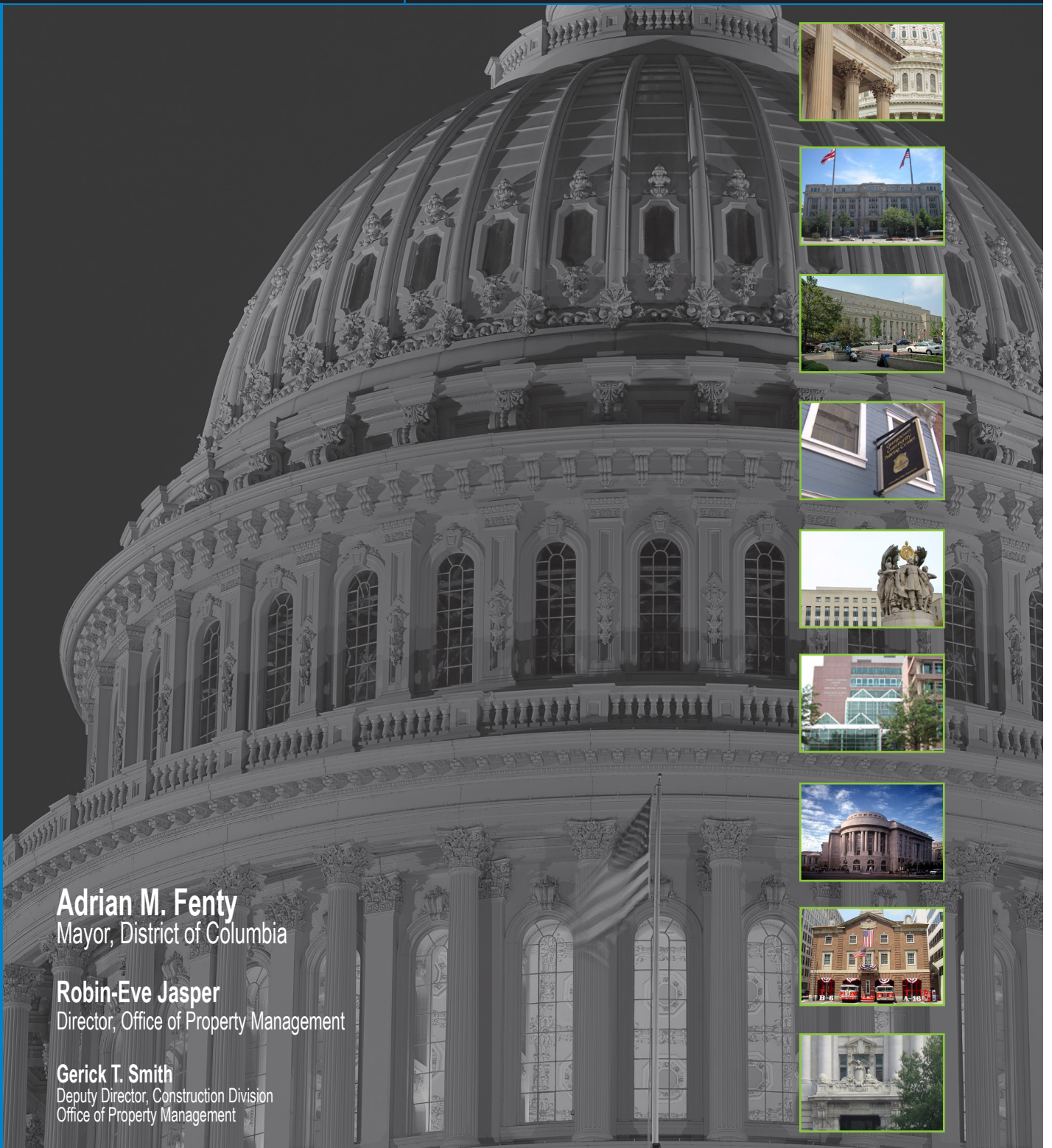




District of Columbia
Office of Property Management
Construction Division

PROJECT DELIVERY MANUAL



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February 4th, 2009



Property Management

Government of the District of Columbia

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Prepared By

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District of Columbia
Office of Property Management

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Initiation

Planning

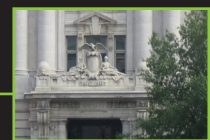
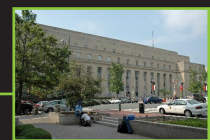
Design

Construction

Closeout

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2. Introduction
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Executive Summary:

The Office of Property Management (OPM) implements the Capital Construction Program for multiple District Agencies. This Project Delivery Manual outlines the processes and procedures utilized by the Office of Property Management in administering capital construction programs for facilities construction projects. This manual includes sections for project initiation, planning, design, construction, closeout of contracts and process controls.

Some of the challenges OPM faced were years of overlay with numerous non-standard methodologies for managing and implementing projects. As a result, Project Managers (PMs) had no consistent processes or guidelines to assist them in their duties and project management. Typically, the longevity of the PMs contributed to a project's success or failure, as they either possessed invaluable historic knowledge about how projects are initiated and what steps or protocols are necessary to carry them through to completion, or they had no formal guidance or minimal historical background to support the success of a project. The PMs who possessed institutional knowledge typically never documented it, but if documented, it was not always correct. It was very common to get multiple answers and guidance for project implementation, depending on who you spoke with or which legacy documents may have been discovered. As new personnel joined the organization there were no reference documents or manuals pertaining to the "correct" way to initiate and manage a project through its life cycle. There was also no guidance to help new personnel understand the roles and responsibilities between OPM and other city agencies.

This Project Delivery Manual acts as a roadmap of activities, information, process flow and controls. It is intended to provide more comprehensive information than has historically been available in the past. In its most basic sense, it is a comprehensive "how-to" guide in understanding the steps involved in each phase of a facilities construction project. This Project Delivery Manual has been developed as a tool to facilitate communication between OPM, its customers, and the community. Its goal is to provide a formal, process-oriented, systematic method for managing and delivering quality capital projects for the District of Columbia.

The Project Delivery Manual includes five (5) sections and overarching process controls: initiation, planning, design, construction, and closeout. Each section includes a detailed description, checklist, flowchart, and a list of pertinent forms for each stage of project implementation.

Standard tasks and methodologies have been codified in the manual for the project manager's use throughout each phase of project delivery. District of

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Columbia clients and partnering agencies will benefit from a manual that clearly define the tasks that a project manager should consider for every phase of a project. With greater transparency and standardization created by OPM's manual, communication is expected to improve, an enhanced service level culture within OPM can develop, and the potential for client satisfaction will increase.

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Introduction:

The methodology in developing the Project Delivery Manual consisted of assessment of OPM's existing processes and procedures. The assessment identified key strengths and vulnerabilities of OPM's project administration, management, and execution processes. A series of interviews helped map function and information flows, indentifying the relevant values and challenges. Gaps were identified that reduced efficiency and required improvement.

Once the current process and procedures were documented and gap analysis assessed, recommendations were developed to identify and define areas for improvement to effectively guide program managers through the capital construction project cycle. Standard business practices were included to enhance the new project delivery method.

The Project Delivery Manual includes five (5) phases and overarching project controls. The Project Delivery Manual phases are: 1) initiation, 2) planning, 3) design, 4) construction and, 5) closeout. Each section includes a detailed description, checklist, flowchart, and a list of forms required per stage of the project.

The ***checklists*** have been developed to support project implementation and specifically identify the responsibility for key tasks. It identifies the responsible party per task, reviews/approvals, deliverables, applicable forms, and specific activities per phase, for example the different stages within the design process. The checklists can be adjusted based on the scope of the project. The OPM Project Manager will consult with the client throughout the project regarding issues or questions that arise in execution of the project requirements.

The ***flow charts*** capture the high level major activities within each phase. This allows the PM to understand the full spectrum and process per phase. They help visualize what is going on as a schematic representation of each activity in a workflow process. The flow charts are a crucial part in understanding the business and operational step-by-step components and relationship development of the Project Delivery Manual.

The ***forms*** have been consolidated and standardized. There were over 150 existing forms within the OPM directory. A fraction of them were of use and value and more than half were eliminated in the assessment and development of the Project Delivery Manual. The forms range from request for payment, request for a project, daily report logs, contractor evaluation, and cash flow reports, etc.

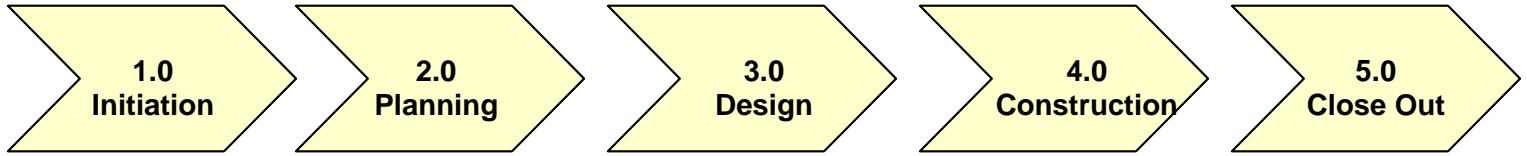
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Each form is tied to a specific task within the checklists. This will assist the PM in knowing what form to fill out, why, when, and where it is located.

Based on the scope of the project, the project manager will determine the level of implementation necessary to facilitate a quality project.

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- 1.1 Project Initiation
- 1.2 FCA Report
- 1.3 Budget/ Estimate Financial Feasibility
- 1.4 Budget Controls Cost Structure
- 1.5 Document Control
- 1.6 Project Work Plan/QA
- 1.7 Project Kick Off Meeting

- 2.1 Existing Conditions
- 2.2 Benchmarking
- 2.3 Site Evaluation
- 2.4 Comprehensive Plan
- 2.5 Financial Feasibility
- 2.6 Risk Evaluation
- 2.7 Outreach Plan
- 2.8 Concept Design
- 2.9 Contracting Strategy
- 2.10 LEED Planning

- 3.1 Pre-Design
- 3.2 Concept (15%)
- 3.3 Schematic Design (35%)
- 3.4 Design Development (65%)
- 3.5 Construction Developments (100%)
- 3.6 Compliance Submittals

- 4.1 Staffing Plan
- 4.2 Pre-Construction Conference
- 4.3 Pre-Construction Meeting
- 4.4 Mobilization
- 4.5 Submittals
- 4.6 Site Survey
- 4.7 Utilities
- 4.8 Daily Reports
- 4.9 Issues and Rejections
- 4.10 Construction Meetings
- 4.11 RFI
- 4.12 Safety Plan Monitoring
- 4.13 Stop Work Orders
- 4.14 Site Visits
- 4.15 Progress Photos
- 4.16 Testing

- 5.1 Close-Out Checklist
- 5.2 Deficiencies List / Substantial Completion Final Inspection
- 5.3 LEED Construction
- 5.4 Drawings / As Built
- 5.5 Waivers of Liens
- 5.6 Final Acceptance
- 5.7 Lessons Learned
- 5.8 Archiving
- 5.9 Warranty Follow-up/ Walkthrough

- PROCESS CONTROLS**
- | | |
|---|--|
| <ul style="list-style-type: none"> A. Procurement and Contracting B. Funding Approval C. Codes D. Payment Process E. Contractor Evaluation F. Stakeholder Engagement G. Issues Tracking H. Risk Identification and Evaluation | <ul style="list-style-type: none"> I. Monthly Report J. Schedule K. QA / QC Inspections L. Permitting M. Move Coordination N. FF&E Coordination O. Final Decisions P. Claims Q. Commissioning |
|---|--|

DOCUMENT CONTROL

Master File Index
Archiving

FORMS

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



STAKEHOLDERS															
Procedures/Tasks	Congress	Mayor	City Admin	Portfolio	Client Agency	OCP	OFRM	DCRA	OCTO	PSD	OPM	OPM Dir. Fac. (eql)	OPM Dir. Const	Cluster PM	PM
Initiation (CIP)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FCA					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Justification				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feasibility				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>										<input checked="" type="checkbox"/>
Programming				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
Contracting						<input checked="" type="checkbox"/>									<input checked="" type="checkbox"/>
Change Orders					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									<input checked="" type="checkbox"/>
Permitting															<input checked="" type="checkbox"/>
Invoices							<input checked="" type="checkbox"/>							<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Acceptance					<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Closeout						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Stakeholder

A stakeholder is any person or organization who can be positively or negatively affected by or cause an impact to project delivery.

It is important to identify all stakeholders for the purpose of identifying their project interest and objectives.

A stakeholder analysis is performed when there is a need to clarify the consequences of envisioned changes or at the start of new projects.

Stakeholder analysis is a form of analysis that aims to identify the stakeholders that are likely to be affected by the activities and outcomes of a project, and to assess how those stakeholders are likely to be impacted by the project. Stakeholder analysis has the goal of developing cooperation between the stakeholder and the project team ultimately, assuring successful outcomes for the project.

Types of Stakeholders

- **Primary stakeholders are those ultimately affected, either positively or negatively, by project delivery.**
- **Secondary stakeholders are the ‘intermediaries’, that is, persons or organizations who are indirectly affected by project delivery.**
- **Key stakeholders (who can also belong to the first two groups) have significant influence on project delivery or project importance.**

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MASTER FORM INDEX

Forms/Letters		Form No.
Project Initiation Phase		CD-I-0000
1	Project Request Form	CD-I-0001
2	Facility Condition Assessment Report	CD-I-0002
3	Request for Facility Condition Assessment Report	CD-I-0003
4	Master File Index	CD-I-0004
5	Project Work Plan and Quality Assurance Plan	CD-I-0005
6	Project Kickoff Meeting Agenda	CD-I-0006
7	Letter Template	CD-I-0007
8	Memo Template	CD-I-0008
9	Transmittal Template	CD-I-0009
10	Meeting Sign In Sheet Template	CD-I-0010
11	Meeting Notes Template	CD-I-0011
Planning Phase		CD-P-0000
1	Cash Flow Report	CD-P-0001
Design Phase		CD-D-0000
1	Pre-Design Agenda	CD-D-0001
2	Agency Review Checklist	CD-D-0002
Construction Phase		CD-C-0000
1	Pre-Construction Conference Checklist	CD-C-0001
2	Contact Information for Emergencies	CD-C-0002
3	Submittal Register	CD-C-0003
4	Submittal Transmittal Form	CD-C-0004
5	Contractor's Daily Report	CD-C-0005
6	Rejection Notice (Inspection Failure)	CD-C-0006
7	Contractor Notification (Inspection Failure)	CD-C-0007
8	Request For Information (RFI)	CD-C-0008
9	Request For Information (RFI) Log	CD-C-0009
Closeout Phase		CD-F-0000
1	Project Closeout Checklist	CD-F-0001
2	Contractor Deficiency Notice	CD-F-0002
3	Memo to Contractor of Deficiencies	CD-F-0003
4	Contractor Deficiency List	CD-F-0004
5	Memo to Using Agency notifying completion of deficiencies	CD-F-0005
6	Receipt for As Built Drawings	CD-F-0006
7	Checklist for Final Acceptance Package	CD-F-0007
8	Agency Feedback Survey	CD-F-0008
9	Transmittal Form to Facility	CD-F-0009

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MASTER FORM INDEX

Forms/Letters		Form No.
Process Controls		CD-G-0000
1	Memo to Using Agency to approve list of Contractors	CD-G-0001
2	Request to Advertise for Bids	CD-G-0002
3	Consultant Criteria List	CD-G-0003
4	Tabulation of Scores	CD-G-0004
5	Evaluation Team Report to Contracting Officer	CD-G-0005
6	Justification for Selection	CD-G-0006
7	Record of Negotiations	CD-G-0007
8	Task Order Document	CD-G-0008
9	Authorization for Title II Services	CD-G-0009
10	Routing Sheet	CD-G-0010
11	Description of Change document for Article 3 Letter (BCD)	CD-G-0011
12	Log of Change Order drawings	CD-G-0012
13	MFR of Negotiations for Change Order	CD-G-0013
14	Checklist for Change Order Package	CD-G-0014
15	MFR on failure to agree on C.O. Costs	CD-G-0015
16	Change Order log (PMIS Report)	CD-G-0016
17	Article 3 Letter (BCD) Checklist	CD-G-0017
18	Reason for Change and Status of Work	CD-G-0018
19	Budget Approval Form	CD-G-0019
20	Request OFRM to Reallocate Funds	CD-G-0020
21	Payment Request Form	CD-G-0021
22	Progress Payment Request Rejection Form	CD-G-0022
23	Payment Request Receipt from OFRM	CD-G-0023
24	Payment Log (in PMIS)	CD-G-0024
25	Contractor Evaluation	CD-G-0025
26	Communication Guidelines	CD-G-0026
27	Contact List (need template)	CD-G-0027
28	Action/ Issue Log	CD-G-0028
29	Risk Log	CD-G-0029
30	Project Performance Report	CD-G-0030
31	Sample Milestone Schedule	CD-G-0031
32	Surveillance Report	CD-G-0032
33	Permit Request Form	CD-G-0033
34	Building Permit fee payment form	CD-G-0034



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INITIATION

INITIATION

Planning

Design

Construction

Closeout

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Initiation

The initiation phase is utilized to identify the need for a project, define requirements, and obtain approval to be included in the Capital Improvement Plan. This ensures inclusion of the proposed projects in the budget and formally authorizes the project or start of a project phase.

As part of the District's overall budget request, the Office of Budget and Planning (OBP) has the responsibility to prepare and submit the Capital Improvement Plan (CIP) that includes all the capital projects.

Capital budgeting is closely connected to the Facility Condition Assessments (FCA) as the data collected during these annual assessments enable the agency directors to better estimate their capital needs over multiple years.

OPM provides technical support and FCA Reports to the Using Agencies, and assists them in submitting their requests for new projects. OPM works with OBP to evaluate all requests for new projects.

Project Initiation:

OPM plays a major role in enhancing the values of the facilities through implementation of the Capital Construction Program. OPM has the implied regulatory authority to be involved in development of capital projects for District agencies.

In the fall of each year, OBP issues a budget call to all agencies requiring them to submit their capital project requests. The budget calls require updated information for ongoing projects (increase or decrease in funding or planned expenditure) and submittal of new projects. Agencies must submit project justification, scope, cost estimate, expenditure plans, implementation schedule, project milestones, operating budget impact and priority if more than one project is requested.

As the implementing agency responsible for administering most of the facility capital construction projects, OPM takes the lead in preparing the capital project requests for the using agencies. OPM validates the project requests and the budget cost estimates for the projects before they are submitted to OBP.

The Capital Budget Team (CBT), chaired by the City Administrator, reviews all the capital project requests to assure that there are no duplications of requests from other agencies and that they meet the established criteria for inclusion in

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the Capital Improvement Plan (CIP). Upon review, CBT sends its recommendations to OBP for inclusion in the District's overall budget request. OBP submits the budget request to the Chief Financial Officer (CFO). The CFO transmits the District's overall budget request by including the CIP to the Mayor. Upon review and approval the Mayor sends it to the Council (usually during the month of March). Upon approval by the Council and the Mayor, the budget is sent (usually during the month of June) to Congress for approval. From Congress, the budget is sent for Presidential approval.

The CFO notifies all agencies as soon as the budget is approved. OPM starts developing the contracts and/or task orders that trigger the implementation of the projects as soon as the funds are actually loaded into the SOAR.

Facility Condition Assessment (FCA) Reports:

To implement the projects approved in the CIP, OPM assigns project managers to work with each of the using agencies. This is important to maintain continuity on the projects and to assure the using agencies that they have representatives in OPM with requisite knowledge and interest about the needs for their facilities. The PMs strive to maintain consistent communication with the representatives of the using agencies.

OPM is responsible for maintaining and updating FCA Reports for all District of Columbia facilities. If any of the facilities do not have FCA Reports, the PMs shall notify OPM requesting procurement of FCA Reports. If they have a FCA Report that is more than three years old, they shall request an updated Facility Condition Assessment and Report (FCA Report). OPM procures an A/E to prepare an FCA.

Budget Controls and Costs Structure:

A Project Request Form formally acknowledges that OPM has the authority and responsibility to encumber funds and resources to execute the project. Once a project has been approved for funding OPM prepares a project budget and scope of work based on the approved project or FCA report.

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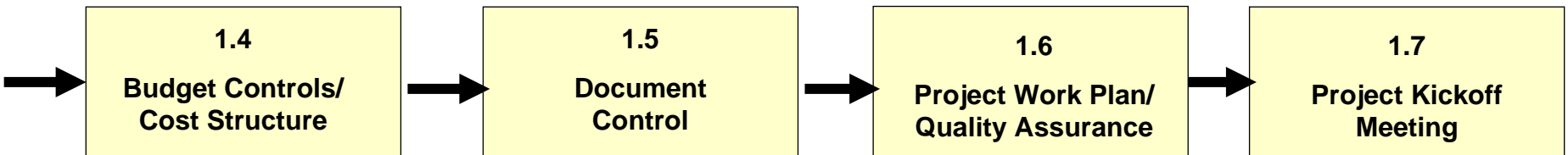
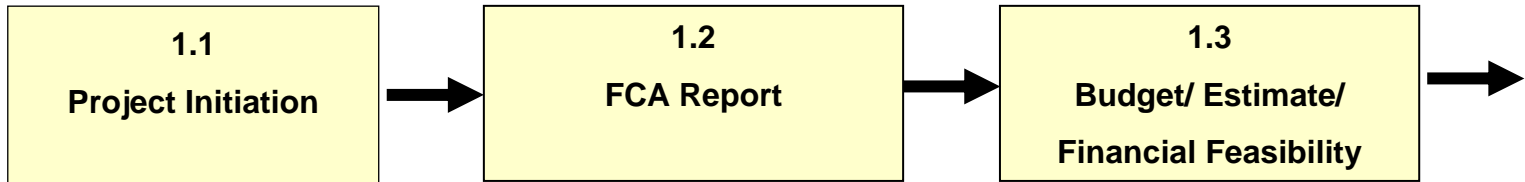
Project Setup:

Project setup allows for the establishment and execution of management procedures and processes for proper project execution. These services may include, but are not limited to establishing client expectations and objectives; scopes of service and deliverables; project budget and schedule; communications procedures; contract administration; project closeout; and safety and quality assurance.

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INITIATION



Procedural Checklist Initiation



Initials & Date or NA	Resp Person	PMIS	Doc Sys	TASKS	FORMS
	Using Agency			Using agency or Deputy Director submits a Project Request Form for consideration. The Project Request is reviewed by the OPM DD and determined if feasible for further review.	Project Request Form CD-I-0001
	OPM DD			OPM DD issues a budget call to agencies requesting them to complete a presentation of their budget request in conformance with the OBP Comprehensive Plan.	
	OPM DD			OPM DD copies all the submittals from the agencies and sends to the Capital Budget Team (CBT) chaired by the City Administrator.	
	CBT		X	CBT evaluates the agency request for funding based on project justification, cost analysis (operating budget impact), and financial analysis (useful life). CBT recommends in the form of a Capital Improvement Plan (CIP) and submits to the Chief Financial Officer (CFO).	
	CFO		X	CFO forwards CIP to the Mayor.	
	Mayor		X	Mayor submits the CIP budget to City Council. City Council approves the CIP Budget.	
	City Council		X	Congress adopts the District budget (inclusive of the CIP budget)	
	Congress		X	President approves the CIP budget	
	OPM DD		X	OPM identifies the need to update the Facility Condition Assessment (FCA) Report at least every three (3) years or upon request of the using agencies through a memo.	Facility Condition Assessment Report CD-I-0002 Request for Facility Condition Assessment Report CD-I-0003
	PM		X	PM selects A/E contractor to perform FCA (refer to Procurement and Contracting process) and requests them to submit a schedule for delivery.	
	A/E			A/E contractor updates the FCA or creates a new FCA formatted using a template.	
	A/E		X	A/E contractor finalizes the report and submits printed copies with CD ROM to PM for review and filing on the file server.	
	PM		X	PM updates the list of facilities with Building Identification Number (BIN), address, name, gsf, year built, ward number, and name of agency that uses the facility. PM informs the Portfolio division of the updates.	
	PM			PM prepares the scope of work and estimate, with support from in-house engineering and estimating, for a capital improvement project based on FCA Report with input from using agency.	
	PM			If the work is of a certain type, PM can assign it as a pool project for separate funding.	
	PM		X	PM submits project estimate to Using Agency for transmittal to Office of Budget and Planning (OBP).	
	CFO			CFO notifies all the agencies of the approval of the budget and loads the budget in SOAR. OFRM notifies the Cluster Leader as soon as the budget is loaded.	
	PM	X		PM obtains project number to project (if not previously assigned). PM enters project into Project Management Information System (PMIS).	
	PM	X		PM creates project cost structure in PMIS for tracking project cost.	
	PM	X		PM establishes preliminary project budget in PMIS and obtains OPM DD approval.	
	PM		X	PM establishes electronic and hard-copy project filing system in accordance with OPM standard file index.	Master File Index CD-I-0004
	PM		X	PM modifies the project templates, as appropriate, to their project.	Letter Template CD-I-0007, Memo Template CD-I-0008, Transmittal Template CD-I-0009, Meeting Sign In Sheet CD-I-0010 Meeting Notes CD-I-0011
	PM		X	PM prepares a Project Work Plan and Quality Assurance Plan.	Project Work Plan and Quality Assurance Plan CD-I-0005
	PM		X	PM prepares and completes project kickoff meeting and distributes kickoff meeting notes.	Project Kickoff Meeting Agenda CD-I-0006, Meeting Sign In Sheet CD-I-0010, Meeting Notes CD-I-0011

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CONSTRUCTION DIVISION



Project Request Form (Page 1 of 2)

Describe Project, Program and Identify Funding

New Funding **Reallocation**

Building Name

Proposed Project Title

Requesting Agency Contact

Agency/Department

Phone Number

E-Mail Address

Project Description/Goal: (Describe scope of work, including facility demolition, renovation, alteration, architectural, electrical, mechanical work, or equipment installation, etc.)

Project Justification or Reason for Request:

Proposed Funding Source:

Estimated Cost:

Desired Project Timing:

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Project Request Form (Page 2 of 2)

Disposition of Existing Facilities:

Agency Precedence <input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low		
Requesting Agency		Requesting Department
Signature	Date	Date
Deputy Director, Construction Division, OPM		
		Date
		Signature of Deputy Director

Date: _____

Received by OPM: _____

Approved _____

Rejected _____

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FACILITY CONDITION ASSESSMENT (FCA) Report

Scope of Work

GENERAL

The A/E will perform an evaluation at each of the facilities listed in the Scope of Work (SOW) provided with the Task Order. The evaluation will provide an independent and documented overview of infrastructure conditions in a simple and concise.

For each FCA, the consultant/contractor shall complete the following formats:

- A. A **Building Evaluation Form** to address major building system. Each system will be evaluated using a suggested grading system; for example: A, B, C, D, F. Sample grading descriptions shall be provided to the District. Estimates of remaining useful life span and costs to correct the deficiencies (“D”s and “F”s) and costs for replacement of each major system shall be provided. A comparison of the correction cost vs. replacement costs for each major system with a single number cost ratio may be provided. Total building correction cost will also be compared with total building replacement cost, providing a total cost ratio. In addition, brief narrative descriptive comments shall be provided for each component describing critical deficiencies and/or required upgrades.
- B. A **Site Evaluation Form** similar to the Building Evaluation Form.
- C. A **Summary form** of significant deficiencies and recommendations including individual cost for each element and totals for each facility. All “D”s and “F”s will be included with a summary of costs. In addition any identified common problems across the facility shall be identified. Identify any other significant code or other deficiencies if not already identified in the “D”s and “F”s.

