether the item is not applicable to the Project.

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Completed copy of the Pre-Design and Phase A Architect-Engineer checklists. |
| <input type="checkbox"/> | <input type="checkbox"/> | Completed copy of the Phase A Estimate of Construction Cost. See Section 309. |
| <input type="checkbox"/> | <input type="checkbox"/> | Design Narrative describing the proposed design, materials and equipment. |
| <input type="checkbox"/> | <input type="checkbox"/> | Revised Commissioning Plan to reflect the Phase A Schematic Design. See The Phase A Commissioning Plan requirements at the end of this section and the Phase A Commissioning Plan Checklist Section 300.4. |

DRAWINGS: Provide **Phase A Schematic Design Drawings** in 8-1/2" x 11" or 11" x 17" bound format. Include at a minimum the following:

- | Provided | N/A | |
|--------------------------|--------------------------|---------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Site Plan Schematic |
| <input type="checkbox"/> | <input type="checkbox"/> | Site Utility Schematic |
| <input type="checkbox"/> | <input type="checkbox"/> | Architectural Floor Plans |
| <input type="checkbox"/> | <input type="checkbox"/> | Architectural Elevations |
| <input type="checkbox"/> | <input type="checkbox"/> | Structural Schematics |

Division 210000 Fire Suppression drawings:

- | Provided | N/A | |
|--------------------------|--------------------------|------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Identified Demolition Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Utilities |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Entry and Stand Pipes |
| <input type="checkbox"/> | <input type="checkbox"/> | Fire Suppression Legend |

Division 220000 Plumbing drawings:

- | Provided | N/A | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Identified Demolition Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Utilities |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Pipe Chases |
| <input type="checkbox"/> | <input type="checkbox"/> | Routing of Distribution Mains (Storm, Sanitary and Domestic Hot & Cold Water) |
| <input type="checkbox"/> | <input type="checkbox"/> | Equipment Locations |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Major Equipment in Mechanical Rooms |
| <input type="checkbox"/> | <input type="checkbox"/> | Plumbing Legend |

Division 230000 HVAC drawings:

- | Provided | N/A | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Identified Demolition Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Identified all Systems |
| <input type="checkbox"/> | <input type="checkbox"/> | HVAC Systems Flow Schematic Diagrams |
| <input type="checkbox"/> | <input type="checkbox"/> | Identified Special Occupancy Zones |
| <input type="checkbox"/> | <input type="checkbox"/> | Air Intake & Discharge Locations |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Utilities |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Mechanical Rooms & Pipe / Duct Chases |

Division 230000 HVAC drawings: (continued)

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Preliminary Routing of Piping Distribution Mains |
| <input type="checkbox"/> | <input type="checkbox"/> | Preliminary Routing of Air Distribution Mains |
| <input type="checkbox"/> | <input type="checkbox"/> | Control & Instrumentation Diagrams |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Major Equipment in Mechanical Rooms |
| <input type="checkbox"/> | <input type="checkbox"/> | Mechanical Legend |

Division 250000 Integrated Automation drawings:

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Identified Legacy System / Demolition Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Identified all Systems / Interface Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Identified Special Occupancy Zones |
| <input type="checkbox"/> | <input type="checkbox"/> | System Architecture |
| <input type="checkbox"/> | <input type="checkbox"/> | Connection to Utilities |
| <input type="checkbox"/> | <input type="checkbox"/> | Panel Server Locations & Space Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Preliminary Bus / Cable Tray Routing |
| <input type="checkbox"/> | <input type="checkbox"/> | Integrated Automation Legend |

Division 260000 Electrical drawings:

- | Provided | N/A | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Identified Demolition Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Identified all Systems |
| <input type="checkbox"/> | <input type="checkbox"/> | Single Line Diagram |
| <input type="checkbox"/> | <input type="checkbox"/> | Zone Lighting Level Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Presentation of Special Lighting |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Utilities / Vault |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Electrical Room / Closets |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Major Equipment in Electrical Rooms |
| <input type="checkbox"/> | <input type="checkbox"/> | Electrical Legend |

Division 270000 Communications drawings:

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Identified Legacy System / Demolition Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Identified all Systems / Interface Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | System Architecture |
| <input type="checkbox"/> | <input type="checkbox"/> | Server Locations and Space Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Connection to Utilities |
| <input type="checkbox"/> | <input type="checkbox"/> | Preliminary Bus / Cable Tray Routing |
| <input type="checkbox"/> | <input type="checkbox"/> | Communications Legend |

Division 280000 Electronic Safety & Security:

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Identified Legacy System / Demolition Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Identified all Systems / Interface Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Identified Special Occupancy Zones |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Panel |
| <input type="checkbox"/> | <input type="checkbox"/> | Connection to Utilities |
| <input type="checkbox"/> | <input type="checkbox"/> | Safety & Security Legend |

