

# PROJECT PLANNING

Project/Phase \_\_\_\_\_ / \_\_\_\_\_

## Defining the Vision

- ☐ Expected Results  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- ☐ Parameters  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Setting Objectives

- ☐ DOS Worksheet
- ☐ Scope of Services
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
- ☐ Disciplines Required
  - ☐ structural
  - ☐ mech/electr
  - ☐ civil
  - ☐ landscape arch
  - ☐ food service
  - ☐ geotechnical
  - ☐ land surveyor
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
- ☐ Also Needed (but by others)
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_

## Assessing Constraints

- ☐ Zoning
  - ☐ Zoning permits
  - ☐ access control
  - ☐ \_\_\_\_\_
- ☐ Building Code
  - ☐ use group
  - ☐ construction type
  - ☐ height and area limits
  - ☐ sprinklers
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
- ☐ Hazardous Materials
  - ☐ asbestos
  - ☐ lead
  - ☐ PCBs
  - ☐ underground tanks
- ☐ Dept. of Transportation
  - ☐ work in state ROW
- ☐ Storm Water
  - ☐ quantity control
  - ☐ quality control
- ☐ ADA
  - ☐ toilet rooms
  - ☐ elevator
  - ☐ accessible routes
- ☐ Special Regs
  - ☐ prevailing wages
  - ☐ bonds
  - ☐ \_\_\_\_\_
- ☐ Other Constraints
  - ☐ insurance
  - ☐ landlord
  - ☐ parent organization
  - ☐ users or customers
  - ☐ funding source
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_

## Listing Activities

- Deliverables
  - ☐ Drawings per checklist
  - ☐ Specifications Type
    - ☐ Abbreviated - on dwgs
    - ☐ Keynotes only
    - ☐ Project Manual
  - ☐ Project Budget
  - ☐ Proj Schedule
  - ☐ Phase Task checklist
  - ☐ Other:
    - ☐ O/A Supp Serv Auth
    - ☐ PFs \_\_\_\_\_
    - ☐ \_\_\_\_\_
    - ☐ \_\_\_\_\_
    - ☐ \_\_\_\_\_
    - ☐ \_\_\_\_\_
    - ☐ \_\_\_\_\_
    - ☐ \_\_\_\_\_

## Committing Resources

- ☐ Architectural Staff
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
- ☐ Consultants
  - ☐ Structural \_\_\_\_\_
  - ☐ mech/electr \_\_\_\_\_
  - ☐ civil \_\_\_\_\_
  - ☐ CAD \_\_\_\_\_
  - ☐ landscape arch \_\_\_\_\_
  - ☐ food service \_\_\_\_\_
  - ☐ geotechnical \_\_\_\_\_
  - ☐ land surveyor \_\_\_\_\_
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_

## Ordering Activities

- ☐ Proj Mgmt schedule  
\_\_\_\_\_  
\_\_\_\_\_

## Agreeing Dates

- Deadlines
  - ☐ planning \_\_\_\_\_
  - ☐ design \_\_\_\_\_
  - ☐ CD phase \_\_\_\_\_
  - ☐ bidding \_\_\_\_\_
  - ☐ construction \_\_\_\_\_
  - ☐ commissioning \_\_\_\_\_
  - ☐ occupancy \_\_\_\_\_
  - ☐ \_\_\_\_\_

## Validating the Plan

- ☐ Client's Approval
- ☐ PIC's Approval
- ☐ Consultants' Agreement
  - ☐ structural
  - ☐ mech/electr
  - ☐ civil
  - ☐ landscape arch
  - ☐ food service
  - ☐ geotechnical
  - ☐ land surveyor
  - ☐ \_\_\_\_\_

## Notes

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

date \_\_\_\_\_