Facility evaluations shall include a site visit to the facility by an interdisciplinary team. Members include professional & experienced staff with extensive knowledge in their particular discipline. Required disciplines will typically include architecture (with fire & safety expertise), mechanical (with plumbing expertise), electrical, estimating, structural, automatic transport (elevators, escalators etc.), and site. Staff shall be engineers, architects or equivalent for discipline evaluated. Much of the data for this report will be gained from personal inspection, from interviews with the appropriate facility staff and the analysis of their knowledge and familiarity of facility systems, and from an overview of facility as-built drawings (especially for structural & site utilities).

The District will provide as-built drawings, if available, facilities personnel with the most knowledge of the existing systems as tour guides, and any significant maintenance or engineering studies.

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DELIVERABLES

After the visit to each facility, the consultant/contractor shall submit three (3) copies of the draft FCA within five (5) business days or less to the Project Manager along with an electronic copy in MS Word or other agreed upon format according to the schedule outline in the Task Order. All comments from the District shall be discussed and resolved. All agreed upon comments shall be included in a Final FCA Report which is prepared according to the T.O. schedule. The contractor shall review the Final Report to verify that the grading of systems is consistent. Identified discrepancies will be documented, discussed with the Project Manager and kept in the project records.

The final report will be in color for both electronic and hard copies. Electronic documentation will be developed using software agreed upon with the Project Manager or directed by the customer. The contractor will provide editable and printable documentation. The contractor shall provide the District with four (4) hard copies of the entire report. The contractor shall also provide the complete electronic versions via email, on CD-ROM, DVD, or other portable media device.

Specific Scope for each Discipline

Architectural System: The FCA may include, but is not limited to include a physical inspection of all Architectural components, including roofs, exterior wall assemblies, windows, interior finishes/doors, life safety requirements, handicapped accessibility features, fixed equipment and signage. Based on the physical inspection, facility manager's input, and available data, existing conditions shall be fully documented. Estimated remaining useful life spans and a short narrative description for each component shall be also provided.

Heating Ventilating and Air conditioning (HVAC) System(s): The FCA shall include a physical inspection of all HVAC systems including air-handlers, package equipment, room terminal units, refrigeration equipment, piping, valves, ductwork, room air distribution, controls, indoor air quality issues and other equipment and system components essential for the operation of the HVAC systems. Inspection, testing, calibration data, maintenance and repair histories shall be reviewed and facility personnel interviewed. Age, condition, capacity deficiencies, equipment/system efficiency, equipment controls shall be documented. Anticipated life expectancy, based on sample data from the District and the A/E's educated analysis, shall be recorded. This information shall be used to evaluate the equipment's ability to support the function that it is currently serving or to determine whether it can support the proposed design or project. Any identified or known deficiency in capacities, ASHRAE system deficiencies, and differences from NFPA and other national code requirements shall be identified. Any identified or known piping flow problems, deteriorated piping problems, pumping problems, etc. shall also be recorded.

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OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Chiller Plant and Distribution System: The FCA shall include a physical inspection of the chiller plant and related systems including refrigeration equipment, cooling towers and condenser water pumping systems, primary and secondary chilled water pumping systems, condenser water system, valves, and other equipment and system components essential for the operation of the Chiller system. Inspection, testing, and calibration data, maintenance and repair histories shall be reviewed and facility personnel shall be interviewed. Age, condition, capacity deficiencies, equipment/system efficiency and equipment controls shall be documented. Projected life expectancy, based on sample data from the District and the A/E's educated analysis, shall be determined. This information shall be used to evaluate the equipment's ability to support the function that it is currently serving. Any identified or known deficiency in capacities, ASHRAE system/standards deficiencies, and deviations from NFPA and other national code requirements shall be included in the FCA report. Any identified or known piping flow problems deteriorated piping problems; pumping problems etc. shall also be included in the FCA report.

Automatic Transport Systems: The FCA may include, but is not limited to include a physical inspection of all vertical transport systems. Inspection, testing and calibration data, maintenance and repair histories shall be reviewed and facility personnel shall be interviewed. Age, condition, capacity deficiencies, speed, travel controls, etc. shall be documented. Projected life expectancy, based on sample data from the District and the A/E's educated analysis, shall be determined. This information shall be used to evaluate the equipment's ability to support current and short-term peak traffic loads or new requirements based on scope of the project. The condition of traveling cables, controllers, control systems, hydraulic jack units, pump units, guiderails, all operating devices, independent and fire service functions, car frames, car platforms, car enclosures electric interlocks, intercom or telephone operations, motors and handicap accessibility shall be reviewed. Any identified deviations from NFPA 13, and ASME 17.1 and 17.2, or other applicable codes shall also be reported.

Plumbing, Gas, and Fire Sprinkler Systems: The FCA may include, but is not limited to inspection of storm water, domestic cold water, domestic hot water and domestic hot water recirculation systems, domestic hot water heaters, vacuum systems and sprinkler systems. Inspection, testing, and calibration data, maintenance and repair histories shall be reviewed and facility personnel shall be interviewed. Age, condition, capacity deficiencies, equipment/system efficiency, control of equipment shall be documented. Life expectancy, based on the A/E's educated analysis, shall be determined. This information shall be used to evaluate the equipment's ability to support the function that it is currently serving. Any deficiency in capacities, national plumbing code deficiencies, and other national code requirements shall also be identified.

Electrical, Lighting and Communications Systems: The FCA may include, but is not limited to a physical inspection of all electrical, lighting and communications systems including

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incoming electrical service and switchgear, incoming telephone service and switch, main facility fire alarm system, site lighting and security systems, secondary distribution system (transformer, secondary service equipment, risers, panel boards and branch circuit wiring), essential electrical system (all related equipment including fuel oil tanks), interior lighting and power, interior fire alarm system, interior telephone, data and communications systems, lightning protection system and electrical, signal and telephone closets. Recent maintenance and testing reports and repair histories on electrical equipment if available shall be reviewed and any deficiencies documented. Age, condition and any capacity deficiencies for all systems shall be documented. Life expectancies, based on the consultant's educated analysis, shall be determined. All equipment's capability to continue to function in the future shall be evaluated. Any National Electrical Code (NFPA 70), any other national code deviations or violations shall be identified. The major portion of the above data shall be collected by personal inspection of the equipment or systems with the assistance of the appropriate Facility staff.

Structural Systems: The FCA shall include a visual inspection of the building to detect any settlement or cracks in the masonry etc. The type of foundation, structural floor system (including vertical members) shall be documented. Any deficiencies in the structural system that can cause life-threatening situations shall be identified. Any settlement cracks in the stairs, sidewalls, basement walls or retaining walls, damaged floor systems and vertical members (especially if they are wood buildings) shall be inspected and evaluated.

Site Access: The FCA shall include a physical inspection of all site features including roads, parking, curb and gutters, walks, exterior accessibility (including exterior steps), exterior signage, fencing, and landscaping. Deficiencies or deterioration of site features and the remaining life expectancy shall be documented. The costs of replacement or repairs that are necessary to correct site features shall be determined. All underground site utilities such as water, storm water, sanitary, and natural gas systems shall be evaluated. The source(s) of the utilities, the age and condition of the pipe mains, inlets, and fire hydrants, outflow of storm and sanitary lines and remaining life expectancy shall be documented. Site electrical and steam distribution (including heating oil system) shall be included under their specific headings. Processes involving hazardous materials including asbestos, waste material, and hazardous waste shall be evaluated and documented.

Steam Generation Systems: The FCA shall include a physical inspection of all boiler plant equipment including boilers, burners, energy recovery devices, burner controls, combustion controls, instruments, condensate storage tank, deaerating feed water heater, water and oil pumps, chemical treatment systems, water softeners, make-up water system, blow off tank, stacks or chimney and breeching, piping system, fuel oil tanks. Boiler inspector's reports on the boilers and deaerator shall be reviewed. The contractor shall verify that the District's requirement on boiler plant boiler and deaerator inspections is being followed and that the professional inspectors have judged the boilers and deaerator to be in good condition. Reports of burner performance resulting from periodic burner calibration procedures shall be reviewed.

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The contractor shall interview facility personnel and shall document the age, condition, capacity and turndown deficiencies, equipment/system efficiencies. Boiler and burner safety controls shall be reviewed for compliance with current NFPA and ASME requirements and recommendations. Flame safety programmers shall be verified for code approval. Burner compliance with local and national emissions limits shall be verified. Instrumentation systems shall be reviewed to determine if boiler/burner performance and plant output are being properly monitored. Fuel oil tanks and piping shall be evaluated for proper design and for protection against spills and leaks. Fuel oil installations shall be reviewed for compliance with local and state EPA requirements. Any piping flow problems, deteriorated piping, and/or pumping problems shall be identified. Life expectancy, based on sample data from District and the A/E's educated analysis, shall be determined. This information shall be used to evaluate the equipment's ability to support the function that it is currently serving as well as any programmed change in functions.

Outside Steam Distribution Systems: The FCA may include, but is not limited to an evaluation of these systems by means of interviews with the District personnel who maintain the systems and with the aid of system plot plans furnished by the District. Condition and life expectancy of the steam supply and condensate return piping, along with the steam traps, main isolation valves and the protective enclosures of the systems, shall be evaluated. This information shall be used to evaluate the ability of the system to support the functions that are being currently served as well as any programmed change in functions.

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CONSTRUCTION DIVISION



Request for Facility Condition Assessment Report

Date: _____

Project Number: _____

Project Name: _____

TO:

A review of the list of the facilities for which OPM has Facility Condition Assessment Reports indicates that OPM does not have the FCA Report for _____ located at _____, Washington DC. The Building Identification Number (BIN) for this facility is _____.

Please take necessary action to procure the FCA Report as soon as possible and advise me when this Report has been retrieved and is available for use.

OPM Project Manager: _____

Telephone #: _____

Government of the District of Columbia
Office of Property Management
Construction Division



Master File Index

#	Division Description	#	Section Description	#	Subsection Description	Contents		
1	Program Information	1.1	Project Directory, Communication Plan and Emergency Response Plans	1.1.1	Project Directory, Communication Plan and Emergency Response Plans	Project Directory, Communication Plan and Emergency Response Plans		
		1.2	Procedures, Templates and Flow Charts	1.2.1	Procedures, Templates and Flow Charts	Procedures, Templates and Flow Charts		
		1.3	Presentations	1.3.1	Presentations	Presentations		
2	Program Contract Files (Originals filed with OPM Central Filing)	2.1	Construction Contracts	2.1.1	RFP	RFP, Responses and Evaluations		
				2.1.2	Contracts and Changes Orders	A121, A131, General Conditions, Amendments and GMP Amendments		
				2.1.3	Construction Invoices	Construction Invoices		
		2.2	AE Contracts with Owner	2.2.1	RFP	RFP, Responses and Evaluations		
				2.2.2	Contracts and Changes Orders	Contracts, certifications, change orders, etc.		
				2.2.3	AE Invoices	AE Invoices		
		2.3	Other Contracts with Owner	2.3.1	RFP	RFP, Responses and Evaluations		
				2.3.2	Contracts and Changes Orders	Contracts, certifications, change orders, etc.		
				2.3.3	Other Invoices	Other Invoices		
3	Project Control	3.1	Project Work Plan and QA/QC Surveillances	3.1.1	Project Work Plan and QA/QC Surveillances	Project Work Plan and QA/QC Surveillances		
		3.2	Monthly Report	3.2.1	Monthly Report	Monthly reports		
		3.3	PMIS Reports	3.3.1	PMIS Reports	PMIS Reports		
		3.4	Schedule	3.4.1	Schedule	Original and published schedules		
		3.5	Budget, Funding and Project Approval	3.5.1	Budget, Funding and Project Approval	Budget Approval, Project Request Forms, Funding Reallocation forms		
		3.6	Risk Logs, Claims and Final Decisions	3.6.1	Risk Logs, Claims and Final Decisions	Risk Logs, Claims and Final Decisions		
		3.7	Safety Program	3.7.1	Safety Program	Safety program, plan, reports, inspections, etc.		
		3.8	CBE Program	3.8.1	CBE Program and Certificates	CBE Program and Certificates		
		3.9	Program Closeout, Contractor Evaluation and Final Acceptance	3.9.1	Program Closeout, Contractor Evaluation and Final Acceptance	Program Closeout, Contractor Evaluation and Final Acceptance		
4	Correspondence	4.1	Consultants	4.1.1	Architectural	Consultant correspondence		
				4.1.2	Construction	Consultant correspondence		
				4.1.3	Misc. Correspondence	Consultant correspondence		
		4.2	Public Agencies, Utilities	4.2.1	Public Agencies, Utilities	Correspondence		
				4.3	Internal	Internal team correspondence		
				4.4	Meeting Minutes	Meeting agenda and minutes		
						4.4.1	Kickoff Meetings	Meeting agenda and minutes
						4.4.2	Design Meetings	Meeting agenda and minutes
						4.4.3	Contractor Meetings	Meeting agenda and minutes
				4.4.4	Internal Meetings	Meeting agenda and minutes		
				4.4.5	Misc. Meetings	Meeting agenda and minutes		
5	Procurement	5.1	Procurement, RFP, General Conditions	5.1.1	Procurement Activities	Procurement strategy, schedules, pre-bid conference, advertisements for bid, prospective bidders list, contractor forum, etc.		
				5.1.2	Construction Contract Selection	Selection criteria, bid sheets, schedules, notice of award, etc		
				5.1.3	Architect/Engineer Contract Selection	Selection criteria, bid sheets, schedules, notice of award, etc		
				5.1.4	Other Vendor Selection	Selection criteria, bid sheets, schedules, notice of award, etc		
				5.1.5	General Conditions and other Contracting Requirements	General conditions, client requirements for bidding and contracting, municipal codes, etc.		
6	Bidding	6.1	Bid Documents	6.1.1	Bid Documents	Bid Documents		
		6.2	Pre-bid Correspondence	6.2.1	Pre-bid Correspondence	Pre-bid Correspondence		
		6.3	Pre-bid Meeting	6.3.1	Pre-bid Meeting	Pre-bid Meeting		
		6.4	Addenda	6.4.1	Addenda	Addenda		
		6.5	Bid Results	6.5.1	Bid Results	Bid Results		
		7.1	Facility Condition Assessment	7.1.1	Facility Condition Assessment	Facility Condition Assessment		
7	Planning	7.2	Site Analysis Reports	7.2.1	Site Analysis Reports	Site Analysis Reports		
		7.3	Comprehensive Plan	7.3.1	Comprehensive Plan	Comprehensive Plan		
		7.4	Sustainability and LEED	7.4.1	Sustainability and LEED	Sustainability and LEED		
		8.1	Programming	8.1.1	Programming	Programming		
8	Studies, Design	8.2	Studies, Reviews	8.2.1	Studies	Permit review, code review, needs assessment, feasibility study, parking study, zoning review, etc		
				8.3	Design Submissions	Design submittals		
						8.3.1	Concept Design	Design submittals
						8.3.2	Schematic Design	Design submittals
						8.3.3	Design Development	Design submittals
						8.3.4	Construction Documents	Design submittals
		8.4	Construction Cost Estimates			8.4.1	Concept Design	Cost estimates
						8.4.2	Schematic Design	Cost estimates
						8.4.3	Design Development	Cost estimates
						8.4.4	Construction Documents	Cost estimates
						8.5	Design Review	8.5.1

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Office of Property Management
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Master File Index

#	Division Description	#	Section Description	#	Subsection Description	Contents
9	CAD Drawings	9.1	CAD Drawings (see drawing file drawers and electronic files)	9.1.1	CAD drawings	CAD drawing files (see drawing file drawers and electronic files)
10	Preconstruction	10.1	Pre Construction Information	10.1.1	Pre Construction Information	Pre Construction Information
		10.2	Permits	10.2.1	Permits	Permit reviews, permit collection plans, deferred permit collection plans, etc
		10.3	Start-Up and Move In Plans	10.2.3	Start-up and Move In Management Plans	Start-up and Move In Management Plans
11	Construction Administration	11.1	Pre-Construction Estimate Reconciliation	11.1.1	Estimates: Conceptual / Program Level	Benchmarking, budget development estimates
				11.1.2	Estimates: Schematic Level	Estimates and Reconciliations
				11.1.3	Estimates: Design Development Level	Estimates and Reconciliations
				11.1.4	Estimates: Construction Document Level	Estimates and Reconciliations
		11.2	Project Testing	11.2.1	Geotechnical Borings and Testing	Reports and finding
				11.2.2	Site Survey	Reports and finding
				11.2.3	Construction Testing	Reports and finding
				11.2.4	Air Balancing and Testing	Reports and finding
				11.2.5	Electrical Testing	Reports and finding
		11.3	Submittals	11.3.1	Submittals	Submittals For Approval
		11.4	RFI's	11.4.1	RFI's	RFI's log, status tracking
		11.5	Construction Schedules	11.5.1	Construction Schedules	Construction Schedules, updates and Lookahead schedules
		11.6	Construction Status Reports	11.6.1	Construction Status Reports	Construction Status Reports
		11.7	Stop Work Orders	11.7.1	Stop Work Orders	Stop Work Orders
		11.8	Progress Photos	11.8.1	Progress Photos	Progress Photos
		11.9	Furniture, Fixtures and Equipment	11.9.1	Furniture, Fixtures and Equipment	FF&E plans, drawings, estimates, purchasing agreements, asset tracking, etc.
		11.10	Move Coordination	11.10.1	Move Coordination	Move Coordination
		11.11	Commissioning	11.11.1	Commissioning	Commissioning plans, schedules, testing, inspections, deficiency lists, etc.
		11.12	Construction Close Out	11.12.1	Construction Deficiency List	Construction Deficiency List, Punch List, Substantial Completion and Final Inspection
				11.12.2	Submittal -As Built	Submittal -As Built
				11.12.3	Submittal - Warranty	Submittal - Warranty
				11.12.4	Submittal - Operations and Maintenance Manuals (O&M)	Submittal - Operations and Maintenance Manuals (O&M)
				11.12.5	Certifications and Tests	Certifications and Tests
		11.13	Approvals	11.13.1	Final Acceptance	Notice of partial utilization, beneficial occupancy approval, final acceptance, etc.
12	Post Construction Data	12.1	Warranty Inspections	12.1.1	Warranty Inspections	Warranty Inspections
		12.2	Post Occupancy Evaluation	12.2.1	Post Occupancy Evaluation	Post Occupancy Evaluation
		12.3	Lessons Learned	12.3.1	Lessons Learned	Lessons Learned
		12.4	Project Closeout Checklist	12.4.1	Project Closeout Checklists	Project closeout checklists, notice of completion, final payment certification, etc.

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 CONSTRUCTION DIVISION



Project Work Plan and Quality Assurance Plan (Page 1 of 2)

Project Name:	Project Number:
Prepared Date:	Estimate Project Start Date: _____ End Date: _____

Prepared by:

Sign:	
Project Manager	Date:
Print:	

Approvals:

Sign:	Sign:
Cluster Leader	Deputy Director:
Print:	Print:
Date:	Date:

Using Agency Decision-Maker Name: _____ **Contact List:** (Insert Contract List)

Project Description: _____ **Project Budget:** (Insert Project Budget Sheet)

Construction Budget: _____

Project Delivery Method: _____ **Schedule:** (Insert Project Schedule)

Design/Bid/Build

Design/Build

Construction Administration

Project Work Plan and Quality Assurance Plan

Program/Construction Management at Risk

Negotiated Contract

Other:

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OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Project Work Plan and Quality Assurance Plan (Page 2 of 2)

OPM Team Responsibilities: (Insert Roles and Responsibilities Matrix)

Communications Guidelines:

Building Codes: (Insert Permit Checklist)

Change Methodology: (Change order approvals authority for changes to scope schedule and contract)

Sustainability:

Conflict Resolution:

Using Agency Expectations:

OPM Goals:

Project Quality Assurance Plan: (Identify the method being used to inspect the project)

- **Frequency of Site Visits:**
- **Frequency of Progress Meeting:**
- **Frequency of Project Surveillances:**
- **Frequency of meeting with using Agency:**

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Project Kick-Off Meeting Agenda

Project Overview/Agenda

- Introduction of project staff
- Brief project description
- Purpose and goal of project
- Challenges/rewards
- Scope of work review, by discipline
- Roles and Responsibilities (attachment)
- Meeting Minutes

Project Administration

- Project work plan
- Project organization
- Authorized communication channels
- Project filing requirements

Project Schedule and Deliverables

- List of deliverables
- Project schedule
- Submittal deadlines
- Submittal dates for QA/QC reviews
- Submittal deadlines for subconsultants

Technical Information

- Applicable codes, standards, regulations, and owner constraints
- Unique project features
- CADD coordination issues
- Specification coordination
- Drawing coordination
- Other technical information

Project-Specific Quality Assurance Plan

- Project quality requirements
- Established QA review milestones
- Assigned QA staff
- Issuance of controlled documents
- Applicability of client QA requirements

Safety Requirements (if applicable)

Project Risk Mitigation Issues

Project Budget Information

- Man-hour budget breakdowns by discipline
- Subconsultant budget breakdown
- Project time-charge breakdown
- Allowable direct and non-chargeable expenses

Lessons Learned from Previous Similar Projects

NOTE: Project managers may limit general project information given to subconsultants, on a need-to-know basis.

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OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



(Letter Template)

Date:

Name of Addressee
Name of Business
Street Address
City, State and Zip Code

Subject:

Dear _____,

Sincerely,

Project Number: _____
Project Name: _____

GOVERNMENT OF THE DISTRICT OF COLUMBIA
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CONSTRUCTION DIVISION



(MEMORANDUM Template)

MEMORANDUM

To:

From:

Date:

Subject:

Project Number: _____

Project Name: _____

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



(Transmittal Template)

[INSERT DATE]

LETTER OF TRANSMITTAL

[INSERT NAME AND ADDRESS]

XXXXXXXXXXXXXXXXXX

XXXXXXXXXXXX, XX XXXXX

Re: Submittal Review – Section: **[INSERT SECTION NUMBER AND NAME]**

Dear **[INSERT NAME]** :

The above referenced submittal is incomplete and is being returned with no action taken.

Please ask the contractor to review the submittal requirements described in **[insert reference to specific submittal requirements such as, Section 05310 – xxxxxxxx xxxxxxxxxxxxxxxxxxxx xxxxxx paragraph 1.3 Submittals]** and resubmit.

Sincerely,

[INSERT NAME]

[INSERT TITLE]

cc: **[INSERT PROJECT NUMBER]**

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Meeting Sign-In Sheet Template

Insert Project Name:

Meeting Title:

Date:

Time:

Location:

Meeting Attendees

Name	Company	Title / Role	Phone #	Email

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Meeting Minutes Template (Page 1 of 2)

Meeting Name Here:

Meeting Number:

Meeting Subject:

Scribe:

Facilitator:

Date:

Time:

Location:

Purpose

Invitees/Attendees: (* in attendance, # absent, + substitute)

Name	Project Role
------	--------------

Optional Invitees/Attendees: (* in attendance, # absent, + substitute)

Name	Project Role
------	--------------

Agenda

Time Allocated	Agenda Item	Presenter
----------------	-------------	-----------

Minutes (clarification / comments in blue font...)

Agenda Item	Main Points, Conclusions/Discussions, Decisions, Next Steps
-------------	---

Action Items/Issues/Risks (Red font = high priority; Blue Font = text changes; Cells with blue shade = complete – see table on last page)

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Meeting Notes Template (Page 2 of 2)

Brief Description	Owner	Due Date	Status

Next Meeting Date:

Next Meeting Location:

Facilitator:

Scribe:

Please provide comments and suggested changes to the scribe within 7 days of issue.



District of Columbia
Office of Property Management
Construction Division

PLANNING

Initiation

PLANNING

Design

Construction

Closeout

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Planning

The planning phase defines the programmatic, physical, financial, and scheduling aspects of a capital project prior to funding and initiation of design work. This process facilitates informed decision-making by identifying and compiling information required within each phase. Officially the process begins when the capital oversight group authorizes the Office of Property Management to initiate a capital project. During the planning process a common understanding by all participants on the proposed project is discussed, thereby avoiding uncertainty about program requirements, costs, timing, and expected outcomes.

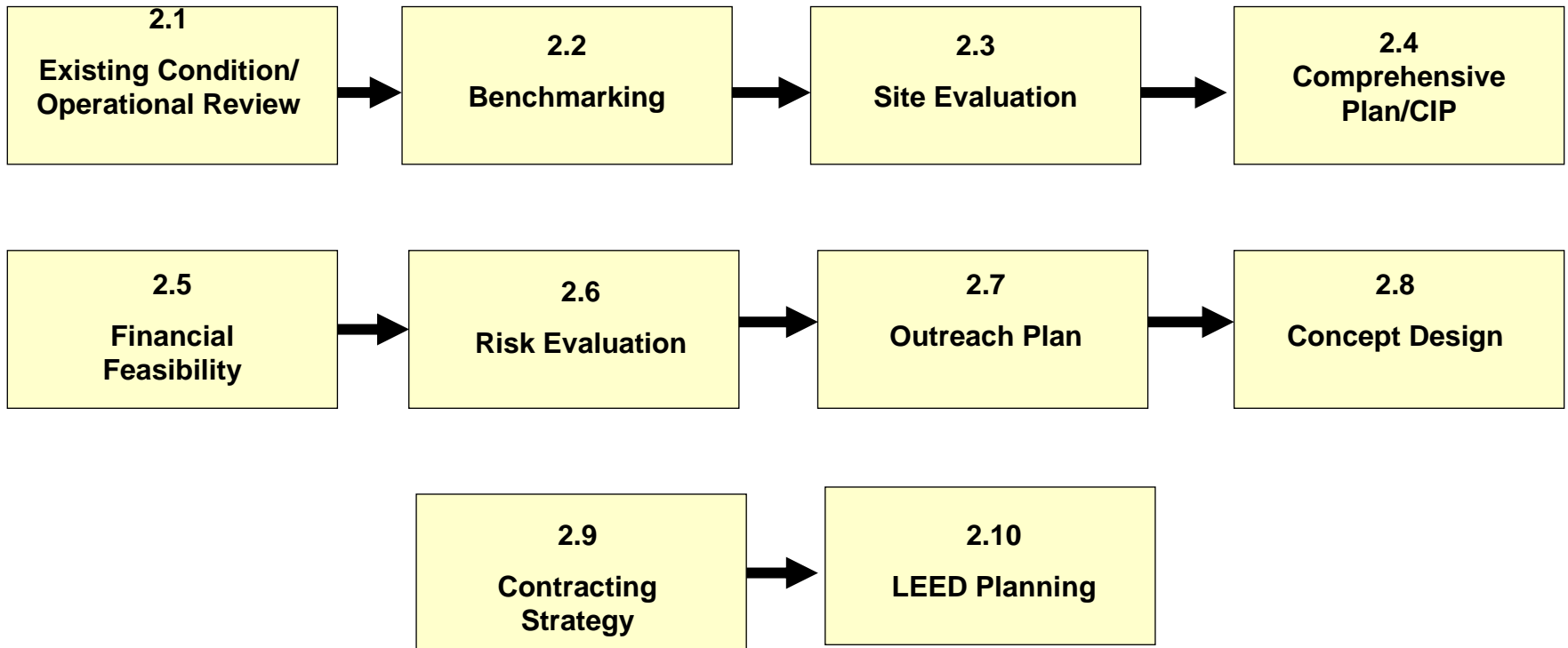
It involves creating of a set of plans to help guide the team through the execution and closure phases of the project. Planning documentation is necessary to provide detailed project information before the project is authorized to proceed. It guides the project team throughout the phases of the project and gives a clear understanding of the statutory requirements for the funded project. The plans created during this phase will help manage time, cost, quality, change, risk and issues.