OUTLINE SPECIFICATIONS / DESIGN NARRATIVE: Submit **Phase A Outline Specifications/Design Narrative** in 8-1/2" x 11" bound format. See Section 307.1 through 307.9. The following items shall be included in the outline Specification/Design Narrative:

Division 21 Fire Suppression:

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Detailed Design Deliverables Checklist for Subsequent Phases |
| <input type="checkbox"/> | <input type="checkbox"/> | Systems Basis of Design Document |
| <input type="checkbox"/> | <input type="checkbox"/> | Cost Projections |

Division 22 Plumbing:

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Detailed Design Deliverables Checklist for Subsequent Phases |
| <input type="checkbox"/> | <input type="checkbox"/> | Systems Basis of Design Document |
| <input type="checkbox"/> | <input type="checkbox"/> | Cost Projections |

Division 23 HVAC:

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Detailed Design Deliverables Checklist for Subsequent Phases |
| <input type="checkbox"/> | <input type="checkbox"/> | Preliminary Design Calculations |
| <input type="checkbox"/> | <input type="checkbox"/> | Code Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Systems Basis of Design Document |
| <input type="checkbox"/> | <input type="checkbox"/> | Energy Life Cycle Evaluations |
| <input type="checkbox"/> | <input type="checkbox"/> | Cost Projections |

Division 25 Integrated Automation:

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Detailed Design Deliverables Checklist for Subsequent Phases |
| <input type="checkbox"/> | <input type="checkbox"/> | Identified Agency Standards/Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Systems Basis of Design Document |
| <input type="checkbox"/> | <input type="checkbox"/> | Cost Projections |

Division 26 Electrical:

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Detailed Design Deliverables Checklist for Subsequent Phases |
| <input type="checkbox"/> | <input type="checkbox"/> | Code Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Light Fixture Cut Sheets |
| <input type="checkbox"/> | <input type="checkbox"/> | Systems Basis of Design Document |
| <input type="checkbox"/> | <input type="checkbox"/> | Cost Projections |
| <input type="checkbox"/> | <input type="checkbox"/> | Energy and Life Cycle Evaluations |

Division 27 Communications:

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Detailed Design Deliverables Checklist for Subsequent Phases |
| <input type="checkbox"/> | <input type="checkbox"/> | Systems Basis of Design Document |
| <input type="checkbox"/> | <input type="checkbox"/> | Cost Projections |
| <input type="checkbox"/> | <input type="checkbox"/> | Location of Communications Room or Closet |
| <input type="checkbox"/> | <input type="checkbox"/> | Coordinate with University IT Office |

Division 28 Electronic Safety & Security:

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Detailed Design Deliverables Checklist for Subsequent Phases |
| <input type="checkbox"/> | <input type="checkbox"/> | Systems Basis of Design Document |
| <input type="checkbox"/> | <input type="checkbox"/> | Cost Projections |

Division 32 Exterior Improvements:

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Identified Agency Standards/Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Cost Projections |

PHASE A COMMISSIONING PLAN:

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | The Phase A Commissioning Plan has been prepared by the Commissioning Authority (See Division 011913 Commissioning Authority documents). The following items, prepared by the Commissioning Authority, have been included in the Phase A submittal: |

Division: 011913 Commissioning Authority

- | Provided | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Detailed Design Deliverables Checklist for Subsequent Phases |
| <input type="checkbox"/> | <input type="checkbox"/> | Updated Owner's Project Requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Design Team Selection Process |
| <input type="checkbox"/> | <input type="checkbox"/> | Project Design Options Document |
| <input type="checkbox"/> | <input type="checkbox"/> | Systems Basis of Design Document |
| <input type="checkbox"/> | <input type="checkbox"/> | Project Communications Plan |
| <input type="checkbox"/> | <input type="checkbox"/> | Updated Commissioning Plan |

End of Phase A Checklist for the Architect-Engineer

300.2 – Phase A Checklist for the Project Manager

This checklist is to be used by the Project Manager during Phase A of the Project.

Instructions: The Project Manager will mark the appropriate check-off box below to indicate completion of each action in accordance with the requirements in the Procedures Manual (including applicable laws, regulations, and requirements) or that the action is not applicable to the Project.

