**Major Capital Projects**

New construction, large renovations or studies for same, may include projects where a consultant is required or where construction must be reviewed by the Bureau of Fire Safety.

Project setup: Obtain project information

Determine extents of work. Identify project ‘ownership’ to determine its planning path. Ownership examples include:

* Customer Requested/Customer Funded (CRCF) may start with :

TMA Project Request

Master Plan/Study Implementation

* FP&M as customer:

Deferred Maintenance planned or unplanned project

New Construction for specific customer or use e.g. utility, other infrastructure.

Make a TMA request for a project number only (if not originated by customer TMA request). This will serve as the official project number and be referenced in Appropriation Request and all documents.

Create a Folder in J: drive, import filing protocol from department Toolbox. A long manila project folder is not required for most Major projects.

Set up project folder with Planning tabs for eventual transition to Project Manager:

(reference tabs here)

TOC -

Summary of Work -

Financial - financial summary, PFA summary

Schedule

Contracts

ACM

Documents (including correspondence, Meeting Minutes, surveys, etc.)

Begin investigation / contact customer or reference Deferred Maintenance planned scope information

(reference “processing a request” info here)

* identify authorized customer contact, use group
* confirm space request approval if required, or initiate space approval with Director of P&E
* use appropriate planning checklist to document existing conditions and required new scope
* engage Operations and Maintenance for known building systems issues and coordination
* Determine if design consultant is required for bid documents, JOC documents (through SD) or for submittal for state review. Consult with Director of P&E to identify consultant (either specialty consultant or Preferred Vendor rotation).
* When Scope understood, Include Consultant in Scope proposal meeting. Consultant may be used to determine conceptual budget to establish initial project budget, or to provide a fee to study and investigate the scope on which to later develop project budget.

If approved for funding request:

* Write an Appropriations Request. (Reference)

When funded:

* Update the financial summary
* Fill out PTS: FO# for PM fees, status, description, links
* Start a schedule

If Consultant:

* Select and hire a consultant (reference):
* See project from schematic design into construction documents
* Familiarize PM with project
* Check drawings, get it released to Procurement, bids, pre-award
* Coordinate furniture and finishes if necessary

If JOC:

* Plans and Narratives