CONSTRUCTION PROJECT PROCESS

**Step 1: Initiate Contact**

a) Client defines scope, timeline, and available funds (if known);

b) Initial assessment by Capital Projects and Construction (CPC); max 2 hrs without a charge #; does not include creating drawings;

c) Hand out to client “Things to Consider” and “Projects: How long does it take?”

d) Use Triage Team for preliminary assessment; this is not to generate a hard estimate;

f) Give input back to client within two weeks; this may include a SWAG;

g) Request index number and funds to develop a hard estimate; usually a min. of $1200 depending on scope of project;

**Step 2: Design**

a) Client approves development of a hard estimate, timeline and drawings;

b) PM uses “CPC Project Management” Meeting Maker proxy to create deadlines for submittal of bids from crews (if using crews);

c) Reminder to include in the estimate funds for:
   
   i. Contract Administration
   
   ii. Space Planner
   
   iii. Signage
   
   iv. Locks/access
   
   v. ?Other

d) Make sure Mail room/Space Planner notified on any room changes.

e) Get approval from Associate Director and Director before taking estimate to client;

f) PM sends client written hard estimate and final scope using AECS project estimate summary sheet.

g) Client approves project initiation, in writing; identifies funding source/project number;

h) Take into consideration
   
   i. Items that might be long lead time issues: such as ordering equipment or LEED applications;
   
   ii. 1% for Art
   
   iii. SEED requirements
   
   iv. MBE/WBE requirement
   
   v. Crime prevention survey
Step 3: Permits/Bidding
a) CPC confirms who the Project Manager is to be; Reminder to include NBS on any projects that affect bldgs. under their management;
b) Record all companies invited to bid, (even if no response) and bid amounts; be aware of BOLI requirements;
c) PM must follow contracting procedures set by CPC Acct’ing;

Step 4: Construction
a) Place emergency contact information on CPC website;
b) PM and client identify stakeholder group; Set on going construction mtg. schedule;
c) PM holds Kick Off mtg.: all affected CPC staff are required to attend;
   i. Take attendance, keep minutes, record assignment/clarification of roles and responsibilities, action items assigned; distribute Microsoft Project schedule and attach schedule to the minutes; set construction meeting schedule and who needs to attend, when;
d) Begin Construction! Update schedule for crews as needed.
   e) Follow change order process set forth by Accounting; change orders that increase costs need to also proportionately increase CPC administrative costs and fees; remember that change orders can affect BOLI requirement;
f) Client approval of scope/budget changes needs to be documented via e-mail or clientsigned memo;
g) Initiate and keep up client-tenant notifications and communication throughout the project;
h) Stakeholder team mtgs. continue throughout the project; minutes distributed;
i) If work will extend beyond contract end date, have CA implement an amendment;
j) If a large project or one with great impact to the University, keep schedule and project updates on AECS website under “Large Projects”.

Step 5: Project Close Out
a) Develop and then complete the punch list;
b) Commissioning, as needed;
c) As-builts to AECS Drafter;
d) Give warranty information to the AECS OS2 for input into Facility Focus;
e) Transfer archive money;
f) Place on the CPC public web site:
   o Code appeals;
   o Fire-life-safety summaries;
   o FEMA reports
   o ADA access reports;
   o Geotechnical reports;
   o Others;
g) Remove emergency contact information from website;
h) Officially close project with Accounting;
i) Organize construction file using the Project Filing System Master template(D:\Contract_forms\Forms_2006\Project_Filing_Master.xls); give to OS2 to apply color tabs; give to archivist for filing in basement;
j) Last contact with client on this project;
k) Lessons Learned.