Project Administration:

- | YES | N/A | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Initial Project Meeting: The initial project meeting has been scheduled. |
| <input type="checkbox"/> | <input type="checkbox"/> | Review: The requirements in Chapter 3 Phase A Schematic Design of the Capital Construction Project Procedures Manual have been reviewed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Authorization: The Project Manager has coordinated with the Director and authorization to proceed has been given to the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Subsurface, Topographic and Other Surveys: The Project Manager has coordinated subsurface, topographic and other surveys necessary to the Project. These services were obtained under contract to CCPA. See Sections 210, 211 and 212. |
| <input type="checkbox"/> | <input type="checkbox"/> | Pre-Design and Phase A Checklists: The Project Manager has reviewed the Pre-Design and Phase A Checklists to determine the appropriate items to be addressed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Federal Funding: Notification that the Project requires a federal review has been received and coordinated with the Using Agency to schedule appropriate meetings. |
| <input type="checkbox"/> | <input type="checkbox"/> | Agency Program: The Project Manager has reviewed the Agency program with the Using Agency and presented it to the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Meetings: Phase A Progress and Design Review Meetings with Architect-Engineer, Owner, Using Agency and Design Team have been attended. |
| <input type="checkbox"/> | <input type="checkbox"/> | Commissioning Meetings: The Project Manager has attended Phase A Commissioning Team Meetings. |
| <input type="checkbox"/> | <input type="checkbox"/> | Project Program: The revised Project Program and/or Owner's Project Requirements have been reviewed as appropriate and necessary. |
| <input type="checkbox"/> | <input type="checkbox"/> | Schematic Design Documents: The Project Manager has verified that the Schematic Design documents comply with the Project Program and/or Owner's Project Requirements. |
| <input type="checkbox"/> | <input type="checkbox"/> | Surveys: Completed preliminary geotechnical, topographic and survey documents have been provided to the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Additional Data: All other data received from Owner, Using Agency or consultants has been reviewed. If necessary, additional data has been requested. |
| <input type="checkbox"/> | <input type="checkbox"/> | Pre-Submittal Meeting: The Project Manager has attended the pre-submittal commissioning review and coordination meeting. |
| <input type="checkbox"/> | <input type="checkbox"/> | Single Source Procurement: The use of any single source procurements or restrictive specifications (i.e. less than 3 Manufacturers) of materials or services have been authorized. |
| <input type="checkbox"/> | <input type="checkbox"/> | Total Estimate of Funds through Design - has been completed See Section 202.1 |

Phase A Review and Approval:

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Review Meeting: The Project Manager and Architect-Engineer have scheduled the Phase A Review Meeting. |
| <input type="checkbox"/> | <input type="checkbox"/> | Phase A Submittal Review: The Project Manager has reviewed the Phase A Submittal and determined that it contains the components outlined in Section 300.1 - Phase A Architect-Engineers Checklist and Section 303 - Phase A Responsibilities of the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Acceptance Letter: The Project Manager issues the Phase A acceptance letter. |

End of Phase A Checklist for the Project Manager

300.3 – Phase A Checklist for the Using Agency

This checklist is to be used by the Using Agency Representative.

Instructions: The Using Agency will mark the appropriate check-off box below to indicate completion of each action in accordance with the requirements in the Procedures Manual (including applicable laws, regulations, and requirements) or that the action is not applicable to the Project.

Project Administration:

- | YES | N/A | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Project Establishment: The project has been established in Banner. |
| <input type="checkbox"/> | <input type="checkbox"/> | Cost Estimate: An Agency Cost Estimate has been developed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Federal or Other Grant Funding: The Using Agency has notified CCPA and the Architect-Engineer that the Project requires a federal or other review. |

Project Development:

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Agency Program: The Using Agency has provided an Agency program to the Project Manager, Architect-Engineer and Commissioning Authority. |
| <input type="checkbox"/> | <input type="checkbox"/> | Special Equipment and Fixtures: Lists of special equipment and fixtures required by the Agency and Owner were created /obtained. These were provided to the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Pre-Design Checklist: The Using Agency has participated with the Project Manager in completing the Pre-Design Checklist. See Section 200 - Pre-Design Checklist. |

Final Budget, Area Calculations and Scheduling Deliverables:

- | YES | N/A | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Cost Estimate: The Agency Representative shall approve and sign the Phase A Estimate of Construction Cost. This form includes cost scheduling and the Space Study Statement. See Section 309 - Phase A Estimate of Construction Cost. |
| <input type="checkbox"/> | <input type="checkbox"/> | Energy Usage Cost. The Using Agency has received the projected energy usage cost from the Architect-Engineer for inclusion in their future operating budget. |

Phase A Submittal Review and Approval:

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Commissioning Plan: The Phase A Commissioning Plan has been reviewed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Copies: A complete set of Phase A documents has been received. |
| <input type="checkbox"/> | <input type="checkbox"/> | Review Meeting: The Using Agency has attended the Phase A Review Meeting. |
| <input type="checkbox"/> | <input type="checkbox"/> | Review: Comments, revisions and changes to Phase A documents were reviewed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Approval: The Using Agency has formally reviewed, commented upon and given approval for the Phase A Submittal prior to issuance of the Phase A acceptance letter. |
| <input type="checkbox"/> | <input type="checkbox"/> | Commissioning Process: The Using Agency participated in the Commissioning Process. |

Projects Seeking LEED Certification:

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Enhanced Commissioning: The Using Agency has participated in the Commissioning Authority design development review process if enhanced commissioning is used. |
| <input type="checkbox"/> | <input type="checkbox"/> | LEED Credits: The Using Agency has assisted the Architect-Engineer and the Project Manager in reviewing the LEED credits appropriate to the Project. |

End of Phase A Checklist for the Using Agency

300.4 – Phase A Checklist for the Commissioning Authority

This checklist is to be used by the Commissioning Authority during Phase A of the Project.

