# EJC CWD Planning Unit: Project Delivery Checklist

November 11, 2015

## PROJECT INITIATION

The Planning Committee’s (PC) role in the conference wide development process begins upon receipt of either a Client Project Request. The timing of CWD’s project oversight, as well as initial tasks depends upon a project’s dollar level. In this initial phase, especially in the case of large projects, PC’s role is primarily one of professional consultant for the CWD executive committee.

### Deliverables

* Client Project Request for project file
* Approval by the EJC Executive Committee

## SCOPING

The objective of the Scoping phase is to develop the ideas and plans of request or proposal into a potential project. In collaboration with the Conference Wide development committee, the Planning Unit (PU) works to identify the architectural program and infrastructure requirements (scope) of a project.

### Deliverables

* Statement of Need
* Rough-Order-of-Magnitude Scope of Work Statement
* Preliminary Budget
* Project Charter
* Estimated Project Schedule
* Approval by the EJC CWD Committee

## FEASIBILITY

The objective of the Feasibility phase is to review and develop options initially arising during the Scoping phase of Pre-design. At the end of Feasibility, only one option will be designated for further exploration in Programming, the final Pre-design phase.

### Deliverables

* Feasibility Study for all options
* Recommendation of preferred option
* Approval by the EJC Executive Committee

## Programming

As the final phase within Pre-design, the objective of Programming is to expand upon and refine the option recommended at the end of the Feasibility phase. During Programming, the client’s objectives, space requirements, and operational plan will be translated into a facility pro­gram in sufficient detail to bring the project to the EJC Executive for approval (when required) and to direct the design team throughout the project design process.

### Deliverables

* Preliminary Project Work Plan
* Programming Report for review and sign-off by client.
* Preliminary total project budget
* Completed Pre-design document
* Approval by the EJC Executive Committee

## SCHEMATIC DESIGN

The objective of Schematic Design is to refine and build upon the scope, conceptual design, scale, and relationships among the components of the project. The primary goal of this phase is to develop a clearly defined design based upon the client’s requirements, as defined by the facility program developed during Pre-design. The project quality, scope, budget, and schedule will also be confirmed and refined.

### Deliverables

* 100% Schematic Design documents
* EJC CWD Executive Documentation
* Exceptions to Standards
* Code summary
* Cost Estimate (preliminary)
* Total project budget
* Consolidated completed review comments
* Progress meeting minutes
* Project Delivery Readiness Index (as needed)
* Benchmark Report
* Benchmark analysis comparing Predesign project quality, scope, budget, schedule to Schematic Design
* Project report for EJC Executive Committee ratification
* Monthly project report summary for project executive management
* Approval by the EJC CWD Committee
* Approval by the EJC Executive Committee

## DESIGN DEVELOPMENT

The Design Development phase is a refinement of the Scope of Work identified during Schematic Design. As required, large-scale drawings, mock-ups, and detailed plans are developed to present a coordinated, clear view of the project’s major elements with respect to architectural, structural, mechanical, electrical, plumbing, equipment, civil, landscape, and utility infrastructure.

### Deliverables

* Site Design
* Building Design
  1. General
  2. Architectural
  3. Hazardous Materials
  4. MEP/Civil Systems Design
  5. Verify Coordination of Drawings and Specs
* Completed review comments
* Exceptions to Standards
* Monthly project summary for CWD Executive Committee
* Total project budget
* EJC CWD Executive Committee (review and approval)

## CONSTRUCTION DOCUMENTS

Construction Documentation is the final design phase focusing upon finalizing all drawings and specifications for building systems, site utilities, and components that will form the basis for the project’s Construction Documents. A final set of comprehensive Construction Documents provides specifications and drawings sufficiently complete to support the Contractor, obtain necessary permits, and construct the project.

### Deliverables

* Coordinated Drawings
* Completed review comments
* Exception to Standards
* Final Project Budget
* Final Work Plan
* EJC CWD Executive Committee (review and approval)
* EJC Executive Committee

## CONSTRUCTION

The objective of the Construction phase is to build the project to draw­ings and specifications at the quality level included in Construction Documents within the budget, schedule, and scope defined and approved by the EJC Executive Committee. The General Contractor is responsible for facili­tating delivery, installation, and construction of the capital project in coor­dination with the EJC CWD Executive Committee, the client requesting the project, and the Design Consultant team.

### Deliverables

* Contractor Requests For Information (RFI), Submittals, and Change Request logs
* Progress Meeting Minutes
* Monthly progress report from General Contractor
* Corrective Observation Report
* Corrective Action Log
* Construction Photographs
* Occupancy Permit
* Site Visit Logs
* Architect’s Change Order Log
* Completed punch list
* As-built drawings to client
* Surplus materials delivered to client
* Signed-off permits
* Certificate of Substantial Completion
* Certificate of Final Completion
* Operation & Maintenance Manuals
* Final Commissioning Report
* EJC CWD Executive Committee Approval
* Applicable Government Agencies Approval
* Client (where applicable)

## CLOSEOUT

The objective of this final phase in project delivery is to facilitate and coordinate occupancy and turnover of the facility to the client, as well as transferring responsibility for maintaining the facility to the client.

### Deliverables

* Completed Project Closeout sheet
* Completed Final Inspection checklist
* Completed punch list and status report provided to client
* Turnover Letter issued to client identifying outstanding punch list items and line of authority for future mainte­nance
* Final Certificate of Occupancy (posted in building)
* 1-year warranty report provided to the client
* Completed commissioning report provided to client’s facility coordinator
* Final keys and keying plan delivered to the client
* EJC Executive Committee Approval
* Local Planning Authority approval
* Client Approval