Procedures for beginning projects under project management

Projects need to be placed on the capital projects planning document which is based on a three year plan.

The estimated cost of every project on the planning document needs to be updated each year, even if the project will not begin in that fiscal year. (This helps to ensure your estimated project cost is not out of date due to the economy.)

To begin a project that is listed on the capital projects planning document:

- ◆ The project owner needs to complete the pre-project checklist and the Pre-Project Budget worksheet
- ◆ After the pre-project checklist and the pre-project budget worksheet are fully completed and provided to the city project manager, the project owner may put the project on the agenda so funds may be appropriated.
- ◆ Please include the completed pre-project checklist, completed budget worksheet and a written report outlining the work to be performed as an attachment to the agenda request.
- ◆ The Project Owner will monitor departmental small tools and capital purchases that are required for the project to meet its intended use. These items need to be budgeted in the correct period as the budget for these items do not carry over.
- ◆ The Project Owner will need to appropriately budget for all future cost related to the operations of the project.
- ◆ The project owner, in conjunction with the City's Project Manager, will make progress reports available to Council.
- ◆ If using a third party manager, please ensure City Project Manager is included on all status reports to monitor the status of the project.
- ◆ When a project is complete, please complete the project completion worksheet.
- This worksheet will be used by the Project Manager and Finance to complete a semi-annual project update for the Mayor and Council.

For a project that is not part of the planning document that was included in the adopted budget, you MUST discuss the project with Mike and obtain his approval to proceed. Then you will complete the steps listed above.

