

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 (This helps to ensure your estimated project cost is not out of date due to the economy.)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 checklist

Project Name: Violet Avenue Pipe Replacement

Submitted by: Taylor Davis

Project Owner: Chad Christian

Expected Project Start Date 01/04/2016

Expected Project Completion Date 01/19/2016

Is this project listed on the capital project planning document? (Please check one) Yes ☒ No ☐

If it is on the capital projects planning document, what is the amount listed? \$19,125.00 What year is it listed? 2016

If not, get approval from Mike Thompson to proceed with planning the project.

Mike (Must have Mike initial and date) - Approved to proceed ☐ Not Approved to Proceed ☐

Brief Project Description

Replace failing 58"x36" metal pipe with equivalent reinforced concrete pipe, 52' length.

Location (Description and tax parcel Identification number(s))

Replace pipe beneath Violet Avenue, at the intersection of Violet Avenue and Poplar Street.

Project type (select one)

☐ Building construction or improvement

☐ Property improvement (examples: parking lots, pools, playgrounds, ball fields, streetscape, signage, etc.)

☒ Infrastructure repair or improvements (example: roads, drainage, right of ways, etc.)

☐ Other, Please explain _____

Will this project include grant funds? Yes ☐ No ☒

If yes, please list Grantor _____

Will this project have a third party manager? Yes ☐ No ☒

If yes, please list third party manager _____

Discuss your project with each of the following individuals. You must have initials and date for each section below.

Individual	Department	Documentation Required:
 12/2/15 Initials & Date Miriam Boutwell	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.
 12/2/15 Initials & Date Miriam Boutwell	Zoning	Review of the desired location and desired use to ensure all requirements are met including but not limited to building codes, architect requirements, etc.
 12/2/15 Initials & Date Chuck Lay	Building, Flood & Historical	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.
 12/2/15 Initials & Date Nelson Bauer	Fire	Determination of potential need for input from the City engineers.
 12/2/15 Initials & Date Chad Christian	Engineering	Determination of potential environmental issues or permits.
 12/2/15 Initials & Date Leslie Gahagan	Environmental	Determination of IT needs with Jessica such as internet access, networking, phones, security cameras/door access control systems, computers, copiers, etc.
 12/2/15 Initials & Date Jessica Middleton	IT/GIS	Budget review and creation of agenda item. Determination of insurance cost to include in budget.
 12/3/15 Initials & Date Miranda Bell and/or Joe Bouzan	Finance	

Effective Date May 21, 2015

Project Management - Pre-project checklist

Taylor Davis

Violet Avenue Pipe Replacement

Project Name: Chad Christian

Submitted by: 01/04/2016

Project Owner: 01/19/2016

Expected Project Start Date Expected Project Completion Date

Is this project listed on the capital project planning document? (Please check one) Yes ☒ No ☐

If it is on the capital projects planning document, what is the amount listed? \$19,125.00 What year is it listed? 2016

If not, get approval from Mike Thompson to proceed with planning the project.

Mike (Must have Mike initial and date) - Approved to proceed Not Approved to Proceed

Replace 52' of 36" diameter pipe with equivalent reinforced concrete pipe, 52' length.

Location (Description of lot, address, and identification number(s)) Violet Avenue and Poplar Street.

Project type (select one)

- ☒ Building construction or improvement
- ☐ Property improvement (examples: parking lots, pools, playgrounds, ball fields, streetscape, signage, etc.)
- ☐ Infrastructure repair or improvements (example: roads, drainage, right of ways, etc.)
- ☐ Other, Please explain

Will this project include grant funds? Yes No

If yes, please list Grantor

Will this project have a third party manager? Yes No

If yes, please list third party manager

Discuss your project with each of the following individuals. You must have initials and date for each section below.

Individual	Department	Documentation Required:
Initials & Date Miriam Boutwell	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	
Initials & Date Chuck Lay	Building, Flood & Historical	Review of the desired location and desired use to ensure all 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.

Effective Date May 21, 2015

Project Management - Pre-project checklistProject Name: Violet Avenue Pipe ReplacementSubmitted by: Taylor DavisProject Owner: Chad ChristianExpected Project Start Date 01/04/2016Expected Project Completion Date 01/19/2016Is this project listed on the capital project planning document? (Please check one) Yes ☒ No ☐If it is on the capital projects planning document, what is the amount listed? \$19,125.00 What year is it listed? 2016

If not, get approval from Mike Thompson to proceed with planning the project.