At the beginning stages the project manager will meet with the using agency to confirm the goal and programming requirements. During the planning phase there is a review of existing conditions/operational review, bench marking (when applicable), site evaluation, financial feasibility, risk evaluation, environmental assessment, outreach plan, community and neighborhood impact, and LEED planning.

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PLANNING



Procedural Checklist Planning



Initials & Date or NA	Resp Person	PMIS	Doc Sys	TASKS	FORMS
	PM		X	Review FCA to confirm the scope; Determine if the project is worth investment of funds, will not significantly increase the cost of maintaining and operating the facility, addresses code compliance issues and does not cause a permanent negative impact on adjacent space/facilities.	
	OPM DD			Based upon information developed in the FCA, OPM DD provides professional opinion regarding project as described within the long term facility plans and funding.	
	PM		X	PM develops benchmark budget for each option and involves outside cost consultants, if necessary.	
	PM			PM submits benchmark budget to OPM DD and Cluster Leader for review (refer to Funding Approval process if budget changes required).	
	PM		X	If new construction, PM identifies potential sites and requisite adjacencies while working with Portfolio Division.	
	PM			PM confirms that initial environmental site assessment has been completed. PM prepares scoping statement for additional environmental site assessment (if initial assessment has determined it to be necessary).	
	PM			PM identifies logistical issues with regard to construction and/or operation.	
	PM			PM reviews possible program adjacency requirements.	
	PM			PM reviews parking at proposed site and vehicular, pedestrian, bicycle, mass transit, and building service access (i.e. loading dock, etc.), and performs a review of safety issues.	
	PM			PM reviews site boundary, topographic surveys, and building orientation.	
	PM			PM reviews special occupant safety requirements.	
	PM			PM conducts assessment of air emissions sources, including proposed emergency generators.	
	PM			PM assesses subsurface hydrology and storm-water management requirements for the site.	
	PM		X	PM includes a site analysis as part of the program documents.	
	PM			PM consolidates Statement of Need, objectives, goals, space requirements, and operational plan into a programming report.	
	PM			PM reviews the physical and functional opportunities/constraints for this project.	
	PM		X	PM conducts preliminary architectural and engineering review with either internal staff or external firm.	
	PM		X	PM reviews applicable guidelines for the proposed project; e.g. sustainable use, historical preservation, DCRA, master plan, and determines compliance and approval.	
	PM		X	PM meets with using agency and other stakeholders to discuss project goals.	Meeting Notes CD-I-0011
	PM		X	PM determines whether the facility will need the capacity to expand for possible future growth: Identifies elements subject to change and makes an assessment of short-term and long-term requirements.	
	PM		X	PM distributes predesign document for review and written comment by using agency and consolidates all review comments received into a single document.	
	PM		X	PM develops financial study for all options and makes recommendations.	
	PM			PM reviews funding sources and account for funds according to grant requirements (refer to Budget Approval process)	
	PM	X		PM updates budget in PMIS.	
	PM		X	PM develops cash flow projections based on the approved schedule (refer to schedule process)	Cash Flow Report CD-P-0001
	PM		X	PM creates and updates project risk log with planning issues (refer to Risk Management process).	Risk Log CD-G-0032
	PM		X	PM develops a business outreach approach to consultants & contractors and reviews with OPM DD.	
	PM			PM develops conceptual plans for each option under consideration with sufficient detail to illustrate project scope, test adequacy of space allocation, and provide basis for preliminary cost estimates.	
	PM			PM identifies contracting strategies for construction and reviews with cluster leader and OPM DD.	
	PM		X	PM establishes LEED planning and monitoring approach.	

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
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CONSTRUCTION DIVISION**



Sample Cash Flow

Budget Schedule	Total Budget	SD	Bid and CD	Bid and CD	NC - Const	NC - Const	NC - Const	NC - Const	Ren - Const	Ren - Const	Ren - Const
		2008	2009	2009	2009	2009	2010	2010	2010	2010	2011
		Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Sitework (even spread during preconstruction)	\$1,300,000	\$433,333	\$433,333	\$433,333							
New Construction (percentage based bell curve per scheduled months)	\$19,381,187	\$484,530	\$969,059	\$2,519,554	\$4,845,297	\$4,845,297	\$2,907,178	\$1,938,119	\$484,530	\$387,624	
Renovation (percentage based bell curve per scheduled months)	\$28,336,094	\$56,672	\$56,672	\$56,672	\$56,672	\$56,672	\$283,361	\$850,083	\$2,266,888	\$3,400,331	\$5,667,219
Contingencies, GC, Escalation, Bonds (spread even over constuction)	\$17,182,027				\$1,562,002	\$1,562,002	\$1,562,002	\$1,562,002	\$1,562,002	\$1,562,002	\$1,562,002
Hard Cost	\$66,199,308	\$974,535	\$1,459,065	\$3,009,560	\$6,463,971	\$6,463,971	\$4,752,541	\$4,350,204	\$4,313,420	\$5,349,957	\$7,229,221
Consultants	\$15,000,000	\$1,071,429	\$1,071,429	\$1,071,429	\$1,071,429	\$1,071,429	\$1,071,429	\$1,071,429	\$1,071,429	\$1,071,429	\$1,071,429
FF&E (66% for NC and 34% for Ren)	\$5,000,000				\$200,000	\$200,000	\$200,000	\$200,000	\$283,333	\$283,333	\$283,333
IT (even during construction)	\$2,000,000							\$200,000	\$200,000	\$200,000	\$200,000
Moving (50% NC, 50% Ren)	\$650,000							\$325,000			
Landscaping (50% NC, 50% Ren)	\$450,000							\$225,000			
Environmental	\$506,000	\$168,667	\$168,667	\$168,667							
Owner Cost	\$2,000,000	\$142,857	\$142,857	\$142,857	\$142,857	\$142,857	\$142,857	\$142,857	\$142,857	\$142,857	\$142,857
Total	\$91,805,308	\$2,357,488	\$2,842,017	\$4,392,512	\$7,878,257	\$7,878,257	\$7,816,827	\$7,964,490	\$6,011,039	\$7,047,577	\$8,926,840

2009 FY	\$9,592,017
2010 FY	\$31,537,831
2011 FY	\$32,329,101
2012 FY	\$18,346,359
	\$91,805,308

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Sample Cash Flow

<u>Budget Schedule</u>	<u>Total Budget</u>	Ren - Const 2011 Q2	Ren - Const 2011 Q3	Ren - Const 2011 Q4	Closeout 2012 Q1
Sitework (even spread during preconstruction)	\$1,300,000				
New Construction (percentage based bell curve per scheduled months)	\$19,381,187				
Renovation (percentage based bell curve per scheduled months)	\$28,336,094	\$7,084,024	\$5,100,497	\$2,833,609	\$566,722
Contingencies, GC, Escalation, Bonds (spread even over construction)	\$17,182,027	\$1,562,002	\$1,562,002	\$1,562,002	\$1,562,002
Hard Cost	\$66,199,308	\$8,646,026	\$6,662,499	\$4,395,612	\$2,128,724
Consultants	\$15,000,000	\$1,071,429	\$1,071,429	\$1,071,429	\$1,071,429
FF&E (66% for NC and 34% for Ren)	\$5,000,000	\$283,333	\$283,333	\$283,333	
IT (even during construction)	\$2,000,000	\$200,000	\$200,000	\$200,000	
Moving (50% NC, 50% Ren)	\$650,000			\$325,000	
Landscaping (50% NC, 50% Ren)	\$450,000			\$225,000	
Environmental	\$506,000				
Owner Cost	\$2,000,000	\$142,857	\$142,857	\$142,857	\$142,857
Total	\$91,805,308	\$10,343,645	\$8,360,118	\$6,643,231	\$3,343,010

2009 FY	\$9,592,017
2010 FY	\$31,537,831
2011 FY	\$32,329,101
2012 FY	\$18,346,359
	<u>\$91,805,308</u>



District of Columbia
Office of Property Management
Construction Division

DESIGN

Initiation

Planning

DESIGN

Construction

Closeout

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Design

Design is broken down into six (6) phases: pre-design, conceptual design, schematic design, design development, construction documents, and compliance submittal.

Pre-design starts the kick-off with the selected architectural and engineering firm (A/E). A Notice to Proceed (NTP) has been issued to an A/E firm. The project manager, using agency, and selected A/E have a kick-off meeting. Items discussed are programming requirements, contractual obligation, payment schedule, communication plan, and the pre-design checklist. The PM, using agency and A/E will mutually agree upon project quality, scope, total project budget, and schedule.

The primary goal of **conceptual design (15%)** is to gather and analyze information and perform all the work necessary prior to actually designing. During the conceptual design phase the project program will be reviewed in detail and other critical information such as site survey; geotechnical and utility; code summary and permitting issues; sustainability components; constructability; building and engineering design requirements; commissioning; and other jurisdictional preliminary required reviews are collected. The project program is reviewed in detail and alternative design solutions discussed, thereby providing a reasonable basis for developing a cost analysis of the project. This deliverable includes data gathering, program definition, goals, budget, site requirements (including building code, zoning, and accessibility issues), and design expectations.

The **schematic design phase (35%)** begins with the creation of concept diagrams and rough sketches. During this time the general layout, form and overall appearance of both the building and the site are developed. Sketches, drawings, and study models are prepared to help evaluate the ideas and concepts and set the final direction for refining the design. The deliverable includes review of the owner's program and budget, conceptual site and building plans, preliminary sections and elevations, preliminary selection of building systems and materials, development of approximate dimensions, areas and volumes, perspective sketches, and study models.

The **design development phase (65%)** continues to develop and refine the design. Structural and mechanical solutions must be evaluated and material selections recorded. The key objective during this phase is to integrate all design

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



elements in order to provide the general contractor and/or construction manager with sufficient information to support a project design development estimate and guaranteed maximum price for the scope of work. Inconsistencies between the budget developed during pre-design or revisions in subsequent phases should be reconciled for scope and budgetary adjustments. While the using agency may provide design input during the phase, any changes in a project scope during design development can impact the budget and schedule. The deliverable includes plans, sections and elevations; typical construction details; three-dimensional sketches; study models; final material selection; equipment layout; and preliminary estimates of construction costs. The design is finalized and the client's approval is required at mid-point of design development.

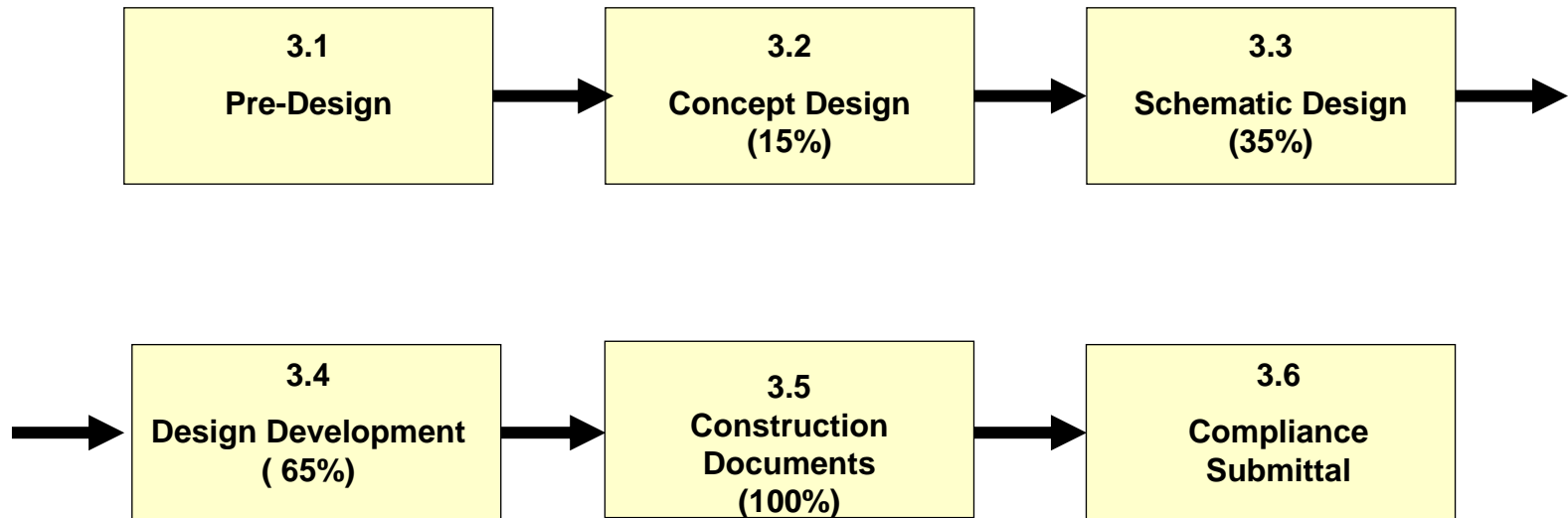
Construction documents (100%) is the final design phase within the project delivery manual. This phase focuses on finalizing the drawing package and specifications for building systems, site utilities, and components. A final set of comprehensive construction documents provides specifications and drawings sufficient to support the contractor, obtain necessary permits and construct the project. Working drawings and specifications are prepared that define in detail all of the materials that are to be incorporated into the building, where they are to be located and how they are to be installed. Specifications are detailed written requirements describing the standards for materials, equipment, and systems. Changes to scope or program in this phase will significantly impact the budget and schedule.

Compliance submittal is the last step in assuring the drawings are ready for bid. It consists of in house final approval, organizing and handling the bidding documents for coordination, reproduction, completeness review, distribution, recording, and retrieval.

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
Construction Division



DESIGN



Procedural Checklist Design



Initials & Date or NA	Resp Person	PMIS	Doc Sys	Task	Forms
	PM	X		PM enters design contract information and NTP date into PMIS.	
	PM			PM arranges and conducts pre-design conference.	
	PM		X	PM provides pre-design checklist to all participants for review and signature.	Pre-Design Agenda CD-D-0001
	PM			PM sets up meeting with applicable regulatory agencies for initial project discussion and review.	
	PM		X	PM, using agency and A/E meet to review program requirements.	Meeting Notes CD-I-0011
	A/E			A/E investigates existing conditions at the project location.	
	PM		X	A/E arranges for site survey and/or geotechnical investigation, if appropriate.	
	PM			PM to provide utility location to A/E.	
	A/E		X	A/E prepares concept design(s) and appropriate cost estimates for each alternative.	
	A/E		X	A/E labels drawings "Concept Design Submittal (15% Design)" and submits copies or drawings and CD ROM to the PM for review.	
	PM		X	PM forwards submittal to required using agencies and reviewing agencies.	Agency Review Checklist CD-D-0002
	PM			PM sets up 15% comment review meeting with using agency or A/E.	
	A/E		X	A/E prepares meeting minutes after 15% comment review meeting and submits to PM within five (5) calendar days.	Meeting Notes CD-I-0011
	PM			PM evaluates program requirements and construction schedule and budget	
	PM			PM sets up meeting with A/E, using agency, Facilities and Portfolio Division to analyze operating costs and expected useful life.	
	A/E			If concept design is rejected, A/E resubmits additional concept with incorporated comments.	
	PM		X	PM obtains sign-off of acceptance from using agency and provides copy of sign-off to them.	
	OPM DD			OPM starts process to get CM on board for schematic design phase as needed.	
	PM			PM approves A/E to move onto schematic design.	
	A/E			A/E prepares Schematic Design submittal drawings (35% design), specifications, and cost estimate.	
	A/E			A/E follows LEED guidelines and to see that it is being incorporated into the design for LEED compliance.	
	A/E		X	A/E labels drawings "Schematic Design Submittal (35% Design)" and submits copies or drawings and CD ROM to the PM for review.	
	A/E		X	A/E includes letter with submittal certifying review comments have been incorporated, from Schematic Concept 15% review.	
	PM			PM reviews submittal to assure comments from last phase were incorporated.	
	PM			PM forwards submittal to required using agencies and reviewing agencies.	Agency Review Checklist CD-D-0002
	PM			PM sets up 35% comment review meeting with using agency, CM and A/E.	
	A/E		X	A/E prepares meeting minutes after 35% comment review meeting and submits to PM within five (5) calendar days.	
	PM			PM review communications/data/security systems with OCTO (Officer of Chief Technology) and PSD (Protective Service Division).	
	PM		X	PM arranges for a independent estimate with CM (QC) team.	
	PM		X	PM arranges for value engineering with CM (QC) team and A/E (if budget needs to reviewed).	
	PM		X	PM arranges for constructability review with CM (QC) team and A/E.	
	A/E			If schematic design is rejected A/E resubmits it by incorporating the comments for further review.	
	PM			PM obtains sign-off of acceptance from using agency and provides copy of sign-off to them.	
	PM			PM and cluster leader approves AE to move onto design development.	
	A/E			A/E prepares design development submittal drawings (65% design), specifications and cost estimate, studies, reports.	
	A/E			A/E labels drawings "Design Development Submittal (65% Design)" and submits copies or drawings and CD ROM to the PM for review.	
	A/E			A/E includes letter with submittal certifying review comments have been incorporated.	
	PM			PM reviews submittal to assure comments from last phase were incorporated.	
	PM			PM forwards submittal to required using agency and reviewing agencies.	Agency Review Checklist CD-D-0002
	PM			PM sets up 65% comment review meeting with using agency, CM (QC) or A/E.	
	A/E			A/E prepares meeting minutes after 65% comment review meeting and submits to PM within five (5) calendar days.	Meeting Notes CD-I-0011
	PM		X	PM forwards submittal to CM (QC) for review and independent estimate.	

Procedural Checklist Design



Initials & Date or NA	Resp Person	PMIS	Doc Sys	Task	Forms
	CM (QC)		X	CM (QC) submits comments to PM.	
	PM			PM reconciles A/E and CM (QC) estimates and if project is over budget PM and cluster leader determine how to bring project back into budget.	
	PM		X	PM coordinates with A/E for regulatory agencies approvals. (i.e. DCRA)	Agency Review Checklist CD-D-0002
	PM		X	PM reviews FF&E Requirements with using agency.	
	PM			PM reviews communications/data/security systems with OCTO (Officer of Chief Technology) and PSD (Protective Service Division).	
	PM			PM, CM and A/E to develop forecasting of list of long-lead items.	
	PM		X	PM arranges for value engineering with CM (QC) team and A/E.	
	PM		X	PM arranges for constructability review with CM (QC) team and A/E.	
	PM			PM, CM, and OCP to develop the contract conditions for construction.	
	A/E			If design development is rejected A/E resubmits it by incorporating the comments for further review.	
	PM		X	PM obtains sign-off of acceptance from using agency and provides copy of sign-off to them.	
	PM			PM and cluster leader approves A/E to move onto construction documents.	
	A/E			A/E prepares construction document submittal drawings (100% design), specifications and cost estimate.	
	A/E		X	A/E labels drawings "Construction Document Submittal (100% Design)" and submits copies or drawings on CD ROM to the PM for review.	
	A/E		X	A/E includes letter with submittal certifying review comments have been incorporated.	
	PM			PM or CM reviews submittal to assure comments from last phase were incorporated.	
	PM			PM forwards submittal to using agency for review.	
	PM			PM forwards submittal to CM (QC) for review.	
	CM (QC)			CM (QC) submits comments to PM.	
	PM			PM sets up 100% comment review meeting with using agency or A/E.	
	A/E			A/E prepares meeting minutes after 100% comment review meeting and submits to PM within five (5) calendar days.	Meeting Notes CD-I-0011
	PM			PM arranges for value engineering with CM (QC) team and A/E (if there are budget concerns).	
	PM			PM arranges for constructability review with CM (QC) team and A/E.	
	PM			PM arranges for independent commissioning (refer to Commissioning process)	
	A/E		X	A/E signs, dates and stamps the drawings with registered architect or professional engineer seal.	
	PM			PM and cluster leader approves A/E to move onto Compliance Submittal.	
	PM			PM sends compliance submittal to cluster leader for approval and OCP and regulatory agencies.	
	using agency		X	Agencies and OCP return comments to PM.	
	PM			PM sends comments and recommendations to CM (QC) and A/E for inclusion into compliance submittal.	
	A/E		X	A/E prepares the compliance submittal (includes, final construction drawings, technical specifications and detailed construction cost estimate).	
	A/E		X	A/E includes letter with submittal certifying he has incorporated all compliance comments agreed from review.	
	PM			PM forwards info to CM (QC) for final acceptance.	
	PM		X	PM receives final approval from CM (QC) for A/E compliance submittal.	
	PM			PM stamps each drawing "Issued for Bid" and date in revision area of title block.	
	OPM DD			OPM DD signs mylars for DCRA use.	
	PM		X	PM enters design complete date into PMIS.	

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Pre-Design Agenda

GOVERNMENT OF THE DISTRICT OF COLUMBIA OFFICE OF PROPERTY MANAGEMENT PRE-DESIGN CONFERENCE CHECK LIST		PROJECT NO.:	
		NAME AND LOCATION:	
CONTRACT NO.	A-E CONTRACTOR	CONFERENCE HELD AT:	DATE:
TASK ORDER NO.:			
A-E CONTRACTOR'S REPRESENTATIVE (NAME, TITLE, ORGANIZATION)			
PLACE "X" IN RIGHT COLUMN IF ITEM IS DISCUSSED WITH CONTRACTOR			
1. GOVERNMENT REPRESENTATIVES	A. PROJECT MANAGER, COTR		
	B. ADMINISTRATOR, CCSA		
	C. CONTRACT SPECIALIST		
	D. AGENCY CHIEF CONTRACTING OFFICER		
	E. OFFICE ENGINEER		
2. STATUS	A. COMMENCEMENT, PROGRESS AND COMPLETION OF WORK		
3. PROGRESS CHART	A. SUBMISSION REQUIREMENTS FOR APPROVAL		
	B. ITEMS TO BE INCLUDED ON SCHEDULE		
4. CHANGES	A. AUTHORITY – CONTRACTING OFFICER ONLY		
5. CORRESPONDENCE	A. ALL CORRESPONDENCE WILL BE ADDRESSED TO THE ADMINISTRATOR OF, OPM, ATTN: COTR		
6. A-E CONTRACTOR	A. REPRESENTATIVE:		
7. SUBCONTRACTORS	A. LIST OF SUB-CONTRACTORS (CONSULTANTS)		
	A. NO CONTRACTUAL RELATIONS BETWEEN SUBCONSULTANT AND GOVERNMENT		
8. PAYMENTS	A. REVIEWED WITH PROJECT MANAGER		
9. COORDINATION OF WORK	A. A-E CONTRACTOR TO COORDINATE WITH HIS STAFF AND CONSULTANTS		
10. LABOR CONSIDERATION	A. EQUAL EMPLOYMENT OPPORTUNITY – AFFIRMATIVE ACTION		
	B. CONTRACT WORK HOURS STANDARD - OVERTIME COMPENSATION		
	C. APPRENTICE - TRAINING PROGRAM		
	D. PAYROLLS		
	E. COPELAND ACT		
	F. WITHHOLDING OF FUNDS TO ASSURE WAGE PAYMENT		
11. TECHNICAL REQUIREMENTS	A. BRIEFING ON DESIGN CRITERIA AND CRITICAL AREA		
	B. SAMPLING AND TESTING		
	C. TECHNICAL PROBLEMS (A-E CONTRACTOR OR GOVERNMENT)		
12. PERMITS AND APPROVALS	A. A-E CONTRACTOR TO OBTAIN BUILDING PERMIT ONLY, EXCEPT FOR DESIGN AND BUILD CONTRACTS. A-E IS ALSO REQUIRED TO OBTAIN APPROVAL FROM ALL REGULATORY AUTHORITIES FOR CONSTRUCTION OF THE FACILITY AS DESIGNED.		
	B. DISTRICT WILL PAY THE PERMIT FEE TO DCRA		
13. GRATUITIES	A. OPM POLICY REGARDING GIFTS AND GRATUITIES		
14. OTHER ITEMS (AND AS NECESSARY) (KEY TO PREVIOUS ITEM, IF APPLICABLE)	A. TITLE II SERVICES		
	B. GUARANTEE OF CONTRACT WORK		
15. ITEMS FURNISHED BY DISTRICT IN THE MEETING	A. BUILDING ID NUMBER		
	B. PARTIAL PAYMENT REQUEST FORMS		
	C. TELEPHONE LISTING OF GOVERNMENT EMPLOYEES.		
	D. FACILITY CONDITION ASSESSMENT REPORT		
	E. INFORMATION FOR EMERGENCIES		
CERTIFICATION: THE PRECEDING ITEMS MARKED "X" HAVE BEEN DISCUSSED			
REMARKS (CONTINUE ON ATTACHED SHEETS IF NECESSARY)			
SIGNATURE (A-E CONTRACTOR)		SIGNATURE (OPM)	

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Agency Review Checklist					
Date:		Project Manager:			
Project Number:	Approval Stage	Project Name:			
AGENCY			Required	Not Required	Date Received
		PERMITS			
DCRA	3	Plumbing			
DCRA	3	Electrical			
DCRA	3	Mechanical Engineer			
DCRA	2	Zoning			
DCRA	3	Fire Safety			
DCRA	3	Structural			
DCRA	5	Wall Closeout			
DCRA	5	Elevator			
	3	Fire Marshall			
	2	ADA (American Disability Act)			
	3	Utilities (Pepco, Washington Gas, Verizon)			
BZA	1	Board of Zoning Adjustment			
DPW	1	Department of Public Works			
DPH	1	Department of Public Health			
DDOE	2	Department of Environmental			
WASA	2	Water and Sewer Association			
WMTA	2	Washington Metropolitan Transit Authority			
DDOT	2	Department of Transportation			
NCPC	2	National Capital Planning Commission			
HPB	1	Historical Preservation Building			
CFA	1	Commission of Fine Arts			
Other Comments:					
Project Manager Approval: Date:					

Notes:

- 1 Planning
- 2 Design
- 3 Permitting
- 4 Construction
- 5 Close Out



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CONSTRUCTION DIVISION



Construction

The objective of the construction phase is to build the project according to the drawings and specifications in construction documents within the budget, schedule, and scope defined and approved. The construction manager (CM) is responsible for facilitating delivery, installation, and construction of the capital project in coordination with the Office of Property Management, the using agency requesting the project, and the architect-engineer.

