

PROJECT MANAGER PROCEDURES

Pre-Construction Services-(PM Only)

- Schedule and organize regular Owner/Architect/Contractor (OAC) meetings.
- Develop and maintain a pre-construction schedule, collaborating with the Field Superintendent when possible.
- Document OAC meetings and distribute minutes to attendees. (PM or PE).
- As the design progresses, identify issues and provide helpful input to assist the Owner in improving quality and reducing costs.
- Establish and assign a “ball-in-court” to the appropriate individual for each issue.
- Continue to address and track issues at each meeting until every item has been closed out.
- Build positive relationships with the Owner and Architect.
- Coordinate with the Project Team regarding the appropriate schedule for the project.
- Assist in fine tuning the budgets, and product/subcontractor selection, thereby eliminating trade areas that have not been bought out.
- Verify that plans and specifications have been finalized.
- Assist with the preparation of the Owner contract.
- Collaborate with the Operations Manager to assign a Superintendent and Project Engineer.

Start-up Checklist

- Ensure that there is a fully executed contract in place with the Owner.
- If the Contract Information Sheet has not already been disseminated, collect the information and distribute it to all departments.
- Obtain all building permits, or ensure that they have been issued.
- Confirm that the customer’s funding is in place.
- Determine if a bond is required and if so, ensure that the bond has been executed and is in force.
- Read and understand the contract language and terms, including liquidated damages and notice requirements.
- Establish a Schedule of Values that is approved by the Owner and their Lender.
- Determine and understand the billing requirements of the Owner and Lender.
- Obtain all building permits, or ensure that they have been issued.
- Interview subcontractors being considered with Estimator.
- Coordinate with the Estimator to interview and make the final selection of subcontractors.

- Review all subcontractor scopes of work and provide feedback to the applicable Estimator as needed for any adjustments to the scope prior to subcontracts being issued.
- Build a CPM schedule that clearly delineates the critical path and ensure that the schedule is included in all subcontracts.
- Review the plans and specifications thoroughly in order to identify all errors and inconsistencies. Ensure that a Request for Information (RFI) is issued formally to the design team. (PM or PE)
- Establish a submittal log based off of the contract drawings and specifications with the Project Engineer. Ensure that the Project Engineer distributes the log to the Owner and Design team for input.
- Verify that Kier has received a written Notice to Proceed.
- Issue the Subcontract Agreements.
- Review and evaluate redlined language/provisions on subcontracts, determining a course of action for each issue. Review with the Operations Manager and meet with the Vice President to discuss and follow the process to completion.
- Participate in the Estimator job pass meeting, along with the Project Engineer, Field Superintendent, Project Assistant, Principal in Charge and CFO. Create a Resource Manual, either electronic or otherwise, for use by the project management team (develop from documents created by Estimator).
- **Ensure that all applicable subcontracts and insurance are in place, to ensure that no work occurs without an executed contract.** (Formal approval from Company Officers must be obtained for any exception.)
- Create a site utilization plan.
- Arrange for temporary facilities including toilet, power, job trailer, fence, office furniture, etc., ensuring that they are placed according to the site utilization plan.
- Coordinate with the IT Manager to arrange for effective internet service.
- Develop a job specific Safety Plan and how it will be enforced.
- Ensure that all permits, and posters such as SWPPP, Safety (including an Emergency Response Plan), Federal wage and hour, and Davis-Bacon wage determinations are displayed properly at the jobsite.
- Establish recurring OAC meetings determining both date and time. Document and distribute the minutes to all attendees weekly. (PE)
- Along with the Field Superintendent, create a site-specific Security Plan that will address issues such as lighting, fencing, and signage, making necessary adjustments as the project proceeds.
- Determine needs for jobsite marketing signage; coordinate with the Business Development Director to maximize advertising for Kier Construction and the Owner.
- Schedule a Subcontractor Preconstruction Conference.
- Review the established job cost report with the Project Engineer, Superintendent, and Project Assistant.
- Complete the buyout process for trade items that were passed from estimating as budgets.

- Instruct the Project Assistant to file the pre-lien notice with the State Construction Registry when appropriate.
- Determine the specific needs for tools, equipment, winter conditions, concrete blankets, etc., coordinating with the Superintendent and the Warehouse Manager to facilitate this well in advance.

