



**SAN JOSÉ STATE
UNIVERSITY**

Planning, Design & Construction

To: Daniel No, Jaleh Behrouze, Annie Shi, Joyce Fan, Elena Stoian
From: Robert Dias
Updated: April 15, 2013
Subject: **Protocols for Data Input: Major & Minor Project Tracking Report**

The following are guidelines for completing the Major & Minor Project Tracking Report and an explanation of the definitions for completing the report:

1. Project Planning Assigned: Indicates the date when a project is assigned to the PM in the Planning Phase. Assignment will be confirmed in writing.
2. Project Planning Complete: Indicates the date when preliminary project scope, budget & schedule has been completed and provided to the Requestor.
3. Project Initiation: Indicates the date when the Project Approval form has been completed and fully executed.
4. Design Start: Indicates the date when the design phase of the project has started. If an A & E contract is needed, it is executed.
5. WD Complete: Indicates the date when the working drawings for the project are 100% completed. DSA & SFM approvals are received and plan check comments are resolved.
6. Bid Opening: To be deleted.
7. Constr Start Date NTP: Indicates the date when construction will start. A fully executed contract has been completed and a Notice to Proceed is issued.
8. “100% Construction + Punch list” to be changed to “Project Completed”: This indicates the date when the project is 100% completed, punch list is completed and ready for occupancy based on the schedule as originally set by the Project Initiation commitment or later revised. Will usually not be the same as the construction contract completion date.
9. % Spent to Date (By Elena): Indicates the actual project expenses as of the accounting month closed as a percentage of the Approved Current Budget.
10. Budget: Indicates the established budget set for the project. Can only be changed by approved management direction.

The following is an explanation of the rows in the “Tracking Criteria” Column:

1. Approved Current Plan: Indicates the current project plan. This should typically occur when Project Initiation is complete. Can only be changed by approved management direction.
2. Performance/Estimated/Actual: Indicates when milestones are estimated by the PM or actually completed. Dates prior to the report date must be actual.
3. Variance: Measures the difference, if any between the Approved Current Plan and the Performance/Estimated Actual.

General: Projects that are in the Planning Phase must not include information on the Planning line except for the Planning columns. See procedures for Capital Projects Planning. Milestones and Budget information during the Planning Phase should be indicated in the Performance/Estimated Actual row, once known to provide concept approximations.

Submittal Procedures:

1. Updates to the report shall be submitted to Elena by the 25th day of each month. These updates should be submitted as “redline” hard copies on last month’s reports.
2. Elena will update the master worksheet for issuance by the 30th day of each month. This report will indicate “As of month/date/year”.
3. Note: Elena will not distribute a reminder as to when the report is due.