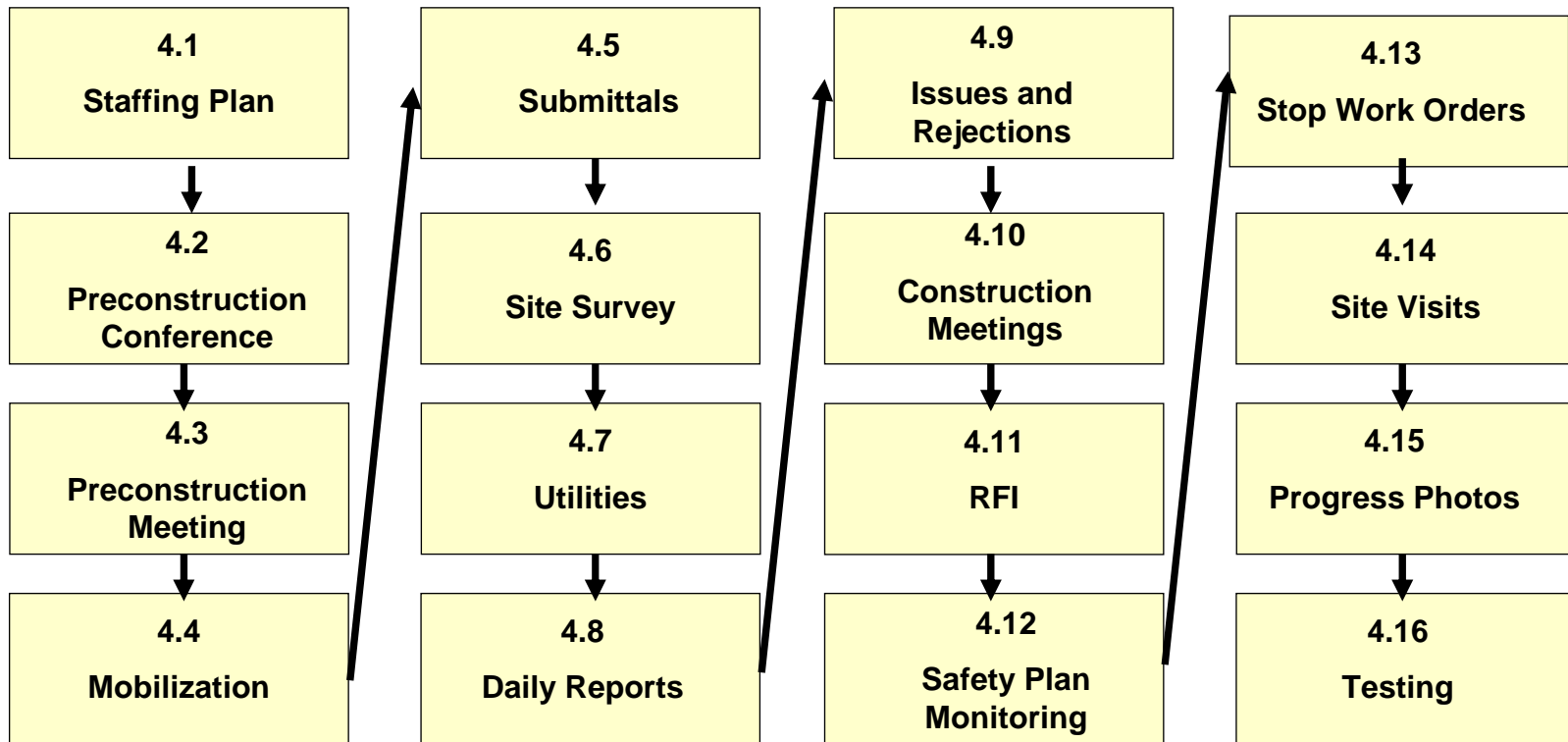
Prior to the start of construction, a preconstruction meeting agenda is developed and distributed to the project team clearly specifying the roles and responsibilities of the OPM, general contractor, CM and A/E for the duration of construction. It is the responsibility of the CM to review with the project team and clarify outstanding issues prior to construction.

During construction, the contractor should facilitate weekly progress meetings and provide written copies of minutes with the OPM project manager, using agency and A/E. At these meetings, outstanding issues, construction progress, client concerns, budget, schedule, and safety will be monitored and discussed. In addition, the change order and request logs will be presented and reviewed in efforts to resolve outstanding issues that may arise during construction. The general contractor's pay application will be reviewed monthly.

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
Construction Division



CONSTRUCTION



Procedural Checklist Construction



Initials & Date or NA	Resp Person	PMIS	Doc Sys	Task	Forms
	PM			PM estimates staffing needs and meets with cluster leader to review staffing plan.	
	PM			If there is a delay in the start of construction or pre-construction conference, the PM notifies the cluster leader and OPM DD as to why (refer to schedule process).	
	PM	X		PM updates PMIS with "current date" based on schedule (refer to schedule process).	
	PM		X	PM obtains all the information to conduct a pre-construction conference checklist. PM provides copies of the materials for the using agency A/E, CM and OCP representative.	Pre-Construction Conference CD-C-0001
	PM		X	PM conducts the pre-construction conference and completes attendee list, pre-construction conference agenda and checklist, contact list, emergency contact list request.	Pre-Construction Conference CD-C-0001 Contact Information for Emergencies CD-C-0002
	PM		X	The contractor pays for and arranges temporary utility expenses in accordance with their contract.	
	PM			PM provides a copy of the permit drawings, original permit, specifications, bid-set (only if permit set was not bid set) drawings and addenda and confirms receipt from the contractor.	
	PM			PM requests a copy of the construction progress schedule and cost breakdown for payments in 14 days (per the Contract requirements deliverable list) from the Contractor (refer to payment and schedule process).	
	PM			PM requests contractor safety plan (refer to safety plan monitoring process).	
	PM		X	PM sends a blank submittal register form to the contractor who submits the completed form to the A/E including all items to request approval.	Submittal Register CD-C-0003
	A/E		X	A/E reviews and approves the submittal register and provides recommendation to PM. The PM signs and sends it back to the contractor (approved register becomes part of the baseline schedule).	
	PM	X	X	If the contractor fails to deliver completed register, PM sends a notification of failure to perform. PM sends a (cure notice) to the OCP representative to follow-up. The issue is logged (refer to issues tracking and risk management process). PMIS is flagged with the issue.	
	Contractor		X	Contractor sends submittals using the submittal transmittal Form to the A/E. If the Contractor fails to submit on schedule, the PM sends a notification warning that delays will be charged to the contractor.	Submittal Transmittal Form CD-C-0004
	A/E		X	A/E reviews submittals for compliance and sends copies with recommendations to the PM within 14 calendar days.	
	Contractor		X	Contractor maintains official submittal log with status and A/E maintains separate log for review. Contractor provides logs to PM in the progress meetings.	Submittal Register CD-C-0003
	Contractor		X	If a site survey is needed, the contractor obtains a copy of the plate survey from the office of the surveyor and performs a survey of the site. If there are discrepancies between the surveys, he notifies the PM in writing.	
	PM		X	The PM provides clarification with consultation from the A/E. The Contractor starts work after establishing control points and elevations from the actual survey conducted by a licensed surveyor. Contractor submits stamped survey to PM.	
	Contractor			Contractor outlines all utility infrastructure requirements location, capacity, and condition.	
	Contractor			Contractor reviews information technology and telecommunications infrastructure availability requirements at the site.	
	Contractor			Contractor determines emergency/temporary power and other utility requirements for the facility during construction.	
	PM		X	PM submits a utility use documentation form to OPM Asset Management division.	
	PM		X	PM ensures the contractor notifies the utility companies in advance of service needed to the site. PM requires sufficient notice (21 days) to arrange payment with the OFRM.	
	Contractor			Contractor establishes permanent utilities connection availability date and identified as project milestone.	
	Contractor			Contractor prepares contractor's daily report.	Contractor's Daily Report CD-C-0005
	PM		X	PM arranges daily review of progress on site and PM prepares a daily report before the close of business each day (refer to monthly report process).	
	PM			PM obtains existing condition photos from the contractor prior to start of construction. If requires tor restore site to existing condition, additional photos are required.	
	PM		X	PM develops site walk-through schedule for both the OPM team and user agency. Construction photos should be taken and filed to document the progress and findings.	
	PM			PM reviews daily report for discrepancies and contract conformance.	
	PM		X	PM observes the contractor performance and issues rejection notices if not in compliance with the contract.	Rejection Notice (Inspection Failure) CD-C-0006
	PM	X	X	The PM confirms the rejection notice in writing after consulting with the A/E and log in the issue log (refer to issues tracking and risk management process). PMIS is flagged with the issue.	Contractor Notification (Inspection Failure) CD-C-0007
	PM		X	PM and cluster leader estimate probable costs which would be applied towards retainage and or additional holding if issue prevails and submits to OPM DD for internal purposes. PM updates Risk Log with impact (refer to Risk Management process).	

Procedural Checklist Construction



Initials & Date or NA	Resp. Person	PMIS	Doc Sys	Task	Forms
	Contractor			PM schedules and arranges for weekly project meetings.	
	A/E		X	The A/E or CM writes the minutes in accordance with the provided format and transmits them within 3 days of the meeting	Meeting Notes CD-I-0011
	PM		X	The PM reviews and provides comments before final distribution.	
	Contractor		X	Contractor issues Request for Information (RFI) to the PM and A/E for review and response with complete information.	Request For Information (RFI) CD-C-0008 Request For Information (RFI) Log CD-C-0009
	A/E		X	The RFI log is updated by the PM or A/E accordingly.	Request For Information (RFI) Log CD-C-0009
	A/E			AE responds to RFI and submits to PM.	
	PM			If design issue arises, the PM reviews the A/E recommendations with CM before transmitting to the contractor.	
	A/E			RFI response provided to contractor.	
	Contractor			Contractor informs PM of ongoing issues.	
	Contractor			Contractor informs PM is a cost or schedule impact arises that may result in a change order.	
	PM			PM evaluates potential change condition and determines if agreeable to pursue a change order (refer to contract and procurement change order process).	
	Contracting Officer			The contracting officer can issue a final decision when appropriate (refer to final decisions process) The contractor has 90 days to appeal with the Contracts Appeal Board.	
	Contractor			Contractor submits safety plan to PM during preconstruction or if any safety conditions change throughout construction.	
	PM		X	PM reviews contractor safety plan, safety items listed, crane requirements, emergency shutdowns and contacts, fencing location, hardhat locations, hazardous materials protocols, hot works program, limits to site and delivery path / sign locations.	
	PM			PM reviews safety issues with using agency and approves Contractor Safety Plan.	
	PM			PM notifies cluster leader of partial stop work order. PM notifies cluster leader, OPM DD and contracting officer of full stop work order (refer to final decisions process when necessary).	
	PM		X	PM issues stop work orders when activity isn't in compliance with critical issues.	
	PM		X	PM requests Cure Notice from contracting officer. Contracting officer issues Cure Notice to contractor.	
	PM		X	PM performs weekly (at minimum) Job-site visits and documents findings in action/issue log (refer to issues tracking process).	
	PM		X	PM takes photographs and files them in file server to show progress.	
	PM			PM secures/coordinates Testing Service (refer to procurement and contracting process if issuing the contract).	
	A/E		X	A/E and/or PM attends tests conducted and communicates with CM findings. If test fails, the PM may need to refer to the issues and rejection, stop work orders or final decisions processes.	
	PM		X	PM obtains test reports from vendor and files on the file server.	

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Pre-Construction Conference Checklist (Page 1 of 2)

Project No.: _____

Contract No.: _____

Contract Name: _____

Contractor: _____

Project Manager: _____

Contract Specialist: _____

ITEM	NO	YES
Review the contract document for completeness:		
• Contractor has signed contract		
• Contracting Officer has signed the contract		
• Contract is dated		
• Contract number is correct		
• Contract description (scope of work) is correct		
• Contract award amount is correct		
• Number of Addenda issued are identified		
• Payment Bond for 50% of contract amount enclosed		
• Performance Bond for 100% of the contract enclosed		
• Surety Certifications enclosed		
• Insurance Certificate is enclosed		
Documents needed:		
• Required ___ Sets of Contract Drawings, are available (Refer to Specification Section H for the number required for the Contractor and add six (6) sets for the District's representatives)		
• Required ___ Sets of Contract Specifications are available		
• Two sets of permit drawings are available		
• Original building permit is available		
Name of the Office Engineer:		
Names of the on-site inspection staff member (Project Inspector):		
Title II Services:		

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Pre-Construction Conference Checklist (Page 2 of 2)

Name of Firm providing Title II Services, name of the Representative, Address, Phone No. and e-mail address		
CM Service:		
Name of CM Firm, name of the Representative, Address, Phone No. and e-mail address		
Name of the Using Agency, Name of the Representative, Address, Phone No., and e-mail address		
Blank copy of Construction Progress Chart on (1)		
Blank copies of Progress Payment Request Forms on (1)		
Blank copy of Cost breakdown for Progress Payment Request on (1)		
Submittal Register on (1)		
Submittal Transmittal Form on (1)		
EEO Forms on (1)		
Blank RFI Form on (1)		

Name of the Project Manager

Date

Name of Contractor

Date

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



CONTACT INFORMATION FOR EMERGENCIES

Provide the following information for use in emergencies by the District staff:

1. Name, Title and 24-hour contact telephone number of the official of the firm who has independent authority to act during emergencies associated with the project.
2. Name and 24-hour telephone number of the Project Manager who has comprehensive knowledge about the project and the work in progress. PM/POC should have access to all work areas and should be able to report to the project site within (shortest period of time) upon notification of an emergency.
3. Name and 24-hour telephone number of the project Superintendent who has the working knowledge of all equipment located at the project site. The POC should be able to report to the site within upon notification of an emergency.

Contract shall submit the aforementioned information immediately after conclusion of Kick-off and/or Pre-Construction conference.

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



SUBMITTAL REGISTER

Project No.: _____
Project Name: _____
Invitation/Contract No.: _____
Contractor Name: _____

No.	Specification Section No.	Description of the Item	Type: Material, Equipment, etc.	Manufacturer	Submittal Date	Requested Approval Date	Approval Date	Type of Action	Remarks

Note to A-E: Complete only first five (5) columns.
 Note to Contractor: Complete A-E has to complete first seven (7) columns.

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



ANDREWS REPRODUCTION CENTER, INC. BELLEVILLE, MD 20705 86553-80 MC 6/01

REQUEST FOR APPROVAL OF THE FOLLOWING ITEMS				DATE
TO: _____ FROM: _____				<input type="checkbox"/> NEW SUBMITTAL <input type="checkbox"/> RESUBMITTAL
PROJECT TITLE AND LOCATION				CONTRACT NO. _____
COVER ONLY ONE SECTION WITH EACH TRANSMITTAL				PROJECT NO. _____
ITEM NO.	DESCRIPTION OF ITEM SUBMITTED	MANUFACTURER	NO. OF COPIES	SPEC. SEC. #
				DRAWING SHEET PLATE, OR FILE NO.
				ACTION CODE & INITIAL
REMARKS				
I certify that the above items have been reviewed and are in conformance with the contract except as otherwise stated.				
Name and Signature of Contractor _____				
INCLUSURES RETURNED	BOC NO.	NAME, TITLE AND SIGNATURE OF APPROVING AUTHORITY		DATE IN OUT
CHECK AND IDENTIFY EACH ITEM RECEIVED: Samples () Certificates () Color Line () ACTION TAKEN: Approved () A Selected () S No Action Taken () NAT Schedules () Shop Drawings () Approved as Noted () AAN Returned for Corrections () RFC Brochures () Color Charts () Accepted () AC Action Withheld () AW Rejected () R				

9-278 WHITE - CONTRACTOR GREEN - DIVISION PARK - INSPECTOR
 BLUE - DME CANARY - CENTRAL FILE GOLDENROD - RETAINED BY CONTRACTOR

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



CONTRACTOR'S DAILY REPORT

Report #: _____

Date: _____ Weather/(Description): _____

Project No.: _____ Temperature: _____

Project Name: _____

Project Location: _____

Name of Contractor:	Number of Contractor Personnel Working on Site:
Name(s) of Subcontractor(s):	Number of Personnel Working on Site:

Time of Day:	Description of Work Performed:
	Materials/Equipment Deliveries on Site; Construction Equipment Used:
	Information Received or Transmitted(from whom/to whom-indicate name and organization of individual(s)):
	Problems/Unusual Conditions or Circumstances/Latent Conditions Discovered, names of visitors, etc.:
	Additional Comments:
Report Prepared by: Signature: _____ Date: _____	

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Rejection Notice (Inspection Failure)

Date _____

Name of the Person
Name of the Contractor
Street Address
City, State and Zip Code

Subject:

Contract No. _____
Contract Name: _____
Rejection Notice No. _____

Dear _____,

Due to defective material/workmanship/noncompliance with the contract drawings(s)
_____ / specifications, the following item(s) is/are rejected:

Your immediate action to correct this (these) deficiency (ies) is essential. If you have questions you may contact me at _____.

Signature

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Contractor Notification of Rejection (Inspection Failure)

Date: _____

Subject: Contract No _____

Contract Name _____

Rejection Notice No. _____

Transmitted herewith is a copy of Rejection Notice as identified above, issued by our inspection staff. The work is not in compliance with contract requirements Section ____ Paragraph ____ and Contract Drawing No. _____. Please refer to the attached report for specific reference to the contract requirements and reasons for rejection).

You are urged to take immediate corrective measures to ensure that the work performed under the contract complies with the contract requirements. Failure to comply may be deemed sufficient cause for invoices to be retained as outstanding and in return, monies may be withheld from your monthly Progress Payment Requisitions.

Please contact the OPM Project Manager at 202-671-_____ with any question you have concerning this matter.

Signature

cc: Project File #: _____

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Request for Information (RFI)

Office Address Here:

RFI Tracking #:

Office Phone:

Office Fax:

OPM Project Manager:

Project Name:

Contractor:

Project Address:

Contractor's #:

OPM Project #:

SUBJECT:

Drawing:

Spec. Section:

Information Requested:

Response:

Attachments:

Response By:

Response Date:

Issued By:

Date Originated:

Status:

Date to Architect:

Cost Impact:

Date Response Requested:

Schedule Impact:

Date Returned:

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Request for Information (RFI) Log

Complete ?	RFI #	Subject	Date Originated	Date to Architect	Date Response Requested By	Date Returned	Status	RFI Category (Proper/Improper)

OPM Project Manager:	Project Name:
Contractor:	Project Address:
Contractor's #:	OPM Project #:



District of Columbia
Office of Property Management
Construction Division

CLOSEOUT

Initiation

Planning

Design

Construction

CLOSEOUT

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Close-out

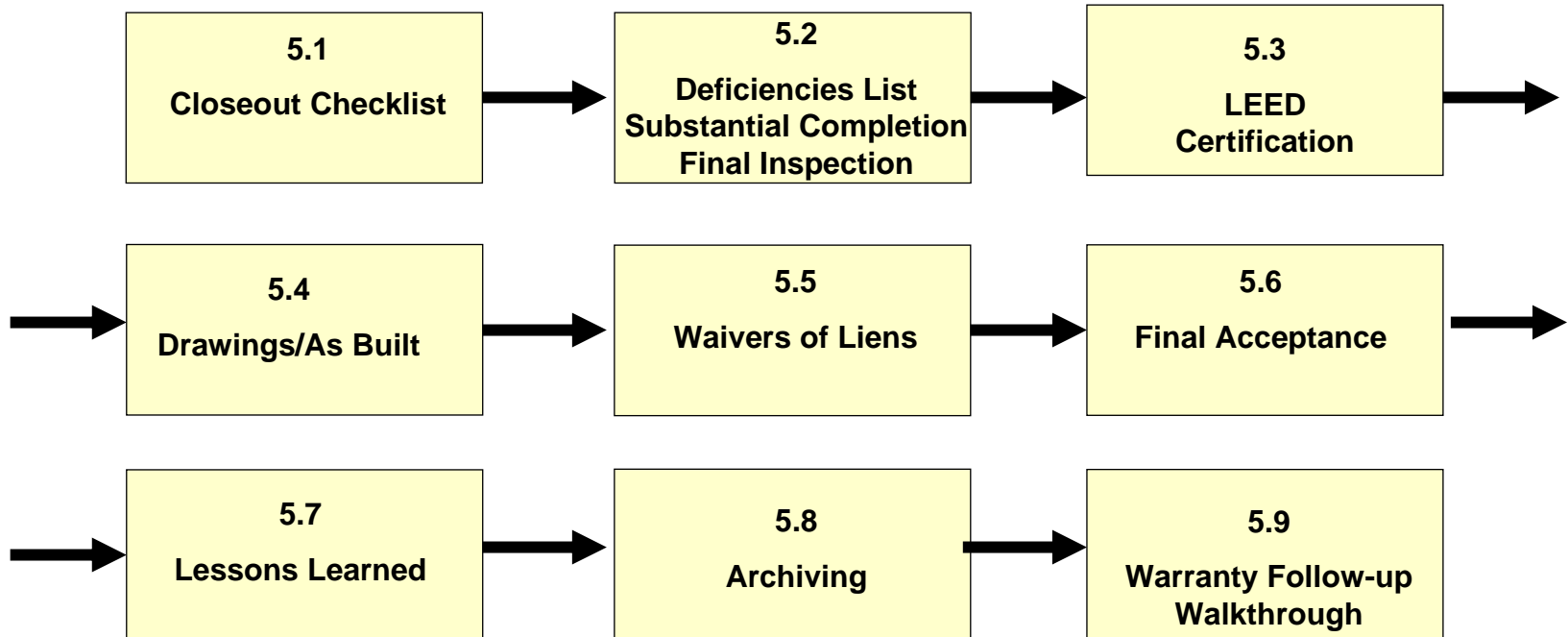
The close-out phase of the Project Delivery is to facilitate and coordinate occupancy turnover of the building to the using agency. It includes services that will be critical to the end user throughout the life cycle of the building. As the construction phase nears its end, the commissioning plan as developed in construction documents, will be reconfirmed and executed. The project manager will facilitate completion of the punch list.

The operations and maintenance of the building is turned over to the facility management group of OPM. Project close-out consists of a complete punch list of project deficiency and agreed upon final acceptance elements. The contractor is responsible for submitting a close out package that includes all warranties, training and operation manuals, any operation and maintenance instruction for equipment, product care guidelines for all finished surfaces, and as-built drawings. All waivers and liens, lessons learned and a final warranty walk-through are provided to facilitate final acceptance of the building. A keying plan and surplus of material is turned over to OPM facilities. A certificate of occupancy is issued and all project information is archived. Within a year of post occupancy the OPM DD follows up with a walk through to confirm outstanding warranty issues are addressed.

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
Construction Division



CLOSE OUT



Procedural Checklist Closeout



Initials & Date or NA	Resp Person	PMIS	Doc Sys	Task	Forms
	PM		X	PM identifies and informs all vendors of closeout. All contracts must be closed out contractually and financially before proceeding to project closeout (refer to invoice process for final payment).	
	PM		X	PM completes the project closeout checklist.	Project Closeout Checklist CD-F-0001
	Contractor			Contractor requests inspection for beneficial occupancy in writing at least two (2) weeks prior to scheduled inspection.	
	Contractor		X	PM and contractor prepare a deficiency list.	Contractor Deficiency Notice CD-F-0002
	PM		X	PM sends memo to contractor notifying them of deficiencies list.	Memo to Contractor of Deficiencies CD-F-0003
	PM		X	PM determines when ready for re-inspection. PM sends a letter as to the date and time of inspection to the A/E, using agency and contractor.	
	PM		X	When facility is ready for occupancy, (upon issuance of temporary or final certificate of occupancy from DCRA), the PM signs off on the beneficial occupancy form. PM sends a letter of acceptance to the contractor and using agency along with final contractor deficiency list.	Contractor Deficiency List CD-F-0004
	PM		X	If the facility is not ready, the PM sends a letter notifying using agency the building is not ready.	
	Contractor		X	If disputes from punch list become irresolvable, the contractor sends a written claim to the PM (refer to claims process).	
	PM		X	PM ensures the contractor corrects all deficiencies and sends a letter (CCSA-F-145) to the using agency that they are corrected. The using agency has seven (7) days to respond.	Memo to the using agency notifying completion of deficiencies CD-F-0005
	PM		X	PM sends a letter (after the seven (7) days given to the using agency) to the contractor stating all construction deficiencies are completed.	
	PM		X	If deficiencies remain beyond the intended completion date, the PM sends a letter requesting a schedule to be sent to correct the remaining issues.	
	PM		X	If the contractor doesn't respond, the PM requests CM to provide a estimate for remaining items. PM prepares a letter to be sent by the contracting officer informing the contractor that the cost will be deducted from contract.	
	OCP Representative		X	PM review's contractor's response to outstanding deficiencies with the A/E and OCP representative. The OCP representative writes a final decision letter for issuance by the contracting officer (refer to Final Decisions process).	
	PM		X	After the expiration of the timeframe designated for issue resolution, the PM and OCP Representative prepare a final decision change order by the contracting officer (refer to the change order process)	
	PM		X	PM tracks deferred commissioning items on the deficiencies list. PM identifies person(s) responsible for tracking and resolving deferred commissioning items.	
	PM			PM to assure that all close out documents are submitted at same time. Closeout binder shall be provided in four (4) copies.	
	PM		X	PM obtains sign offs to date of punch list items deferred for testing.	
	PM		X	PM determines requirements for building opening and confirms with using agency (refer to move coordination process).	
	PM		X	PM completes checklist for final acceptance and files on file server.	Checklist for Final Acceptance Package CD-F-0007
	PM		X	Within a reasonable time subsequent to move-in, PM conducts a post-occupancy review and prepares a final inspection report.	
	PM		X	PM obtains LEED Certification	
	PM		X	PM obtains warranties and guarantees from the contractor in accordance with contract specifications.	
	Contractor			The contractor provides substantial completion dates.	

