Construction Management Contract Administration Checklist (CM/CA)

**Pre-Design Phase Tasks**

**Establish a Project Management Plan (PMP)**

***A typical PMP includes the following components:***

Project Charter

Project description

Project planning

Owners project requirements

Design consultants’ selection and contracting methods

Project delivery method selection

Project management portfolio considerations and coordination

Conceptual studies

Scope of work and scope management, monitoring, and control plan

Risk management, monitoring, and control plan (identify, analyze, qualify, quantify, response)

Stakeholder management, monitoring, and control plan

Communications management, procedures, protocol, monitoring, and control plan

Budget and cost management, monitoring, and control plan

Schedule management, monitoring, and control plan (milestone and master schedule)

Quality assurance and quality control and monitoring, and control management plan

Sustainability and environmental studies and plan

Safety management, monitoring, and control plan

Integration management plan

Reference to project documents

Project organization chart and staffing plan

Explanation of roles, responsibilities, and authority of team members

Work/cost breakdown structure

Logistics including temporary construction support requirements

Laydown or marshaling areas

Environmental and archaeological considerations

Reference to project procedures manual

Project information management system (PMIS)

Bid packaging, contracting strategy, and delivery system evaluation

Site mobilization and utilization plan, requirements, and phasing

BIM implementation strategy

**Establish Construction Management Plan (CMP)**

***A typical CMP includes the following components:***

Project overview

Public safety (police, fire department, perimeter, and emergency access)

Perimeter coordination (resident stakeholders, adjacent construction projects, signage, utilities, affected municipalities, and existing landscape features)

Construction logistics (work hours, waste management, parking, and sanitation)

Mitigation (air/fugitive dust, noise, water, and vibration)

**Design Phase Tasks**

Design Contracts                                                       Technical Specification Reviews

Create Master Schedule                                           Constructability Reviews

Communication management                                 Value engineering

Design reviews                                                             Construction contract packaging

Sustainability reviews                                                 Pre-bid construction milestones and schedule

Budget management

Construction specifications

**Procurement Phase Tasks**

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| ***Bidding*** | ***Award*** |
| Bidders list | Bid opening and evaluation |
| Interest campaign | Procurement options |
| Pre-qualification | Letter of intent to award |
| Advertisement | Receive required award documentation |
| Document Distribution | (insurance, bonds, permits, other) |
| Addenda | Pre-award meeting |
| Pre-bid conference | Project award |
| Info to bidders |  |

**Construction Phase Tasks**

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| Pre-construction conference |
| Contract and specifications requirements |
| Construction management plan |
| Partnering |
| Documentation procedures |
| Communications procedures |
| Computerized information management |
| Quality management and control | |
| Change management and control | |
| Cost monitoring and control | |
| Schedule management and control | |
| Quality assurance and quality control | |
| Progress payments | |
| Damage assessments | |
| Testing and balancing | |
| Field reports | |
| Status reports | |
| Safety | |
| Commissioning and functional performance testing | |
| Records drawings | |
| Punch lists | |

**Post Construction and Closeout Tasks**

Checklist and schedule        Preventative maintenance plan

O&M manuals                                                 Claims resolution

Operations personnel training                       Contractor closeout documentation

Spare parts turnover                                      Final Payment

Warranties and extended warranties             Closeout report

Final permits                                                   Contractor warranty responsibility responsibilities

Sustainable project documentation             Contractor one year warranty review

Acceptance                                                    Post occupancy revies

Beneficial occupancy                                      Project closeout