

# 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
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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:

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

## Minor Capital Improvements

Specifications, plans, and drawings are approved by:

- o Project Manager
- o 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.