

## “Life of a Project”

<i>Phase</i>	<i>General Activities</i>	<i>Specific Activities</i>	<i>Notes</i>	<i>Expected Time Frame</i>
<b>1.0 Inception</b>				
1.1	Project Request from Client / User	Client or User to generate formal request for a project	Use standard form to request project or estimate	NA
1.2	Assignment	Manager reviews and assigns the request to a Project Manager or discipline Manager		2 weeks
1.3	Preliminary Project Charter	Prepare a preliminary charter document that includes scope and total project cost estimate	Construction costs – based on experience / history	2 weeks
			Professional consulting fees including set PR management fees	
			Additional soft costs	
1.4	Submit Project Charter to Client/User	Submit Project Charter to Client / User for approval	Require confirmation that Project Charter is understood	1 day
1.5	Approval from Client/User	Written approval of Project Charter required from Client/User – confirms understanding of scope	<b>Required to move forward</b>	2 weeks
1.6	Obtain internal project number	Request project number form Support Staff/Accounting		1 day
1.7	Initial Project Authorization (PA)	Generate initial project authorization based on approved Project Charter Circulate for signatures	Initial authorization may be for “seed” money for consulting and management or for full funding to end of bid period	1 day
1.8	Approval from Client/User	Return of signed PA with coding	<b>Required to move to next phase</b>	2 weeks
1.9	Funding	Transfer of funds from Client/User to PR Finance		2 weeks
<b>2.0 Initiation</b>				
2.1	Develop Project Charter	Written Project Charter (further detailed) for inclusion into proposed documents		2 weeks
2.2	Submit to Client/User	Submit written detailed scope to Client / User for approval		1 day
2.3	Approval from Client/User	Written approval of Project Charter required from Client/User prior to issue	<b>Required to move forward</b>	1 week

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	2.4	Establish internal Committees	Establish Steering Committee and / or Building Committee	In consultation with Senior U of G Staff and Client/User	1 week
	2.5	Consultant Selection Process	Expression of Interest (EOI)	Prepare, issue, advertise, receive expressions, evaluate, award	2 to 4 weeks
			Request for Proposals (RFP)	Prepare, issue RFP, receive proposals, evaluate, award, generate contract order, work on site, receipt of final report	2 to 4 weeks
	2.6	Procure Reports	Topographic survey	Prepare, issue RFP, receive proposals, evaluate, award, generate contract order, work on site, receipt of final report	3 to 6 weeks
			Geotechnical – boreholes and reports	Prepare, issue RFP, receive proposals, evaluate, award, generate contract order, work on site, receipt of final report	3 to 6 weeks
			Hazardous materials	Prepare, issue RFP, receive proposals, evaluate, award, generate contract order, work on site, receipt of final report	2 to 4 weeks
<b>3.0</b>	<b>Pre-design</b>				
	3.1	Formal agreement	With Consultant	Initiate, provide for signature, return, execute by U of G	2 weeks
	3.2	Scope Development	Periodic meetings with Client/user groups	Bi-weekly or as required. Confirm requirements, reviews	2 weeks
			Periodic meetings with steering and/or building committee	Seek approvals and/or direction	
			Site visits	As required for confirmations	
	3.3	Functional Program	Initial confirmation of program including space allocation and requirements		2 to 4 weeks
	3.4	Construction cost	Initial confirmation on construction cost		2 weeks
	3.5	Submit to Client/User	Submit written detailed scope, functional program and cost to Client / User for approval		1 day
	3.6	Approval from Client/User	Written approval of program, scope and cost required from Client/User	<b>Approval required to move forward</b>	2 weeks

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<b>4.0</b>	<b>Schematic Design</b>			
4.1	Develop design	Periodic meetings with Client/user groups	Bi-weekly or as required. Confirm requirements, reviews,	4 weeks
		Periodic meetings with steering and/or building committee	Seek approvals and/or direction	
		Site visits	As required for confirmations	
4.2	Cost check	Confirmation on construction cost		2 weeks
4.3	Submit to Client/User	Submit written detailed scope, functional program and cost to Client / User for approval		1 day
4.4	Approval from Client/User	Of schematic design documents – drawings, outline spec and cost	<b>Client Sign-off required to move to next phase</b>	2 weeks
4.5	Submit for Site Plan Approval		By Consultant based on schematic design as approved – if required	4 to 6 weeks
4.6	Submission to Board of Governors	Prepare and issue documentation as required for committees – PRPC, Finance, Board		varies
4.7	Stakeholder Review	Submit a copy of the approved schematic design documentation to stakeholders at U of G for their review and comment	Request a return of comments within a specific time frame. Must include any standing committees with U of G - landscape, accessibility, space	2 weeks
<b>5.0</b>	<b>Design Development</b>			
5.1	Detailed development of schematic design	Periodic meetings with Client/user groups	Bi-weekly or as required. Confirm requirements, reviews,	6 weeks
		Periodic meetings with steering and/or building committee	Seek approvals and/or direction	
		Site visits	As required for confirmations	
5.2	Cost check	Confirmation on construction cost		2 weeks
5.3	Submit to Client/User	Submit design development and cost to Client / User for approval		1 day
5.3	Approval from Client/User	Of design development documents – drawings, outline spec and cost	<b>Client Sign-off required to move to next phase Required to move to next phase</b>	1 week

