“Required Phases & Minimum List of Deliverables”

SPREADSHEET DIRECTIONS
FOR PSC’S

SPREADSHEET FLOWCHART

**TAB A**
* General Project Info, Project Type
* Applicable Phases
* Define # of what deliverables to whom

**TAB B**
* Choose report type and components.
* Applicability of deliverables and components for a Feasibility Study or Memo/Short Report or Conceptualization Only (w/large future Amend.)

**TAB C**
* Enter Last Edit Date, Entity, Editor Name
* Applicability of Deliverables & Components / phase
* Compares when deliverables are used per phase

**TAB 00**
- Concept.
  - Print and use this checklist at any Concept. Submittals.
  - Autopopulated from Tabs A & B.
  - Shows the completion level of components at Concept.

**TAB 01**
- SD
  - Print and use this checklist at SD Submittals.
  - Autopopulated from Tabs A & C.
  - Shows the completion level of components at SD.

**TAB 02**
- DD
  - Print and use this checklist at DD Submittals.
  - Autopopulated from Tabs A & C.
  - Shows completion level of components at DD

**TAB 03**
- 50% CD
  - Print and use this checklist at 50% CD Submittals.
  - Autopopulated from Tabs A & C.
  - Shows completion level of components at 50% CD.

**TAB 04**
- 95% CD
  - Print and use this checklist at 95% CD Submittals.
  - Autopopulated from Tabs A & C.
  - Shows completion of components at 95% CD

**TAB 05**
- BID
  - Print and use this checklist at BID Submittals.
  - Autopopulated from Tabs A & C.
  - Shows completion of components at BID.

**TAB 06**
- CONST
  - Print and use this checklist at Const. Submittals.
  - Autopopulated from Tabs A & C.
  - Shows completion level of components at CONST

**TAB 07**
- CLOSEOUT
  - Print and use this checklist at Closeout Submittals.
  - Autopopulated from Tabs A & C.
  - Shows completion level of components at CLOSEOUT.

**TAB 08**
- POST CONST
  - Print and use this checklist at Post Const. Submittals.
  - Autopopulated from Tabs A & C.
  - Shows completion level of components at POST CONST

Design = Yes & Construction = Yes

Feasibility Study = Yes

Concept Only = Yes

Applicability of Deliverables & Components
Auto populated from TAB C

PSC
Transmittal Guidance

Print and use transmittal aid prior to each submittal.
Autopopulated by Tabs A, B, and C.
TIP #1 – PASTE SPECIAL (VALUES) – REQUIRED!

DO NOT USE A DIRECT COPY AND PASTE! Doing so will change the formulas, “smart” features, and conditional formats.

If there are multiple cells to change to the same value, use “paste special – values”.

For example – several cells need to be modified from a “N” to a “Y”. Choose an existing cell with a “Y”. Copy (Either ctrl-c or right click and select “copy”).

- Choose multiple cells at one time that need the value changed to “Y” by selecting the first cell, then holding down the “Ctrl” button while clicking to select the remaining cells.

- While cells are still chosen, right click. Choose paste special – values “1-2-3”
TIP #2 – DO NOT DELETE ANY ROWS OR COLUMNS. USE TIP #3 INSTEAD

There are multiple references, names, etc. Deleting rows and columns will cause multiple errors.

TIP #3 – HIDE / UNHIDE MULTIPLE ROWS

The PM or Planner may wish to hide some of the non-applicable disciplines in TABS 00-08.

- Select first row to hide by selecting the row number at the left of the sheet.

- While row # is still selected, press the “Ctrl” button and hold down while selecting the #’s of the other row to hide.

- While all row #’s to hide are still chosen, continue to hold “Ctrl”, hover over the #’s while simultaneously & right clicking.

- Select “Hide”.

- Project Applicable Information / Calculations - Updated
  - (complete) Occupancy calculations between existing and proposed; breaking down for FTE
  - [Complete] Soil Borings and Soils Report
  - [Substantially Complete] Stormwater Runoff Rate Calculation/Model Results and Water Detention
  - [Substantially Complete] Asbestos and Lead Survey and Recommendations
  - Results of Hazardous Materials Testing and Hazardous Materials Mitigation Plan
  - [Substantially Complete] EPA & State Permits
  - [Substantially Complete] Environmental Checklist
  - (Preliminary) Excel files of all equipment schedules for all disciplines.
Directions for Overall Spreadsheet

UIUC PM/Planner will start on TAB: [A-Info, Phases, Recip.] – A-Info, Phases, Recip.

