

bunker toolbox

PROJECT ORGANIZATION

FILING SYSTEM & PROJECT MANUAL



FILING SYSTEM STRUCTURE

- A) General Correspondence
- B) Owner Contract
 - Contract Summary
 - Insurance Certificates, Bonds
 - Roles & Responsibilities
 - Payment Requests
 - Incentives statusing
- C) Changes in Owner Contract
- D) Purchase Orders & Subcontracts
 - Insurance Certificates/Bonds
 - Payment Log
- E) Submittals in Process
 - Submittals Approved
- F) Requests for Information in Process
 - Requests for Information Finalized
- G) Engineering Correspondence
 - Design Agreement
 - Documents Status
 - Billings/Payment
- H) Vendor Files (reports, submittals, evaluations)
 - 1) Mechanical
 - 2) Electrical
- I) Safety Plan - Meetings, Inspections, & Reports
- J) Quality Plan - Meetings, Inspections & Reports
- K) Progress Meetings, Reports
- L) Cost: Labor reports
 - Equipment & Tool Reports (rentals & expendables)
 - PO (Materials)/Contract (Subcontractor) Status Reports
 - Field PO's
 - Freight & Drayage
 - Travel & Miscellaneous (shop visits, off-site meetings)
 - Craftworker Recruitment, Training & Incentives
 - Consultants (Labs, Form/Shoring Design, etc.)
 - Cost to Complete
- M) Control Estimate
- N) Schedule Information
- O) Permits, Authorities, Inspections
- P) Independent Lab Tests & Reports
- Q) Project Execution Plan
- R) Performance Criteria: Objectives/Evaluations

PROJECT MANUAL

Purpose:

To maintain a single bound document that includes the essential information for efficient management of production, communications, costs, physical resources, and finances for project success.

Responsibility:

Project Manager

When Required:

Initiate at the start of a project and maintain through completion of the project.

Scope:

See enclosures

Enclosures

The following describes the items, data, material, and information that is to be included in the Project Manual

NOTE: THIS IS A CONFIDENTIAL DOCUMENT AND IS "NEVER" TO BE TAKEN FROM THE CORPORATE OFFICE UNLESS ALL CONTRACTS AND PRICING INFORMATION IS REMOVED.

Section 1 - Production Control

- 1) Schedule
 - a) Updated Start Schedule, when applicable
 - b) Updated Completion Schedule, when applicable
 - c) Updated Delivery and Installation Schedules

Note: JOB PROGRESS SCHEDULE WILL REMAIN UPDATED AND POSTED IN THE CONTROL BOOK.

- 2) Meetings
 - a) Copy of current and previous two Main Office Job Progress Meeting Minutes, with summary sheet on top.
 - b) Copy of current plus previous two Job Progress Jobsite Subcontractor Meeting Minutes, when applicable.
 - c) Any other current meeting notes and/or minutes that document or describe problems or situations which may require attention.
- 3) Procurement
 - a) Updated copy of status of Subcontracts. Use date of occurrence rather than a check mark to indicate action completed.

Section 2 - Cost Control

- 1) Labor cost information The summary of labor cost for the most recent and two previous pay periods.
- 2) Materials/Subcontracts Commitment Status The last month's Purchase Commitment Summary Report.
- 3) Equipment The current copy of the construction manager's equipment charge report.
- 4) Cost to Complete The most recent project manager's projected cost to complete summary.

Section 3 - Financial Control

- 1) Invoicing. A copy of the last invoice submitted to the owner.
- 2) Change order log. Copy of the current C/O Log
- 3) Construction Cost Code Summary. Current copy of the Construction Cost Code Summary Report.
- 4) Subcontractor Ledger Summary. Current copy of S/C Ledger Summary Report

Section 4 - Contracts

- 1) Summary sheets. Summary of status of each subcontract amount and changes.
- 2) Subcontracts & Purchase Orders. Alphabetical insertion of P.M., 's copies of subcontracts, P.O.'s, and bonds. Each subcontract is to be preceded by the summary sheet.

Section 5 - Documentation:

- 1) Project Manager's Project Summary Sheet (Subcontract Status)
 - (a) Purpose. To be used as a guide to determine that most major areas of responsibility are being addressed.
 - (b) Responsibility. Project Manager
 - (c) When Required. Initially and for project's duration
 - (d) Scope. Lists significant items, activities and milestones from start through completion of a project.
 - (e) Action required.
 - (i) Review periodically
 - (ii) List the date that each area of responsibility is completed.
 - (iii) Get results and do not procrastinate.
 - (f) Forms: Project Control List
- 2) Document control logs
- 3) Requests and Changes Log
- 4) Contract and P.O. Log.
- 5) Submittals Log