

## APPENDIX J: PROJECT DESIGN DEVELOPMENT TASKS CHECKLIST

Phase	Information Items	Completed
Master Plans	<ol style="list-style-type: none"> <li>1) Master plans are credible and up-to-date.</li> <li>2) The objectives for the project or the project itself are included in the plans.</li> </ol>	
Initial Project Plans	<ol style="list-style-type: none"> <li>1) Project concept and parameters are defined.</li> <li>2) Project scope and budget is established.</li> <li>3) Expenditures and funding sources are identified.</li> <li>4) The initial feasibility review is favorable.</li> </ol>	
Five-Year Construction Plans	<ol style="list-style-type: none"> <li>1) The five-year construction plan is credible and up-to- date.</li> <li>2) The project is included in the five-year construction plan.</li> </ol>	
Final Project Proposal (COBCP)	<ol style="list-style-type: none"> <li>1) Review the final project proposal for project purpose, program, scope, calendar, and cost estimate.</li> <li>2) Identify any problems with the scope, calendar or budget (cost estimate/quantities and unit costs supporting the JCAF 32).</li> <li>3) Identify the project delivery methodology (e.g., traditional, ready access, multiple-prime, etc.) in the SAM narrative.</li> </ol>	

Phase	Information Items	Completed
Project Organization	<ol style="list-style-type: none"> <li>1) Define project administration during design.</li> <li>2) Assemble the project management team.</li> <li>3) Select consultants.</li> <li>4) Contract with consultants.</li> <li>5) Develop the workplan.</li> <li>6) Select project delivery method.</li> <li>7) Develop initial quality assurance plan.</li> <li>8) Team review of previous planning and proposals.</li> </ol>	
Site Acquisition	<ol style="list-style-type: none"> <li>1) Site information complete.</li> <li>2) Site approved by State Public Works Board (PWB).</li> <li>3) Final appraisal and relocation costs completed.</li> <li>4) PWB approves acquisition.</li> <li>5) Acquisition completed.</li> </ol>	
Programming	<ol style="list-style-type: none"> <li>1) Initiate project administration and reporting procedures.</li> <li>2) Monitor the workplan.</li> <li>3) Monitor scope, calendar and cost</li> <li>4) Coordinate district-supplied data.</li> <li>5) Analyze project site including geotechnical findings and reports.</li> <li>6) Complete initial environmental studies and reports.</li> <li>7) Complete programming.</li> <li>8) Update feasibility review.</li> <li>9) Complete quality assurance plan.</li> </ol>	

Phase	Information Items	Completed
Schematic Design	<ol style="list-style-type: none"> <li>1) Project administration and reporting.</li> <li>2) Monitor the workplan.</li> <li>3) Monitor quality assurance plan.</li> <li>4) Produce design alternatives.</li> <li>5) Select design.</li> <li>6) Prepare schematic documents.</li> <li>7) Review design.</li> <li>8) Prepare categorical exemption, negative declaration or draft EIR report.</li> </ol>	
Design Development	<ol style="list-style-type: none"> <li>1) Project administration and reporting.</li> <li>2) Monitor the workplan.</li> <li>3) Monitor scope, calendar, and cost.</li> <li>4) Monitor quality assurance plan.</li> <li>5) Evaluate educational systems and building systems alternatives.</li> <li>6) Develop the design.</li> <li>7) Design development documents.</li> <li>8) Plan and design equipment and systems.</li> <li>9) Conduct value engineering, if necessary.</li> <li>10) Concurrent plan review.</li> </ol>	

Phase	Information Items	Completed
Preliminary Plans	<ol style="list-style-type: none"> <li>1) Complete Final EIR.</li> <li>2) Consult with DSA periodically, if necessary.</li> <li>3) Send geo-hazard/tech report to the CA Geological Services via DSA for approval.</li> <li>4) Prepare preliminary plan package with scope, calendar and cost information.</li> <li>5) Submit preliminary plans (schematic design) to Chancellor's Office for review and approval and to the State Public Works Board for review and approval.</li> <li>6) Incorporation of any modifications per prior approvals.</li> </ol>	
Construction Documents	<ol style="list-style-type: none"> <li>1) Project administration and reporting.</li> <li>2) Monitor the workplan.</li> <li>3) Monitor scope, calendar and cost.</li> <li>4) Monitor quality assurance plan.</li> <li>5) Produce construction documents.</li> <li>6) Perform plan check and code review.</li> <li>7) Complete construction documents.</li> <li>8) Activate the contract with the construction manager if not already active.</li> <li>9) Coordinate and document plan check.</li> <li>10) Submit working drawings and specifications to DSA and obtain approval.</li> </ol>	