Procedural Checklist Closeout



Initials & Date or NA	Resp Person	PMIS	Doc Sys	Task	Forms
	PM			PM should review all warranty and maintenance provisions and follow required procedurals for activation.	
	Contractor		X	Contractor provides operating and maintenance manuals to PM and arranges for training.	
	Contractor			Contractor must submit two (2) sets of the preliminary as built drawings with a transmittal to the PM.	
	A/E			The drawings are reviewed by the A/E and PM. Any discrepancies are sent back to the Contractor requiring them to resubmit.	
	PM		X	PM requires the Contractor to submit final As Built drawings on CD and one final set on Mylar within 15 days. If found not acceptable, the Contractor is asked to resubmit within seven (7) days.	
	PM		X	If the Contractor fails to submit, a letter is sent requiring the contractor to submit. If there is no response, the PM and A/E estimate what it would cost to obtain them by another source.	
	PM		X	PM prepares a letter to be sent by the contracting officer informing the contractor that the estimated amount will be deducted if not completed by a specified period.	
	PM		X	PM sends the CD and mylar to the engineering library and receives a receipt of delivery.	Receipt for As Built Drawings CD-F-0006
	PM		X	PM obtains lien waivers, if necessary.	
	PM		X	PM prepares a final acceptance letter and delivers the package to the cluster leader for review.	
	PM			PM signs the final acceptance letter and sends to the cluster leader.	
	cluster leader		X	cluster leader initials the package and sends to the contracting officer. The PM prepares a transmittal and receipt for the contracting officer to sign.	Receipt for As Built Drawings CD-F-0006
	Contracting Officer			Contracting Officer sign the final acceptance letter and mails the original to the contractor with a copy to the cluster leader.	
	Contractor			Contractor signs the release document sent with the final acceptance letter and submits it with request for final payment to the PM.	
	PM		X	PM requests that using agency fill out customer survey in order to identify strengths and weaknesses on the project.	Agency Feedback Survey CD-F-0008
	PM		X	PM arranges for a meeting, if appropriate, to discuss what could have been done different for lessons learned.	Meeting Notes CD-I-0011
	PM			PM summarizes "lessons learned" from project for project file.	
	PM		X	PM saves final project e-files or hard copy files such as:	
	PM		X	PM saves in document control system programming documents, 100% schematic design documents, 100% design development documents, 100% construction documents, permit documents, punch list report.	
	PM		X	PM saves in document control system temporary certificates of occupancy, certificate of substantial completion, certificate of final completion, turnover letter to using agency, final review comments and responses.	
	PM		X	PM saves in document control system O&M manuals, warranties, equipment commissioning reports, change order logs, submittals, material test results, inspections, RFIs, as-built record documents, red-line documents (Field Set).	
	PM		X	PM saves in document control system payment applications, financial closeout documents, completed project closeout checklist, completed final acceptance.	
	PM		X	PM saves in document control system final certificate of occupancy, warranty report, commissioning report, final keys and keying plan and any other contract documents.	
	PM		X	PM provides transmittal form to facilities.	Transmittal Form to Facility CD-F-0009

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
 CONSTRUCTION DIVISION



Project Closeout Plan

Date:
 Project Number
 Project Title

Element	Responsible Party	Planned	Actual	Comments
Close Contracts				
Confirm all contracts recorded as closed out in PMIS				
Verify unconditional waivers of lien are on file				
Reconcile to make sure that the contract and invoiced are equal in PMIS				
Obtain Documents from GC				
Calculations, as applicable				
Record documents				
Operating manuals				
Submittals				
Deficiency List Completed and Signed Off				
Contract Closeout Checklist				
Complete GC Contract Closeout Checklist				
Complete AE Contract Closeout Checklist				
Archive Project Files				
Prepare final record documents				
Review/clean up/archive files				
Copy all electronic files to CD/DVD				
Contractor Evaluation				
Complete Contractor Evaluations				
Project Successes				
What were they?				
Were they recognized?				
Project Failures				
What were they?				
Were they recognized?				

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Contractor Deficiencies Notice

Contract No.	Project Name										
ITEMS					INSPECTION DATES						
Contractor is required to correct the following deficiencies before project will be considered 100% complete.					Initiated Date	/ / / / / / / / / /					
A = Action Complete C = Complete				NC = Not NA = No Action		Trade: _____, Page _____ of _____ Page (s) Report prepared by: _____					

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Memo to Contractor of Deficiencies

Date: _____

Name of the Person
Name of the Contractor
Street Address
City, State and Zip code

Subject: Contract No. _____, Record #: _____
Contract Name: _____
Completion of Construction Deficiencies

Dear Mr. _____,

Reference is made to the beneficial occupancy inspection conducted on _____ for the subject contract. A letter confirming the acceptance of the facility for beneficial use was sent to you on _____ with a list of deficiencies to be corrected within 30 calendar days of the acceptance.

An inspection of the facility was conducted by our staff, your representative and the Using Agency representative on _____ to verify the completion of the deficiencies.

This letter is to advise you that all the construction deficiencies noted in the construction deficiency report provided to you on _____ are corrected and accepted as of _____.

If have questions you may contact me.

Sincerely,

Project Manager

Copy to: _____, Cluster Leader
_____, OCP Representative
_____, A/E
_____, Using Agency
Project file

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Contractor Deficiency List

Contract No.	Project Name
ITEMS	INSPECTION DATES
Contractor is required to correct the following deficiencies before project will be considered 100% complete.	Initiated Date
	/ / / / / / / /
A = Action Complete NC = Not Complete C = Complete NA = No Action	Trade: _____, Page _____ of _____ Page (s) Report prepared by: _____

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Memo to Using Agency Notifying Completion of Deficiencies

MEMORANDUM

To: *Mr.* _____
Facility Manager
Department of Health

From: Project Manager

Date: _____

Subject: Completion of Deficiencies
Project #: _____
Project Name: _____

Reference is made to the beneficial occupancy inspection conducted on _____. During the inspection, we identified a number of deficiencies in construction. A letter was sent to the Contractor on _____ requiring the completion of noted deficiencies within ____ calendar days.

On _____ we conducted an inspection to verify the completion of the identified noted deficiencies as outline in the construction deficiencies reports _____. Your representative Mr. _____ was in attendance. Upon completion of our inspection, it was determined that all deficiencies have been corrected as of _____.

I intend to issue a letter to the Contractor notifying him of completion of all the construction deficiencies. If you have concerns or questions in this regard, please send me a letter within 15 calendar days. If I do not receive any response from you, I consider that you have no objection in issuing the completion letter.

Copy to: OCP Representative

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CONSTRUCTION DIVISION



Receipt for As-built Drawings

Building ID No.: _____

Project No.: _____

Project Name: _____

Contract No.: _____

Contract Name:

Project Manager: _____

I have received from _____ on _____ electronic copy(ies) and set(s) of As-built drawings on Mylar for the aforementioned contract.

Name:

Date

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Check for Final Acceptance Letter Package

CHECKLIST FOR FINAL ACCEPTANCE LETTER PACKAGE

PROJECT NO.:	
CONTRACT NAME:	
CONTRACT NO.:	
CONTRACTOR NAME:	
PROJECT MANAGER:	
OCP REPRESENTATIVE:	
CONTRACT COMPL. DATE (ORIGINAL) :	
CONTRACT COMPL. DATE (REVISED)	
CONTRACT AMOUNT (ORIGINAL):	
CONTRACT AMOUNT (REVISED):	

NO.	ITEM	YES	NO
1	FINAL ACCEPTANCE LETTER		
2	COPY OF DEFICIENCIES COMPLETION LETTER		
3	RESOLUTION OF ALL CHANGES AND CLAIMS		
4	RESOLUTION OF TIME OVERRUN		
5	AS-BUILT DRAWINGS		
6	WARRANTIES		
7	EVALUATION OF CONTRACTOR'S PERFORMANCE		
8	EVALUATION A-E'S TITLE II PERFORMANCE		
9			
10			
11			
12			

APPROVED BY:	
NAME:	DATE
TITLE:	PROJECT MANAGER

APPROVED BY:	
NAME:	DATE
TITLE:	CLUSTER LEADER

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Agency Feedback Survey

Agency:
Project Manager:
Project Name:
Project #:

Period of Performance: through

ELEMENT	EVALUATION CRITERIA	Exceeded Expectations	Met Expectations	Needs Improvement	Unsatisfactory
Technical Quality	Completeness, accuracy, relevance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	Clarity of reports, drawings, and other documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timeliness	On-time delivery, expeditious completion of tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value	Value received based on actual cost of service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dependability	Consistency, promises kept, credibility, trustworthiness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creativity	Development of innovative, cost-effective solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cooperativeness	Responsiveness, flexibility, approachability, courtesy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attitude	Highest priority given to solving client's problems cost-effectively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professionalism	Did our team conduct themselves in a professional and ethical manner?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other Comments:

Evaluator's name (optional):

Date:

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Transmittal Form to Facility

FROM: OPM Construction Division		DATE PREPARED	
PROJECT/JOBNUMBER		CONTRACT NUMBER(S)	
TO OPM Facilities Division			
TRANSFER DETAILS			
NEW CONST.	EXISTING FAC.	BENF/O	
CAPITAL IMP.	OTHER <i>(Specify)</i>		
DESCRIPTION			
STATEMENT OF COMPLETION.			
The project herein listed is transferred to _____, including all documentation, (i.e. site maps, drawings, and specifications and change orders, warranties and certificates, approved by the authorized representative of OPM Construction Division.			
a. ACCEPTED BY		TITLE	
b. DATE SIGNED			
a. TRANSFERRED AND TRANSMITTED BY <i>(Typed Name and Signature)</i>			
b. TITLE			
c. DATE SIGNED			

GOVERNMENT OF THE DISTRICT OF COLUMBIA
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Process Controls

The process controls sections encompass procedures that are touch points within each of the five (5) phases (initiation, planning, design, construction, and closeout). These checklists apply consistently across each phase.

Procurement/Bidding/Selection/Negotiation: The process of obtaining construction services for a general contractor is through OCP. The method of bidding such as 1) fixed fee 2) Guaranteed Maximum Price (GMP) 3) Design Build 4) CM or 5) CM at risk is determined by DC OPM. A pre-bid conference is held. If changes are made to the drawings, the PM issues an addendum to the bidders. The cluster leader determines the selection board to evaluate and rank the candidates. Once selected, the PM negotiates the contract and issues a task order.

IDIQ Contracting/Title II/Task Order Issuance: OCP executes the Indefinite Delivery/Indefinite Quality (IDIQ) contracts to contractors such as A/E and CM. The PM prepares the task order package. The PM is responsible preparing the task order and entering the information into PASS once the cluster leader approves.

Change Order Process: This procedure starts once there is an agreed upon change order. When a change order has been agreed upon, the PM issues a request for change order to the contractor so they can prepare their documents. The contractor provides a description of the change and resolution with costs. The cluster leader determines if the change should be a Basic Change Directive (BCD) or change order. The PM is responsible for negotiation and Change Order package to be submitted to OFRM for budget reallocation. The PM is responsible to enter all information into PASS and PMIS.

Funding approval from OFRM: Before a notice to proceed (NTP) can be provided, OFRM must validate there are sufficient funds available per the bid negotiation and budget approval. The cluster leader and OPM Deputy Director need to approve before the funds can be encumbered and approved in PASS.

Codes: Code review is reviewed and approved under the direction of DCRA. The A/E is responsible for assuring that the design goes through the proper agency reviews.

Payment Process: The payment process is based upon the payment breakdown and cost loaded schedules from the contractor or A/E. Any changes to the agreed upon cost breakdown may result in rejection of payment application. The

GOVERNMENT OF THE DISTRICT OF COLUMBIA
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PM is responsible for reviewing the payment application against the schedule of values. The cluster leader confirms there is money on PASS to pay the invoice and the PM logs in the information for payment. OFRM issues payment to the contractor.

Contractor Performance Evaluation: At the end of each contract (A/E, CM or general contractor) the PM is required to submit a performance evaluation form with final invoice. The cluster leader must approve evaluation before payment is issued.

Communication Plan/Emergency Response: The PM is responsible for establishing a communication plan, project directory, and contractors and using agency's single point of contact. The PM also establishes weekly meetings to assure there is consistent communication throughout the project.

Stakeholder Engagement: The PM is responsible for the inclusion of stakeholder involvement during each phase of a project as applicable. Stakeholders include but are not limited to OFRM, OBP, Facilities, using agency, DCRA, Physical Security Division (PSD), Portfolio, Facilities and OCTO.

Issues Tracking: The PM is responsible for keeping track of and managing all action items and risk issues throughout the project. This will assist PM, cluster leader and contractor on items that need oversight or action.

Program Schedule: A critical control in successful project management is the development and maintenance of a project schedule. The schedule organizes a series of project critical tasks into a sequence of events throughout the project lifecycle. The PM will utilize the schedule to establish goals, timelines, and expectations for the project team. Combined with the design and contractor schedules, the project management schedules as a whole can be an effective communication and performance tool for the project manage throughout the project duration.

Quality Assurance/Quality Control Inspection (QA/QC): PM or designated person shall review the performance adherence to the project work plan set-up at the project initiation phase.

Permitting: The A/E is responsible for coordination of building plans by the designated government agency, Department of Consumer and Regulatory Affairs (DCRA), as meeting the requirement of prescribed codes. The A/E should engage DCRA during the pre-design stage. If an environmental impact statement is needed it is reviewed by DOH, DWSA, DOT, DPW and DCRA. DCRA is the governing body that issues notice to proceed for construction or reconfiguration

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of a specific structure at a particular site in accordance with the approved drawings and specifications. DCRA arranges for plan reviews when appropriate with zoning reviewer, electrical reviewer, plumbing reviewer, mechanical engineering reviewer, fire safety reviewer, elevator reviewer, structural reviewer, Department of Health, Department of Water and Sewer Authority, Department of Transportation, WMATA, utility companies (Verizon, Washington Gas, PEPCO). The A/E must also:

1. Determine if zoning Commission needs to review in meeting and public hearing
2. Determine if Board of Zoning Adjustment needs to review in meeting and hold public hearing
3. HPB (Historic Preservation Building): File CD review with HPRB 30 days before application
4. File application month before the hearing
5. Attend HPRB meeting
6. Zoning administrator reviews and makes decision
7. Apply for building permit at DCRA.
8. Other permits potentially required:
 - DDOE (Department of Environment)
 - WASA (Water and Sewer Authority)
 - DDOT (Department of Transportation)
 - NCPC (National Planning Council)
 - COA (Community of Art)

Move Coordination: The PM can provide the using agency with move management assistance if required. Move management addresses the need and identification of swing space, temporary space, and schedule precise schedule coordination for per move in date.

FF&E Coordination: The PM should identify with the using agency responsibility for furniture fixtures and equipment coordination. The PM coordinates FF&E purchases (if required) and installation with the contracting officer or other designated furniture or equipment planners.

Final Decisions: When issues or risks become a potential liability, the PM, cluster leader and OPM DD issue final decisions. If potential claims may result, the claims management process proceeds engaging the contracting officer.

Claims Management: Claims are the compensation, payment or reimbursement for a loss under a contract, or an injury due to negligence. It is the responsibility of the contracting officer to understand and issue a written decision on all claims within 60 days of receipt of claim. All contractor appeals go forward to The

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Contract Appeals Board and are handled by Office of Corporation Counsel (OCC). The PM is responsible for reviewing any outstanding claims quarterly.

Commissioning: The A/E schedules inspections for equipment and facility when a project is complete or nearing completion. Systems are tested to verify if they are functioning according to design and objective specifications. Additional items such as keying, phone activation and A/V equipment should also be tested. PM reviews action log deficiencies status of equipment tested and confirms response and resolution taken.

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PROCESS CONTROL

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Procedural Checklist Procurement & Contracting



Initials & Date or NA	Resp Person	PMIS	Doc Sys	Task	Forms
	PM			PM to consider project delivery method and impact on selection of design consultant and review with contracting officer and OCP representative.	
	PM			PM reviews method of selection for consultant or contractor.	
	PM			PM to validate procurement strategies with OCP, OPM DD and supervisor.	
	PM			PM validates the general conditions, any changes are approved by OCP, OPM DD and supervisor.	
	PM			PM to develop bid package strategies to attract appropriate CBE participation. If the CBE requirements are adjusted, PM to prepare a memo to the CBE team explaining justification.	
	PM		X	PM obtains a list of specialized ID/IQ contractors as listed.	
	PM	X	X	PM verifies the amount of money available on the ID/IQ available for funding the project in PMIS. The PM to recommend three (3) for approval by the cluster leader.	Memo to approve list of Contractors CD-G-0001
	PM		X	PM sends a memo and drawing package to the CM (QC) and a letter to the A/E with two (2) sets for review and response.	
	CM (QC)		X	CM (QC) sends letter to PM giving approval of bid documents.	
	PM		X	PM obtains signature from cluster leader on title sheet of design documents approving the release for bid.	
	PM		X	PM stamps each drawing "Issued for Bid" and date in revision area of title block.	
	PM		X	PM sends memo with one set of approved drawings, technical specification, construction cost estimate, recommended rate for liquidated damages, time for construction and funding approval form to OCP to advertise for bid. PM makes sure the cost to print documents is covered.	Request to Advertise for Bid CD-G-0002
	PM		X	PM retains original set of signed drawings and electronic versions.	
	PM			PM arranges for printing and delivery of 10 sets (dwgs and specs) to bid room.	
	PM		X	PM sends letters to the invited bidders with the scope of services requesting their proposed team and cost proposal. PM and OCP representative answer any questions and request response within seven (7) days.	
	PM		X	PM arranges for a pre-bid conference and prepares a memo of the conference notes. The PM and A/E participate in the conference.	Meeting Notes CD-I-0011
	PM		X	If changes are made to the bid documents, PM arranges for A/E to process an addendum.	
	PM		X	PM reviews the questions received and works with the A/E to determine merit and proper response time. They issue the responses to the OCP.	
	OCP Representative		X	OCP representative issues an addendum to the bid documents. The addendum is distributed to bidders.	
	cluster leader			The cluster leader determines the bid evaluation team and provides the consultant criteria list.	Consultant Criteria List CD-G-0003
	Evaluation Team		X	The evaluation team reviews the proposal and tabulates the scores and issues a report to contracting officer.	Tabulation of Scores CD-G-0004 Evaluation Team Report to Contracting Officer CD-G-0005
	PM			PM prepares a memo that explains the reason for selection.	Justification for Selection CD-G-0006
	PM			PM meets with the selected contractor to discuss the team and negotiate. He prepares a record of negotiation of the meeting.	Record of Negotiations CD-G-0007
	PM			PM notifies OCP of the consultant of selection.	
	OCP		X	OCP informs contractor of selection.	
	PM			PM obtains the contingency formula based on the OPM standards.	
	PM		X	PM negotiates cost of the task order and sends record of negotiations (CCSA-F-034).	Record of Negotiations CD-G-0007
	PM	X	X	PM writes task order.	Task Order Document CD-G-0008

Procedural Checklist Procurement & Contracting



Initials & Date or NA	Resp Person	PMIS	Doc Sys	Task	Forms
	Contractor		X	Contractor submit subcontractor list to PM and OCP for review before going out to bid for subcontractors.	
	Contracting Officer	X	X	OCP executes Indefinite Delivery/Indefinite Quantity (ID/IQ) contracts with contractors.	
	PM	X	X	If staff not available to support the project, the PM will issue a NTP to A/E for providing Title II service.	Authorization for Title II Services CD-G-0009
	PM			PM prepares the task order package.	
	PM			PM obtains items based on the task order checklist including the government cost estimate signed by the estimator.	
	PM			PM obtains a list of prior task orders to include in package and a signed task order letter with contractor's signature.	
	PM		X	PM prepares task order including; ID/IQ contract, cost estimate on bldg type & gsf, To letter signed, scope/fee/timeframe/deliverables, list of approved task orders, record of negotiation and cost proposal.	Record of Negotiations CD-G-0007
	PM			PM signs and dates the checklist and initials task order to send to cluster leader with routing sheet.	Routing Sheet CD-G-0010
	cluster leader			Cluster leader signs and dates checklist and initials task order and sends back to PM.	
	PM		X	PM scans and files into PASS. PM approves in PASS.	
	cluster leader			Cluster leader approves the task order in PASS.	
	Contracting Officer		X	Contracting officer prints, signs, scans back into PASS, files complete package with OCP, and sends confirming email to PM.	
	PM	X	X	PM sends the electronic task order letter and scope of work to the contractor. PM loads the contract in PMIS and makes sure OCP saved it in PASS.	
	Contracting Officer			Contracting officer sends the PM an executed copy of the construction contract package.	
	OCP Representative			OCP reviews the package for completeness including; signed contract form, copy of the payment and performance bonds with affidavits and certifications and insurance certificates. If the information can't be obtained, the OCP sends an email to the PM and cluster leader to help obtain.	
	PM		X	PM scans and stores on the file server the completed package and distributes copies to OCP.	
	PM		X	PM issues a request for change order to the contractor to prepare documentation. PM confirms the scope of the change order with the change initiator.	
	Contractor		X	Contractor provides a description of change including change order drawings, specifications and detailed estimate to PM. PM reviews with the CM (QC). The drawings are logged and stamped/signed by the A/E.	Description of Change document for Article 3 Letter (BCD) CD-G-0011 Log of Change Order drawings CD-G-0012
	PM			PM and cluster leader determines which change order process to take: direct change or Article 3 letter - Basic Change Directive (BCD).	
	PM		X	PM directs the contractor to start work immediately if BCD.	
	PM	X		PM records the BCD or change order in PMIS.	Change Order log (PMIS Report) CD-G-0016
	PM		X	PM prepares a request for cost proposal Letter and sends to the Contractor.	
	PM			PM receives the cost proposal and meets with the cost estimator and cluster leader to discuss strategy for negotiation.	
	PM			PM schedules a negotiation meeting with the contractor and includes OCP, cost estimator and cluster leader and A/E.	
	PM		X	PM prepares a record of negotiations, preparation of a change order package (CCSA-F-121), negotiates the budget and requests approval for budget reallocation to OFRM when needed (refer to budget approval process).	MFR of Negotiations for Change Order CD-G-0013 Checklist for Change Order Package CD-G-0014
	PM		X	If there is a failure to agree during negotiations, the PM sends a memo to contracting officer.	MFR on failure to agree on CO Cost CD-G-0015

Procedural Checklist Procurement & Contracting



Initials & Date or NA	Resp Person	PMIS	Doc Sys	<u>Task</u>	<u>Forms</u>
	PM		x	PM assembles change documentation per checklist including; Article 3 letter	Article 3 Letter (BCD) Checklist CD-G-0017
	PM		x	PM assembles change documentation per checklist including; description of work, reason for change completed by the PM.	Reason for Change and Status of Work CD-G- 0018
	PM		x	PM assembles change documentation per checklist including; government cost estimate, funding availability from OFRM, list of prior changes (change order log) and base contract.	Change Order log (PMIS Report) CD-G-0016
	PM			PM signs and dates the checklist and initials change order to send to cluster leader with a routing sheet.	Routing Sheet CD-G-0010
	cluster leader		x	Cluster leader signs and dates checklist and initials change order and sends to PM.	
	PM			PM scans, uploads and approves the change order in PASS.	
	cluster leader			Cluster leader approve the change order in PASS.	
	Contracting Officer			Contracting officer prints, signs, scans back into PASS, files complete package with OCP and send confirming email to PM.	
	PM		x	PM sends copies of the completed scope of work to the contractor and using agency. PM confirms uploaded to PASS.	
	PM		x	PM updates log of change orders in PMIS.	Change Order log (PMIS Report) CD-G-0016

Procedural Checklist Funding Approval



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	PM			PM obtains a funding status report from OFRM to validate if funding is available in the current phase.	
	PM	X		If funding increases are required, the PM submits a budget approval form with routing sheet to the cluster leader to approve. The cluster leader requires the approval of the OPM DD. PM tracks it in PMIS.	Budget Approval Form CD-G-0019 Routing Sheet CD-G-0010
	PM		X	If the bids are over the Government cost estimate OCP requests PM to increase funding.	
	PM		X	If the bids are over 10% of the estimate, the OCP requires written justification for the discrepancy.	
	PM	X	X	If funds are available in other phases, PM gets approval from cluster leader and OPM DD. PM updates in PMIS.	
	PM		X	PM sends a memo to OFRM requesting reallocation of funds after obtaining approval from OPM DD.	Request OFRM to Reallocate Funds CD-G-0020
	OFRM			OFRM encumber the funds and send to contracting officer for approval in PASS.	
	PM			If funds are not available to cover the bid prices, the PM notifies OPM DD to determine action.	

Procedural Checklist Codes



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	A/E			A/E identifies extraordinary or atypical code requirements for PM review.	
	PM			PM reviews existing FCA and necessary extensions, upgrades, replacements, and required code improvements.	
	A/E			A/E identifies accessibility (ADA) issues and notifies PM of findings.	
	PM			PM reviews the design and plan with DCRA per the agency review checklist.	Agency Review Checklist CD-D-0002
	A/E			A/E assesses building code hazard classification and exhaust and filtration requirements and notifies PM of findings.	
	A/E			A/E identifies, evaluates, and documents historic resource preservation status, treatment requirements, and proposed project treatment responses and notifies PM of findings.	

Procedural Checklist Payment Process



Initials & Date or NA	Resp. Person	PMIS	Doc Sys	Task	Forms
	PM		X	PM obtains a cost breakdown/cost loaded schedule from the contractor, A/E or other vendor (no payments are made until it is approved). Any changes to the agreed upon cost breakdown results in rejection of the payment application.	
	PM		X	If the contractor fails to submit cost breakdown, the PM sends a letter. If they fail to meet the deadline an email is sent to the OCP to follow-up (refer to final decisions process).	
	PM			PM meets with the contractor to review the pay application in advance of submission (pencil copy). The PM walks the job to confirm percent complete.	
	Contractor			Contractor submits for payment using the standard payment request form. The contractor sends to the invoice processor to receive and log.	Payment Request Form CD-G-0021 or AIA G703
	PM			PM or receiver signs a receipts of delivery for the invoice and sends to the invoice processor to receive and log.	
	PM			PM secures all releases, affidavits, bonds, waivers & warranties, certified payroll from contractor. PM is not allowed to drop retention below 10% without DD approval.	
	PM			If final payment, PM receives the invoice and evaluates that all the documentation is in place (refer to the closeout process).	
	Invoice Processor			OPM Invoice processing staff to stamp "Received". Invoice processor dates and initials it, logs it in payment request Log maintained on the PMIS and sends to the PM for review (in one day).	Payment Log (in PMIS) CD-G-0024
	PM			PM reviews against the SOV reviewed prior to final submission. If there are any discrepancies, the pay application is rejected. PM notifies contractor of rejection. If approved PM sends to cluster leader for approval. If final payment, refer to closeout process and stamp the invoice "Final Payment".	Progress Payment Request Rejection Form CD-G-0022 Routing Sheet CD-G-0010
	Cluster Leader			Cluster leader reviews and sends to operations manager for review and verification of funds on the contract in PASS.	
	Operations Manager			Operations manager sends to OPM DD for review and approval.	
	OPM DD			OPM DD signs it and delivers to the invoice processor, who delivers the documents to PM for PASS processing (in two days).	
	PM			OPM invoice processor scans invoice, sends hard copy to OFRM for payment and sends scanned copy to PM.	
	PM	X	X	PM enters the 'PMIS' invoice tracking number in PASS and inserts the 'PASS' receipt number in PMIS.	Payment Log (in PMIS) CD-G-0021
	OFRM			OFRM receives payment application and processes for payment. OFRM sends payment receipt to PM. If OFRM pays final payment, the contract is considered closed and remaining funds are released on the purchase order.	
	Invoice Processor			Invoice processor sends approved payment copy to PM.	
	Invoice Processor		X	Invoice processor scans in receipt into the same folder where the payment request was stored and sends hard copy to project file.	
	PM	X	X	PM enters payment receipt from OFRM into payment log in PMIS with date and amount is confirmed.	Payment Request Receipt from OFRM CD-G-0023 Payment Log (in PMIS) CD-G-0024

Procedural Checklist Contractor Evaluation



<u>Initials & Date or NA</u>	<u>Resp Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	PM		x	PM prepares a contractor evaluation form and attaches to the final acceptance letter or final invoice. Cluster leader concurs with evaluation.	Contractor Evaluation Form CD-G-0025

Procedural Checklist Stakeholder Engagement



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	PM		X	PM adapts or edits (with approval of cluster leader) communication guidelines and project dictionary.	Communication Guidelines CD-G-0026
	PM		X	PM creates contact list (also referred to as project directory). PM identifies single point of contact for project with using agency.	Contact List CD-G-0027
	PM		X	PM sets up project team meeting schedule and schedules QA/QC reviews (refer to the QA/QC plan process).	
	PM		X	PM to discuss their procedures for emergency notification to and from the impacted neighborhood with using agency.	
	PM		X	PM confirms using agency expectations for success of the project during the planning phase.	
	PM			PM schedule workshop meetings with stakeholders (including PSD, Portfolio, Facilities Division and OCTO) to review the planning and design (at each stage of design) updates.	
	PM		X	PM conducts pre-construction meeting with stakeholders. PM record/distribute meeting minutes to stakeholders.	Meeting Notes CD-I-0011
	PM		X	PM invites stakeholders (including OCTO) to the construction meetings.	Meeting Notes CD-I-0011

Procedural Checklist Issues Tracking



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	PM		X	PM tracks and managing Issues in an action/issue log.	Action/ Issue Logs CD-G-0028
	PM		X	PM discusses outstanding items with cluster leader; determine responsible party and plan of action to clear items in progress meetings.	
	PM			PM monitors actions till closed out, typically reviewed in weekly progress meetings (refer to construction meetings process). Outstanding action items and issues are recorded in the monthly report (refer to monthly report process).	
	PM			PM identifies actions that are appropriate for lessons learned in closeout (refer to lessons learned process).	