TAB A -- appears in white as shown in the list of tabs below:

START - Guidance A-Info, Phases, Recip. B-Studies or Concept only C-Design&Const PSC Transmittal Guidance 00 - Concept. 01 - SD

For Studies Projects, UIUC PM/Planner will next complete only TAB: [B-Studies or Concept Only] - PSC will review and make/recommend modifications to TAB B.

TAB B -- appears in orange as shown in the list of tabs below:

START - Guidance A-Info, Phases, Recip. B-Studies or Concept only C-Design&Const PSC Transmittal Guidance 00 - Concept. 01 - SD

For Design & Const. Projects, UIUC PM/Planner complete TAB: [C-Design&Const] - PSC will review and make/recommend modifications to TAB C.

TAB C -- appears in blueish-purple as shown in the list of tabs below:

START - Guidance A-Info, Phases, Recip. B-Studies or Concept only C-Design&Const PSC Transmittal Guidance 00 - Concept. 01 - SD

Prior to submitting, PSC will review and adjust print margins for applicable phases after TAB C. (i.e. 00 - Concept, 01 - SD, etc...). PSC will print and submit the applicable phase as a pdf and the excel file in accordance to the MLD.

For all tabs, the default viewing setting is “page break preview”. Areas outside of the printable area will appear in gray.

DIRECTIONS: Fill out form for whether or not a reviewer applies and in all boxes with a red background. (Earlier phases drop down)

Directions for each tab will appear at the top of the sheet and be locked in that position.

Guidance or instructional messages will appear at the right outside of the printable area. Red text is important or special directions.
**On TAB A**, cells with peach backgrounds are to be completed, edited, or verified by **UIUC PM/Planner**. Light peach is for a manual entry. Darker peach are dropdown options.

**Fill in / complete in light peach cells.**

**On TABs A, B, C** cells with peach backgrounds are to be completed, edited, or verified by the **UIUC PM/Planner**. Darker peach are dropdown options. On all design and construction phase tabs, the only dropdown is for the “Edited by”.

**Fill in / complete in dark peach cells.**
**TAB A DIRECTIONS- FOR PSC’S**

**“Info, Phases, Recip.”**

---

### Directions for Tab [A-Info, Phases, Recip.]


**Purpose:** UIUC PM/Planner will start the new process to insert basic project information, verify type of project, select applicable phases, provide a list of who receives how many of what deliverable in which format and set the basic information and phase applicability echoed in subsequent tabs.

**A-1:** UIUC PM/Planner will complete all peach cell information at the top including:
- Date, Bldg #/Lot / Utility, Construction Delivery Method, Construction Type, LEED Goal, Project Name, Project Number, Planner, PM, BOT applicability, IHPA Involvement, and CDB applicability.

**A-2:** UIUC PM/Planner will use dropdown menus at the top of the table to determine applicability of master phases (Feas, vs Concept. / Design / Const.).

---

### Table: Required Phases and Delivery Requirements

<table>
<thead>
<tr>
<th>Date: 8/26/2020</th>
<th>Bldg #/Lot or Utility</th>
<th>Construction Delivery Method</th>
<th>Construction Type</th>
<th>LEED Goal</th>
<th>Project Name</th>
<th>Planner</th>
<th>Project Number</th>
<th>PM</th>
<th>BOT applicability</th>
<th>IHPA Involvement</th>
<th>CDB applicability</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note 2a:** If a choice of something not applying is selected, the subsequent cells below will automatically gray out. (see "construction does not apply" below).

**Note 2b:** If Feasibility Study is selected, Design or Construction should NOT be selected. An error will appear in red at the right.

**A-3:** UIUC PM/Planner will use next row of dropdown menus at the top of the table to determine applicability of each phase (Draft and Final of reports, SD, DD, 50% CD, 95% CD, Bid, Const., Close Out, Post Const.).

