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| C:\Users\wbhun\Pictures\GCPS Logo Seal.png |  **Supplemental Attachment No. 3** | GCS | GADSDENCOUNTYSCHOOLS |

**PROCEDURE IMPLEMENTING BOARD POLICY 6320**

PROCEDURE FOR PROJECT SUPERVISION AND DOCUMENT ORGANIZATION.

**PART 1 – SUMMARY**

* 1. The following construction outline identifies and benchmarks key tasks and DOE required reports.

**PART 2 – GENERAL REQUIREMENTS**

1. The Project Outline shall be used to organize and track tasks for each major project.
2. The Director of Facilities, upon instruction from the governing body, shall initiate use of the Project Outline when instructed to proceed with design and construction of a project.
3. Updated copies of the Project Outline shall be provided to the design team throughout the design process.

**PART 3 – INTENT**

1. The Project Outline provides chronological recording of key benchmarks in the design and construction process.
2. It serves as an event log from conception to final acceptance of the completed project.
3. This document also serves as a reminder of when a task is due and what is involved in its execution.
4. This policy satisfies the following key requirements:
	1. Record program narrative providing project justification
	2. Architect assignment and contract review
	3. Engineer assignment and contract review
	4. Schedule development
	5. Budget development
	6. OEF forms

Project Name: Click here to enter name Date Started

|  |  |
| --- | --- |
| Meetings & Tasks | 1. Project Conception: Delivered to the Director of Facilities
 |
|  | 1. Pre-Design: Identify User Group. Special Note: The user group consists of personnel associated or familiar with program needs and that are authorized to make critical decisions.
 |
|  | * 1. Initiating Backup – Forms and supporting documentation outlining project.
 |
|  | * + 1. Program Summary or Narrative – Developed and provided by user group.
 |
|  | * + - 1. Identify use of space and program requirements that determine configuration and design of building
 |
|  | * + 1. Program start date goal
 |
|  | * + 1. Feasibility Study
 |
| Date | * 1. Written notification from the Deputy Superintendent to the Director of Facilities that a new project has been approved.
 |
|  | * 1. Architect assignment/selection (if over 5 million develop RFP for selection) (add 3 month)
 |
|  | * 1. Review Architect’s contract. Architect provides copy of insurance. Issue PO to Architect
 |
|  | * 1. Master Plan Review/Development
 |
|  | * 1. Written description of project developed by Owner and Architect
 |
|  | * 1. Engineers recommended by Architect
 |
|  | * + 1. Architect issues contract to Engineers/Consultants. Copies provided to GCS
 |
|  | * + 1. Require copy of all Engineer’s/Consultant’s insurance
 |
| Date | * 1. Pre-Design Kickoff meeting
 |
|  | * + 1. User group identified for updates and progress meetings.
 |
|  | * + 1. Adjacent departments to construction identified. Contacts selected to be added to monthly up-date list.
 |
|  | * + 1. Director of Facilities works with the User group to identify preliminary schedule.
 |
| Date | * 1. Add project to Construction Status Report on Board Agenda.
 |
| Date | * 1. Pre-Design conclusion meeting
 |
|  | * + 1. Review Narrative and Written Description
 |
|  | * + - 1. Identify major objectives and systems
 |
|  | * + 1. Budget set/discussed. Emphasize the design has to be within established budget
 |
|  | 1. Setup budget/project files
 |
|  | * + 1. Outline design process, task responsibilities and benchmarks
 |
|  | * + 1. Establish Project Concept and compare it to the narrative.
 |
|  | * + 1. Assignment of Owner’s Project Manager
 |
|  | * + - 1. Copy of Narrative, Written description/Project Concept, Contracts, User Group list and dates provided to Project Manager
 |
|  | 1. Schematic Design (SD)
 |
| Date | * 1. Schematic Design Kickoff meeting
 |
|  | * + 1. Physical Plant, DSS and Information Technology are all added to the users group making the “Project Team”.
 |
|  | * + 1. Overall schedule with benchmark dates set by the Team.
 |
|  | * + - * 1. Schematic Design \_\_\_\_\_\_\_\_ weeks
 |
|  | * + - * 1. Design Development \_\_\_\_\_\_\_\_ weeks
 |
|  | * + - * 1. Construction Documents \_\_\_\_\_\_\_\_ weeks
 |
|  | * + - * 1. Construction Duration \_\_\_\_\_\_\_\_ months
 |
|  | * + - * 1. Close-out \_\_\_\_\_\_\_\_ days
 |
|  | * + 1. Discuss each party’s responsibilities and relate them to design schedule.
 |
|  | * + 1. Budget review
 |
|  | * + 1. Discuss/Set sustainability goals
 |
|  | * + 1. Review site work required
 |
|  | * + - 1. Utilities, roads, parking
 |
|  | * + 1. Set planning and progress meeting dates (to be the same throughout Project)
 |
| Date | * 1. 50% Review
 |
|  | 1. Furniture selection and signage is discussed and sub-team formed.
 |
| Date | * 1. 100% Review – Results noted in meeting minutes
 |
|  | 1. Design Development (DD) – Kick-off meeting starts after approval of the SS docs. during the SS 100% review meeting.
 |
|  | * 1. DD key subjects
 |
|  | 1. Review project scope, budget and schedule
 |
|  | 1. Determine project delivery method (hard bid, CM)
 |
|  | 1. Determine owner provided data and equipment – make list with budget estimates.
 |
|  | 1. Identify all permitting and testing required. (federal, state, local)
 |
|  | 1. Identify any impact fees or stormwater management requirements
 |
| Date | * 1. 75% Review – Optional if needed
 |
| Date | * 1. 100% Review – full project team approval to be noted in meeting minutes
 |
|  | 1. Construction Documents (CD) – Kick-off meeting starts after approval of DD docs. during the DD 100% review meeting
 |
|  | * 1. CD key subjects
 |
|  | 1. Review project scope, budget and schedule
 |
|  | 1. Review all prior design notes and major elements of project verifying all needs have been met
 |
|  | 1. Owner provided services identified (i.e. testing, cabling)
 |
|  | 1. Finalize FF&E lists and develop bid packages
 |
|  | 1. Identify systems to be commissioned
 |
| Date | * 1. 50% Review (NOTE: if by hard bid start developing bid package for GC)
 |
|  | 1. Review coordination of systems (electric, controls, communications, AV/computer etc…)
 |
|  | 1. Confirm equipment lists. Identify long lead items
 |
|  | 1. Architect to provide owner close-out checklist (attic stock, training, certifications etc…)
 |
|  | 1. Identify direct purchase items. Make list
 |
|  | 1. Develop site logistics plan (equipment, security, preservation, traffic, noise, deliveries, laydown, parking, fencing, temp services, construction sign, etc…)
 |
|  | 1. If CM project – get preliminary GMP and review labor burden and general conditions
 |
| Date | * 1. 80% Review – submit copies to user group for written comments
 |
| Date | 1. Date written comments are due to Architect
 |
|  | 1. Review budget, scope and schedule
 |
|  | 1. Identify budget variances
 |
|  | 1. Develop budget reconcile strategy
 |
|  | 1. Incorporate additive and deductive alternates
 |
|  | 1. Verify all additional fees and permits are being addressed
 |
|  | 1. Develop scope of commissioning plan and price
 |
| Date | * 1. 100% Review – User group participation required and approval set reviewed and signed
 |
|  | 1. Architect to provide 2 copies of each:
 |
|  | 1. OEF forms
 |
|  | 1. LCCA-1, Life Cycle Cost Analysis
 |
|  | 1. 208, Letter of Transmittal
 |
|  | 1. 208A, Facilities Space Chart/Net and Gross Square Footage
 |
|  | 1. Project Implementation Information form
 |
|  | 1. Signed & Sealed plans for permitting review
 |
|  | 1. If it’s a CM project the Architect shall provide CD’s to CM for bid package development
 |
| Date | 1. Date CM will submit GMP or date of ITB
 |
| Date | 1. Date of Board Meeting
 |
| Date | 1. Anticipated Notice to Proceed
 |
| Date | 1. Confirm Monthly owner progress meeting dates
 |
|  | 1. Construction
 |
|  | * 1. Verify all License
 |
|  | * 1. Monthly updates will be provided by GC/CM
 |
|  | * 1. Occupancy by owner
 |
|  | 1. Close-out
 |
|  | 1. Verify all items on close-out checklist has been submitted
 |
|  | 1. Submit OEF forms 209 and 564CC
 |