Procedural Checklist Risk Management



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	PM		x	PM to identify exposures/risks and update them monthly in a risk log. Risks can be identified in all stages of the project by all parties (A/E, CM, using agency, etc).	Risk Log CD-G-0029
	PM			PM quantifies the risks after reviewing with the cluster leader. The risks are tracked through till closure at the end of the project. Risks are noted in the monthly report (refer to the monthly report process).	

Procedural Checklist Monthly Report



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	PM			PM to issue monthly internal status report to cluster leader and OPM DD.	
	PM	X		PM to provide monthly project performance report to OPM DD and using agency from PMIS.	Project Performance Report CD-G-0030
	PM		X	PM reviews monthly construction reports from contractor.	

Procedural Checklist Schedule



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	PM			PM establishes milestones for progress review (25%, 50%, 75% and 95% standard).	
	PM		X	PM reviews milestone schedule with the OPM DD and using agency during planning.	Sample Milestone Schedule CD-G-0031
	PM		X	PM obtains preliminary schedule from contractor and reviews it. If contractor fails to submit, the PM send a letter. If they fail to meet the deadline, an email is sent to OCP to follow-up.	
	PM		X	PM obtains final CPM (critical path method) electronic schedule from contractor. If contractor fails to submit, the PM sends a letter. If they fail to meet the deadline, an email is sent to OCP to follow-up.	
	PM			PM sends accepted schedule and cost break down to CM (QC) for review.	
	CM (QC)			CM (QC) team evaluates the construction schedule against progress at each milestone and prepare a report outlining deficiencies, % complete, work in progress, unacceptable work and other issues around meeting schedule.	
	PM		X	PM reviews and verifies schedule monthly with A/E and contractor.	
	PM			PM sets the schedule for construction progress meetings.	
	PM		X	If the contract is behind schedule, the PM sends a letter requesting explanation of delay and need for a recovery schedule	
	PM		X	If no response to schedule request, contracting officer sends a cure letter. If no response, PM discusses with cluster leader and OPM DD.	
	PM		X	PM evaluates contractor reason for delay with A/E and OCP. If acceptable, PM sends memo approving time extension to the contractor.	
	PM			PM requests a revised schedule (CCSA-F-133) for approval if the contractor chooses to accelerate.	

Procedural Checklist QA QC Plan



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	PM			PM schedules for the QA/QC activities according to the quality assurance plan.	
	OPM DD		x	OPM DD to determine who performs project surveillances to verify compliance with quality assurance plan.	Surveillance Report CD-G-0032

Procedural Checklist Permitting



Initials & Date or NA	Resp. Person	PMS	Doc Sys	Task	Forms
	Contractor			The contractor is required to send copies of all contractor permits, approvals from DCRA and verifications prior to proceeding with work. PM confirms the permits required, refer to the agency review checklist.	Agency Review Checklist CD-D-0002
	A/E		x	A/E submits 100% complete drawings with prescribed permit request form to department of consumer and regulatory Affairs (DCRA).	Permit Request Form CD-G-0033
	A/E			A/E requests DCRA to defer any filing cost requirements until the final permit costs are determined.	
	A/E		x	A/E provides copy of permit application and permit number filed with DCRA to PM.	
	A/E		x	A/E meet weekly with DCRA on permitting issues and provides PM meeting notes.	Meeting Notes CD-I-0011
	A/E			A/E will notify PM in writing if A/E finds the permit will not be received within 30 calendar days of filing for the application.	
	DCRA			DCRA notifies A/E when permit is ready.	
	A/E			A/E obtains a faxed copy of permit from DCRA with permit fee.	
	A/E			A/E delivers permit to PM to pay all required costs to obtain permit.	
	PM		x	PM prepares building permit fee payment form to DCRA requesting OFRM transfer funds to DCRA.	
	PM		x	PM provides copy of the approved funding document to A/E to pick up permit.	
	A/E			A/E keeps one (1) copy of permit and forwards original and two (2) sets for approved drawings to PM.	
	PM		x	PM makes copies of permit and places on in the project file server.	
	PM			PM files original permit with two (2) approved sets of drawings.	
	Contractor			Contractor obtains the construction permits in accordance with specifications. Copies of all permits must be given to the PM prior to starting work. Inspections are scheduled with the DCRA and confirmed.	

Procedural Checklist Move Coordination



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	PM		x	PM provides coordination plan for move management or obtains external consultant to do so.	
	PM			PM determines swing space requirements.	
	PM			PM confirms temporary space, if necessary.	
	PM			PM confirms that movers have been scheduled for the using agency.	
	PM		x	PM confirms move-in schedule with using agency.	

Procedural Checklist FF&E Coordination



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	PM		x	PM reviews and confirms that any items requiring specialty handling have been addressed with using agency.	
	PM		x	PM clears any security items with PSD that remain outstanding.	
	PM		x	PM coordinates FFE purchases (if required) and installation with contracting officer or other designated furniture or equipment planners.	

Procedural Checklist Final Decisions



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	PM		x	During the course of construction, it is recommended that issues and potential claims are evaluated by an expert to analyze the pros and cons of the District's position. The PM reviews the risk log and claims status.	
	PM		x	The PM and OCP representative would prepare letter to the effect of the position of the District if a dispute arises and request the contractor to submit additional information for final decision.	
	PM		x	PM reviews submittal of information from contractor regarding potential dispute. If there isn't sufficient justification for change order, the PM prepares a final decision letter and supporting documentation for contracting officer. If legal action could result, refer to the claims process.	

Procedural Checklist Claims



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	Contracting Officer		x	Contracting officer meets with the District's representatives to understand their portion of the claim.	
	Contracting Officer			Contracting Officer issues a written decision on the claim within 60 days of receipt of the claim. It is sent by mail with a copy sent to the PM and file.	
	Contractor			Contractor appeals the final decision to the Contract Appeals Board and it is handled through the Office of Corporation Counsel (OCC).	
	OCC			The OCC meets with the appropriate parties to obtain information.	
	OCP			The OCP and Office of Implementing Agency (OIA) submit the appeal file.	
	OCC			OCC sends to the Board.	
	OCC		x	OCC will engage the team in informal meetings and discussions. This may include depositions. All contract documents must be made available to the OCC. Funding is issued through the project by the PM (refer to budget approval process).	
	PM			PM issues a purchase order to procure services for claim resolution (refer to the contract and budget approval process).	
	Cluster Leader			Cluster leader provides technical representatives during any hearings scheduled by the OCC.	
	PM			PM reviews status of outstanding claims quarterly.	
	OCC			Any issue irresolvable between the contracting officer and contractor will become a claim. Accordingly to the DCMR 27, the District will resolve such disputes.	
	Contracting Officer		x	Contracting officer responds to written claims submitted by the contractor in closeout.	

Procedural Checklist Commissioning



<u>Initials & Date or NA</u>	<u>Resp. Person</u>	<u>PMIS</u>	<u>Doc Sys</u>	<u>Task</u>	<u>Forms</u>
	A/E			A/E schedules inspections for the following: A/E, elevator, high-pressure steam, commissioning agent, fire inspector, building code inspectors.	
	PM			PM confirms key/lock plan and procedures with using agency.	
	Contractor			Contractor confirms phone activation schedule with PM and using agency.	
	Contractor			Contractor confirms A/V equipment installation with using agency and PM.	
	Contractor		X	Contractor determines operating condition of commissioned systems at the end of functional testing.	
	PM		X	PM reviews deficiencies list identified by contractor and confirms response and resolutions taken.	Contractor Deficiency List CD-F-0004
	PM		X	PM documents any unresolved deficiencies that were accepted and obtain appropriate signature for acceptance (refer to deficiencies list process).	
	PM		X	PM reviews Deficiency List for status of equipment tested and confirms response and resolutions taken.	Contractor Deficiency List CD-F-0004
	PM			PM reviews estimated schedule for required deferred (off-season) testing.	
	A/E			A/E reviews draft O&M manuals and provides comments to contractor.	
	PM			PM schedules meeting with contractors, design consultant, emergency management, and appropriate personnel to discuss equipment maintenance forms and format.	
	PM			PM ensures training of facilities team.	
	PM			PM provides agenda topics and certificates of satisfactory completion for sign off and for specified training developed in design phases.	
	Using Agency			Using agency decides if training should be taped for future use and PM arranges for it to be provided.	

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Memo to Using Agency to Approve List of Contractors

MEMORANDUM

TO: NAME
TITLE

FROM: NAME
TITLE

DATE:

SUBJECT: Request for approval of Architect-Engineer Selection List to perform Facility Condition Assessment
Project No.:
Project Name:

We require the need to procurement of A-E Services to perform Facility Condition Assessment and submit a Report for **LOCATION NAME** located at **ADDRESS**. I have reviewed the list of the A-E Contracts for procuring the required service. Based on my review I am forwarding for your review and approval the following three Architect-Engineers for this project

Please review, sign and return this memo to me indicating your approval of the Architect-Engineers as listed for the project. If you make changes to the order in which they are listed, please include justification for your change. Upon receipt of approval, I will contact the A-E firm which is first on the list for developing the scope of work of their services and negotiation of a Task Order. If the negotiations fail, I will be recommending to the Contracting Officer to approve the termination of negotiations with the 1st A-E and initiate negotiations with the next A-E on the list approved by you.

Name of the A/E	As recommended	As approved
_____	[1]	[]
_____	[2]	[]
_____	[3]	[]

Comments:

Cluster Leader

Date

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Request to Advertise for Bids “Page 1 of 2”

MEMORANDUM

To: Name
Title

From: Name
Project Manager

Date:

Subject: Project Name:
Project No.:
Request for Advertising the Project for Bids

Attached are the following documents for your office to take necessary action to advertise the project for bids, obtain the bids and award a construction contract:

1. One copy of the technical specifications. As soon as your office makes a request we will e-mail a copy of these specifications.
2. One copy of construction drawings. As soon as you notify us the number of copies of these drawings you need to issue for bids, we will have the copies printed in three working days.
3. Copy of the construction cost estimate.
4. Copy of the funding document approved in PASS.
5. Copy of justification for the amount of liquidated damages

Time for completion of the construction is ## calendar days. Liquidated Damages for each day of inexcusable delay in completing the project is \$#,### dollars (\$###.##).

Your expeditious action in this regard will be appreciated.

Attachments as stated

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Cluster Leader

Date

Request to Advertise for Bids "Page 2 of 2"

**SAMPLE
JUSTIFICATION FOR THE AMOUNT OF LIQUIDATED DAMAGES**

Project No. _____

Project Name: _____

Item	Hours	Rate	Amount
Project Manager:	## hours	##.##	###.##
Project Inspector	## hours	##.##	###.## *
Elect / Mech / Insp	## hours	##.##	###.## *
Office Overhead	LS	LS	###.##
TOTAL:			###.##

* If the Inspectors are employees of the District and are not contract employees use their actual salary and multiply X 1.45 to determine the hourly rate.

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



CONSULTANT CRITERIA LIST
for
ARCHITECT-ENGINEER EVALUATION CRITERIA

1. Professional qualifications, specialized experience and technical competence necessary for satisfactory performance of specified services.
2. Professional capacity of the firm to perform the work within the time limitations.
3. Past record of performance on contracts with the District, other governmental entities and private industry in terms of cost control, quality of work and compliance with the performance schedule.
4. Location of the firm in general geographical area of the projects and knowledge of the locality in which the projects are located.
5. Understanding of the applicable Federal and District of Columbia regulations, Orders, criteria, standards and procedures with respect to planning, design, construction, and approval of the project by DCRA.
6. Demonstrated specialized experience in working on renovation of historical preservation projects.
7. Experience in energy conservation, pollution prevention, waste reduction and use of recovered material.

(Add and or delete criteria to meet the requirements of specific project. The determination has to be made jointly by Implementing Agency, User and OCP)

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Tabulation of Score

Tabulated by: _____

TABULATION OF A-E EVALUATION BOARD MEMBER'S
TOTAL SCORE FOR ID/IQ CONTRACTS

No.	Name of Firm	Score from Evaluator No.1	Score from Evaluator No. 2	Score from Evaluator No. 3	Score from Evaluator No. 4	Total Score of all the Evaluators
1						0
2						0
3						0
4						0
5						0
6						0
7						0
8						0
9						0
10						0
11						0
12						0
13						0
14						0
15						0
16						0
17						0
18						0
19						0
20						0

Note: Do not enter/delete information in areas highlighted in light turquoise color.

Name: _____ Date: _____

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Evaluation Team Report to Contracting Officer (Page 1 of 2)

MEMORANDUM

TO: NAME
TITLE

FROM: NAME
TITLE

DATE:

SUBJECT: Evaluation Board's Selection Report for awarding Indefinite Delivery, Indefinite Quantity Contracts

Office of Contracting and Procurement (OCP) had issued a Request for Proposals (RFP) on _____ (Attachment No.1) soliciting Expression of Interest from NAME to enter in to Indefinite Delivery, Indefinite Quantity contracts for providing NAME Services to various District Agencies in architecture, engineering and related areas. The receipt for responses to be considered in the initial screening date was _____. OCP had received _____ responses to this RFP.

In accordance with the DCMR 27 Chapter 26, an Evaluation Board was appointed to evaluate all the proposals received in response to the RFP and recommend awarding ID/IQ contracts to most qualified and experienced NAME for providing services stated in the RFP. As required by DCMR 27, the board was provided with evaluation criteria to be used for rating the firms (Attachment No. 2).

Upon review the proposals received from the A/Es, the board members rated each of the A-Es for the listed evaluation factors using a scale of 0 to 4, 4 being the highest rating. All the evaluations from each of the members (Attachment No. 3) were tabulated and added to arrive at a total numerical score (Attachment No. 4). Based on the tabulation, a rating list has been prepared with the first firm on the list being the top scorer (Attachment No. 5).

Please select required number of firms to award ID/IQ contracts in the same order as provided in the rating list. The regulations require that if you choose not to select as recommended by the board, you have to provide justification and select the firm next on the rating list. Upon completing the selection please send a copy for files of the Board.

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Evaluation Team Report to Contracting Officer "Page 2 of 2"

SUBJECT: Evaluation Board's report for awarding Indefinite Delivery, Indefinite Quantity Contracts

No.	Name of the Firm	Rating by the Board	Rating by Contracting Officer
1			
2			
3			
4			
5			

Comments:

NAME, TITLE

Date

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Justification for Selection

Date: _____

Subject: _____
Project No: _____
Construction Contract No.: _____
Contract Name: _____

Cluster Leader had approved the list of three Contractors to negotiate the services and the cost. Meetings were held with all the three Contractors. They were provided with the scope for their services. All the Contractors were requested to submit their recommended team and the cost proposal no later than 2.00 PM on _____. The proposals were received and tabulated.

All the members reviewed the team proposed by each of the Contractors and their cost proposal. Upon discussion, it was determined that _____ Contractors Firm was to be contacted for further negotiation. If the negotiations fail, the next Contractors to be selected for negotiation will be _____. This determination was based on the following:

- 1.
- 2.
- 3.

Prepared by: _____

Concurred by: _____

Concurred by: _____

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



RECORD OF NEGOTIATION

Date: _____

SUBJECT: Contract No.: _____
Project No.: _____
Task Order No. _____
Contract Name: _____

A meeting was held with the _____ on _____. Mr./Ms. _____, Contract Specialist, Mr./Ms. _____, Chief of Construction management and Mr./Ms _____, Administrator of CCSA also participated in the meeting. In the meeting the proposal submitted by the CM contractor on _____ was discussed.

At the conclusion of the meeting, it was mutually agreed for \$_____ as the compensation for the _____ Services. It was agreed that the Contractor will provide the required services within seven calendar days of approval of the Task Order by the Contracting Officer or on the date specified in the Task Order. It was also agreed that he will provide additional services only if such services are requested in writing by the Contracting Officer.

Contractor was advised that a Task Order will be prepared for the Contracting Officer's approval and he could start the work only after receiving an approved copy of the Task Order signed by the Contracting Officer.

Prepared by: _____
Project Manager, CCSA, OPM

Concur by: _____
Contract Specialist, OCP

Agreed by: _____
Name of the Representative, Name of the Firm

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Task Order Document (Page 1 of 2)

Name of the Person
Name of the Company
Street Address
City, State and Zip code

Subject: Contract No.: _____
 Project No.: _____
 Project Name: _____
 Task Order No.: _____

Dear _____,

This Task Order is issued in accordance with the subject contract. The work to be performed under the task order is delineated in the attached Appendix A dated _____ / Description of Work dated _____.

The work for the services required under Title I shall begin within seven (7) calendar days of the date of this task order and shall be completed within _____ calendar days thereafter. This timeframe includes the time required by the District to review the design submittals and provide the comments.

For the services provided under the task order, the District will pay an agreed amount of ----- Dollars (\$-----) for Title I Services and _____ Dollars (\$_____) totaling to _____ Dollars (\$_____).

No work under Title II services shall be started until written receipt of authorization from the Contracting Officer's. If this work is authorized, the services will be required for the duration of the construction contract.

Partial payments under this task order will be made in accordance with the contract and the payment schedule approved by the Project Manager for the acceptable work accomplished.

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Task Order Document (Page 1 of 2)

Subject: Contract No.: _____
Project No.: _____
Project Name: _____
Task Order No.: _____

The total negotiated amount of _____ Dollars (\$_____) is based on unaudited overhead rate of ____%. As agreed on _____, the rate as well as the total task order amount will be adjusted upon receipt of acceptable audited report for the overhead rate. Requests for payment under this task order shall be made after submitting the aforementioned report.

All other conditions as applicable to the subject contract remain unchanged.

Sincerely,

Contracting Officer

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Authorization for Title II Services

Name of the Person
Name of the A/E Firm
Steer Address
City, State and Zip Code

SUBJECT: A-E Contract No.: _____
Task Order No.: _____
Project No.: _____
Project Name: _____

**Renovation of Chief Medical Examiner's Office
Authorization for Title II Services**

Dear _____,

Reference is made to the subject Task Order that was issued by the Contracting Officer on _____.

As stated in the Task order, I am hereby authorizing you to provide all the services required by the Title II services for the project. It should be noted that the Title II Services can only be provided up to the amount authorized in the Task Order. Additional services, if required, shall be provided only after receiving written authorization from the Contracting Officer for such services.

If you have questions or need additional information you may call me at (202) ###-####.

Sincerely,

Name of the Project Manager
Project Manager

Attachments as stated

Copy to **Cluster Leader** _____
OCP Representative _____

GOVERNMENT OF THE DISTRICT OF COLUMBIA

OFFICE OF PROPERTY MANAGEMENT

CONSTRUCTION DIVISION



ROUTING SHEET

PROJECT MANAGER _____

DATE: _____

VENDOR NAME: _____

\$\$ AMOUNT: _____

CONTRACT/CO/INVOICE# _____

PROJECT NUMBER

Check appropriate boxes:

Date and initial appropriate box(es):
DC OPM

- Project Manager
- Cluster Leader
- Deputy Director
- Invoice Processor
- Bid Evaluation Team

- Project Manager handoff
- Contractor (if applicable)
- Architect (if applicable)

DC OCP

- Contract Specialist
- Contracting Officer

DC OFRM

- OFRM Representative

DC Permit Dept

- Permit Expeditor

Design Reviewers

- CM (QC)

Using Agency

- UA Representative

INITIALS & DATE RECEIVED	PROJECT APPROVAL	BUDGET REALLOCATION	BID	CONTRACT	CHANGE ORDER	INVOICE PAYMENT	PERMIT APPROVAL	DESIGN REVIEW
	INITIAL	INITIAL	INITIAL	INITIAL	INITIAL	INITIAL	INITIAL	INITIAL
	INITIAL	INITIAL	INITIAL	INITIAL	INITIAL	INITIAL	N/A	N/A
	INITIAL	N/A	INITIAL	INITIAL	INITIAL	INITIAL	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	INITIAL	N/A	N/A
	N/A	N/A	INITIAL	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	INITIAL	N/A	INITIAL	INITIAL	INITIAL	N/A	INITIAL
	N/A	N/A	N/A	INITIAL	INITIAL	INITIAL	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	INITIAL	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	INITIAL	INITIAL	INITIAL	N/A	N/A	N/A
	N/A	N/A	INITIAL	INITIAL	INITIAL	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	INITIAL	INITIAL	N/A	N/A	N/A	INITIAL	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	INITIAL	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A	INITIAL
	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	INITIAL	N/A	N/A	N/A	N/A	N/A	N/A	INITIAL
	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Description of Change Document for Article 3 Letter (BCD)

Date: _____

Name of the Person
Name of the Contractor
Street Address
City, State, and Zip Code

Subject: BCD No.: _____, Article 3 Letter
Contract No.: _____
Project No.: _____
Project Name: _____

Dear _____,

Immediately upon receipt of this document and in accordance with Article 3 of the contract, you are directed to proceed with the enclosed Description of Change dated _____.

If a request for an increase in contract amount or time is to be made, or if a credit is due the District of Columbia, your written request or statement of credit should be promptly made to the Contracting Officer.

Your request for an increase or statement of credit should include details on cost of labor, material, equipment, overhead, profit, and any pertinent data which affect the subject change. Should extension of the period of contract performance be a consideration, a complete justification is also required, explaining the time involved and how this change affects the contract as a whole. You should also describe the activity or activities affected and the number of days each activity(s) duration has to be increased or decreased. However, all items of work not affected by this change shall be completed within the time specified in the contract.

It is requested that you submit your complete proposal within twenty (20) days from receipt of this letter.

Sincerely,

Contracting Officer

Enclosures as stated

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



LOG OF CHANGE ORDER DRAWINGS

Project No.: _____
Name of the A-E: _____
A-E Contract No.: _____
Task Order No.: _____
Change Order No.: _____
Construction Contractor Name: _____
Contract No.: _____
Contract Name: _____

C.O. Dwg. No.	Description of Drawing	Drawing Date	Issue date	BCD No./ D.C No.

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



MFR OF NEGOTIATION FOR CHANGE ORDER

Date: _____

SUBJECT: **Contract No.:** _____
Project No.: _____
Contract Name: _____
Change Order No.: _____
BCD No.: _____

The contractor, _____, was requested on _____ to submit a cost proposal for performing additional change order work. He submitted his cost proposal on _____ in the amount of \$ _____.

A negotiation meeting was held with Mr. / Ms. _____ of _____ on _____. In attendance were: _____, _____, _____, and _____ representing the District.

Upon conclusion of the meeting it was mutually agreed for \$ _____ as the compensation for the added work identified in the scope of work. It was also agreed that contract time be extended by _____ calendar days. Details for the time extension are provided in the attached time extension justification memo.

Contractor was advised that a Change Order as agreed for added costs and time will be prepared for the Contracting Officer's approval and he will start the work only after receiving an approved copy of the change order signed by the Contracting Officer.

Prepared by: _____
_____, Office Engineer, CCSA, OPM

Concurred by: _____
_____, Project Manager, CCSA, OPM

Concur by: _____
_____, Contract Specialist, OCP

Agreed by: _____
Name of the Contractor

Enclosure(s): _____

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
 CONSTRUCTION DIVISION



Checklist for Change Order Package

CHANGE ORDER NO.:
 ARTICLE 3 LETTER NO.:

PROJECT NO.:	<input type="text"/>
CONTRACT NAME:	<input type="text"/>
CONTRACT NO.:	<input type="text"/>
CONTRACT NAME:	<input type="text"/>
PROJECT MANAGER:	<input type="text"/>
CONTRACT SPECIALIST:	<input type="text"/>

NO.	ITEM	YES	NO
1	CHANGE ORDER SIGNED BY THE CONTRACTOR		
2	SCOPE OF WORK		
3	MEMORANDUM OF NEGOTIATIONS		
4	GOVERNMENT COST ESTIMATE		
5	CONTRACTOR COST PROPOSAL		
	ARTICLE 3 LETTER, FWA		
6	LIST OF PAST CHANGE ORDERS		
7	COPY OF THE CONTRACT		
9	FUNDING DOCUMENT		
10			
11			
12			

PREPARED BY:	<input type="text"/>	
NAME:	<input type="text"/>	DATE
TITLE:	PROJECT MANAGER	

APPROVED BY:	<input type="text"/>	
NAME:	<input type="text"/>	DATE
TITLE:	CLUSTER LEADER	

APPROVED BY:	<input type="text"/>	
NAME:	<input type="text"/>	DATE
TITLE:	ADMINISTRATOR	

I COMPLETED SCANNING THE CHANGE ORDER PACKAGE TO THE PASS	
NAME:	<input type="text"/>
DATE:	<input type="text"/>

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



MFR of Failure to Agree on CO Costs

Date: _____

SUBJECT: Contract No.: _____
Project No.: _____
Contract Name: _____
Change Order No.: _____
BCD No.: _____

The contractor, _____, was requested on _____ to submit a cost proposal for performing additional change order work. He submitted his cost proposal on _____ in the amount of \$ _____.

A negotiation meeting was held with Mr. _____ of _____ on _____ . In attendance were: _____, _____, _____, and _____ representing the District.

After extensive discussions no agreement could be reached for fair and reasonable costs for the change.