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### Diagram: Conceptualization, Design, Construction

---

**A-3:** UIUC PM/Planner will use next row of dropdown menus at the top of the table to determine applicability of each phase (Draft and Final of reports, SD, DD, 50% CD, 95% CD, Bid, Const., Close Out, Post Const.).


**TAB A DIRECTIONS - FOR PSC’S**

“Info, Phases, Recip.”

**Note 3a** – Selecting “No” in one or more of the design phases will automatically change the labels to reflect combined submittals. Columns below will gray out.

A-4a : **UIUC PM/Planner** will verify/Complete the names of each recipient in the peach cells on the left.

A-4b : **UIUC PM/Planner** will fill in requested # of each deliverable and deliverable format in the rows to the right of each name.

<table>
<thead>
<tr>
<th>Recipient &amp; Applicability</th>
<th>Conceptualization</th>
<th>Design</th>
<th>Construction does not apply</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Yes</strong> Project Department(s): <strong>TAB</strong></td>
<td>Concept DRAFT</td>
<td>Concept FINAL</td>
<td>DD / SDSD</td>
</tr>
<tr>
<td>INSERT: Room/Block/DS Name</td>
<td>INSERT: Street Address</td>
<td>INSERT: City, State, ZIP CODE</td>
<td>INSERT: email address</td>
</tr>
<tr>
<td><strong>Yes</strong> Project College (as applicable): <strong>TAB</strong></td>
<td>Concept DRAFT</td>
<td>Concept FINAL</td>
<td>DD / SDSD</td>
</tr>
<tr>
<td>INSERT: Room/Block/DS Name</td>
<td>INSERT: Street Address</td>
<td>INSERT: City, State, ZIP CODE</td>
<td>INSERT: email address</td>
</tr>
<tr>
<td><strong>Yes</strong> Other: <strong>TAB</strong></td>
<td>Concept DRAFT</td>
<td>Concept FINAL</td>
<td>DD / SDSD</td>
</tr>
<tr>
<td>INSERT: Room/Block/DS Name</td>
<td>INSERT: Street Address</td>
<td>INSERT: City, State, ZIP CODE</td>
<td>INSERT: email address</td>
</tr>
</tbody>
</table>

**4a** - **Recipient information entered for Project Department, College, and any other applicable recipients.**

**4a** - **Yes or No** chosen from drop downs. (Cells will automatically gray out if **No** is chosen.)

**Note 4b** – The key for the deliverables and formats are at the bottom of the table.

| Key: DD = link to digital download pdf and all native files (cad, word, excel, etc.) | D = paper Drawings, E = emailed pdfs or link to files, e = access to F&S files, PR = paper Report, PBDO = paper Basis of Design, PC = paper Cales & Info, FB = hard copy Finishes & F&E Binder/Boards, PM = paper Project Manual |
| Key: **# of each as indicated above** Any “E” refers to Drawings, BOO, FB, and Manuals | 

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1 Address is: Facilities & Services, University of Illinois, 1501 S. Oak St., Champaign, IL 61820

PSC mails or delivers directly to recipients with specific cover sheets. PSC shall use Transmittal Guidance provided by PM/Planner and the “PROJECT SUBMITTAL REQUIREMENTS”. 

Page 7 of 18 Required Phases & MLD Spreadsheet Directions (PSC) Updated 2020/08/11
**Directions for Tab [B - Studies or Concept Only]**

**TAB B – Studies or Concept Only (For Feasibility Studies, Memo/Short Report or for Conceptualization Only contract)**

**Purpose:** After basic project information is completed in previous tab [A-Info, Phases, Recip.], use TAB [B-Studies or Concept Only] to choose applicability of deliverables and components for a Feasibility Studies or Memo/Short Reports or Conceptualization on Contracts. Select type of report. Not dependent on TAB C.

**B-1a:** UIUC PM/Planner will verify in TAB A that the following selections are chosen: (Investigation/Memo/Short Report) or (Feasibility Study) or (Conceptualization Only) WITH Design & Construction Grayed.

**B-1b:** If TAB [B-Studies or Concept only] is grayed out like the image below, “Feasibility Study” or “Memorandum or Short Report” or “Conceptualization Only” was not selected in TAB A.

