

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:

- 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.