**Date:**

**Project Title:** **W.O:**

Client:       Council District(s):

**Project Manager:       Phone:**

**Project Engineer:       Phone:**

## PROJECT INITIATION

| **✓** | Activity | Date Performed | **PDM Ref.**  **Chapter** | **Comments** |
| --- | --- | --- | --- | --- |
|  | Develop preliminary scope, schedule & total project budget |  | 3.4 |  |
|  | Identify project delivery method |  | 2 |  |
|  | Determine if consultant services are needed in any phase of the project |  | 6 |  |
|  | Identify funding strategies/sources |  | 3.3 |  |
|  | Open a Work Order |  | 3.2 |  |
|  | Create UPRS file |  | 5.1 |  |

## PRE-DESIGN

| **✓** | Activity | Date Performed | **PDM Ref.**  **Chapter** | **Comments** |
| --- | --- | --- | --- | --- |
|  | Prepare Pre-Design Report |  | 7, 4 |  |
|  | Review & update project schedule |  | 4 |  |
|  | Prepare class “C” estimate |  | 3.7 |  |
|  | Obtain client approval & signature |  | 7.6 |  |
|  | Obtain approval from Oversight Committee |  | 1.5, 7.6 |  |
|  | Update UPRS (budget, scope & schedule) |  | 5, 5.1 |  |
|  | Close W.O. (if not approved) |  | 25.8 |  |

## DESIGN

| **✓** | Activity | Date Performed | **PDM Ref.**  **Chapter** | **Comments** |
| --- | --- | --- | --- | --- |
|  | Provide Monthly Progress Reporting and update UPRS, budget, scope & schedule as changes occur (be aware of scope creep) |  | 4, 5, 5.1 |  |
|  | Maintain a project file to properly document design phase. Use E2020 online document record server |  | 8.1 |  |
|  | Send notification to Unions for construction projects |  | 8.1 |  |
|  | Conduct Design Kickoff meeting to initiate Design Development |  | 8, 8.1 |  |
|  | Obtain Survey & Geotechnical Reports |  | 8.2, 8.3 |  |
|  | Initiate Permit Processes |  | 8.1 |  |
|  | Coordinate with Public Affairs for community outreach |  | 1.6, 7.5 |  |
|  | Identify utility interference and coordinate required utility removal or relocation with PAC – 1st Notice |  | 8.5 |  |
|  | Coordinate traffic control planning, including Rush Hour Exemption (as needed) |  | 8.10 |  |
|  | 20% REVIEW MILESTONE   * Complete Design Plan Review, * Prepare Technical Specifications, |  | 8.1, 9, 10 |  |
|  | 50% REVIEW MILESTONE   * Prepare Class “B” estimate * Complete Design Plan Review, * Prepare Technical Specifications, * Complete QA/QC checklist(s), * Conduct client workshop * Conduct Constructability Review |  | 8.1, 9, 10 |  |
|  | 90% REVIEW MILESTONE   * Complete Design Plan Review, * Prepare Technical Specifications, * Complete QA/QC checklist, * Conduct client workshop * Conduct Constructability Review * Submit plans to Building & Safety (B&S) |  | 8.1, 9, 10 |  |
|  | Obtain all required clearances & permits |  |  |  |
|  | Prepare class “A” estimate |  | 3.7, 8.1 |  |
|  | Assemble 100% plans & specifications and Ready to Advertise Checklist |  | 8.1 |  |
|  | Obtain required signatures and stamps for plans & specifications |  | 12.1 |  |

## BID & AWARD

| **✓** | Activity | Y/N | **PDM Ref.**  **Chapter** | **Comments** |
| --- | --- | --- | --- | --- |
|  | Notify utility companies of the project - 2nd Notice |  | 8.5 |  |
|  | Board authorizes advertisement |  | 13.1 |  |
|  | Conduct Pre-bid Meeting and Job Walk |  | 13.4 |  |
|  | Prepare & issue addenda (obtain board authorization if an addendum change is + $100K) |  | 13.5 |  |
|  | Receive and open bids |  | 14.1 |  |
|  | Evaluate bids (PAC) and contract compliance review (BCA) |  | 14.2, 14.3 |  |
|  | Prepare Board Report to Award Contract (PAC) |  | 14.4 |  |
|  | Contract Award (BPW) |  | 14.4 |  |
|  | Contractor submits bonds & insurance to the BPW office |  | 14.5 |  |
|  | BPW Issues Notice to Proceed (NTP) |  | 14.7 |  |
|  | Construction Start Date |  | 14.7 |  |