---

**U12345 - Davenport Hall Addition & Remodel - Example**

**PROJECT IS DESIGN & CONSTRUCTION - NO FEASIBILITY STUDY**
**TAB B - FOR PSC’S**

**B -2a :** Note the information echoed from **TAB A** at the top of the printable area
Date, Bldg #/ lot/ Utility, Construction Delivery Method, Construction Type, Project Name, Project Number, Planner, PM, BOT applicability, and CDB applicability.

**B -2b :** The last editor either the **UIUC PM/Planner** or the **PSC** will complete the DATE, EDITED BY, & EDITOR NAME

### U12345 - Davenport Hall Addition & Remodel - Example

**Feasibility Study - PSC Minimum List of Deliverables**
Const. Delivery - BID; Const. Type - Remodeling/Addition; LEED Goal - Gold; Not Cert.; Bldg, lot, or Utility: 0001
Master Template last updated on: 12/01/2016. Struck out text is not required.

<table>
<thead>
<tr>
<th>Date Transmitted</th>
<th>Applies?</th>
<th>Item Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>00.</td>
<td>Updated Minimum List of Deliverables</td>
</tr>
<tr>
<td></td>
<td>01.</td>
<td>Conceptual Construction Cost Estimate for Each Alternate (area, volume; unit costs)</td>
</tr>
<tr>
<td></td>
<td>02.</td>
<td>Project Schedule Not Used in this Design Phase</td>
</tr>
</tbody>
</table>

**NOTE – For TAB [B-Studies or Concept only]**, applicability of each item is selected within the ACTUAL tab for the Feasibility phase, **not** in **[C-Design&Const]**. No other tabs beyond TAB [B-Studies or Concept only] should be completed.

**B-3 : UIUC PM/Planner will** Choose “Y” for only 1 of the 4 types of reports. If more than one report type is selected OR no report types are selected, an ERROR will appear.
B-4a: PSC will choose / Verify applicability of numbered bold deliverable items - Y / N / ?

4b: PSC will choose / Verify applicability of sub or component items - Y / N / ?

4c: PSC will choose / Verify applicability of subset items of components - Y / N / ?

B-4: Selecting “N” will automatically strike out the item and any dependent components or subset items.

B-5: UIUC PM/Planner may HIDE rows of non-applicable report types.
Directions for Tab [C – Design & Const.]

**TAB C – Design & Const Deliverables (For design & Construction Phases)**

Purpose: After basic project information is completed in previous tab [A-Info, Phases, Recip.], UIUC PM/Planner will choose PSC will verify and change applicability of major deliverables and turn off deliverable components and subset items for design & construction phases [TABs 00 – 08]. All design and construction phases are listed side by side to see when each item is applicable. **Inputs in this sheet will echo on the individual tabs for each phase.**

*Note* – The completion level of line items is indicated is indicated within the individual tabs for each design & construction phase.

**C1:** PSC will insert last edited information – Date, By (Planner, PM, PSC), and Editor Name at the top of the sheet.

**C2:** If Cells at the top of the sheet appear with Red Text and a red or pink background, PM/Planner should finish completing project information in TAB A. This information includes:
- Date, Bldg #/ lot/ Utility, Construction Delivery Method, Construction Type, Project Name, Project Number,
- Planner, PM, BOT applicability, SHPO applicability, and CDB applicability.

**C3:** Note that applicable phases have been selected (in previous **TAB A**). Non-applicable phases will appear with dark gray background.

**C-4a:** Verify applicability for each item for each phase. Edit by choosing from the dropdown choices.

**C-4b:** Verify applicability of Basic Services for each item for each phase. Edit by choosing from the dropdown choices.

**4a – Hover over cell, click/select to see and select dropdown choice. (Y / N / ? / )**

**4a – Hover over cell, click/select to see and select dropdown choice. (Y / N / ? / )**
PSC will finish verifying / choosing applicability for entire sheet (Item 1 down all the way to Item 42).