Instructions: The Commissioning Authority shall mark the appropriate check-off box below to indicate completion of each action in accordance with the requirements in the Procedures Manual (including applicable laws, regulations, and requirements) or that the action is not applicable to the Project.

Project Administration: The Commissioning Authority has:

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Review: Requirements in Chapter 3 – Phase A Schematic Design, of the Capital Construction Project Procedures Manual have been reviewed. |
| <input type="checkbox"/> | <input type="checkbox"/> | Pre-Design Checklist: The Pre-Design Checklist has been reviewed. The Architect-Engineer has been consulted to confirm that all items have been included or attached to the Phase A Checklist. |
| <input type="checkbox"/> | <input type="checkbox"/> | Team Meetings: Phase A Commissioning Team Meetings have been scheduled, conducted and documented. |
| <input type="checkbox"/> | <input type="checkbox"/> | Minutes: The minutes of Commissioning Process activities and decisions have been prepared and distributed to Commissioning Team members and attendees within five (5) workdays of event. |
| <input type="checkbox"/> | <input type="checkbox"/> | Report: The Commissioning Process Report for Phase A has been written and distributed to all Commissioning Team members. |
| <input type="checkbox"/> | <input type="checkbox"/> | Owner's Project Requirements: The Commissioning Authority has created or updated the Owner's Project Requirements and provided them to the Project Manager and the Architect-Engineer |
| <input type="checkbox"/> | <input type="checkbox"/> | Design Review Report: A pre-submission Design Review Report has been prepared and provided to the Project Manager. |
| <input type="checkbox"/> | <input type="checkbox"/> | Commissioning Plan: An updated Commissioning Plan for Phase A has been prepared and provided to the Project Manager and the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Project Specifications: An integration plan to incorporate Commissioning requirements into the Project specifications has been prepared. |
| <input type="checkbox"/> | <input type="checkbox"/> | Forms and Checklists: Outlines for Construction Phase Commissioning Forms and Checklists have been prepared. |
| <input type="checkbox"/> | <input type="checkbox"/> | Systems Basis of Design: The Commissioning Authority has verified the Systems Basis of Design Document for compliance with the Owner's Project Requirements and incorporated changes approved by the Project Manager. |
| <input type="checkbox"/> | <input type="checkbox"/> | Notification: Commissioning Team members have been informed of decisions that alter the Owner's Project Requirements. |
| <input type="checkbox"/> | <input type="checkbox"/> | Design Schedule: The Architect-Engineer changes to the Design Schedule have been incorporated into the Owner's Project Requirements. |
| <input type="checkbox"/> | <input type="checkbox"/> | Process Changes: The Commissioning Process activities have been altered as required by the revised schedule. |
| <input type="checkbox"/> | <input type="checkbox"/> | Test Criteria: The Functional Performance Test criteria have been defined for the Architect-Engineer. |

Phase A Commissioning Submittals:

- | YES | N/A | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Revisions: Changes to the Commissioning Plan have been incorporated to include updates and changes to Project information. |
| <input type="checkbox"/> | <input type="checkbox"/> | Verification: Completion of Phase A Submittals Checklist by each design discipline has been verified. |
| <input type="checkbox"/> | <input type="checkbox"/> | Specification Table of Contents: The Commissioning Authority has prepared a specification table of contents for use by the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Integration Plan: The Commissioning Authority has prepared a specification / Commissioning Integration Plan for use by the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Forms and Checklists Outline: A Construction Forms & Checklists Outline for use by the Architect-Engineer has been prepared. |
| <input type="checkbox"/> | <input type="checkbox"/> | Systems Manual Outline: A Systems Manual Outline for use by the Architect-Engineer has been prepared. |
| | | Commissioning Requirements: The Commissioning Authority shall identify Commissioning Requirements to the Architect-Engineer for the following Divisions of Work: |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 210000 - Fire Suppression |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 220000 - Plumbing |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 230000 - HVAC |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 250000 - Integrated Automation |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 260000 - Electrical |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 270000 - Communications |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 280000 - Electronic Safety & Security |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 320000 – Exterior Improvements |

Phase A Review and Approval

- | YES | N/A | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Owner's Project Requirements: The Commissioning Authority shall review documents for satisfaction of the Owner's Project Requirements. |
| <input type="checkbox"/> | <input type="checkbox"/> | Commissioning Process Activities: The Commissioning Authority shall review documents for completion of Commissioning Process activities for Phase A. |
| <input type="checkbox"/> | <input type="checkbox"/> | Phase A Submittal Acceptance: The Commissioning Authority shall recommend acceptance of Phase A Submittal to the Using Agency and Owner. |