## CONSTRUCTION

| **✓** | Activity | Date Performed | **PDM Ref.**  **Chapter** | **Comments** |
| --- | --- | --- | --- | --- |
|  | Identify the Construction Management (CM) Team |  | 15.1 |  |
|  | Identify the Lead Inspector (LI) |  | 17 |  |
|  | Conduct Pre-Construction Meeting (held within 15 working days from NTP) |  | 16.6 |  |
|  | Schedule and conduct weekly construction progress meetings |  | 16.6 |  |
|  | Review Contractor’s baseline schedule for reasonableness and completeness (BCA) |  | 18.2, 18.1 |  |
|  | Conduct monthly schedule update meetings |  | 16.6 |  |
|  | Conduct Partnering Session(s) |  | 15.2 |  |
|  | Maintain construction document control procedures for all construction records |  | 16.5, 16 |  |
|  | Review and process all contract required **Shop Drawings** in a timely manner |  | 16.1 |  |
|  | Review and respond to **RFI** in a timely manner |  | 16.2 |  |
|  | Review and issue all **Plan Clarifications** to the Contractor in a timely manner |  | 16.3 |  |
|  | Review and process all requests for “substitution” and “or equal” submittals |  | 16.4 |  |
|  | Conduct appropriate and timely inspections (BCA and Dept Bldg & Safety) |  | 17 |  |
|  | Take photographs of project construction progress at 30-day intervals during the entire period of contract work |  | 17.9 |  |
|  | Maintain and follow Job Site Safety procedures throughout contract work |  | 17.14 |  |
|  | Initiate and process all construction **Change Orders** in a timely, efficient and proper manner. |  | 20, 21 |  |
|  | Initiate and process all construction **Allowance Orders** in a timely, efficient and proper manner |  | 20.5 |  |
|  | Ensure that changes are minimized and that construction is completed within budget |  | 19 |  |
|  | Advise Contractor of any impending liquidated damage dates/events and assess any liquated damages in a timely manner |  | 18.5 |  |
|  | Conduct Partial Final Inspection (BCA) and obtain Partial Acceptance (as needed) |  | 22.1 |  |
|  | Identify equipment and/or facility Start-up needs |  | 24 |  |
|  | Identify a Startup Team to facilitate the coordination of startup activities |  | 24.1 |  |
|  | Coordinate equipment and/or facility testing and training |  | 24.2 – 24.5 |  |
|  | Finalize all change orders and negotiate any outstanding issues with the contractor |  | 20.4, 21.1 |  |
|  | Perform Final Inspection (BCA) and obtain Statement of Completion |  | 22.3 |  |
|  | Final Field Acceptance of the project by the Inspector of the Bureau of Contract Administration (BCA) |  | 22.3 |  |

## POST-CONSTRUCTION/PROJECT CLOSE OUT

| **✓** | Activity | Date Performed | **PDM Ref.**  **Chapter** | **Comments** |
| --- | --- | --- | --- | --- |
|  | Review and approve final record drawings (As-Built Plans) |  | 25.2 |  |
|  | Prepare the Project Performance Report or Lessons Learned Memoranda |  | 25.5 |  |
|  | Prepare the Contractor Performance Evaluation Reports (CPERS) |  | 25.6 |  |
|  | Prepare the contract acceptance Board Report (BCA) |  | 25.7 |  |
|  | Close the work order |  | 25.8 |  |

## SPECIALTY CONSTRUCTION CONTRACTS

| **✓** | Activity | Date Performed | **PDM Ref.**  **Chapter** | **Comments** |
| --- | --- | --- | --- | --- |
|  | Verify Oversight Committee approval for projects over $100,000 |  | 23.3 |  |
|  | Prepare Board Report if project is over $100,000 |  | 23.3 |  |
|  | Receive Quote from CiSCo Contractor |  | 23.3 |  |
|  | Evaluate and negotiate contract cost |  | 23.3 |  |
|  | Issue Final Task Work Order (TWO) |  | 23.3 |  |

## PRE-AUTHORIZED EMERGENCY CONSTRUCTION CONTRACTS

| **✓** | Activity | Date Performed | **PDM Ref.**  **Chapter** | **Comments** |
| --- | --- | --- | --- | --- |
| **CONSTRUCTION COST LESS THAN $200,000** | | | | |
|  | Prepare Board Report declaring “URGENT NECESSITY” Board report must indicate top listed or top three listed pre-qualified contractors |  | 23.2 |  |
|  | Prepare addendum to meet the project specifics |  | 23.2 |  |
|  | Prepare Class “A” estimate |  | 23.2 |  |
|  | Construction Services Manager (CSM) to contact listed contractors. |  | 23.2 |  |
|  | Conduct Pre-Bid meeting |  | 23.2 |  |
|  | Contractor to provide lump sum proposal |  | 23.2 |  |
|  | Evaluate the bids |  | 23.2 |  |
|  | Negotiate with Contractor |  | 23.2 |  |
|  | CSM to issue “Construction Order” |  | 23.2 |  |
|  | Contractor submits Insurance & Bond |  | 23.2 |  |
|  | CSM to issue “Notice to Proceed” |  | 23.2 |  |
|  | Proceed to Construction |  | 23.2 |  |
| **CONSTRUCTION COST EQUAL TO OR GREATER THAN $200,000** | | | | |
|  | Prepare board report declaring “URGENT NECESSITY”. Board report must indicate top listed or top three listed pre-qualified contractors. |  | 23.2 |  |
|  | Prepare addendum #1 to meet the project specifics |  | 23.2 |  |
|  | Prepare Class “A” estimate |  | 23.2 |  |
|  | CSM to contact Top listed or Top Three listed contractors. |  | 23.2 |  |
|  | Contractor to provide lump sum proposal. |  | 23.2 |  |
|  | Issue “Notice To Proceed” to the lowest bidder. |  | 23.2 |  |
|  | Proceed to Construction |  | 23.2 |  |