### Comparison between MLD requirements in phases for U12345-Davenport Hall Addition & Remodel - Example

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
<td>Minimum List of Deliverables</td>
</tr>
<tr>
<td>01</td>
<td>Construction Cost Estimate</td>
</tr>
<tr>
<td>02</td>
<td>Project Schedule</td>
</tr>
<tr>
<td>03</td>
<td>Final Approved Contractor Submittals with Log</td>
</tr>
<tr>
<td>04</td>
<td>Contractor As-Built Drawings and As-Built Project Manual</td>
</tr>
<tr>
<td>05</td>
<td>Post Construction Activities Log</td>
</tr>
<tr>
<td>06</td>
<td>Log of Equipment with Settings Different than Manufacturer’s Recommendations</td>
</tr>
<tr>
<td>07</td>
<td>Post Construction Report</td>
</tr>
</tbody>
</table>

**PSC Minimum List of Deliverables - General Item Name(s)**

- Completeness level would be specific to phase
- Item’s with only one * - Updates beyond first listed phase

**Master Template last updated on:** 08/31/2020

**Responsibility (PSC Team):**

**Back Scheduling Request:**

**Last Editor:** Smith
Directions for Echoed Design Phases - Tabs 00 - 04

**00 - Concept**
Print and use this checklist at any Conceptualization Submittals.
Represents overall project information and conceptualization phase applicability from **TAB A**. Echoes applicability of Deliverables and Components chosen in **TAB C**. Echoes the level of completion of components.

**01 - SD**
Print and use this checklist at any SD Submittals.
Represents overall project information and SD phase applicability from **TAB A**. Echoes applicability of Deliverables and Components chosen in **TAB C**. Echoes the level of completion of components.

**02 - DD**
Print and use this checklist at any DD Submittals.
Represents overall project information and DD phase applicability from **TAB A**. Echoes applicability of Deliverables and Components chosen in **TAB C**. Echoes the level of completion of components.

**03 - 50% CD**
Print and use this checklist at any 50% CD Submittals.
Represents overall project information and 50% CD phase applicability from **TAB A**. Echoes applicability of Deliverables and Components chosen in **TAB C**. Echoes the level of completion of components.

**04 - 95% CD**
Print and use this checklist at any 95% CD Submittals.
Represents overall project information and 95% CD phase applicability from **TAB A**. Echoes applicability of Deliverables and Components chosen in **TAB C**. Echoes the level of completion of components.

**00/04-1a**: **UIUC PM/Planner will verify in TAB A** that following selections are chosen:
[Design]

**00/04-1b**: If any of TABS 02-06 is DARK-grayed out like the image below with "NO DESIGN" in red, Design was not selected in **TAB A**. If “DESIGN DEVELOPMENT DOES NOT APPLY”, then the individual phase was not selected in **TAB A**.

---

**U12345 - Davenport Hall Addition & Removdel - Example**

**NO DESIGN - DESIGN DEVELOPMENT DOES NOT APPLY**

---

**Minimum List of Deliverables - Current**

**01**: Construction Cost Estimate - Quantity Takeoff in CSI Format (Subst. Complete w/ Bid Alter.)

Estimates for all ADD upgrades and deficiency corrections shall be broken out in an additional estimate.

**02**: Project Schedule - Updated

---

**Written Response to Comments**
00/04-2a: Note the information echo from TAB A at the top of the printable area.

Date, Bldg #/ lot/ Utility, Construction Delivery Method, Construction Type, Project Name, Project Number, Planner, PM, BOT applicability, SHPO applicability, and CDB applicability.

00/04-2b: PSC will check the accuracy of the DATE, EDITED BY, & EDITOR NAME (if incorrect, edit in TAB C).

<table>
<thead>
<tr>
<th>Item Name</th>
<th>Item Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>00.</td>
<td>Minimum List of Deliverables - Current</td>
</tr>
<tr>
<td>01.</td>
<td>Construction Cost Estimate - Quantity Takeoff in CSI Format (Subst. Complete w/ Bid Alts.)</td>
</tr>
<tr>
<td>02.</td>
<td>Project Schedule - Updated</td>
</tr>
</tbody>
</table>

REMINDER – TAB C controls the applicability of individual items in these phase sheets.

00/04-3a: VIEW applicability of numbered bold deliverable items - Y / N / ?

3b: VIEW applicability of sub or component items - Y / N / ?