ACCOUNT NUMBER - 12-665-7128 A19 VIOLET

Project Management - Pre-project of	checklist	Project Name: Violet Avenu	A SOUND TO SEE A SEE AND A SECOND SEC
Submitted by: Taylor Davis	Project O	wner: Chad Christian	
Expected Project Start Date	2016	_ Expected Project Completion Date	01/19/2016
If it is on the capital projects planni If not, get approval from Mike Tho	ng document, what is mpson to proceed wit ate) - Approved to pr	oceed Not Approved to Proc	What year is it listed? 2016
Location (Description and tax parce Replace pipe beneath Violet Aver		er(s)) on of Violet Avenue and Poplar Str	eet.
	ent (examples: parking	lots, pools, playgrounds, ball fields, st	
X Infrastructure repair Other, Please expla	ALCOHOLOGY AND COLOR OF A STANDARD STANDARD STANDARD STANDARD	ample: roads, drainage, right of ways, e	tc.)
Will this project include grant funds	2 Vas No X		
		4.0	
Will this project have a third party if yes, please list third party manager		. No_X	
Discuss your project with each of the	e following individual Department	s. You must have initials and date fo	r each section below. ion Required:
Miriam Boutwell		Review of the desired location &	
Initials & Date			ice to defermine it the property
W 12 2 Miriam Boutwell			ck setbacks, etc.; and a record of
	Zoning	correctly zoned; a site plan to chec the Planning Commission recomn	ck setbacks, etc.; and a record of
Initials & Date	Zoning	the Planning Commission recomn	ck setbacks, etc.; and a record on mending approval of the project
Chuck Lay	Zoning Building, Flood & Historical		ck setbacks, etc.; and a record of nending approval of the project I desired use to ensure all
	Building, Flood &	Review of the desired location and requirements are met including but architect requirements, etc.	ck setbacks, etc.; and a record of nending approval of the project d desired use to ensure all t not limited to building codes.
Chuck Lay Initials & Date	Building, Flood & Historical	Review of the desired location and requirements are met including by architect requirements, etc. Determination of potential needs a protection, fire department access	ck setbacks, etc.; and a record of nending approval of the project desired use to ensure all t not limited to building codes elated to active/ passive fire roads, egress, and all other
Chuck Lay Initials & Date	Building, Flood &	the Planning Commission recomn Review of the desired location and requirements are met including by architect requirements, etc. Determination of potential needs in the property of the pro	ck setbacks, etc.; and a record of nending approval of the project desired use to ensure all t not limited to building codes elated to active/ passive fire roads, egress, and all other
Chuck Lay Initials & Date Nelson Bauer Initials & Date	Building, Flood & Historical	Review of the desired location and requirements are met including by architect requirements, etc. Determination of potential needs a protection, fire department access	ck setbacks, etc.; and a record of nending approval of the project d desired use to ensure all t not limited to building codes related to active/ passive fire roads, egress, and all other International Codes.
Chuck Lay Initials & Date Nelson Bauer Initials & Date Chad Christian Leslie Gahagan	Building, Flood & Historical Fire	Review of the desired location and requirements are met including but architect requirements, etc. Determination of potential needs a protection, fire department access requirements as determined by the	ck setbacks, etc.; and a record of nending approval of the project d desired use to ensure all t not limited to building codes, related to active/ passive fire roads, egress, and all other International Codes.
Chuck Lay Initials & Date Nelson Bauer Initials & Date Chuck Lay Chuck Lay	Building, Flood & Historical Fire Engineering	Review of the desired location and requirements are met including but architect requirements, etc. Determination of potential needs a protection, fire department access requirements as determined by the Determination of potential need for	ck setbacks, etc.; and a record of the project dending approval of the project of desired use to ensure all the not limited to building codes delated to active/passive fire roads, egress, and all other International Codes. For input from the City engineers demental issues or permits.
Chuck Lay Initials & Date Nelson Bauer Initials & Date Chad Christian Mitials & Date Leslie Gahagan Initials & Date	Building, Flood & Historical Fire Engineering Environmental	Review of the desired location and requirements are met including but architect requirements, etc. Determination of potential needs a protection, fire department access requirements as determined by the Determination of potential need for Determination of potential environ Determination of IT needs with Jenetworking, phones, security came	ck setbacks, etc.; and a record of the project dending approval of the project desired use to ensure all the not limited to building codes delated to active/passive fire roads, egress, and all other antenational Codes. For input from the City engineer: International issues or permits.
Chuck Lay Initials & Date Nelson Bauer Initials & Date Chad Christian Initials & Date Leslie Gahagan	Building, Flood & Historical Fire Engineering Environmental	Review of the desired location and requirements are met including but architect requirements, etc. Determination of potential needs a protection, fire department access requirements as determined by the Determination of potential need for Determination of potential environ Determination of IT needs with Je	ck setbacks, etc.; and a record of the project dending approval of the project of desired use to ensure all the not limited to building codes delated to active/passive fire roads, egress, and all other antenational Codes. For input from the City engineers desired issues or permits.
Chuck Lay Initials & Date Nelson Bauer Initials & Date Chad Christian Leslie Gahagan Initials & Date Jessica Middleton	Building, Flood & Historical Fire Engineering Environmental	Review of the desired location and requirements are met including but architect requirements, etc. Determination of potential needs a protection, fire department access requirements as determined by the Determination of potential need for Determination of potential environ Determination of IT needs with Jenetworking, phones, security came	ck setbacks, etc.; and a record hending approval of the project desired use to ensure all thot limited to building codes related to active/ passive fire roads, egress, and all other International Codes. For input from the City engineer mental issues or permits. Sessica such as internet access, tras/door access control system and item. Determination of