Mike (Must have Mike initial and date) - Approved to proceed ☐ Not Approved to Proceed ☐**Brief Project Description**

Replace failing 58"x36" metal pipe with equivalent reinforced concrete pipe, 52' length.

Location (Description and tax parcel Identification number(s))

Replace pipe beneath Violet Avenue, at the intersection of Violet Avenue and Poplar Street.

Project type (select one)☐ Building construction or improvement☐ Property improvement (examples: parking lots, pools, playgrounds, ball fields, streetscape, signage, etc.)☒ Infrastructure repair or improvements (example: roads, drainage, right of ways, etc.)☐ Other, Please explain _____Will this project include grant funds? Yes ☐ No ☒

If yes, please list Grantor _____

Will this project have a third party manager? Yes ☐ No ☒

If yes, please list third party manager _____

Discuss your project with each of the following individuals. You must have initials and date for each section below.

	Individual	Department	Documentation Required:
<u> </u> Initials & Date	Miriam Boutwell	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.
<u> </u> Initials & Date	Miriam Boutwell	Zoning	
<u> </u> Initials & Date	Chuck Lay	Building, Flood & Historical	Review of the desired location and desired use to ensure all requirements are met including but not limited to building codes, architect requirements, etc.
<u> </u> 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.
<u> </u> Initials & Date	Chad Christian	Engineering	Determination of potential need for input from the City engineers.
<u>LG 11/30/15</u> Initials & Date	Leslie Gahagan	Environmental	Determination of potential environmental issues or permits.
<u> </u> 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.
<u> </u> Initials & Date	Miranda Bell and/or Joe Bouzan	Finance	Budget review and creation of agenda item. Determination of insurance cost to include in budget.

Effective Date May 21, 2015

Project Management - Pre-project checklist

Project Name: Violet Avenue Pipe ReplacementSubmitted by: Taylor DavisProject Owner: Chad ChristianExpected Project Start Date 01/04/2016Expected Project Completion Date 01/19/2016Is this project listed on the capital project planning document? (Please check one) Yes ☒ No ☐If it is on the capital projects planning document, what is the amount listed? \$19,125.00 What year is it listed? 2016

If not, get approval from Mike Thompson to proceed with planning the project.

Mike (Must have Mike initial and date) - Approved to proceed _____ Not Approved to Proceed _____

Brief Project Description

Replace failing 58"x36" metal pipe with equivalent reinforced concrete pipe, 52' length.

Location (Description and tax parcel Identification number(s))

Replace pipe beneath Violet Avenue, at the intersection of Violet Avenue and Poplar Street.

Project type (select one)

_____ Building construction or improvement

_____ Property improvement (examples: parking lots, pools, playgrounds, ball fields, streetscape, signage, etc.)

☒ _____ Infrastructure repair or improvements (example: roads, drainage, right of ways, etc.)

_____ Other, Please explain _____

Will this project include grant funds? Yes _____ No ☒

If yes, please list Grantor _____

Will this project have a third party manager? Yes _____ No ☒

If yes, please list third party manager _____

Discuss your project with each of the following individuals. You must have initials and date for each section below.

Individual	Department	Documentation Required:
<u> </u> Miriam Boutwell	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.
<u> </u> Miriam Boutwell	Zoning	
<u> </u> Chuck Lay	Building, Flood & Historical	Review of the desired location and desired use to ensure all requirements are met including but not limited to building codes, architect requirements, etc.
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<u> </u> Chad Christian	Engineering	Determination of potential need for input from the City engineers.
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<u> </u> Miranda Bell and/or Joe Bouzan	Finance	Budget review and creation of agenda item. Determination of insurance cost to include in budget.

Effective Date May 21, 2015



Taylor Davis <tdavis@cityoffoley.org>

Pre-project checklist for Violet Avenue pipe replacement

Chuck Lay <clay@cityoffoley.org>

Mon, Nov 23, 2015 at 4:37 PM

To: Taylor Davis <tdavis@cityoffoley.org>

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.,	\$ 16,750
Soft Cost (Architectural, Engineering, Legal, Geotech, etc.)	\$ 0
Insurance Cost	\$
Bid Cost	\$ 500
Other cost to construct and make operational (please list below:)	
	\$
	\$
	\$
Capital Project Subtotal	\$16,750
10% Contingency	\$1,675
Total capital project cost	\$ 18,425

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

	\$
	\$
	\$
Total cost departmental small tools purchases	\$0

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 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
	\$
	\$
Total cost of all phases	\$ 18,925

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