3c: VIEW applicability of subset items of components - Y / N / ?

00/04-4: “N” will automatically strike out the item and any dependent components or subset items.
Directions for Echoed Construction Phases - Tabs 05 - 08

05 - Bid
Print and use this checklist at any BID Submittals.
Represented overall project information and BID phase applicability from TAB A. Echoes applicabilities of Deliverables and Components chosen in TAB C. Echoes the level of completion of components.

06 - CONST
Print and use this checklist at any CONST Submittals.
Represented overall project information and CONST phase applicability from TAB A. Echoes applicabilities of Deliverables and Components chosen in TAB C. Echoes the level of completion of components.

07 - CLOSE OUT
Print and use this checklist at any CLOSE OUT Submittals.
Represented overall project information and CLOSE OUT phase applicability from TAB A. Echoes applicabilities of Deliverables and Components chosen in TAB C. Echoes the level of completion of components.

08 - POST CONST
Print and use this checklist at any POST CONST Submittals.
Represented overall project information and Post Const. phase applicability from TAB A. Echoes applicabilities of Deliverables and Components chosen in TAB C. Echoes the level of completion of components.

05/08-1a: **UIUC PM/Planner** will verify in **TAB A** that following selections are chosen:
[Construction]

05/08-1b: If any of TABS 05/08 is DARK grayed out like the image below with “NO CONSTRUCTION” in red, Construction was not selected.

---

**U12345 - Davenport Hall Addition & Removdel - Example**

---

**NO CONSTRUCTION - CONST. DOES NOT APPLY**

---

**Minimum List of Deliverables - Current**

---

**Construction Cost Estimate Not Used in This Construction Phase**

---

**Project Schedule Not Used in This Construction Phase**

---

**Written Response to Comments Not Used in This Construction Phase**
**TAB 05 - 08 DIRECTIONS**

"05 - 08 – Bid & Award / Const./Close Out/Post Const."

**FOR PSC's**

05/08-2a: Note the information echo from **TAB A** at the top of the printable area.

Date, Bldg #/ lot/ Utility, Construction Delivery Method, Construction Type, Project Name, Project Number, Planner, PM, BOT applicability, SHPO applicability, and CDB applicability.

05/08-2b: **PSC will** check the accuracy of the DATE, EDITED BY, & EDITOR NAME (if incorrect, edit in **TAB C**)

---

<table>
<thead>
<tr>
<th>Item Name</th>
<th>Item Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Updated Minimum List of Deliverables</td>
<td>Cost Estimate Not Used in This Construction Phase</td>
</tr>
</tbody>
</table>

**REMINDER – TAB C controls the applicability of individual items in these phase sheets.**

05/08-3a: **VIEW** applicability of numbered bold deliverable items - Y / N / ?

3b: **VIEW** applicability of sub or component items - Y / N / ?

3c: **VIEW** applicability of subset items of components - Y / N / ?

---

05/08-4: Selecting “N” (in **TAB C**) will automatically strike out the item and any dependent components or subset items.

---

05/08-5: **PSC will** adjust page layout and print to a pdf. Shall be 1 page wide by ## sheets tall with no excessive blanks.
PSC Transmittal Guidance

TAB – “PSC Transmittal Guidance”

Purpose: Before each transmittal, **PSC shall use this tab** to help determine which how many of which products/deliverables in what format are due to the university. The transmittal guidance will also echo the applicability of each numbered deliverable and remind of the required attachments to accompany each transmittal letter.

Note – This tab shall be used at each submittal. The submittal phase shall be chosen to properly convey the transmittal guidance.

PSC Trans.....-1: Prior to submitting on a design or construction phase, **PSC shall select** the current phase from the dropdown. **Note – if many cells have red text, pink backgrounds, an applicable submittal phase was not chosen.**

Submittal phase needs to be chosen to properly work.