**PART 4 – FILE ORGANIZATION**

4.1 Major/Minor Construction Projects File Folders

**1.000 Building Program**

1.100 Budget and COIP

1.200 Financial Status Reports

1.201 Copy of Advertisement and Bid Documents

1.300 Purchase Orders (PO)

1.400 Direct Purchase Orders (DPO)

**2.000 A/E Selection/Owner Confirmation**

2.100 A/E Agreement/License verification

2.200 A/E Invoices

2.300 A/E Status Reports

2.400 A/E Correspondence

2.500 A/E Certificates of Insurance

**3.000 Technical Data & Permitting Confirmation**

3.100 Survey & Test Reports

3.200 DOE Correspondence/OEF forms

3.300 Letter of Transmittal

3.400 Permitting

**4.000 Construction Manager (CM) Selection/Owner Confirmation**

4.100 CM Agreement/Amendments or GC Contract/License verification

4.101 Awarded trade contract proposals

4.200 Guaranteed Maximum Price (GMP)

4.300 Change Orders (CO)

4.400 Contractor Pay Requests

4.500 Request for Information (RFI)

4.600 Architect’s Supplemental Instruction (ASI)

4.700 Change Order Proposals

4.800 Contingency Modifications

**5.000 Pre-bid – Construction Correspondence**

5.100 Pre-bid/Pre-construction Meeting Minutes

5.110 Trade Bids/Owner Confirmation and copies of sub license

5.200 CM Status Reports

5.300 Project Rep. Daily Logs/Field Reports

5.400 Telecommunications

5.500 Submittals and Shop Drawings

5.600 Furnishings and Equipment

5.700 Art Acquisitions

**6.000 Substantial/Final Completion**

6.100 General Correspondence (User & Contractor)

6.200 Tax Exempt Purchasing/Savings Spreadsheet

6.300 Notice to Owner

6.400 U.S. Census Bureau

6.500 Certificates of Insurance

6.600 Legal Correspondence

6.700 Municipality Correspondence

6.800 Miscellaneous

6.900 Close-Out Documents