Projects Seeking LEED Certification:

- | YES | N/A | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | LEED Credits: The Commissioning Authority shall provide the Commissioning Plan and appropriate information to the Architect-Engineer in order to comply with the LEED Commissioning credits. |
| <input type="checkbox"/> | <input type="checkbox"/> | Energy Model: The Commissioning Authority shall review the Energy Model to insure the required numbers of points for LEED Energy and Atmosphere Credit 1 are being met. |

End of Phase A Checklist for the Commissioning Authority

301 – Phase A Initial Project Meeting

301.1 Initial Project Meeting: Once the Architect-Engineer is selected and a contract is awarded, the Project Manager schedules an initial project meeting to introduce the Architect-Engineer to the Using Agency and to the requirements of the Project. The initial project meeting is attended by representatives of CCPA, Using Agency, and Architect-Engineer.

The Project Manager presents the CCPA guidelines and procedures for each phase of the project. This information includes the responsibilities and performance expected of the Architect-Engineer for the project.

301.2 Project Requirements: During the initial project meeting CCPA will provide the Architect-Engineer with a copy of the Using Agency's Project Program defining the Project scope of work.

The Project Manager provides budget information to the Architect-Engineer as guidance for the Project. This information includes the construction budget amount. Throughout the project, the Architect-Engineer is expected to closely monitor the scope of work (including estimates of construction cost) and notify the Project Manager at any time that the estimate exceeds the construction budget amount.

301.3 Project Walk-Through: The Project Manager and Using Agency Representative will facilitate a walk-through of the project site and/or (in the case of a renovation or addition) the existing building(s). This walk-through is intended to provide a general introduction to the existing conditions that will be addressed during the design phases of the project.

The Project Manager will provide the Architect-Engineer with all available "as-built" or "record" drawings. However, these drawings are for informational purposes only and shall not be relied upon for any condition that can be determined through field investigation.

301.4 Project Schedule: The Project Manager will provide the Architect-Engineer with a project design and construction time line based on the RFP, Architect-Engineer Contract and/or Project Program. The timeline will include dates or times for completion of design work and for start and completion of construction. The Architect-Engineer is expected to review the time line information and to develop a detailed Project schedule. The Project schedule, once approved by the Project Manager, will become the basis for contractual agreements following the completion of Phase A.

301.5 Evaluation: The Architect-Engineer may be evaluated by CCPA at the end of the Project. **See Section 1002 Consultant Performance Evaluation.**

302 – Phase A Responsibilities of the Using Agency

During Phase A, the Using Agency shall:

- Identify the primary Using Agency Project contact.
- Identify the Using Agency Representative authorized to sign plans and approvals. Participate in the initial Project meeting and subsequent design review meetings.
- Notify CCPA and the Architect-Engineer if the Project requires Federal review and identify the Federal permits required.
- Participate in the Project walk-through.
- Provide additional information as needed or requested.
- Provide formal review, comment and approval of the Phase A submittal.
- Participate in the Commissioning Process.
- For Projects seeking LEED certification, assist the Architect-Engineer and the Project Manager in determining the LEED credits appropriate to the Project.
- Obtain a copy of the Energy Model from the Architect-Engineer.

303 – Phase A Responsibilities of CCPA

303.1 Items Provided: During Phase A, CCPA will provide the Architect-Engineer the following:

- Identity of Project Manager for CCPA.
- Architectural/Engineering Agreement.
- Notice of initial Project meeting date, time, place, and key personnel to attend.
- All property, topographical and geotechnical surveys. These services typically will be, procured directly by CCPA using Master Agreements. If the subsurface investigation or survey work exceeds Master Agreement limits then those services may be included as a part of the Architect-Engineer's contract.
- Project Program and CCPA's Procedures Manual.

303.2 Actions Taken: During Phase A, CCPA shall:

- Review the Project Program provided by the Using Agency to determine adequacy and sufficiency. Provide additional information as needed or requested.
- Participate in the initial Project meeting, walk-thru and subsequent design review meetings.
- Provide formal review, comment and approval of Phase A submittal.
- Monitor Architect-Engineer performance to ensure adherence to Project budget, schedule and program.
- Update the Total Estimate of Funds Through Design. **See Section 202.1.**
- Participate in the Commissioning Process.
- Assist the Architect-Engineer and the Using Agency in determining the LEED credits appropriate to the Project. Review the energy model to insure compliance with the required number of points for Energy and Atmosphere Credit 1.
- Develop an energy budget for the facility based on the energy model. Include a reasonable safety factor in the final calculation.
- Provide the USGBC account number to register the project for projects seeking LEED Certification.

