PLANNING DESIGN & CONSTRUCTION PROCESS

Campus
Department Owner
Guide
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 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
- Public Works Contract Officer
- Contractor(s)
- Subcontractors
- Department Owners
- 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
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.