If a not-applicable phase is chosen, an error will appear.
"PSC Transmittal Guidance" for Design Phases & Construction Phase Submittals
U12345 - Davenport Hall Addition & Remodel - Example

Master Template list updated on: 08/31/2020

Transmittal sheets shall include (BOLD ITEMS should appear on each document sheet or plan sheet):
- Date
- Design Phase (SD, DD, 50% CD, etc...) or Report of Conceptualization Phase (Draft, 50% Draft, 75% Draft, Final, etc...)
- U of I recipient name, Planner and/or PM name(s)
- U of I project number
- Full project title

Closeout

Recipient | Required products to Deliver | "C" Size, if App.
---|---|---
F&S Planner and/or PM: Jane Doe (Planner): John Smith (PM) | - | Half Size
Design & Construction Submittal Receiving | PM, DD, D | Full Size
Code Compliance: Craig Grant <cgrant@illinois.edu> | - | -
Technology Services (CITES) Plant Design, Vince Tutich <vtutich@illinois.edu> | e, D | Half Size
Technology Services - Service/Project Management Office (formerly CITES CCME) | e | -
Division of Public Safety | e | -
Parking Department | e | -
Project Department(s): Provost Office | - | Half Size
Project College (as applicable): LAS | E, D, PM | Half Size
Other: Campus Historic Preservation Officer | - | Half Size
Email electronics only: INSERT email addresses of recipients

Recipient not applicable

Key:
D = link to digital download pdf and all native files (cad, word, excel, etc.)
E = emailed pdfs
D = backdoor internal access to F&S files
FB = hardcopy
05a & 05b Finish Binder/Boards and/or FFE Binder

<table>
<thead>
<tr>
<th>Delivered</th>
<th>V/N</th>
<th>Required for this submittal format &amp; delivery method to PM/QA</th>
</tr>
</thead>
<tbody>
<tr>
<td>00 - Minimum List of Deliverables</td>
<td>Y</td>
<td>Digital Download of native file and pdf of phase specific tab to PM &amp; Design and Construction Submittal Receiving</td>
</tr>
<tr>
<td>01 - Construction Cost Estimate</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>02 - Project Schedule</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>03 - Written Response to Comments</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>04a - Basis of Design (BOD)</td>
<td>- Final including All Updates</td>
<td>Y</td>
</tr>
<tr>
<td>04b - Project Applicable Information / Calculations</td>
<td>- Final</td>
<td>Y</td>
</tr>
<tr>
<td>05a - Int. &amp; Int. Finishes Binder(s)/Finishes Board(s)</td>
<td>- Installed - RECORD SET</td>
<td>Y</td>
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<tr>
<td>05b - Furniture, Fixtures, and Equipment Binder(s)</td>
<td>- Installed - RECORD SET</td>
<td>Y</td>
</tr>
<tr>
<td>06 - Project Manual</td>
<td>- RECORD SET (with Addenda, AAL, Field Directives, and As-Built Red Lines incorporated)</td>
<td>Y</td>
</tr>
<tr>
<td>07a - Drawing Set</td>
<td>- RECORD SET (with Addenda, AAL, Field Directives, and As-Built Red Lines incorporated)</td>
<td>Y</td>
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<tr>
<td>07b - Building Information Model (BIM)</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>08 - Design Presentation</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>09 - Illinois State Historic Preservation Office (ISHPO)</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>10 - O &amp; M’s &amp; Systems Manuals (check for full component list in the facility standards)</td>
<td>Y</td>
<td>Printed (upon client request) and digital download</td>
</tr>
<tr>
<td>11 - LEED Certification / Documentation</td>
<td>Y</td>
<td>Digital Download</td>
</tr>
<tr>
<td>12 - Final Approved Contractor Submittals with Log</td>
<td>Y</td>
<td>Digital Download</td>
</tr>
<tr>
<td>13 - Contractor As-Built Drawings and As-Built Project Manual</td>
<td>Y</td>
<td>Scanned and Digital Download</td>
</tr>
</tbody>
</table>

Include a separate transmittal sheet for each applicable recipient with the recipient’s name and delivery items highlighted.

With EVERY TRANSMITTAL PRIOR TO THE CONSTRUCTION PHASES, attach the following behind the transmittal sheet for the Planner/PM and Quality Assurance Copies:
- Printout of TAB [A-Info, Phases, Recip.]
- Printout of Updated “Closeout Minimum List of Deliverables” Checklist for Phase
- Updated Excel file of this spreadsheet on the CD

Updated 2020/08/31