Project Management - Pre-project checklist

Violet Avenue Pipe Replacement
Project Name:______

Submitted by: _			Chad Christian
	01/04/201	Project Ow	v ner:
Expected Projec			Expected Project Completion Date
If not, get appro Mike (Must hav	oval from Mike Tho e Mike initial and d	mpson to proceed with ate) - Approved to pro	ceed Not Approved to Proceed
Baice Paidjegt 126	ြ <mark>ိုးသိတ်ptina</mark> tal pipe w	ith equivalent reinford	ed concrete pipe, 52' length.
Mecatipip (Descr	iption/inidttAx pane	el a thtméifid atise ction be	fr'(si))let Avenue and Poplar Street.
Project type (sel	Building construct Property improven Infrastructure repa		lots, pools, playgrounds, ball fields, streetscape, signage, etc.) mple: roads, drainage, right of ways, etc.)
f yes, please list	Grantor	s? Yes No manager? Yes	X
_			
		e following individuals Department	s. You must have initials and date for each section below. Documentation Required:
Initials & Date		Department Planning	Documentation Required: Review of the desired location & use to determine if the property
Initials & Date	Individual Miriam Boutwell	Department Planning	Review of the desired location & use to determine if the property correctly zoned; a site plan to check setbacks, etc.; and a record of
	Individual Miriam Boutwell Miriam Boutwell	Department Planning Zoning Building, Flood &	Review of the desired location & use to determine if the property correctly zoned; a site plan to check setbacks, etc.; and a record of the Planning Commission recommending approval of the project. Review of the desired location and desired use to ensure all requirements are met including but not limited to building codes,
Initials & Date Initials & Date	Individual Miriam Boutwell Miriam Boutwell Chuck Lay	Department Planning Zoning Building, Flood & Historical	Review of the desired location & use to determine if the property correctly zoned; a site plan to check setbacks, etc.; and a record of the Planning Commission recommending approval of the project. Review of the desired location and desired use to ensure all requirements are met including but not limited to building codes, architect requirements, etc. Determination of potential needs related to active/ passive fire protection, fire department access roads, egress, and all other requirements as determined by the International Codes.
Initials & Date Initials & Date Initials & Date Initials & Date Initials & Date	Individual Miriam Boutwell Miriam Boutwell Chuck Lay Nelson Bauer	Department Planning Zoning Building, Flood & Historical	Review of the desired location & use to determine if the property correctly zoned; a site plan to check setbacks, etc.; and a record of the Planning Commission recommending approval of the project. Review of the desired location and desired use to ensure all requirements are met including but not limited to building codes, architect requirements, etc. Determination of potential needs related to active/ passive fire protection, fire department access roads, egress, and all other
Initials & Date Initials & Date Initials & Date Initials & Date	Individual Miriam Boutwell Miriam Boutwell Chuck Lay Nelson Bauer Chad Christian	Department Planning Zoning Building, Flood & Historical Fire Engineering Environmental	Review of the desired location & use to determine if the property correctly zoned; a site plan to check setbacks, etc.; and a record of the Planning Commission recommending approval of the project. Review of the desired location and desired use to ensure all requirements are met including but not limited to building codes, architect requirements, etc. Determination of potential needs related to active/ passive fire protection, fire department access roads, egress, and all other requirements as determined by the International Codes. Determination of potential need for input from the City engineers.

Project Manage	ment - Pre-project o	checklist	Project Name: Violet Avenu	ue Pipe Replacement
Submitted by: \underline{T}	aylor Davis	Project O	wner: Chad Christian	
			_ Expected Project Completion Date	01/19/2016
If it is on the cap If not, get appro	oital projects planni val from Mike Tho	ng document, what is mpson to proceed with	ment? (Please check one) Yes X the amount listed? \$19,125.00 h planning the project. oceed Not Approved to Proc	What year is it listed? 2016
Brief Project De Replace failing	scription 58"x36" metal pip	e with equivalent reir	nforced concrete pipe, 52' length.	
		el Identification numb nue, at the intersection	per(s)) on of Violet Avenue and Poplar St	reet.
Project type (sel	Building constructs Property improven Infrastructure repai Other, Please expla			
If yes, please list	third party manager		ls. You must have initials and date f	
Initials & Date	Miriam Boutwell		Review of the desired location &	t use to determine if the property is eck setbacks, etc.; and a record of
Initials & Date	_Miriam Boutwell	Zoning	the Planning Commission recom	
Initials & Date	_Chuck Lay	Building, Flood & Historical	Review of the desired location as requirements are met including be architect requirements, etc.	
Initials & Date	_Nelson Bauer	Fire	Determination of potential needs protection, fire department acces requirements as determined by the	s roads, egress, and all other
Initials & Date	_Chad Christian	Engineering	Determination of potential need	for input from the City engineers.
LG 11/30/15 Initials & Date	_Leslie Gahagan	Environmental	Determination of potential environment	onmental issues or permits.
Initials & Date	_Jessica Middleton	IT/GIS	Determination of IT needs with J networking, phones, security can computers, copiers, etc.	dessica such as internet access, neras/door access control systems,
Initials & Date	Miranda Bell and/or Joe Bouzan	Finance	Budget review and creation of aginsurance cost to include in budg	

