

**1.0 SCOPE:**

- 1.1 This work instruction applies to the Planning and Construction Department and describes actions taken throughout the process of conducting a Capital Improvement Project for Sacramento City Unified School District.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

**2.0 RESPONSIBILITY:**

- 2.1 Project Manager

**3.0 APPROVAL AUTHORITY:**

- 3.1 Director of Planning and Construction

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**4.0 DEFINITIONS:**

- 4.1 DPC – Director of Planning and Construction  
4.2 PM – Project Manager  
4.3 CM – Construction Manager  
4.4 PCD – Planning and Construction Department  
4.5 MOP – Maintenance and Operations Department  
4.6 NOC – Notice of Completion  
4.7 OT – Office Technician

**5.0 WORK INSTRUCTION:**

- 5.1 DPC receives a request to build, improve, add or modify a facility or item at a specific location.  
5.2 DPC assigns project to a PM.  
5.3 PM visits location and reviews the need for the project.  
5.3.1 After review, a scope of work is determined.  
5.3.2 An estimated cost of design and/or construction is determined.  
5.3.3 Project funding is determined.  
5.3.3.1 If funding is available, then the project proceeds.  
5.3.3.2 If funding is not available, then the project is canceled.  
5.4 If necessary, the PM generates specifications and drawings based on needs identified by the requesting administrator. These may be developed in-house, or the PM may have them done by an architectural or engineering firm.  
5.4.1 Specifications and drawings are reviewed and approved by the requesting administrator.

- 5.4.2 Revisions are completed if needed.
- 5.5 The OT prepares an online requisition in the Escape system and establishes a project file.
  - 5.5.1 The requisition is budget coded in the Escape system and then forwarded to the Budget Department for approval.
- 5.6 Bid information is submitted per the established bid criteria of the Contracts Office.
  - 5.6.1 If required the PM coordinates with the Contracts Office to ensure bids are advertised.
- 5.7 After the Contracts Office opens and records bids, the PM and DPC review the bids and make recommendations to the Contracts Officer for approval.
- 5.8 The PM conducts regular project status meetings to assess the progress of the project, determine construction issues, and to deal with pertinent project issues.
- 5.9 At the end of the project, the PM coordinates the walk through inspection.
  - 5.9.1 Contractor performs punch list items, if any, to finish the work and the PM coordinates the final inspection.
  - 5.9.2 Contractor furnishes any operation and maintenance manuals and warranties to the PM. Documents are held until DSA close out notification is received (DSA projects only).
  - 5.9.3 The OT places all documents in the project file and gives copies of any maintenance and warranty items to MOP.
- 5.10 PM turns the completed project over to the site administrator.
- 5.11 Final payment is recommended by the PM.
  - 5.11.1 PCD processes the final payment through the district Escape system.
  - 5.11.2 PM notifies the Contracts Office of NOC via email if necessary.

**6.0 ASSOCIATED DOCUMENTS:**

None

**7.0 RECORD RETENTION TABLE:**

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Close Out Documents	Warehouse	5 Years	Discard as desired	Access Limited to Operation Support Services

**8.0 REVISION HISTORY:**

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
03/30/04	A	Draft – Initial Release
12/05/07	B	Original – Changes include

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PLANNING AND CONSTRUCTION CAPITAL IMPROVEMENT PROJECTS (PCD-W003)  
Sacramento City Unified School District

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- 5.9 & 5.10 changes to sentence structure
  - addition of 4.5, 4.6, 4.7
  - Rewrite of entire work instruction done.
- Remove 5.8 & 6.1, Clarified 5.10.2 & 7.0

**\*\*\* End of procedure \*\*\***