*In view of this, as the contractor has already accomplished the work under Article 3 Directive (BCD NO. ___ dated _____), in order for him to be paid, it was mutually agreed that the District will issue a final decision for the amount the District considers as fair and reasonable. It was also agreed that the District will state in the decision letter that the following items were agreed for the costs noted against each of these items and these items are not in dispute:

*In view of this, as time is of essence, the contractor was advised that the District will issue an Article 3 Letter directing him to proceed with the work immediately pending settlement of costs and time for the work.

Prepared by: _____
_____, Office Engineer, CCSA, OPM

Concurred by: _____
_____, Project Manager, CCSA, OPM

Concurred by: _____
_____, Contract Specialist, OCP

Concurred by: _____
Name of the Contractor

*Note: Use one of the two

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



PMIS REPORT

Change Order Log (PMIS) Report

CD-G-0016

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Article 3 Letter (BCD) Checklist

Subject: BCD No. _____, Article 3 Letter Date: _____
Contract No.: _____
Project No.: _____
Project Name: _____

Sample:

- Refer to Contract drawing Nos. ____ through ____ dated _____.
- Delete the requirement of providing (describe the work shown or identified in the drawing) as shown on _____.
- Delete all the drawings listed above in their entirety.
- Provide (describe the work shown or identified in the drawing) in accordance with the details provided in the Change Order Drawing Nos. ____ through ____ dated _____.
- Replace the deleted drawings with the drawings identified above.
- Refer to Contract specifications Section ____ paragraph _____. Delete this paragraph in its entirety
- Provide the (describe the work required in the change order specification) as delineated in the attached specifications title _____ dated _____.

Project Manager

Date

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Reason for Change and Status of Work

Subject: Subject: BCD No. 00 (Article 3)
Contract No.: _____
Title: _____

Date: _____

STATUS OF AFFECTED WORK

The Contractor is awaiting this directive to proceed with work. The contract work is approximately ___% complete. This change does not affect the items that are on critical path of work and can be accomplished concurrently with the contract work.

The following contract work activities related to this change order work are not being performed and are on critical path as such the contract work is being delayed:

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Budget Approval Request (Page 1 of 2)

First Paragraph (Choose one)

- 1) **New Project Approval:** I am requesting administrative approval for the *Name of Project* (project number 9XXXXX).
- 2) **Augmentation of Existing Project:** I am requesting administrative approval for a budget increase and change of scope for the *Name of Project* (project number 9XXXXX).

Second Paragraph (if applicable)

History of prior approvals for this project &/or history relating to this project.

Third Paragraph

Description of the project or use your executive summary from your PPG in brief.

Fourth Paragraph (if applicable, need for the budget increase and a detail description)

Example of detail description:

“Net project budget increases of \$800,000 have been experienced due to the following:

Net Construction Cost Increases Attributable to Original Scope (+\$400,000)

Net construction cost increases attributable to the original scope include higher foundation costs due to poor soil conditions (\$200,000), higher than anticipated costs for vertical structure (\$100,000), increased costs for fire separation between X building and the adjacent Y building per the Fire Marshal (\$100,000), and increased site utility costs due to the unanticipated complexity of existing conditions (\$100,000). These increased costs were offset by (-\$100,000) reduction in construction management fees.

Construction Cost Increase Attributable to New Scope (+\$300,000)

Explanation

Soft Cost Increase (+200,000)

Explanation

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Budget Approval Request (Page 2 of 2)

Special Items Decreased (-\$100,000)

Explanation

Fifth Paragraph (Final)

The **revised** (*if applicable*) total project cost of \$15,000,000 would be funded from gift funds (\$5,000,000), campus funds (\$5,000,000), and external financing (\$5,000,000).

Attached

SOW

Project Budget Estimate

Contract or Amended *Contract*

Schedule or Revised Schedule (if applicable)

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Request OFRM to Reallocate Funds

Office of Finance and Resource Management
Account and Reporting Fixed Assets (Real Property)

Building ID No. _____ Date _____

Building Name: _____

Building Location/Address: _____

Purchase Order No.: _____ Project No.: _____ Phase: _____

Contract Number: _____ Task Order No.: _____

Contractor's Name: _____

Contractor's Address: _____

Partial Payment No: _____ Date: _____ Payment Amount: \$ _____

Received in OFRM by: _____ Date: _____

Program Funding Code _____ Title: _____



PROGRAM FUNDING CODES

- | | |
|---------------------------------|--|
| 01) Exterior Doors and Frames | 19) Fire Suppression |
| 02) Windows and Frames | 20) Emergency System |
| 03) Exterior Finishing –other | 21) Lighting |
| 04) Exterior Walls | 22) Electrical System |
| 05) Roofing | 23) Interior Finishing –other |
| 06) Interior Door and Frames | 24) Underground Storage Tanks |
| 07) Ceilings | 25) Elevator Renovations |
| 08) Floors | 26) Equipment purchase |
| 09) Interior Walls | 27) Information Technology (IT) |
| 10) Life Safe Code Compliance | 28) Storage Tanks |
| 11) ADA Compliance | 29) Site Acquisition |
| 12) Kitchen Equipment | 30) Security Systems |
| 13) Asbestos Abatement | 31) Project Manager Services, Title I & II |
| 14) Foundation / Site Condition | 32) Project Closeout |
| 15) Heating Plants- Boilers | 33) New Building /Additions |
| 16) Cooling Plants –HVAC | 34) Site Preparation |
| 17) Plumbing Fixtures | 35) Environmental Cleanup |
| 18) Plumbing Facilities | 36) Structural Work |
| 19) Other: _____ | |

Submit an Account and Reporting of Fixed Assets (Real Property) data sheet for all capital construction projects _____

**GOVERNMENT OF DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**

**BREAKDOWN FOR PROGRESS PAYMENT REQUEST
ARCHITECT-ENGINEER DESIGN TASK ORDERS**

Date submitted:

Project Name: **Project No.:**

Task Order No.: **P.O. No.:**

A-E Contract No.:

Title I Services:

Change Order No. 1		
Change Order No. 2		
Change Order No. 3		
Change Order No. 4		
Total for Change Orders	\$	-
Total for Title I Services:	\$	-

Title I Services Completed:

Original Title I work completed %		\$ -
Change Order 1 work compl. %:		\$ -
Change Order 2 work compl. %:		\$ -
Change Order 3 work compl. %:		\$ -
Change Order 4 work compl. %:		\$ -
Total Change Order compl.:	\$	-
Total Title I Service work completed:	\$	-

Title II Services:

Attend pre-con. Conf.	LS	
Review submittals	LS	
Attend ___ Progress Meetings @ 12		
Inspect construction, ___ @		
Respond to RFI docs.	LS	
Attend Testing	LS	
Attend BO Inspection	LS	
Attend Final inspection	LS	
Review As-Built drawings	LS	
Total for Title II Services		\$ -

Title II Services Completed:

Attend pre-con. Conf.	LS	
Review submittals:	LS	
Attend __ Progress Meetings @		
Inspect construction, ___ @		
Respond to RFI docs.	LS	
Attend 10 Testing	LS	
Attend BO Inspection	LS	
Attend Final inspection	LS	
Review As-Built drawings	LS	
Total work completed for Title II Services		\$ -
Total work completed for Title I & Title II Services		\$ -

**GOVERNMENT OF DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



**PROGRESS PAYMENT REQUEST FORM FOR WORK PERFORMED
ARCHITECT-ENGINEER DESIGN TASK ORDERS**

Date submitted: January 0, 1900

Project Name: 0 Project No.: 0
 A-E Contractor: _____ Contract No.: 0
 A-E Address: _____ Task Order No.: 0
 _____ P.O. No.: January 0, 1900
 A-E Phone No.: _____
 Payment Request No.: _____ For period from: _____ To: _____

1. Original Task Order Amount for Title I Services	\$	-		
2. Net Amount of Modifications to Title I Services	\$	-		
3. Revised Task Order Amount for Title I (1+2)				\$ -
4. Original Task Order Amount for Title II Services	\$	-		
5. Net Amount of Modifications to Title II Services				
6. Revised Amount for Title II (5+6)				\$ -
7. Total Task Order Amount for Title I & Title II				\$ -
5. Total Amount Completed %				\$ -
6. Less Percentage Retained		10%		\$ -
7. Less Previous Payments				
8. TOTAL AMOUNT DUE THIS PAYMENT (5-6-7)				\$ -

CONTRACTOR'S CERTIFICATE: I Certify that all items, quantities and prices of work shown in the requisition are correct to the best knowledge and belief.

CERTIFICATION OF TIMELY PAYMENTS TO SUBCONTRACTORS AND SUPPLIES: I will make timely payments from the proceed payment to all subcontractors and suppliers in accordance with my contractual arrangements with them. I have made payment from payments to all subcontractors and suppliers in accordance with my contractual arrangements with them.

 A-E CONTRACTOR'S SIGNATURE
 By: _____
 Printed name

 TITLE

DC CERTIFICATE: I certify that to the best of my knowledge and belief, this requisition is a true and correct statement of work performed by contractor and that the work complies with the requirements of the contract.

CONSTRUCTION REPRESENTATIVE: _____ DATE: _____
PROJECT MANAGER: _____ DATE: _____
EXEC. PROGRAM MANAGER: _____ DATE: _____
OPERATIONS MANAGER: _____ DATE: _____
DEPUTY DIRECTOR: _____ DATE: _____

★ ★ ★

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Inclusive

[REDACTED]

[REDACTED]

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[REDACTED]

DATE

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[REDACTED]

**GOVERNMENT OF DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



PROGRESS PAYMENT REQUEST FORM FOR WORK PERFORMED

Date submitted: January 0, 1900

Project No. _____ Contract No.: 0 Purchase Order No.: _____

Contract Name: _____ 0 Contract Starting Date: _____

Contractor: _____ 0 Contract Compl. Date: _____

Payment Request No.: _____ 0 For period from: _____ To: _____ Inclusive

1. Original Total Contract Amount			
2. Net Amount of Change Orders Executed			
3. Adjusted Total Contract Amount (1+2)			\$ -
4. Scheduled For Completion %	<u>0.00%</u>		
5. Total Amount Completed %	<u>0.00%</u>		\$ -
6. Stored Material			\$ -
7. TOTAL (4+6)			\$ -
8. Less Percentage Retained	<u>10%</u>		\$ -
9. Less Previous Payments			\$ -
TOTAL AMOUNT DUE THIS PAYMENT (7-8-9)			\$ -

CONTRACTOR'S CERTIFICATE: I Certify that all items, quantities and prices of work and material shown in the requisition are correct to the best of my knowledge and belief.

CERTIFICATION OF TIMELY PAYMENTS TO SUBCONTRACTORS AND SUPPLIES: I will make timely payments from the proceeds of this payment to all subcontractors and suppliers in accordance with my contractual arrangements with them. I have made payment from proceeds of prior payments to all subcontractors and suppliers in accordance with my contractual arrangements with them.

CONTRACTOR'S SIGNATURE

By: _____
Printed name

TITLE

DATE

DC CERTIFICATE: I certify that o the best of my knowledge and belief, this requisition is a true and correct statement of work performed and materials supplied by the contractor and that the work and materials comply with the requirements of the contract. I also certify that all of the required certified payroll affidavits have been received.

CONSTRUCTION REPRESENTATIVE: _____	DATE: _____
PROJECT MANAGER: _____	DATE: _____
EXEC. PROGRAM MANAGER: _____	DATE: _____
OPERATIONS MANAGER: _____	DATE: _____
DEPUTY DIRECTOR: _____	DATE: _____

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



**PAYMENT REQUEST FOR WORK PERFORMED
SUMMARY SHEET**

Project No.: Date:
 Contract Name:
 Contract No.
 Payment Request No.: Contractor:

ITEM	CONTRACT AMOUNT	%THIS REPORT	%LAST REPORT	VALUE	MATERIAL ON SITE
1. General Expenses				\$ -	
2. Existing Conditions				\$ -	
3. Concrete				\$ -	
4. Masonry				\$ -	
5. Metals				\$ -	
6. Woods, Plastic, and Composites				\$ -	
7. Thermal & Moisture Protection				\$ -	
8. Openings				\$ -	
9. Finishes				\$ -	
10. Specialties				\$ -	
11. Equipment				\$ -	
12. Furnishings				\$ -	
13. Special Construcion				\$ -	
14. Conveying Equipment				\$ -	
21. Fire Suppression				\$ -	
22. Plumbing				\$ -	
23. Heating, Ventilating, Air Cond.				\$ -	
25. Integrated Automation				\$ -	
26. Electrical				\$ -	
27. Communicaitons				\$ -	
28. Electronic Safety, Security				\$ -	
31. Earthwork				\$ -	
32. Exterior Improvements				\$ -	
33. Utilities				\$ -	
34. Transportation				\$ -	
Total	\$ -	#DIV/0!		\$ -	\$ -

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Payment Request Receipt from OFRM

Office of Finance and Resource Management Account and Reporting Fixed Assets (Real Property)

Building ID No. _____ Date _____

Building Name: _____

Building Location/Address: _____

Purchase Order No.: _____ Project No.: _____ Phase: _____

Contract Number: _____ Task Order No.: _____

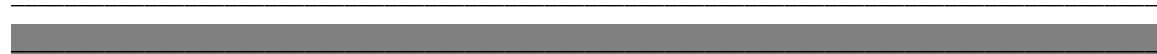
Contractor's Name: _____

Contractor's Address: _____

Partial Payment No: _____ Date: _____ Payment Amount: \$ _____

Received in OFRM by: _____ Date: _____

Program Funding Code _____ Title: _____



PROGRAM FUNDING CODES

- 01) Exterior Doors and Frames
- 02) Windows and Frames
- 03) Exterior Finishing –other
- 04) Exterior Walls
- 05) Roofing
- 06) Interior Door and Frames
- 07) Ceilings
- 08) Floors
- 09) Interior Walls
- 10) Life Safe Code Compliance
- 11) ADA Compliance
- 12) Kitchen Equipment
- 13) Asbestos Abatement
- 14) Foundation / Site Condition
- 15) Heating Plants- Boilers
- 16) Cooling Plants –HVAC
- 17) Plumbing Fixtures
- 18) Plumbing Facilities
- 19) Other: _____

- 19) Fire Suppression
- 20) Emergency System
- 21) Lighting
- 22) Electrical System
- 23) Interior Finishing –other
- 24) Underground Storage Tanks
- 25) Elevator Renovations
- 26) Equipment purchase
- 27) Information Technology (IT)
- 28) Storage Tanks
- 29) Site Acquisition
- 30) Security Systems
- 31) Project Manager Services, Title I & II
- 32) Project Closeout
- 33) New Building /Additions
- 34) Site Preparation
- 35) Environmental Cleanup
- 36) Structural Work

Submit an Account and Reporting of Fixed Assets (Real Property) data sheet for all capital construction projects

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Project Invoice Report (PMIS)

CD-G-0024

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Contractor Evaluation

1. INTRODUCTION

[Adapted from the Commonwealth of Pennsylvania Department of General Services... Review Draft: June 14, 2005]

DEFINITIONS

The term “Contractor” means the Construction General Contractor.

The term “Administrator” means the Administrator of Construction in the Office of Property Management’s Construction Division.

The term “Deputy Director” means the Deputy Director of Construction in the Office of Property Management’s Construction Division.

The term “Project Manager” means the Property Manager assigned to the Project by the Office of Property Management’s Construction Division.

The term “Client” means the District agency for which the Office of Property Management is managing the Project.

The term “Project” means an Office of Property Management managed construction project.

The term “Representatives” means OPM’s third party professionals, such as architects and engineers.

The acronym “QA/QC” means Quality Assurance/Quality Control.

The acronym “SOV” means Schedule of Values.

The Contractor Performance Evaluation System has been developed to evaluate the performance of contractors on current construction projects. This system makes it possible for the Office of Property Management (OPM) to review the Contractor’s performance on OPM managed construction projects.

OPM will conduct construction contractor performance evaluations for all construction projects managed by OPM regardless of the method of procurement.

2. SCHEDULE OF EVALUATION

(A) OPM will evaluate a Contractor’s performance during the course of each Project. The minimum frequency of evaluations will be based on the percent of physical work completed, as shown in the following table:

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



MINIMUM FREQUENCIES OF PERFORMANCE EVALUATIONS

Contract Duration	Evaluation Frequency
Up to 4 months	One: at final completion
Between 4 to 12 months	Two: at 50% and final completion
Beyond 12 months	Five: at 15%, 30%, 50%, 75% and final completion

(B) In addition to the above, OPM reserves the right to evaluate a Contractor's performance at any time during a Project provided that no less than thirty (30) calendar days has elapsed since the last performance evaluation.

3. PERFORMANCE EVALUATION

The OPM Project Manager (PM) will be responsible for ensuring that the Contractor Performance Evaluation Form (Exhibit A) is completed and submitted to the Administrator in accordance with the above Section 2. The Contractor Performance Evaluation Form consists of two parts: Part 1 Summary Report, and Part 2 OPM Project Manager Report. Upon completing Part 2, the PM will complete Part 1 Summary Report and calculate the Contractor's overall performance rating for the project to-date. The PM will be responsible for completing and submitting its evaluation to the OPM Senior Project Manager (Senior PM) within 5 business days of Contractor's completion of an evaluation milestone as set forth in the table in Section 2(A) above, and additionally will be responsible for completing and submitting its evaluation to the Senior PM at such other times as OPM deems appropriate, in its sole discretion, in accordance with Section 2(B) above.

The Senior PM will be responsible for submitting the completed Contractor Performance Evaluation Form to the Administrator for review approval. The Administrator will review the Contractor Performance Evaluation Form to ensure that ratings are fair, consistent, and accurate based on the underlying facts and supporting documentation.

Upon approval, the Administrator will forward the Contractor Performance Evaluation Form to the Deputy Director for approval and signature. The final evaluation form will be sent to the Contractor per Section 6 of these guidelines.

4. EVALUATION CRITERIA

As identified on the Contractor Performance Evaluation Form, the evaluation criteria and sub-factors of each criteria are:

QUALITY OF WORK

- Quality of Workmanship
- Quality of Subcontractors' Work
- Compliance with Plans and Specifications
- Adequacy of the QA/QC Plan
- Adequacy of the QA/QC Testing
- Implementation of the QA/QC Plan

GOVERNMENT OF THE DISTRICT OF COLUMBIA
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- Quality of QA/QC Documentation
- Storage of Materials
- Adequacy of Materials
- Use of Specified Materials
- Quality of Submittals
- Timely Correction of Deficient Work

COST CONTROL

- Practices Change Order Avoidance and Minimization
- Change Order Documentation
- Change Order Pricing (based on the percentage calculated by dividing the total value of the change orders since the last evaluation by the total Project budget applicable to the same period, the rating for this sub-factor shall be: $\leq 3\% = 100$, $\leq 10\% = 90$, $\leq 15\% = 80$, $\leq 20\% = 70$, $> 20\% = 60$)
- Timely Performs Change Order Work

SCHEDULE/TIME MANAGEMENT

- Adequacy of Initial Project Schedule
- Adherence to Approved Schedule
- Schedule Update Timeliness and Accuracy (Monthly)
- Timely Submittal of and Adherence to Recovery Schedule (If Applicable)
- Timely Notification of Conditions Impacting Schedule (such as, inspectors, material lead times, coordination with other city agencies)
- Timely Submission of Shop Drawings
- Timely Payments to Subcontractors and Vendors
- Timely Conducting of all Inspections, including, for example, inspections for permits (materials, mechanical systems, close-out, etc.)

MANAGEMENT

- Cooperation/Responsiveness with OPM Project Staff, Client and Representatives
- Coordination with Other Primes
- Coordination and Control of Subcontractors
- Professional Conduct
- Management of Personnel/Resources
- Adequate Amount of Workforce, Materials and Equipment to Meet Schedule
- Job-site Supervision
- Adequacy of Daily Work Log
- Review/Resolution of Subcontractor's Issues
- Compliance with Laws, Regulations, Permits, Inspections, Testing
- Housekeeping (i.e. cleanliness of job site, trailer, etc.)
- Invoices adhere to approved S.O.V./% Complete
- Prompt Correction of Deficiencies
- Certified Payrolls Properly Completed and Submitted
- Trained and Skilled Workforce

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



SAFETY STANDARDS

- Adequacy of Safety Plan
- Implementation of Safety Plan
- Minimizes Job-site Accidents
- On-site Safety Maintenance
- Compliance with Worker Exposure Requirements
- Compliance with Drug/Alcohol Abuse Requirements
- Adequacy of Regulatory Compliance Documentation

CLOSE-OUT

- Prompt Completion of Punch List
- Promptness of submitting As-built Drawings, O&M Manuals, Warranties, etc.
- Quality of As-built Drawings, O&M Manuals, Warranties, etc.
- Adequacy of User Training
- Supports Building Commissioning
- Demobilization and Site Clean-up

5. PERFORMANCE EVALUATION RATING SYSTEM

In evaluating and rating each criteria and sub factor on the Contractor Performance Evaluation Form, the evaluator will use the following rating systems. The ratings reflect the District's satisfaction with the Contractor's performance of the requirements of the Project from the date of the last evaluation (or from Project commencement if it is a first Project evaluation) to the date of the current evaluation.

Excellent (100)

When applied to the individual evaluation sub-factor, a rating of excellent should be given if the contractor work far exceeds the contract requirements by consistently exhibiting excellent performance typically meets and regularly exceeds the contract requirements.

Good (90)

When applied to the individual evaluation sub-factor, a rating of good should be given if the Contractor often exceeds the contract requirements and frequently provides a high level of performance, typically meets, and often exceeds the contract requirements.

Satisfactory (80)

When applied to the individual evaluation sub-factor, a rating of satisfactory should be given if the Contractor provides an acceptable level of performance consistently meeting the contract requirements.

Marginal (70)

When applied to the individual evaluation sub-factor, a rating of satisfactory should be given if the Contractor performs slightly below the requirements of the contract, meeting the contract requirements on an intermittent basis.

Unsatisfactory (60)

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OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



When applied to the individual evaluation sub-factor, a rating of unsatisfactory should be given if the Contractor fails to meet important contract requirements, resulting in a negative impact on the entire project.

For any performance evaluation rating value below Satisfactory (80.0), the evaluator must provide written comments with specific explanations of how and when a Contractor failed to meet the contract requirements.

6. NOTIFICATION TO CONTRACTOR

OPM will notify the Contractor of the results of the most recent performance evaluation. The notification will include a cover letter, and a copy of the Contractor Performance Evaluation Form with supporting documents, if any. If the overall Performance Rating is below Satisfactory (80.0), the cover letter will set forth a timeframe in which the Contractor must correct deficiencies to achieve an overall performance rating of at least satisfactory (80.0). If the Contractor fails to remedy the deficiencies within this timeframe, OPM will input results into the OPM database and submit a copy of evaluation and supporting documents to OCP for inclusion in the Contractor's OCP file.

7. CONTRACTOR CHALLENGES

A Contractor who wishes to challenge a performance evaluation shall submit its challenge in writing to the Deputy Director, with a copy to the Administrator, postmarked within fifteen (15) calendar days of date of notice.

The written challenge must include a detailed explanation, and documentation, if any, of the specific grounds for the challenge.

Failure to timely challenge a performance evaluation in the manner required will be deemed to be a waiver of Contractor's right to challenge that performance evaluation.

If a challenge, in accordance with this Section 7, is given by a Contractor, the results of the Contractor's performance evaluation will not be final (entered into the OPM database) until the Deputy Director renders a final written decision. Upon arriving at a final decision, the Deputy Director, or his designee, will forward said decision to the Contractor. If the Deputy Director's final decision is to maintain the overall Performance Rating, the Deputy Director will forward a copy of the decision to OCP and the Contractor shall be added to the OPM database and a copy of evaluation and supporting documents will be provided to OCP for inclusion in the Contractor's OCP file.

8. FINAL PERFORMANCE EVALUATION RATING

At the completion of a Project, the Contractor will be given a Final Performance Evaluation Rating which will be calculated by averaging all Performance Ratings given in the course of the Project.

GOVERNMENT OF THE DISTRICT OF COLUMBIA
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CONSTRUCTION DIVISION



Exhibit A
CONTRACTOR PERFORMANCE EVALUATION FORM

Part 1
Summary Report

DATE _____
CONTRACTOR _____
CONTACT NAME _____
PROJECT NUMBER _____
PROJECT NAME _____
PROJECT ADDRESS _____

EVALUATION SCHEDULE (based on physical work):						
Circle One:	15%	30%	50%	75%	Final	Other _____

EVALUATOR _____ DATE _____

INSTRUCTIONS:

The Office of Property Management (OPM) should complete a performance evaluation form for each prime contract according to the evaluation schedule set forth above. It is important to use the point ranking system specified on this form.

	SUMMARY RATING	N/A
QUALITY OF WORK		
COST CONTROL		
SCHEDULE/TIME MANAGEMENT		
MANAGEMENT		
COMPLIANCE WITH SAFETY STANDARDS		
CLOSEOUT (Final Only)		
OVERALL PERFORMANCE RATING*		

*Sum of Summary Ratings divided by number of categories evaluated.