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<b>6.0</b>	<b>Construction Documents</b>			
6.1	Completion of detailed documents for bidding	Periodic meetings with Client/user groups	Bi-weekly or as required. Confirm requirements, reviews,	6 to 8 weeks
		Periodic meetings with steering and/or building committee	Seek approvals and/or direction	
		Site visits	As required for confirmations	
6.2	Final Cost check	Confirmation on construction cost		2 weeks
6.3	Submit to Client/User	Submit documents and cost to Client / User for approval		1 day
6.4	Approval from Client/User	Of construction documents – drawings, outline spec and cost	<b>Client Sign-off required to move to next phase</b>	1 week
6.5	Contractor Selection	Pre-qualification process	Expression of Interest (EOI) - Issue, advertise, receive expressions, evaluate, select General Contractors	2 to 3 weeks
			Formal pre-qualification - Issue document, receive documents, evaluate, award	4 weeks
6.6	Stakeholder Review	Issue completed documents to all pertinent stakeholders for review	Receive comments, review comments, initiate revisions in form of addendum or change orders as required	3 weeks
6.7	Manager / Director approval	Seek approval from Manager or Director to issue bids	prior to final printing of the bid documents	1 week
6.8	Building Permit Application	Submit a copy of bid documents to City for building permit	By Consultant	4 to 6 weeks
<b>7.0</b>	<b>Bidding</b>			
7.1	Issue	Issue bids documents to pre-qualified bidders	Use Support Staff and comply with written procedures	1 week
7.2	Bid Period		Provide direction as required on inquiries for addendum to be issued by Consultant	4 weeks
7.3	Receipt of bids	The receipt and opening of bids received	Comply with written procedures	1 day
7.4	Evaluation of bids	Detailed review of the bids received, make recommendations, revise total project budget based on accepted bid	Comply with written procedures	1 week

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	7.5	Generate second PA	Generate 2 <sup>nd</sup> Project Authorization (if required) for additional funding based on accepted bid		1 day
	7.6	Approval from Client/User	Return of signed PA with coding	<b>Required to move to next phase</b>	2 weeks
	7.7	Funding	Transfer of funds from Client/User to PR Finance		2 weeks
	7.8	Award	Prepare and issue “letter of intent” or acceptance for signature and execution	Based on accepted bid and project requirements	1 day
<b>8.0</b>	<b>Construction</b>				
	8.1	Completion and execution of formal contracts	Consultant to assemble and prepare formal contracts for execution by U of G and Contractor		2 weeks
	8.2	Construction Period	Construction activities, contract administration, certification for payment,	Periodic site meetings, approvals for revisions, reviews of the work	Varies - months to years
			Periodic meetings with steering and/or building committee	Seek approvals and/or direction	
	8.3	Commissioning	Start-up of equipment and systems	Training of U of G personnel and staff	Varies
	8.4	Closeout	Final close-out of construction and project including financials	Final payments to contractor, adjustments to funding	Varies
	8.5	Move-in	Occupancy of the new spaces by Client	Physical move by client/Users into new spaces/building	4 weeks
	8.6	Satisfaction Survey	Survey to be sent to Client for their feedback on project and services		2 weeks
<b>9.0</b>	<b>Warranty / Post Construction</b>				
	9.1	One Year Warranty Period	Correction of any outstanding deficiencies found during warranty period		12 months from formal acceptance
			Formal reviews and sign-off by PR		

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### **Notes:**

- .1 Phases for all projects are generally the same.
- .2 Time Frames will vary based on complexity of the proposed project and length of time required to receive approvals.
- .3 The expected time frame for one activity may overlap the time frame for another activity.
- .4 Not all Phases will require all of the activities listed.