

20 Appendix List

The templates and checklists in the Appendix are not a requirement of these policies and procedures; they serve as optional tools for FP&C personnel and facilitate consistent and efficient documentation throughout the project lifecycle.

Appendix	Title	Applicable phases				No change	Modifying	Creating
		Initiation	Planning	Execution	Closeout			
1	Introduction							
1.3	PPM Revisions Tracking Form	X	X	X	X			X
3	Roles and Responsibilities							
3a	Project Responsibility Matrix	X	X	X	X			X
4	Portfolio Process							
4.1.1	10 Year Capital Planning Request List Template	X				X		
4.5	Master Planning Workflow	X						X
6	Initiation							
6.1a	Project Request	X				X		
6.1W	Project Request Workflow	X						X
7	Planning							
7.3	Design Assessment Checklist		X					X
7.4a	Project Budget Template		X			X		
7.4b	Preparation of Project Budget Guideline		X				X	
7.9	Value Engineering Log Template		X	X				X
8	Execution							
8.4	Quality Assessment Checklists			X				X
9	Closeout Procedures							
9.1a	Punchlist Template				X			X
9.1b	Construction Closeout Checklist Template				X			X

Appendix	Title	Applicable phases				No change	Modifying	Creating
		Initiation	Planning	Execution	Closeout			
9.1c	Certificate of Substantial Completion				X	X		
9.3	Project Closeout Checklist				X		X	
9.6	Post Occupancy Report Template				X	X		
10	Scheduling Management							
10.2a	Schedule Management Checklist						X	
10.2b	Two Week Look-Ahead Schedule Template						X	
12	Risk Management							
12.2	Project Risk Management Typical Events Template	X	X	X	X		X	
13	Project Communication							
13	Communication Plan	X	X	X	X		X	
14	Change Management							
14W	Change Management Workflow		X	X	X		X	
14.2a	Change Order Review Checklist		X	X	X		X	
15	Procurement							
15W	Procurement Management		X	X			X	
15.2.2b	RFQ Addendum Master		X			X		
15.2.3a	Bid Package Signature Page		X			X		
15.2.3b	Bid Package Template Example		X			X		
15.2.3c	Addendum for IFB – Master		X			X		
15.2.3d	Bid Tabulation Template		X			X		
15.2.4a	RFP Package Signature Page		X			X		
15.2.4b	RFP Template Example		X			X		
15.2.4c	Addendum for RFP – Master		X			X		
15.2.5a	Insurance Checklist		X			X		
15.2.5b	Form 254		X			X		
15.2.5c	Form 255		X			X		
15.2.5d	Term Consultant Preliminary Score Sheet		X			X		
16	Payment Processing							
16.1a	First Payment Application Review Checklist			X	X		X	
16.1b	Progress Payment Application Review Checklist			X	X		X	

Appendix	Title	Applicable phases				No change	Modifying	Creating
		Initiation	Planning	Execution	Closeout			
16.1c	Final Payment Application Review Checklist			X	X			X
16.1W	Pay Application Management Workflow			X	X			X
16.1d	GC Waiver of Lien Rights and Indemnification			X	X	X		
16.1e	Subs Waiver of Lien Rights and Indemnification			X	X	X		
17	Document Management							
17	RFI Template			X		X		
17.2a	Submittal Summary Sheet Template			X		X		
17.2b	Transmittal of Submittals Template			X		X		
17.2c	Shop Drawing/Submittal Log Sheet			X		X		
18	Lessons Learned							
18.1	Project Lessons Learned	X	X	X	X			X
18.2	Workshop Project Lessons Learned				X			X
A	Recommended Leading Practices for P&P Manual							
A.1	Recommended Leading Practices for P&P Manual	X	X	X	X			X