

PROJECT SEQUENCE AND TO DO LIST

Client

- 1) Meet with client to discuss their project concept and goals
- 2) Site visits as needed
- 3) Review of available documents, other research as needed
- 4) Project qualification and feasibility review including specific project challenges
- 5) Client qualification - references, financial credibility, etc.
- 6) Establish client program, rough budget, rough schedule
- 7) Discuss contract and payment terms, insurance, point of contact persons
- 8) Preconstruction agreement and preconstruction budget

Developer / Realtor

- 1) Get copy of title to property including legal address, easements, encumbrances, etc.
- 2) Get existing plat and / or survey of this subdivision and parcel
- 3) Inquire if there is an aerial photo of this subdivision / area and check Google Maps
- 4) Inquire as to zoning, special districts, wetlands, other land / legal considerations
- 5) Get copy of subdivision CCRs
- 6) Inquire if there is a geotest / percolation test for this development and / or this parcel
- 7) Determine whether the project is located in the floodplain
- 8) Inquire as to design review process / HOA approvals
- 9) Inquire if there was an inspection performed of existing structures and get the report
- 10) Inquire if there was hazardous material testing performed; ask for disclosure

Planning and Zoning, DRB, Building Officials

- 1) Obtain county map, topo survey, aerial photos showing this property
- 2) Get copy of governing Land Use Code and related info as available
- 3) Research applicable building codes and other AHJ requirements and instructions
- 4) Consult with Building Officials re plans, engineering and permits required
- 5) Get necessary applications / forms / permits etc. related to this project
- 6) Consult with Fire Marshal re access, wildfire mitigation, other considerations
- 7) Consult with Sanitation Engineer re well, stormwater management and septic system

Utilities

- 1) Research water infrastructure, supply availability, quality, capacity, irrigation limitations, trenching / pipe / meter requirements and related costs
- 2) Research sewer infrastructure, tie in availability, capacity, trenching / pipe / slope requirements, oil / grease interceptor requirements, ejection pit / pump and related costs
- 3) Research electrical infrastructure, service availability, capacity, trenching / conduit / meter requirements and related costs
- 4) Research natural gas infrastructure, service availability, capacity / pressure, location and protection requirements and related costs
- 5) Research telephone service, capacity, high speed internet and related costs
- 6) Research cable tv service, capacity, high speed internet and related costs
- 7) Research satellite tv / internet service, bandwidth and limitations, mounting location and angle, DRB / HOA limitations
- 8) Research requirements for propane gas tanks and service lines
- 9) Obtain will serve letters (if necessary) from all utilities
- 10) Meet with utility service providers (preferably on site), obtain construction booklets and check for current incentives and rebates

Roads and Public Infrastructure

- 1) Consult with roads department re existing and proposed roads and access issues
- 2) Street lighting ? Parking meters ? Signs ? Benches ? Bus stops ?
- 3) Fire hydrants ? Meet with Fire Marshal
- 4) Parking lots / spaces, sidewalks, curb and gutter, V pans
- 5) Other public improvements and infrastructure requirements (PIA)
- 6) Obtain information booklets from all infrastructure departments
- 7) Meet with public infrastructure departments, take notes, get things in writing

Site Considerations

- 1) Solicit surveyor
- 2) Solicit geotesting firm for soils, percolation testing and hazard assessment
- 3) Solicit septic system design / engineering / installation
- 4) Solicit water system design / engineering / installation
- 5) Talk to excavation subcontractor re access, sitework, infrastructure, utilities, etc.
- 6) Consider access construction and related work and costs

Site Design / Drafting

- 1) Take 360 degree pictures from potential house sites on property
- 2) Sketch rough site plan including all existing infrastructure, constructions and features
- 3) Establish magnetic and true north at the project site
- 4) Establish benchmark elevation at the project site
- 5) Site plan, civil engineering and landscape design