Project Мападе	ment - Pre-project (checklist	Project Name: Violet Avenue Pipe Replacement
Submitted by: _	aylor Davis	Project Owne	er: Chad Christian
Expected Projec	t Start Date	2016 Ex	xpected Project Completion Date
If it is on the cap If not, get appro Mike (Must have	oital projects planni val from Mike Tho e Mike initial and d	ng docnment, what is the mpson to proceed with pl	and the project. No What year is it listed? 2016 anning the project. Not Approved to Proceed
Brief Project De Replace failing	scription 58"x36" metal pip	e with equivalent reinfor	ced concrete pipe, 52' length.
Location (Descri Replace pipe b	ption and tax parce eneath Violet Ave	el Identification number(s nue, at the intersection o	s)) of Violet Avenue and Poplar Street.
Project type (sel	Building constructi Property improvem	ir or improvements (examp	s, pools, playgrounds, ball fields, streetscape, signage, etc.) le: roads, drainage, right of ways, etc.)
If yes, please list	Grantor	s? Yes NoX	0 X
If yes, please list	third party manager	e following individuals.)	You must have initials and date for each section below.
Initials & Date	Individual Miriam Boutwell	Department Planning	Review of the desired location & use to determine if the property is correctly zoned; a site plan to check setbacks, etc.; and a record of the Planning Commission recommending approval of the project.
Initials & Date	_Miriam Boutwell	Zoning	Review of the desired location and desired use to ensure all
Initials & Date	_Chuck Lay	Building, Flood & Historical	requirements are met including but not limited to building codes, architect requirements, etc.
Initials & Date	_Nelson Bauer	Fire	Determination of potential needs related to active/ passive fire protection, fire department access roads, egress, and all other requirements as determined by the International Codes.
Initials & Date	_Chad Christian	Engineering	Determination of potential need for input from the City engineers.
Initials & Date	_Leslie Gahagan	Environmental	Determination of potential environmental issues or permits.
(Initials & Date	Jessica Middleton	IT/GIS	Determination of IT needs with Jessica such as internet access, networking, phones, security cameras/door access control systems, computers, copiers, etc.
Initials & Date	Miranda Bell and/or Joe Bouzan	Finance	Budget review and creation of agenda item. Determination of insurance cost to include in budget.



Taylor Davis <tdavis@cityoffoley.org>

Pre-project checklist for Violet Avenue pipe replacement

Chuck Lay <clay@cityoffoley.org>
To: Taylor Davis <tdavis@cityoffoley.org>

Mon, Nov 23, 2015 at 4:37 PM

I have no way to sign it, but I have no issues with it.

Chuck
[Quoted text hidden]

Project Management - Pre-project budget worksheet

Estimated capital project cost	
Land Acquisition (cost and location)	\$ 0
Hard Cost (building structure, sitework-including utilities, paving, grading, etc., landscaping, furnishings.,	\$ <u>16,750</u>
Soft Cost (Architectural, Engineering, Legal, Geotech, etc.)	\$ 0
Insurance Cost	\$ <u>500</u>
Bid Cost Other past to construct and make appreciated (places list below)	\$ 500
Other cost to construct and make operational (please list below:)	¢
	\$
	\$
Capital Project Subtotal	\$\frac{16,750}{}
10% Contingency	\$\frac{\fin}}}{\fint}}}}}}}}{\frac}\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac}}}}}}}}}}}}}}}}}}}}}}}}}}}}}}}}}}}}
Total capital project cost	\$ 18,425
	4 10,1=0
Estimated Cost - Departmental Capital Purchases to make project operational	
	\$
	\$
	\$
Total cost departmental capital purchases	\$ 0
Estimated Cost - Departmental Small Tools Purchases to make project operational	
Estimated Cost - Departmental Small Tools I urchases to make project operational	\$
	\$
	\$
Total cost departmental small tools purchases	\$ 0
The same are the s	
Total Cost to complete project and make fully operational	§ 18,925
Items below are for informational purposes:	
Estimated Future Operating Cost	
Utilities	\$ 0
Head count	\$ 0
Future Insurance	\$ 0
Additional future equipment (i.e. mowers, tractors, vehicles, etc.)	\$ 0
Additional cost to operate	\$ 0
	\$ 0
	\$ 0
	\$ 0
Total estimated future cost to operate	\$ 0
Will do not be a local and a l	
Will the project be completed as one project or will there be phases?	
Please list all phases below with cost of each phase: Phase	Cost
One Phase	\$ 18,925
One i hase	\$ 10,020 \$
	\$
Total cost of all phases	\$ 18,925
Total cost of all phases	Ψ , -
Is this project part of a project with previous cost? (i.e. a phase of a previous City project.)	
Please list all previous phases below with final cost of each phase:	
Phase	Cost
	\$
	\$
None	\$
Total cost of all previous phases	\$ 0