303.3 Mechanical, Electrical and Plumbing (MEP) Plan: The Division of Facilities Services will review and approve the MEP submittal. Special attention will be given to the energy model and whether the required numbers of points for LEED Energy and Atmosphere Credit 1 have been met. The submittal for the Associate Director of Mechanical and Electrical Services shall be as follows:

- ½ size drawings.
- Specifications.
- Energy model (include appropriate cut sheets or back up).
- Cover letter transmitting the submittal. Include a signature approval line for Facilities Services.

304 – Phase A Responsibilities of the Commissioning Authority

During Phase A the Commissioning Authority responsibilities shall include the following:

304.1 Owner's Project Requirements: Coordinate with the Project Manager and the Using Agency to update or create the Owner's Project Requirements based on the Architect-Engineer's review for:

- Adequacy and sufficiency
- Budget

304.2 Schedule: Incorporate the Architect-Engineer provided Design Schedule into the Owner's Project Requirements and integrate the Commissioning Process activities into the Design Schedule, including:

- Pre-Design Commissioning Plan
- Commissioning Team meetings
- Document review coordination meetings
- Phase A Commissioning Meeting within sixty (60) days of Architect-Engineer selection to review the Commissioning Process.
- Establish tentative schedules for the Design Phase

304.3 Documentation:

- Prepare minutes of Commissioning Process activities and distribute to Commissioning Team members and attendees within five (5) workdays of event.
- Incorporate the Architect-Engineer's technical clarifications to the Project Program into the Owner's Project Requirements.
- Verify that the Systems Basis of Design Document prepared by the Architect-Engineer is consistent with the Owner's Project Requirements. If discrepancies are found, document the issue and report it to the Project Manager for resolution.
- Write or revise the Commissioning Plan.
- With the Commissioning Team, prepare a detailed design deliverables checklist for each commissioned system and submittal phase.

304.4 Phase A Submittal: Review the Phase A submittal for:

- Satisfaction of the Owner's Project Requirements and Completion of Commissioning Process activities for Phase A
- Inclusion of all Commissioning Process activities. These shall be clearly described in Architect-Engineer's and Sub-consultant's scopes of work.
- Energy Model compliance with the requirements of LEED Energy and Atmosphere Credit 1.

304.5 Communication:

- Incorporate the project communication plan into the Owner's Project Requirements.
- Write Commissioning Process report for Phase A and distribute to all Commissioning Team members.

- Inform Commissioning Team of decisions altering the Owner's Project Requirements.

304.6 LEED:

- For projects seeking LEED certification, provide the Commissioning Plan to the Architect-Engineer in order to comply with the LEED Commissioning credits.
- Review the energy model to insure the required numbers of points for LEED Energy and Atmosphere Credit 1 have been met.

304.7 Approval: The Commissioning Authority shall recommend acceptance of the Phase A submittal to the Using Agency and Owner.

305 – Phase A Responsibilities of the Architect-Engineer

The Architect-Engineer shall provide the following minimum services during Phase A:

305.1 Project Program and Administration: The Architect-Engineer Shall:

- Evaluate the Project Program furnished by the Using Agency relative to the Project construction budget. The Architect-Engineer is to notify CCPA at the earliest possible date if the program cannot be developed within the limits of the project budget.
- Meet with the assigned CCPA representatives and the appropriate Using Agency Representative(s) as needed to fully develop the Project Program into a schematic design.
- Record all meetings with accurate minutes and distribute to the Project Manager, Using Agency and consultants.
- Assist the Using Agency in supplementing the Project Program in those technical areas as may be needed. These areas will be clarified to the Architect-Engineer by the Project Manager.
- Review any As-Built or Record Drawings that may be provided and verify accessible existing conditions and all interfaces between new and existing work.
- Involve the structural, mechanical, and electrical consultants immediately in the schematic design.
- Coordinate the work of the site survey and subsurface investigations. **See Section 210 Survey Requirements and Section 211 Subsurface Investigations.**

305.2 Budget - Cost Estimate: The Architect-Engineer Shall:

- Notify the Project Manager immediately and prior to the submission of the Phase A submittal if, at any time, the cost estimate exceeds the construction budget.
- Propose alternatives to bring the Project within the allotted cost. The Project Manager will then give direction to the Architect-Engineer on how to proceed.
- Provide Value Engineering as required during the selection of building component systems. Value Engineering shall be a continuous process that is applied to all phases and aspects of the Project. If at any time the Architect-Engineer identifies that the Project Scope is likely to exceed the project budget, the Architect-Engineer shall provide a candidate list of areas to be considered for Value Engineering evaluation.

305.3 Schedule: The Architect-Engineer Shall:

- Furnish a Project schedule defining major Project design and construction milestone dates or times. The Project schedule shall be delivered to the Project Manager within 10 working days from date of the initial Project meeting.
- Schedule the design review meetings through the Project Manager. Phase A submittal shall be delivered to CCPA's representatives one week prior to the formal presentation unless notified otherwise. The Phase A review meeting location to be determined by the Project Manager.