Issue Management

- Follow the Change Request (CR) flow chart at all times.
- Work directly with the Project Superintendent to identify and document situations that could result in additional costs or time delays. Provide formal notification in writing to Subcontractors and the Owner regarding schedule related impacts and delays.
- Create a Change Request (CR) for each cost related or delay issue and enter into Timberline. Ensure that the Superintendent and Project Engineer notify you of any impending costs.
- Request subcontractor and supplier pricing for change conditions. Ensure that subcontractors understand time restrictions and processes for reporting change conditions.
- Create a folder on the H drive for each CR that correlates to and contains all supporting documentation related to the CR, including emails, photos, information from the architect and engineers, inspection reports, schedule updates, etc.
- Present and track CRs in weekly OAC meetings or more frequently if necessary, until resolved.
- If it becomes clear that the CR will become an owner expense, the CR is presented to the owner at the next OAC meeting for approval.
- Once approved, issue a Change Order (CO) to the owner.
- Present the CO to the Owner for signature at the next OAC meeting or sooner, if necessary.
- Upon written approval of owner change orders, issue the applicable Subcontract Change Orders and Purchase Orders immediately.
- No work should proceed without a fully executed change order in place.

Project Management-General

- Review job cost reports weekly, evaluating budgets, expenses and outstanding issues to identify and forecast areas of potential cost overruns or savings. Ensure that these changes are reflected on the Job Cost Management Report (JCMR).
- Code and approve all job related invoices. Review invoices that were coded by the Superintendent or accounting for accuracy, making corrections when necessary.
- Prepare Project Status Reports monthly for Accounting.

- Schedule monthly Project Review Meetings on each project and prepare relevant reports. These reports should include the Status Report Forecast Worksheet, an updated JCMR with supporting documentation, tracking log, CR Log by Status, and CO log by Status. Ensure that the Project Assistant distributes accurate detailed meeting minutes to all attendees. These minutes should be reviewed once more at the next scheduled review meeting.
- Review the tracking log weekly to ensure that subcontract requirements have been met. Assist the Project Assistant with unresponsive subcontractors.
- Issue Short Form contracts where applicable.
- Ensure that onsite As-Built Drawings are updated and maintained to reflect all RFIs, ASIs, change conditions, etc.
- Update the CPM schedule at a minimum monthly, and more frequently if necessary due to project conditions or owner requirements. Ensure that the critical path is identifiable through each update and remains intact. Each update must be saved separately to create historical data and submitted to the owner according to the requirements of the contract. If the project is behind schedule establish a recovery plan.
- Ensure that the Project Superintendent is updating and keeping a 3 week look ahead schedule, which should coordinate with the master CPM schedule.
- Coordinate with the Project Assistant to prepare payment requests to the Owner monthly. It is the responsibility of the PM to ensure that all work completed during the billing period has been billed to Kier by the Subcontractor and is in turn billed to the Owner. Present these to the Owner within the time frame designated in the Owner Contract.
- Directly supervise and mentor the Project Engineer, Superintendent and Project Assistant.
- Evaluate staffing needs throughout the project and present to management if additional field support is needed.

Required Meetings

- Job Pass Meeting.
- Subcontractor Pre-Construction Conference.
- Weekly Project OAC Meetings.
- Weekly Subcontractor Foreman Meetings, if situations with the project mandates this. (Ensure that all subcontractors on the 3-week look ahead schedule are in attendance.)
- Monthly Project Review Meetings.
- Project Close-out Meeting.

Project Management-Close Out

- Reconcile final committed costs to ensure that all subcontract commitments have either been fully invoiced or subcontract change orders issued. Outstanding balances on commitments may be written off only if a full unconditional final lien waiver has been received from the applicable vendor or subcontractor.
- Coordinate with the appropriate Accounts Payable Clerk to prepare and send letters to subcontractors and suppliers requesting final invoices.
- Ensure a punch list is being documented and subcontractors are closing out issues in a timely manner.
- Close out the Building Permit with the applicable jurisdiction.
- Ensure that the Project Engineer provides complete O & M Training Manuals to Owner, including a video of the systems training.
- Complete all outstanding issues with subcontractors, coordination with PE, PA and accounting
- Finalize and collect outstanding receivables with Owner.
- Coordinate with the Superintendent to ensure that all temporary facilities including toilet, power, job trailer, fence, etc. are closed out.
- Instruct the Project Assistant to file the Notice of Completion under one of the following circumstances as applicable:
 1. When work is substantially complete
 2. Following final inspection by the local jurisdiction
 3. Following receipt of the permanent Certificate of Occupancy
 4. File a follow-up Notice of Completion, if necessary
- Coordinate with the CFO in order to identify the potential lien date.
- Ensure that all monies are collected or a lien is filed by the lien date, unless the money has been escrowed prior to that time. CFO will file liens when necessary.
- Schedule a project Close-out Meeting that includes the Operations Manager, Estimator, Project Engineer, Superintendent, and Project Assistant.