PLANNING DESIGN & CONSTRUCTION PROCESS

Campus
Department Owner
Guide
PLANNING DESIGN & CONSTRUCTION PROCESS

1. Identify Need
2. Work Order Process
3. Project Management
4. Identify Funding
5. Design Process
6. Construction Bids
7. Pre Construction
8. Construction
9. Project Close-Out
10. Completion
1. Identify Need

Department Owner Identifies Needs for:
- Classroom renovation / alteration
- Carpet removal / replacement
- Electrical repairs / installation
- Erection of new structures

Department Chair Approves Concept
- Communicates with FD &O Service Center
- Requests Work Order Number
2. Work Order Process

FD&O Administrative Services:
- Creates Work Order Number in TMA
- Submits Work Order to Building Permit Committee

Building Permit Committee:
- Determines need / exemption from building permit process
- Assigns specialized Project Manager from Units PDC / FM / EU
3. Project Management

Project Manager:

- Meets with Department Owner
- Develops preliminary Scope of Work
- Conducts initial feasibility study
- Creates initial cost estimate
- Obtains funding approval from Department Owner
- Prepares a formal conceptual study of the details of the project
Project Management

Project Manager may employ outside services such as:

• Feasibility Consultants
• Architectural Engineers
• Project Estimators
• Environmental Specialists
• Geotechnical Surveyors
• Historical Professionals

All professionals are geared towards the creation of a precise, detailed, and final Scope of Work (SOW).
4. Identify Funding

- Full Funding commitment is identified and approved.

Major Capital Improvements
Projects costing over $600,000

Minor Capital Improvements
Projects costing under $600,000
5. Design Process

**Major Capital Improvements**

Specifications, plans, and drawings are approved by:

- CSU Office of the Chancellor (CPDC)
- Plan Check Consultants
- California Environmental Quality Act (CEQA)
- State Fire Marshal
- other state regulatory boards.

**Minor Capital Improvements**

Specifications, plans, and drawings are approved by:

- Project Manager
- Department Owner
  - Scope of Work
  - Timelines
6. Obtaining Construction Bids

Public Works Contracts Officer starts the Bidding Phase

- Project Manager submits approved Drawing Plans, Specs, & Scope of Work
- Legal Advertisements are made in sources such as:
  - California Contracts Register
  - Local Newspapers
  - Trades Circulars
  - Builder Exchanges
- Pre-Bid Meeting for Licensed Contractors / Subcontractors to discuss details & Job Walk.
- All Clarification issues are addressed through Addendum to Contract.
- Bid Opening 30 days after the Pre-Bid meeting. Low bidder is determined. Bid is Evaluated.
- Responsive and Responsible bidder is determined.
- Contract is awarded.
7. Pre Construction

Pre-Construction meeting; includes:
- Project Manager
- Contractor(s)
- Department Owners
- Public Works Contract Officer
- Subcontractors
- Consultants

Project Manager chairs & Discusses:
- Protocols
- Access
- Phasing
- Planned work activities
- Parking
- Schedule of values
- Notice to proceed
- Critical Path Method (CPM)
- Construction schedule
- Request for payments
- Request for information (RFI)
- Change orders (C/O)

Public Works Contract Officer Discusses:
- Escrow (if applicable)
- Percentage of payment retentions
- Stop notices
- Notice of completion
- Close out
- Any other issues that may come up in the performance of the Contract.
8. Construction

During Construction

The Project Manager:
  • Serves as Main point of contact
  • Is responsible for all construction issues
  • Ensures the project finishes on time and on budget

University Construction Inspector:
  • Oversees planned activities being followed
  • Prevailing wages implemented
  • State codes meticulously installed
  • Fire Marshal inspections and correction
9. Project Close-Out

Project Manager initiates Project Close Out:

- **Final inspection** is done by a committee composed of:
  - The Project Manager
  - University Inspector
  - Department Owner
  - Architect / Engineer
  - Consultants
  - And CSU representatives

- **Fire Marshal inspections** are necessary for all projects indicated at the Building Permit process.
10. Completion

The Project Manager:
- Declares Project Completion
- Submits a Project Evaluation
- Shares evaluation with University Community
- Instructs the Contract Officer to:
  - File a Notice of Completion
  - Pay all approved invoices and retentions

Occupancy given to Department Owner
- Can be issued while punch-lists being performed by Contractor if normal activities will not be affected.
- Full occupancy usually follows.