305.4 Space Study Statement: The Architect-Engineer shall provide area information in the Space Study Statement on the Phase A Estimate of Construction Cost form defining the area of the project.

305.5 Commissioning: The Architect-Engineer Shall:

- Enhance the Basis of Design (BOD) based on the Owner's Project Requirements (OPR).

- Participate in Commissioning Authority schematic design review process when Enhanced Commissioning is used.

305.6 LEED: For Projects seeking LEED Certification: The Architect-Engineer Shall:

- Determine the appropriate LEED checklist relative to the Project Program.
- Identify, with the Using Agency and the Project Manager's assistance, the LEED credits appropriate for the Project.
- Conduct design activities to achieve the desired credits.
- Provide a preliminary energy model as required to document compliance with the required number of points for LEED Energy and Atmosphere Credit 1.

306 – Phase A Submittal

The Architect-Engineer will furnish to CCPA, Using Agency and others as determined by the Project Manager a Phase A submittal Package. Generally a minimum of four sets (three hard copy and one electronic) of submittals will be required for the Phase A review, but the Project Manager will determine the exact number needed for any given Project. The Phase A submittal package shall include the following in bound form:

306.1 Phase A Checklist: With the Phase A submittal, the Architect-Engineer shall prepare the Phase A Checklist. This checklist shall be placed at the beginning of the Phase A submittal.

See Section 300.1 – Phase A Checklist for the Architect-Engineer.

306.2 Phase A Commissioning Plan: During Phase A, the Commissioning Team will make necessary revisions to the Commissioning Plan created in the Pre-Design Phase. The purpose of the Phase A Commissioning Plan is to improve the accuracy of the Commissioning Plan created in Pre-Design and incorporate any alterations and/or decisions made during Schematic Design. These decisions may include selection of design professionals and Commissioning Authorities. The Phase A Commissioning Plan will focus on defining the subsequent design phase commissioning requirements. This document will be submitted to the Project Manager as the Commissioning Authority's Phase A Submittal Document. **See Section 019113-4 Commissioning Plan Overview and Section 019113-5 Sample Commissioning Plan Outline.**

306.3 Design Narrative: The design narrative is a written description of the Project design. The narrative shall contain a summary of the Project including the history of the Project design, programming information, codes, Using Agency and Owner's Project Requirements, conferences and pertinent research. The justification for each major design decision and product/material selection shall be clearly stated. Narrative descriptions of design solutions are to also be included. Written material may be supplemented by diagrams, sketches, models, etc. to convey design concepts. The narrative shall include identification and verification of the availability and/or adequacy of all utilities/infrastructure required for the operation of the proposed facility. The design narrative shall be in 8 ½" X 11" bound form.

Generally a minimum of four sets (three hard copy and one electronic) of submittals will be required for the final review, but the Project Manager will determine the exact number needed for any given Project. When federal funding is involved the Using Agency will notify the Architect-Engineer as to the quantity required for federal review. The design narrative shall have a prepared space provided for the Using Agency Head's signature of acceptance of the schematic design.

306.4 Schematic Design Documents: Phase A schematic drawings shall be in 8 ½" X 11" or 11" x 17" bound form. Larger scale drawings may be required by the Project Manager in addition to the bounds for use in the review process.

306.5 Schematic Drawings: Schematic drawings showing the basic features, concepts and design intent of the Project shall include at a minimum drawings as outlined in the Phase A Checklist.

306.6 Outline Specifications: Outline specifications shall be descriptive of design intent in a brief and concise CSI Division format. Each outline specification shall include sections for all work anticipated to be included in the scope of the Project. Submittal of a specification "index" or "table of contents" only does not meet the requirement for submittal of outline specifications.

307 Outline Specification Examples - Contents

307.1 Outline Specification

307.2 Division 210000 – Fire Suppression

307.3 Division 220000 – Plumbing

307.4 Division 230000 – HVAC

307.5 Division 250000 – Integrated Automation

307.6 Division 260000 – Electrical

307.7 Division 270000 – Communication

307.8 Division 280000 – Electronic Safety and Security

307.9 Division 320000 – Exterior Improvements

308 – Phase A Review and Approval

308.1 Review: The Project Manager and the Using Agency Representative review the Phase A submittal. The Project Manager then schedules a review meeting. The purpose of the review meeting is to evaluate the submittal for compliance with the Project Program, budget and schedule.

Following the review meeting the Architect-Engineer documents, in the meeting minutes, all significant issues or concerns. All comments, drawing mark-ups and other issues and concerns identified during the Phase A review are then incorporated into the Project documents.