Phase	Information Items	Completed
Bidding and Award of Contract	<ol style="list-style-type: none"> <li>1) Submit to Department of Finance for approval to bid.</li> <li>2) Project administration and reporting.</li> <li>3) Monitor the workplan.</li> <li>4) Monitor quality assurance plan.</li> <li>5) Prepare the bid documents.</li> <li>6) Submit to CO and DOF for approval to bid.</li> <li>7) Advertise bid and provide instructions to bidders.</li> <li>8) Conduct pre-bid meetings and addenda.</li> <li>9) Bid opening and evaluation.</li> <li>10) Monitor scope, calendar, and cost.</li> <li>11) Submit to CO and DOF for approval to award the bid.</li> <li>12) Receive contractor submittals.</li> <li>13) Award construction contract.</li> </ol>	
Pre-Construction Organization	<ol style="list-style-type: none"> <li>1) Determine project administration and any partnering agreements for construction.</li> <li>2) Receive contractor schedule of values, construction schedule, substitutions.</li> <li>3) Select and contract for testing and inspection.</li> </ol>	

Phase	Information Items	Completed
Construction	<ol style="list-style-type: none"> <li>1) Project administration and reporting.</li> <li>2) Monitor workplan.</li> <li>3) Monitor quality assurance plan.</li> <li>4) Coordinate district supplied materials and systems.</li> <li>5) Monitor testing and inspection.</li> <li>6) Monitor mitigation measures.</li> <li>7) Participate in construction meetings.</li> <li>8) Review contractor submittals.</li> <li>9) Review construction schedule.</li> <li>10) Negotiate change orders.</li> <li>11) Negotiate disputes and claims.</li> <li>12) Conduct site reviews and photography.</li> <li>13) Close contract.</li> </ol>	
Systems and Group 1 and 2 Equipment	<ol style="list-style-type: none"> <li>1) At 50% completion of construction, request authority from the CO and DOF to release Group 2 equipment funds.</li> <li>2) Procure and install Group 1 and 2 equipment.</li> <li>3) Commission the development/installation of Group 1 and 2 equipment.</li> </ol>	
Post Construction	<ol style="list-style-type: none"> <li>1) Project administration.</li> <li>2) Document coordination.</li> <li>3) Move-in.</li> <li>4) Warrantee coordination.</li> <li>5) Post-construction evaluations: Six-month evaluation. Twelve-month evaluation.</li> </ol>	

When bid results are more than the approved appropriation and additional state funds are not available (due to the full commitment of authorized funds and our policy of no augmentations, increases in State funding at this stage of a project generally are no longer available).

Item #	Items to Submit	# of Copies	Completed
1	Letter from the district identifying deductive alternates to apply or other efforts taken or planned to reduce project costs to level of available funds. If applicable, letter also details plans to provide additional non-state capital outlay funds to the project.	2	
2	Revised JCAF 32 if cost changes due to bid award.	2	
3	Tabulation of the base bids and all the bid alternates.	1	
4	A copy of the bid the district intends to accept.	2	
5	Reason for not awarding to the lowest bidder, if applicable.	2	
6	Board of Trustees approved action item selecting lowest qualified bidder.	1	

**REQUEST FOR AUGMENTATION  
Submittal Checklist**

Augmentations are *not* considered for the following:

- Delays in placing the project out to bid or during construction due to the need for further design development or in anticipation of a better bid market resulting in lost purchasing power over time;
- Delays caused by regulatory agencies;
- Inaccurate estimating — bid results that substantially vary from the pre-bid cost estimate;
- District- or architect-initiated changes to the project (see item one above);
- Building a modified scope by including additive alternates (or not applying deductive alternates) as agreed when project was approved to go to bid (i.e., when the project obtained proceed to bid authority per a signed DF 14D).

	Items to Submit	# of Copies	Completed
1	A bid tabulation comparing the authorized funds with all bids after application of <b>all</b> deductive alternates.	2	
2	A district letter requesting the augmentation with: a. A final cost estimate at current building construction cost index based on receipt of bids, b. A complete narrative description justifying the need for such an augmentation.	2	
3	Explanation of the efforts made to reengineer the project and reduce costs.	2	
4	Calculation of the amount to be requested after applying <b>all</b> deductive alternates and subtracting all change orders not initiated as a result of increased regulatory requirements or unforeseen site conditions.	2	