Structure Design / Drafting

- 1) Establish Owner's program, including rough design, schedule and budget
- 2) Establish Scope of Work for architectural services
- 3) Schematic design, conceptual drawings, CAD and / or physical modeling
- 4) Design development and specifications
- 5) Obtain design-related permits and approvals
- 6) Engineering : structural, mechanical, electrical, plumbing, etc.
- 7) Interiors : interior design, lighting, FFE, etc.
- 8) Construction documents (plans and specs)
- 9) Obtain construction-related approvals and permits
- 10) Establish budget and schedule
- 11) Solicit and select building contractor

Financing

- 1) Proof of ownership of property
- 2) Owner legal and financial statement and references
- 3) Submit plans and specifications for appraisal if required
- 4) Submit budget and schedule and cash flow requirements to owner and bank
- 5) Provide info on building contractor including financial statement, references, etc.
- 6) Provide copy of contract between owner and builder to bank if required
- 7) Meet with financial institution, discuss cash flow and procedures, paperwork, etc.
- 8) Legal consultation regarding owner, bank, other parties to the project, contract, etc.
- 9) Letter of intent or understanding between owner and builder

Pre Construction

- 1) Obtain plans and specifications, duplicate, upload to file sharing
- 2) Generate plan pages list with dates and revisions
- 3) Establish scope of work for project as a whole
- 4) Plans review and comments, questions, concerns, suggestions > RFIs
- 5) Discussions, meetings with owner, architect, engineers, consultants
- 6) Establish bidding process rules and dates, list of potential subcontractors
- 7) Quantity takeoffs and summaries
- 8) Clarify items not specified or acknowledge that these items will be allowance only
- 9) Create subcontractor scope of work checklists and / or scopes of work
- 10) Prepare and distribute supplier and subcontractor bid package
- 11) Receive and correlate supplier quotes and subcontractor proposals
- 12) Obtain prices for items not bid by suppliers or subcontractors
- 13) Unit cost estimating
- 14) Cost estimate and budget with allowances
- 15) Preliminary schedule
- 16) Prepare proposal and draft contract for client
- 17) Negotiations, value engineering, contingencies, billing and payment terms
- 18) Execute prime contract and addenda
- 19) Establish schedule of values
- 20) Final schedule
- 21) Written Notice to Proceed from owner and deposit / working funds

Project Coordination

- 1) List of equipment and tools needed and plan to buy or rent
- 2) Identify long lead time items
- 3) Ready orders with suppliers
- 4) Buy out the tradework with subcontractors and execute contracts
- 5) Run ads for help needed, interview, check references, background, etc.
- 6) Line up management and labor including administrative help if needed
- 7) Accounting services including payroll and tax-related work
- 8) Housing for workers
- 9) Safety plan and safety officer if needed
- 10) Construction mitigation plan and submit to AHJ
- 11) Training of key people : OSHA, equipment, first aid / cpr
- 12) Set up legal entity to build the project
- 13) Employer Identification Number
- 14) Licenses as needed (business, contractor)
- 15) Insurance as needed (liability, work comp, tools, builders risk)
- 16) Create and activate utility accounts in owner's name, designate billing
- 17) Line up crane if needed
- 18) Set up accounts with local vendors and name signers
- 19) Line up office trailer if needed
- 20) Line up working capital if needed
- 21) Permits : demolition, excavation, dewatering, electrical, building, etc.

Mobilization

- 1) Site access
- 2) Clear and grub site
- 3) Mud control gravel for access drive, parking area, trailers, dumpster, porta potty etc.
- 4) Office trailer including computers, software, phones, tablets, etc.
- 5) Temporary power - office trailer, crane, site, structure
- 6) Porta potties
- 7) Dumpster, trash and recycle
- 8) Tool trailer
- 9) Storage containers, material / equipment shelters
- 10) Site security, safety and silt fencing
- 11) Signage - project sign, general contractor sign, legal, safety, etc.
- 12) Temporary water
- 13) Wash down area for vehicles
- 14) Security lights and cameras
- 15) Dewatering including generator for backup power
- 16) Propane tank
- 17) Fueling station
- 18) Phone / internet
- 19) Parking and street permits
- 20) Offsite storage and staging areas