308.2 Approval: When the Phase A design is acceptable, the Using Agency shall forward to the Project Manager a signed Phase A Estimate of Construction Cost (**See Section 309**). The Project Manager then issues a letter of approval to the Architect-Engineer and copies the approval letter to the Director of CCPA.

The Architect-Engineer is cautioned not to proceed beyond Phase “A” work until a fee has been negotiated and a contract modification has been received or a letter allowing such work is issued from the Director.

309 - ARCHITECT-ENGINEERS ESTIMATE OF CONSTRUCTION COST PHASE "A" - SCHEMATIC DESIGN

Project Name: _____

Location: _____

RCF/Org Code: _____ Activity Code: _____

I.	a.	SITE WORK		
		1.0 Demolition	\$	-
		2.0 Clearing	\$	-
		3.0 Grading	\$	-
		4.0 Paving	\$	-
		5.0 Concrete	\$	-
		6.0 Planting	\$	-
		7.0 Miscellaneous Items (Identify)	\$	-
		General Site Work Subtotal:	\$	-
	b.	EXTERIOR MECHANICAL	\$	-
	c.	EXTERIOR ELECTRICAL	\$	-
	d.	UTILITY RELOCATION	\$	-
TOTAL SITE WORK:				\$ -
II.	a.	OFF-SITE UTILITIES		
		1.0 (Identify Utilities)	\$	-
TOTAL SITE UTILITIES:				\$ -
III.	a.	BUILDING CONSTRUCTION		
		1.0 Structural	\$	-
		2.0 Architectural	\$	-
		3.0 Elevator	\$	-
		4.0 Built-in Equipment	\$	-
		5.0 Special Items (Identify)	\$	-
		General Construction Total:	\$	-
	b.	BUILDING MECHANICAL		
		1.0 Fire Suppression	\$	-
		2.0 Plumbing	\$	-
		3.0 Heating, Ventilation & Air Conditioning	\$	-
		4.0 Control Systems	\$	-
		Mechanical Subtotal:	\$	-
	c.	BUILDING ELECTRICAL		
		1 Electric Power & Lighting	\$	-
		Communication	\$	-
		Electric Safety & Security	\$	-
		Electrical Subtotal:	\$	-
TOTAL BUILDING CONSTRUCTION:				\$ -
TOTAL SITE WORK, SITE UTILITIES, & BUILDING CONSTRUCTION:				\$ -

project name:

date:

office project #:

IV. SUMMARY OF COSTS

1.0	All General Construction (including general sitework)	\$ -
2.0	All Mechanical (exterior & building)	\$ -
3.0	All Electrical (exterior & building)	\$ -
4.0	Off-site Utilities (When Applicable)	\$ -

TOTAL CONSTRUCTION COST ESTIMATE (Base Bid):	\$ -
---	-------------

V. ADDITIVE ALTERNATES (When Applicable - Requires Project Manager Approval)

1.0	ADD ALT #1 (List Alternates)	\$ -
-----	------------------------------	------

TOTAL COMBINED COST:	\$ -
-----------------------------	-------------

VI. SPACE STUDY STATEMENT

a.	Total Gross Area:	-	gsf
b.	Gross Area (AIA Architectural Area):	-	gsf
c.	Net Assignable Area (Productive Space):	-	naa % efficient
d.	Square Foot Costs (Excluding Sitework)	\$ -	/sq ft
e.	Square Foot Costs per Net Assignable Area	\$ -	/sq ft of naa

Note: All measurements per AIA Method Document D101 (June, 1974).
 Additional special information relating to this estimate to be attached on separate sheets.

Design Development:

Time, in calendar days, after receipt of written authorization to complete Phase "B" Plans: _____ Days

Construction Documents:

Time, in calendar days, after approval of Phase "B" to complete Phase "C" Construction Documents, including time necessary to secure all Agency approvals: _____ Days

Bidding, Plan Review & Permitting Time:

Time, in calendar days, to obtain bids, plan review approvals and permits: _____ Days

Construction Time:

Time, in calendar days, after work order is issued to Substantial Completion: _____ Days

Estimate Prepared by: _____ Date: _____

Estimate Certified by: _____ Date: _____
 (Principal of firm)

Estimate Approved by: _____ Date: _____
 Using Agency Representative

310 – ADA/Section 504 Design and Renovation Policy Suggestions

While all designs for new facilities and renovations to existing facilities must meet the standards set forth in ADA, it is also important that the usability of all ADA features be considered and maximized when possible. The University wants to meet the spirit of the law and not just the law when we design facilities for use on campus.

Review by both the University ADA/Section 504 Compliance Officer and the University ADA/Section 504 Coordinator should be sought out. Designs should be reviewed for practical application so that students, faculty, staff and guests that may use the facilities with the least amount of difficulty. For example, travel distances from ADA accessible points should be as convenient as practical. Signage should be placed in logical and clear places within facilities to easily identify all accessible features and paths. Alarms should be both audible and visual in all facilities.