PROJECT MANAGER/DATE

SR. PROJECT MANAGER/DATE

ADMINISTRATOR/DATE

DEPUTY DIRECTOR/DATE

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Exhibit A
CONTRACTOR PERFORMANCE EVALUATION FORM
Part 2
Construction Inspection Supervisor Detailed Report

DATE _____
 CONTRACTOR _____
 CONTACT NAME _____
 PROJECT NUMBER _____
 PROJECT NAME _____
 PROJECT ADDRESS _____

EVALUATION SCHEDULE
 Circle One: 15% 30% 50% 75% Final Other _____

EVALUATOR _____ **DATE** _____

QUALITY OF WORK	N/A	Excellent	Good	Satisfactory	Marginal	Unsatisfactory
Quality of Workmanship		100	90	80	70	60
Quality of Subcontractor's Work		100	90	80	70	60
Compliance with Plans and Specifications		100	90	80	70	60
Implementation of the QA/QC Plan		100	90	80	70	60
Adequacy of the QA/QC Plan		100	90	80	70	60
Adequacy of QA/QC Testing		100	90	80	70	60
Quality of QA/QC Documentation		100	90	80	70	60
Storage of Materials		100	90	80	70	60
Adequacy of Materials		100	90	80	70	60
Use of Specified Materials		100	90	80	70	60
Quality of Submittals		100	90	80	70	60
Identification and Timely Correction of Deficient Work		100	90	80	70	60

Summary Rating
 (Sum of values circled divided by number of sub-factors evaluated)

Comments for Individual or Summary Ratings less than 80: _____

COST CONTROL	N/A	Excellent	Good	Satisfactory	Marginal	Unsatisfactory
Practices Change Order Avoidance and Minimization		100	90	80	70	60
Change Order Documentation		100	90	80	70	60
Change Order Pricing		100	90	80	70	60
Timely Performs Change Order Work		100	90	80	70	60
Subcontractor Change Order		100	90	80	70	60

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Review and Approval						
Summary Rating						
(Sum of values circled divided by number of sub-factors evaluated)						
Comments for Individual or Summary Ratings less than 80: _____						

Exhibit A
CONTRACTOR PERFORMANCE EVALUATION FORM
Part 2

SCHEDULE/TIME MANAGEMENT	N/A	Excellent	Good	Satisfactory	Marginal	Unsatisfactory
Adequacy of Initial Project Schedule		100	90	80	70	60
Adherence to Approved Schedule		100	90	80	70	60
Schedule Update Timeliness and Accuracy		100	90	80	70	60
Timely Submittal and Adherence to Recovery Schedule		100	90	80	70	60
Timely Notification of Conditions Impacting Schedule, Tie-ins, Shut-downs, etc.		100	90	80	70	60
Time Submission of Shop Drawings		100	90	80	70	60
Timely Payments to Subcontractors and Vendors (Compliance with Prompt Payment Act)		100	90	80	70	60
Timely in Obtaining Permits, Conducting Inspections, etc.		100	90	80	70	60
Summary Rating						
(Sum of values circled divided by number of sub-factors evaluated)						
Comments for Individual or Summary Ratings less than 80: _____						

MANAGEMENT	N/A	Excellent	Good	Satisfactory	Marginal	Unsatisfactory
Cooperation/Responsiveness with OPM Project Staff, Client and Representatives		100	90	80	70	60
Coordination with Other Primes		100	90	80	70	60
Coordination and Control of Subcontractors		100	90	80	70	60
Professional Conduct		100	90	80	70	60
Management of Personnel/Resources		100	90	80	70	60
Provides Adequate Amount of Workforce, Materials and		100	90	80	70	60

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Equipment to Meet Schedule						
Job-Site Supervision		100	90	80	70	60
Adequacy of Daily Work Log		100	90	80	70	60
Review/Resolution of Subcontractor's Issues		100	90	80	70	60
Practices Claim Avoidance and Minimization		100	90	80	70	60
Compliance with Laws, Regulations, Permits, Inspections, Testing		100	90	80	70	60
Housekeeping		100	90	80	70	60
Summary Rating (Sum of values circled divided by number of sub-factors evaluated)						

Comments for Individual or Summary Ratings less than 80: _____

Exhibit A
CONTRACTOR PERFORMANCE EVALUATION FORM
Part 2

LABOR STANDARDS	N/A	Excellent	Good	Satisfactor y	Marginal	Unsatisfactory
Correction of Noted Deficiencies		100	90	80	70	60
Payrolls Properly Completed and Submitted		100	90	80	70	60
Compliance with Labor Laws		100	90	80	70	60
Compliance with Prevailing Wage Law		100	90	80	70	60
Trained and Skilled Workforce		100	90	80	70	60
Summary Rating (Sum of values circled divided by number of sub-factors evaluated)						

Comments for Individual or Summary Ratings less than 80: _____

SAFETY STANDARDS	N/A	Excellent	Good	Satisfactor y	Marginal	Unsatisfactory
Adequacy of Safety Plan		100	90	80	70	60
Implementation of Safety Plan		100	90	80	70	60
Minimizes Job-site Accidents		100	90	80	70	60
On-site Safety Maintenance		100	90	80	70	60
Compliance with Worker Exposure Requirements		100	90	80	70	60
Compliance with Drug/Alcohol Abuse Requirements		100	90	80	70	60

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Adequacy of Regulatory Compliance Documentation		100	90	80	70	60
Summary Rating (Sum of values circled divided by number of sub-factors evaluated)						

Comments for Individual or Summary Ratings less than 80: _____

Exhibit A
CONTRACTOR PERFORMANCE EVALUATION FORM
Part 2

CLOSE-OUT	N/A	Excellent	Good	Satisfactor y	Marginal	Unsatisfactory
Prompt Completion of Punch List		100	90	80	70	60
Promptness/Quality of As-built Drawings, O&M Manuals, Warranties, etc...		100	90	80	70	60
Adequacy of User Training		100	90	80	70	60
Supports Building Commissioning		100	90	80	70	60
Demobilization and Site Clean-up		100	90	80	70	60
Summary Rating (Sum of values circled divided by number of sub-factors evaluated)						

Comments for Individual or Summary Ratings less than 80: _____

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



**Exhibit A
CONTRACTOR PERFORMANCE EVALUATION FORM**

INSTRUCTIONS:

In the space provided below, if applicable, provide additional text to identify and to describe how specific individuals or firms exerted a positive or negative impact on the contractor's performance on this project. The text provided below is for informational purposes only and should already be factored into the evaluation ratings.

Contractor's Personnel

Subcontractor's Personnel

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Comunciations Guideline

DC OPM Logo Center Top

Date and confidential or draft lower right

File and Path in left footer

Page # in center footer

Type font Arial 10pt

File Name:

ProjectName_Subject_Version_Initials_Date

DC OPM_Schedule_V1_JFS_062707

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Contact List

District of Columbia

OPM

Last	First	Title	Phone	Cell	Fax	Other	Email	Notes

OFRM

Last	First	Title	Phone	Cell	Fax	Other	Email	Notes

OCP

Last	First	Title	Phone	Cell	Fax	Other	Email	Notes

Architect

Architect XXX

Address

Address

Last	First	Title	Phone	Cell	Fax	Other	Email	Notes

Engineer XXX

Address

Address

Last	First	Title	Phone	Cell	Fax	Other	Email	Notes

Construction Manager

GC XXXX

Address

Address

Last	First	Title	Phone	Cell	Fax	Other	Email	Notes

Consultants

Consultant XXX

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Contact List

Address

Address

Last	First	Title	Phone	Cell	Fax	Other	Email	Notes

Regulatory Agencies

City XXX

Address

Address

Last	First	Title	Phone	Cell	Fax	Other	Email	Notes

DCRA

Address

Address

Last	First	Title	Phone	Cell	Fax	Other	Email	Notes

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Action Items

Project Name:
Distribution List:
OPM:

Priority Key:
1 = Critical Path Item / Due within 2 weeks
2 = Critical Path Item / Due within 4 weeks
3 = Critical Path Item / Due within 8 weeks
4 = Non Critical Path Item

Wednesday, October 01, 2008

Action Item	Project	Agency	Priority	Description	Status	Started	Due	Responsible Party	Remarks

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Action Items

Project Name:
Distribution List:
OPM:

Priority Key:

- 1 = Critical Path Item / Due within 2 weeks
- 2 = Critical Path Item / Due within 4 weeks
- 3 = Critical Path Item / Due within 8 weeks
- 4 = Non Critical Path Item

Wednesday, October 01, 2008

Action Item	Project	Agency	Priority	Description	Status	Started	Due	Responsible Party	Remarks

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Project Performance Report

CD-G-0030


Master Project Schedule Issued: October 9, 2007

ID	Task Name	Start	Date	Year					
				2007	2008	2009	2010	2011	
1	PROJECT NAME	Thu 1/4/07	Mon 12/21/09	[Summary Bar]					
2	DCOPM	Thu 1/4/07	Thu 3/1/07	[Summary Bar]					
3	Facility Condition Assessment Submission	Thu 1/4/07	Thu 1/4/07	1/4	[Milestone Diamond]				
4	Project Request Form Approval	Thu 2/1/07	Thu 2/1/07	2/1	[Milestone Diamond]				
5	Funding Approval	Thu 3/1/07	Thu 3/1/07	3/1	[Milestone Diamond]				
6	Architect / Engineer	Tue 5/15/07	Tue 4/1/08	[Summary Bar]					
7	Schematic Design	Tue 5/15/07	Thu 7/19/07	5/15	[Task Bar]				
8	Design Development: Complete	Wed 7/11/07	Fri 10/12/07	7/11	[Task Bar]				
9	Schematic Design Estimate	Fri 7/20/07	Fri 7/20/07	7/20	[Milestone Diamond]				
14	Estimate Reconciliation Complete	Mon 8/13/07	Mon 8/13/07	8/13	[Milestone Diamond]				
15	Schematic Design: MEP Infrastructure	Wed 10/3/07	Wed 10/3/07	10/3	[Milestone Diamond]				
10	Construction Documents Bid Pack	Fri 10/12/07	Fri 10/12/07	10/12	[Milestone Diamond]				
11	Construction Documents Bid Pack 2	Wed 10/31/07	Wed 10/31/07	10/31	[Milestone Diamond]				
16	Design Development	Fri 11/2/07	Fri 11/2/07	11/2	[Milestone Diamond]				
12	Construction Documents Bid Pack 3	Mon 11/26/07	Mon 11/26/07	11/26	[Milestone Diamond]				
13	Construction Documents Bid Pack 4	Tue 4/1/08	Tue 4/1/08	4/1	[Milestone Diamond]				
36	Geotechnical Engineering or Survey Work	Mon 6/25/07	Fri 8/10/07	[Summary Bar]					
37	Bid Geotechnical Soil Borings	Mon 6/25/07	Mon 6/25/07	6/25	[Milestone Diamond]				
38	Contract Soil Borings	Mon 7/16/07	Mon 7/16/07	7/16	[Milestone Diamond]				
40	Borings: 2nd Visit	Mon 8/6/07	Mon 8/6/07	8/6	[Milestone Diamond]				
39	Soil Borings Reports Complete	Fri 8/10/07	Fri 8/10/07	8/10	[Milestone Diamond]				
31	Move In Planning Services	Tue 6/26/07	Fri 10/19/07	[Summary Bar]					
32	Move In Planning Final Recommendations and Budget Presentation	Tue 6/26/07	Fri 10/19/07	6/26	[Task Bar]				
41	Construction Testing and Inspection Services	Mon 10/15/07	Mon 12/3/07	[Summary Bar]					
42	RFP And Bid	Mon 10/15/07	Fri 11/9/07	10/15	[Task Bar]				
43	Bid Evaluation And Award	Mon 11/12/07	Mon 12/3/07	11/12	[Task Bar]				
44	Asbestos Testing and Abatement	Mon 10/15/07	Thu 11/15/07	[Summary Bar]					
45	Testing and Abatement	Mon 10/15/07	Thu 11/15/07	10/15	[Task Bar]				
17	Construction	Mon 12/3/07	Mon 12/21/09	[Summary Bar]					

Task		Rolled Up Task		External Tasks	
Progress		Rolled Up Milestone		Project Summary	
Milestone		Rolled Up Progress		Group By Summary	
Summary		Split		Deadline	

Master Project Schedule Issued: October 9, 2007

ID	Task Name	Start	Date	Year							
				2007	2008	2009	2010	2011			
18	GMP Contract	Mon 12/3/07	Mon 12/3/07		12/3	◆	GMP Contract				
19	Mobilize	Tue 12/18/07	Wed 1/2/08		12/18		Mobilize				
20	Decel / Sitework, Foundations	Wed 12/26/07	Thu 6/5/08		12/26	▨	Decel / Sitework, Foundations				
30	MEP Infrastructure	Thu 5/8/08	Thu 4/16/09		5/8	▨	MEP Infrastructure				
21	Structure	Thu 5/15/08	Thu 6/5/08		5/15		Structure				
22	Enclosure	Fri 8/29/08	Wed 1/7/09		8/29	▨	Enclosure				
25	Mechanical / Electrical	Fri 10/3/08	Tue 2/24/09		10/3	▨	Mechanical / Electrical				
23	Building Enclosed	Wed 1/7/09	Wed 1/7/09		1/7	◆	Building Enclosed				
24	Prep / Recovery / Waiting	Wed 4/8/09	Mon 12/21/09		4/8	▨	Prep / Recovery /				
26	Punch List	Wed 4/8/09	Wed 4/22/09		4/8		Punch List				
27	Ready for Occupancy	Wed 4/22/09	Wed 4/22/09		4/22	◆	Ready for Occupancy				
28	Pre/Recovery Inspections: Punch List	Fri 8/28/09	Mon 9/21/09		8/28		Pre/Recovery Inspecti				
29	Pre/Recovery Ready for Occupancy	Mon 9/21/09	Mon 9/21/09		9/21	◆	Pre/Recovery Ready				
33	FF&E	Tue 1/1/08	Mon 9/1/08								
34	Furniture Systems (Procurement)	Tue 1/1/08	Tue 7/1/08		1/1	▨	Furniture Systems (Procurement)				
35	Furniture Systems (Installation)	Tue 7/1/08	Mon 9/1/08		7/1	▨	Furniture Systems (Installation)				

Task		Rolled Up Task		External Tasks	
Progress		Rolled Up Milestone		Project Summary	
Milestone		Rolled Up Progress		Group By Summary	
Summary		Split		Deadline	

Master Project Schedule

Issued: October 9, 2007

ID	Task Name	Start	Date	2007				2008				2009				2010				2011				2012
				Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
1	PROJECT NAME	Thu 1/4/07	Thu 5/20/10	[Project Summary Bar]																				
2	DCOPM	Thu 1/4/07	Thu 3/1/07	[DCOPM Bar]																				
3	Facility Condition Assessment Submission	Thu 1/4/07	Thu 1/4/07	1/4 ◆ Facility Condition Assessment Submission																				
4	Project Request Form Approval	Thu 2/1/07	Thu 2/1/07	2/1 ◆ Project Request Form Approval																				
5	Funding Approval	Thu 3/1/07	Thu 3/1/07	3/1 ◆ Funding Approval																				
6	Architect / Engineer	Tue 5/15/07	Tue 4/1/08	[Architect / Engineer Bar]																				
7	Schematic Design: Surgery	Tue 5/15/07	Thu 7/19/07	5/15 □ Schematic Design: Surgery																				
8	Design Development: Complete	Wed 7/11/07	Fri 10/12/07	7/11 □ Design Development: Complete																				
9	Schematic Design Estimate: HKS	Fri 7/20/07	Fri 7/20/07	7/20 ◆ Schematic Design Estimate: HKS																				
14	Estimate Reconciliation Complete with HKS and CM: 10:00AM - Noon	Mon 8/13/07	Mon 8/13/07	8/13 ◆ Estimate Reconciliation Complete with HKS and CM: 10:00AM - Noon																				
15	Schematic Design: MEP Infrastructure	Wed 10/3/07	Wed 10/3/07	10/3 ◆ Schematic Design: MEP Infrastructure																				
10	Construction Documents Bid Pack 1: MDOT Decel/Site/Civil	Fri 10/12/07	Fri 10/12/07	10/12 ◆ Construction Documents Bid Pack 1: MDOT Decel/Site/Civil																				
11	Construction Documents Bid Pack 2: Site Prep/Demo/MEP Reroutes	Wed 10/31/07	Wed 10/31/07	10/31 ◆ Construction Documents Bid Pack 2: Site Prep/Demo/MEP Reroutes																				
16	Design Development: MEP Infrastructure	Fri 11/2/07	Fri 11/2/07	11/2 ◆ Design Development: MEP Infrastructure																				
12	Construction Documents Bid Pack 3: Foundations/Structure/Skin	Mon 11/26/07	Mon 11/26/07	11/26 ◆ Construction Documents Bid Pack 3: Foundations/Structure/Skin																				
13	Construction Documents Bid Pack 4: Interior Fit-Out	Tue 4/1/08	Tue 4/1/08	4/1 ◆ Construction Documents Bid Pack 4: Interior Fit-Out																				
44	Geotechnical Engineering or Survey Work	Mon 6/25/07	Fri 8/10/07	[Geotechnical Engineering or Survey Work Bar]																				
45	Bid Geotechnical Soil Borings	Mon 6/25/07	Mon 6/25/07	6/25 ◆ Bid Geotechnical Soil Borings																				
46	Contract Soil Borings	Mon 7/16/07	Mon 7/16/07	7/16 ◆ Contract Soil Borings																				
48	Borings: 2nd Visit	Mon 8/6/07	Mon 8/6/07	8/6 ◆ Borings: 2nd Visit																				
47	Soil Borings Reports Complete	Fri 8/10/07	Fri 8/10/07	8/10 ◆ Soil Borings Reports Complete																				
39	Move In Planning Services	Tue 6/26/07	Fri 10/19/07	[Move In Planning Services Bar]																				
40	Move In Planning Final Recommendations and Budget Presentation	Tue 6/26/07	Fri 10/19/07	6/26 □ Move In Planning Final Recommendations and Budget Presentation																				
49	Construction Testing and Inspection Services	Mon 10/15/07	Mon 12/3/07	[Construction Testing and Inspection Services Bar]																				
50	RFP And Bid	Mon 10/15/07	Fri 11/9/07	10/15 □ RFP And Bid																				
51	Bid Evaluation And Award	Mon 11/12/07	Mon 12/3/07	11/12 □ Bid Evaluation And Award																				
52	Asbestos Testing and Abatement	Mon 10/15/07	Thu 11/15/07	[Asbestos Testing and Abatement Bar]																				
53	Testing and Abatement	Mon 10/15/07	Thu 11/15/07	10/15 □ Testing and Abatement																				
17	Construction	Mon 12/3/07	Thu 5/20/10	[Construction Bar]																				
18	GMP Contract	Mon 12/3/07	Mon 12/3/07	12/3 ◆ GMP Contract																				

Task		Summary		Rolled Up Progress		Project Summary	
Progress		Rolled Up Task		Split		Group By Summary	
Milestone		Rolled Up Milestone		External Tasks		Deadline	

Master Project Schedule

Issued: October 9, 2007

ID	Task Name	Start	Date	2007				2008				2009				2010				2011				2012				
				Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1			
19	Mobilize	Tue 12/18/07	Wed 1/2/08						12/18	Mobilize																		
20	Decel / Sitework, Foundations	Wed 12/26/07	Thu 6/5/08						12/26	Decel / Sitework, Foundations																		
38	MEP Infrastructure	Thu 5/8/08	Thu 4/16/09						5/8	MEP Infrastructure																		
21	Structure	Thu 5/15/08	Thu 6/5/08						5/15	Structure																		
22	Enclosure	Fri 8/29/08	Wed 1/7/09						8/29	Enclosure																		
24	Surgery & CSR Build Out (A & B)	Wed 10/1/08	Tue 4/7/09						10/1	Surgery & CSR Build Out (A & B)																		
27	Mechanical / Electrical: Basement	Fri 10/3/08	Tue 2/24/09						10/3	Mechanical / Electrical: Basement																		
23	Building Enclosed	Wed 1/7/09	Wed 1/7/09						1/7	Building Enclosed																		
25	Prep / Recovery / Waiting (C & D)	Wed 4/8/09	Mon 12/21/09						4/8	Prep / Recovery / Waiting (C & D)																		
28	Surgery & CSR Inspections / Punch List/ MDCIS Survey (A & B)	Wed 4/8/09	Wed 4/22/09						4/8	Surgery & CSR Inspections / Punch List/ MDCIS Survey (A & B)																		
29	Surgery & CSR Ready for Occupancy	Wed 4/22/09	Wed 4/22/09						4/22	Surgery & CSR Ready for Occupancy																		
30	Pre/Recovery Inspections: Punch List / MDCIS (C)	Fri 8/28/09	Mon 9/21/09						8/28	Pre/Recovery Inspections: Punch List / MDCIS (C)																		
31	Pre/Recovery Ready for Occupancy	Mon 9/21/09	Mon 9/21/09						9/21	Pre/Recovery Ready for Occupancy																		
26	Lockers / Waiting (E & F)	Tue 12/22/09	Wed 5/5/10						12/22	Lockers / Waiting (E & F)																		
32	Lockers / Waiting: Inspections / Punch List / MDCIS (D)	Tue 12/22/09	Thu 1/14/10						12/22	Lockers / Waiting: Inspections / Punch List /																		
33	Lockers / Waiting: Ready for Occupancy	Fri 1/15/10	Fri 1/15/10						1/15	Lockers / Waiting: Ready for Occupancy																		
34	PACU / Admin: Inspection / Punch List / MDCIS (E)	Thu 3/4/10	Thu 3/18/10						3/4	PACU / Admin: Inspection / Punch List / M																		
35	PACU / Admin: Ready for Occupancy	Thu 3/18/10	Thu 3/18/10						3/18	PACU / Admin: Ready for Occupancy																		
36	New Waiting Area: Inspection / Punch List / MDCIS (F)	Fri 5/7/10	Thu 5/20/10						5/7	New Waiting Area: Inspection / Punch																		
37	New Waiting Area: Ready for Occupancy	Thu 5/20/10	Thu 5/20/10						5/20	New Waiting Area: Ready for Occupa																		
41	FF&E	Tue 1/1/08	Mon 9/1/08																									
42	Furniture Systems (Procurement)	Tue 1/1/08	Tue 7/1/08						1/1	Furniture Systems (Procurement)																		
43	Furniture Systems (Installation)	Tue 7/1/08	Mon 9/1/08						7/1	Furniture Systems (Installation)																		

Task		Summary		Rolled Up Progress		Project Summary	
Progress		Rolled Up Task		Split		Group By Summary	
Milestone		Rolled Up Milestone		External Tasks		Deadline	

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Surveillance Report (Page 1 of 3)

Attention: Deputy Director of OPM

Date of Report: 11/7/07

Report No: SR #

Surveillance Activity

To determine if the Project XXXX is in compliance with the DC OPM Procedure Manual

Location:

Performed By:

Date:

Attendees:

Surveillance Summary

Initiation Phase

- *Are you in compliance with the checklist?*

Planning Phase

- *Are you in compliance with the checklist?*

Design Phase

- *Are you in compliance with the checklist?*

Construction Phase

- *Are you in compliance with the checklist?*

Closeout Phase

- *Are you in compliance with the checklist?*

Process Controls: Procurement/Bidding/Selection/Negotiation

- *Are you in compliance with the checklist?*

Process Controls: Funding Approval from OFRM

- *Are you in compliance with the checklist?*

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Surveillance Report (Page 2 of 3)

Process Controls: Codes

- *Are you in compliance with the checklist?*

Process Controls: Payment Process

- *Are you in compliance with the checklist?*

Process Controls: Contractor Performance Evaluation

- *Are you in compliance with the checklist?*

Process Controls: Stakeholder Engagement

- *Are you in compliance with the checklist?*

Process Controls: Issues Tracking

- *Are you in compliance with the checklist?*

Process Controls: Risk Identification and Evaluation

- *Are you in compliance with the checklist?*

Process Controls: Monthly Report

- *Are you in compliance with the checklist?*

Process Controls: Program Schedule

- *Are you in compliance with the checklist?*

Process Controls: QA / QC Plan / Inspections

- *Are you in compliance with the checklist?*

Process Controls: Permitting

- *Are you in compliance with the checklist?*

Process Controls: Move Coordination

- *Are you in compliance with the checklist?*

Process Controls: FF&E Coordination

- *Are you in compliance with the checklist?*

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



Surveillance Report (Page 3 of 3)

Process Controls: Final Decisions

- Are you in compliance with the checklist?

Process Controls: Claims Management

- Are you in compliance with the checklist?

Process Controls: Commissioning

- Are you in compliance with the checklist?

Corrective Action Response Required

Yes No

If Yes, Submit Resolution Report to the DC OPM Deputy Director

Corrective Action Response

Leave this area blank until the surveillance report is prepared and provided to the PM. The responsible party for the findings will need to complete this section and return to you as the quality rep.

Response Submitted By:

Date:

Verification of Corrective Actions *(explain what was verified):*

Verified By:

Date:

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Permit Request Form (Page 1 of 4)

MEMORANDUM OF UNDERSTANDING

FOR

DIRECT CHARGE JOURNAL ENTRY

This Memorandum of Understanding ("MOU") is made as of this ____ day of _____, 200__, by and between Office of Property Management ("Buyer") and the Department of Consumer and Regulatory Affairs ("Seller").

WHEREAS, the implementation of the project and specific services (referred to in the attached Scope of Work (SOW) dated _____) for Building Permit for Capital Construction Project is provided by Seller to the Buyer and budgeted under Direct Charge Journal Entry or Capital funding; and

WHEREAS, the Seller and Buyer agencies must budget for the same amount by project to ensure that such agencies are reflecting the agreed upon costs for the proposed project or services; and

WHEREAS, the Seller will be funded through Direct Charge Journal Entry for services provided to the buyer for the issuance of permits; and

WHEREAS, the Seller reserves the right to charge a fee in support of processing the building permit.

For and in consideration of the mutual premises contained herein, the Seller and Buyer agencies (hereafter the "Parties") agree as follows:

Capital construction Building Permits Review Fees. The Purpose of the MOU is to establish a mechanism for funds transfer for payment of Building Permit Review Fees.

Monthly Review: Pursuant to the Financial Review Process (FRP) mandated by the Office of the Chief Financial Office of the District of Columbia, all services provided through Direct Charge Journal Entry funding shall be reported monthly in the Buyers, FRP submission to the Office of Budget and Planning.

Resolution of disputes: The D.C. Office of Financial Operation and Systems shall resolve all adjustments and/or disputes arising from services provided under this MOU.

Obligations of the Seller

1. The Seller agency will make sure that the revenues for this project are reflected in the budget entry budget line item detail screen and the appropriate accumulators.

Permit Request Form (Page 2 of 4)

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION



2. The Seller must establish an agency internal service fund with a corresponding index that ties to the fund and agency organization structure.
3. The Seller must provide the projected costs of providing the services under this MOU.

Obligations of the Buyer

1. The Buyer agrees to the terms, projected cost and fund availability associated with MOU.
2. The Buyer processes the projected costs to the Seller on an agreed upon frequency (monthly, quarterly or annually).

IN WITNESS WHEREOF, the Parties hereto have signed this MOU as of the day and year first written above.

Seller _____ Date
Department of Consumer and Regulatory Affairs

Seller: _____ Date
_____, CFO for OPM

Buyer _____ Date
Office of Property Management

Buyer: _____ Date
_____, CFO for DCRA

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



Permit Request Form (Page 3 of 4)

SCOPE OF WORK

Date: _____

Subject:

Project No:

Review construction documents for the subject project and issue Building Permit for the same. Total amount for this service is _____.

Permit Request Form (Page 4 of 4):

2000 14TH STREET, N.W., 8TH FLOOR, WASHINGTON, D.C. 20009
(202) 671-2214 FAX: (202) 671-0648

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PROPERTY MANAGEMENT
CONSTRUCTION DIVISION**



BUILDING PERMIT FUNDING REQUEST FORM

MOU NUMBER: _____

SERVICE INFORMATION AND FUNDING CODES

GOOD/ SERVICE: _____ **BUIDING PERMIT REVIEW #856-B** _____

REQUESTED DATE: ___/___/___ **TOTAL:** _____

	AGY	INDEX	PCA	OBJ	AOBJ	GRANT/PH	PROJ/PH	AG1	AG2	AG3
SELLER										
BUYER										

GOOD/ SERVICE: _____ **PROJECT MANAGEMENT** _____

REQUEST DATE: ___/___/___ **TOTAL:** _____

	AGY	INDEX	PCA	OBJ	AOBJ	GRANT/PH	PROJ/PH	AG1	AG2	AG3
SELLER										
BUYER										

GOOD/ SERVICE: _____ **CONSTRUCTION** _____

REQUEST DATE: ___/___/___ **TOTAL:** _____

	AGY	INDEX	PCA	OBJ	AOBJ	GRANT/PH	PROJ/PH	AG1	AG2	AG3
SELLER										
BUYER										

GOOD/ SERVICE: _____ **EQUIPMENT** _____

REQUEST DATE: ___/___/___ **TOTAL:** _____

	AGY	INDEX	PCA	OBJ	AOBJ	GRANT/PH	PROJ/PH	AG1	AG2	AG3
SELLER										
BUYER										