

## APPENDIX A - Project Planning Checklists

Located in the Appendix A folder are a group of documents designed to help you plan and organize your project. Each Checklist is provided in Portable Document Format (PDF-requires Acrobat Reader), and two versions of Microsoft Word (98-2002 and 2007).

The checklists are designed to be “ready to use” so most users will simply print the checklists directly from the PDF. If you’d like to modify the checklist, than the Word document will allow for modification.

### Course Assessment & Inventory

This checklist will provide the basic structure to evaluate your course. Although you may be retaining an architect who may also perform this assessment (as a part of their contracted services), the evaluation and inventory process is an important step in setting up your project correctly.

### Architect & Builder Selection Process

Both of these checklists help you organize your evaluation efforts. Also, look in Appendix B for the Architect and Builder RFP Templates which should be used in conjunction with these checklists.

### Master Planning

This checklist is a basic list. You may find that additional, more detailed line items are necessary for your project. If you need to make modifications, look for the Word documents titled “BTB-Planning\_Checklists\_ALL.docx (or .doc)”. These are multi-page documents containing all of the checklists.

### Construction Management

This checklist covers some of the core responsibilities of the construction phase. Depending on the specifics of your project, you’ll want to plan ahead and begin formulating specific methods to perform these tasks. Also look in Appendix B for the documents titled “BTB-Project\_Management\_Control\_Sheet”, either as a Microsoft Excel file or as a PDF. These files and this checklist work together to set-up and manage the Construction Phase.

### In-House Project Task Review

If you’re considering direct control over your project as a General Contractor, you’ll want to review this checklist. It’s much more detailed and factors in many of the responsibilities that a Golf Course Builder would perform. Acting as your own general contractor has a number of advantages, but be aware that the more complex your project, the more these functions will require your time.

## Project Communications

This checklist will be important for all projects. Think ahead with regards to the mechanisms you'll need to keep golfers/members informed. Also look in Appendix B for several Communications Worksheets and in Appendix F for various documents and templates you can use to help create these communication vehicles.