



PROJECT PHASE CHECKLIST TASKS

This reference document outlines each of the project Phase Checklists and associated checklist tasks available in Facilities Connect.

The purpose of this document is to provide applicable users with support for selection of appropriate project phases (in the context of their projects).

Note that as of November 2024, Capital Programs is only using one Phase Checklist template, regardless of project size.

Phase	Number of Checklist Items
0.0 Initial Request	1

CHECKLIST ITEM

01. Complete preliminary project record, including basic information on the following tabs of the FC record: General, Scope, Budget, Schedule, and Contacts. Gather available project information onto shared drive. Open project Work Tasks.

Phase	Number of Checklist Items
1.0 Design	6

CHECKLIST ITEM

01. Contact project sponsor (identified in CFW approval) to confirm project scope/goals, schedule, and key stakeholders.
02. A/E and specialty consultants selected and under contract.
03. Schedule and conduct Design Meetings with appropriate groups. Obtain stakeholder approvals at completion of each design phase (including Space Mgmt, Operations, IT, EH&S, Research Safety, etc.). Review with AHJ as needed.
04. Obtain permits and applicable governance approvals (CFW, EPC, BoT) .
05. Develop construction procurement strategy, prepare bidding requirements, solicit and tabulate bids, select contractor, and submit contract for signature.
06. Maintain milestone schedule, including required NU and municipal approvals.



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Phase	Number of Checklist Items
2.0 Construction Delivery	10

CHECKLIST ITEM
01. Construction Kick-off Meeting with Key Stakeholders, FM Shops, Commissioning Agent, EH&S, etc. including review of construction logistics plan, construction and submittal schedules, project-specific safety plan, etc.
02. Periodic OAC meetings including review of submittal and change logs, updated project schedule, and project risks.
03. Periodic walkthrus with FM Shops, Cx Agent, etc.
04. Coordinate other vendor scopes such as abatement, audio-visual, furniture, specialty equipment relocation and hook-up, safety/security, asset tagging, and room signage.
05. Certificate of Substantial Completion issued. Occupancy inspections completed (TCO).
06. O&M Manual (at least draft version) delivered to Space Information, and Facilities Operations training complete.
07. Coordinate pre-occupancy activities such as tel-data transition and keying.
08. Specialty equipment moved/installed and accepted by users and Research Safety (when applicable).
09. Move-in complete, including disposal of abandoned materials/equipment. Any remaining lab equipment decontaminated (when applicable).
10. Operations, Facilities Customer Service, and Safety/Security notified of occupancy.

Phase	Number of Checklist Items
3.0 Closeout	4

CHECKLIST ITEM
01. Commissioning and LEED activities complete.
02. Final O&M Manuals transferred to Space Records.
03. Final Certificate of Occupancy received.
04. Final invoices paid. FM Accounting has closed all Work Tasks and Purchase Orders for the project. FM Finance advised that project may be closed in NU Finance system.

Phase	Number of Checklist Items
4.0 Closed	0

CHECKLIST ITEM