







5. Design and Construction	TBR						SVC		Institution				State-Wide					
	Project Manager	Proj. Mgr. Director	Contracts Manager	Const. Rep./Sch.	Construction Director	Planning Director	Exec. Dir./V. Ch/Chan.	Designer	Contractor	Facility Coordinator	Physical Plant	Program Personnel	Vice Pres./President	State Building Com.	Tn. Higher. Edc. Com.	Dept. of Finance & Adm.	State Fire Marshal	Regulatory
 <p>ACTION ITEMS</p> <p><u>Legend:</u> L=Lead Responsibility S=Support A=Approve I= Informed</p> <p>Flowchart(s): P505, P525, P720, P750</p>																		
	Phase 5.1 Project Initiation																	
1. Monitor costs and schedule throughout design	L							S		S								
2. Designer agreements	L	S								S								
3. Review terms & conditions	L							I		S								
4. Circulate agreement for signature	L	S					A	A						A				
5. Distribute agreement	L							I		I								
6. Pre-design conf./Designers' Manual agenda	L							S		S	S	S	S					
7. FF&E Plan (furniture, fixtures, movable equipment, voice, data, video equipment, signage)	S							L		S	S	S	I					
8. Special consultants as required	A							L		A		S						
9. Special considerations (power, temporary facilities, security)	S									L	S	S						
10. Confirm project budget, program and schedule	S	I						L		S	S	S	S					
11. Designer payment(s)	A							L										
Phase 5.2 Schematic Design																		
1. Authorize Designer to proceed	L							I		I								
2. Establish site analysis	S							L		S	S							
3. Concept drawings, narrative & alternatives	A	S						L		A	S	S	S					
4. Review with Fire Marshal and regulatory authorities as required	I							L		I							S	S
5. Budget cost estimate	I							L		I								
6. SDP Review/Designers' Manual agenda	A							L		A	S	S	S				S	S
7. Designer payment(s)	A							L										

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	Phase 5.3 Design Development																	
1. Authorize Designer to proceed	L							I		I								
2. Fully develop design concept																		
a. Outline specs/Drawings	S							L		S	S	S	S				S	S
b. Cost estimate	I							L		I								
c. Campus meetings	I							L		S	S	S						
d. Milestone meetings	S							L		S	S	S						
3. DDP review/ Designers' Manual Agenda	A	S						L		A	S	S	S					
4. Approval of DDP by VP/Pres as required	S							S		S			A					
5. EDP presentation for SBC if required	S	S				S	A	L		S			S	A	I	I		
6. Designer payment(s)	A							L										
Phase 5.4 Construction Documents																		
1. Authorize Designer to proceed	L							I		I								
2. Develop documents																		
a. Drawings	S							L		S	S	S						
b. Project Manual	S							L		S	S	S						
c. Final cost estimate	I							L		I								
d. Campus meetings	I							L		S	S	S						
e. Milestone meetings	S							L		S	S	S						
3. Campus review documents	S							S		L	S	S						
4. CDP review / Designers' Manual agenda	S							L		A	S	S	S					
5. Completion of CDP	A							L		I								
6. Fire Marshal and/or Regulatory agency	S							L									A	A
7. Designer payment(s)	A							L										

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<div style="text-align: center;">  <p>ACTION ITEMS</p> </div> <p>Legend: L=Lead Responsibility S=Support A=Approve I= Informed</p> <p>Flowchart(s): P550, P556, P560, P750, P820</p>																		
	Phase 5.5 Project Bid																	
1. Authorize to proceed with bid	L	A	I															
2. Establish date & location	I		L					I		I				I				
3. Advertise for bid	S		S					L		I								
4. Distribute Documents	S		I	I				L		I								
5. Pre-bid conference	S			S				L		S	S	S						
6. Bid Opening	S		S	I				L		I				I				
7. Recommendations of award	S		I					L		I								
8. Prepare & Issue Agreement			L	I				I	I					I				
9. Circulate Agreement for approval			L				A		A					A				
10. Present Agreement			S	S	L			I	I	I						I		
11. Complete T-100 (Insurance form)	L		S															
12. Designer evaluation	L	A	S					I		S								
13. Designer payment(s)	A							L										
14. Update PFI information										L								
Phase 5.6 Construction Administration																		
1. Monitor costs and schedule throughout construction	L			S	S			S	S	S								
2. Pre-construction conference	I			S	S			L	S	S	S	I				I	I	
3. Notice to proceed				S	I			L	I	I								
4. Project meetings/Designers' Manual Agenda				S	I			L	S	S	S	I						
5. Permits				I				S	L									
6. Establish site presence				S				S	L	S	S							
7. Submit project schedule				S	I			S	L	I								

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	Phase 5.6 Construction Administration																	
8. Submit schedule of values				I				A	L									
9. Construction progress observation				S				L	S	S	S						S	S
10. Evaluation of progress schedule update				S				L	S	I								
11. Reports																		
a. Daily work reports								I	L									
b. Field reports and meeting minutes				A	I			L	S	I								
12. Action items log				L	I			S	S	S	I							
13. Visitor log				I	I			I	L									
14. Shop drawings								A	L	S								
15. Shop drawing log				I	I			I	L									
16. Request for information				I				S	L									
17. RFI log				L	I			S	S	I								
18. Request for Proposals				S				L	S	I								
19. RFP Log				L	I			S	S	I								
20. Modifications																		
a. Program Change (discretionary)	S			S	A			A	A	L	S	S	S					
b. Design Change request	S			S	A			L	A	S	S	S	S					
c. General requirements changes				S	A			A	L	I								
d. Claims				S	S	A		A	L	I								
e. Construction necessities				S	A			A	L	I								
f. Exceeding 10% of base agreement amount	I			S	S	A		A	A	I				I	I	I		
g. Extended overhead	I			S	S	A		A	L	I								
h. Change Order Preparation and Directives				S	L													

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	Phase 5.6 Construction Administration																	
21. Change order log				L	I			S	S	I								
22. Contractor payment	I			S	S			A	L	I								
23. Designer payment	A							L										
24. FF&E implementation																		
a. Moving coordination	S			S				S	S	L	S	S						
b. Furniture, fixtures, movable equipment, voice, data, video equipment, signage	A			I				S	S	L	S	S						
25. Special considerations (power, temporary facilities, security)	S			S						L	S	S						
26. Operations & Maintenance Manuals and training				S	I			S	L	S	S							
27. Certificate of Occupancy				S	S			S	L	I	I						A	A
28. Substantial Completion																		
a. Request				I				A	L	I	I							
b. Perform inspection, create punch list				S	I			L	S	S	S						A	A
c. Certify Substantial Completion				I	A			L	A	I								
d. Evaluation of Designer	S	A		L	S			I		S								
e. Evaluation of the Contractor				L	A				I	S	S							
29. Punch list				S				S	L	S	S							
30. Transfer responsibility for Insurance					L			I	I									
31. Transfer responsibility for utilities				I				S	S	L	S							
32. Install permanent keying				I				I	S	L	S							

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	Phase 5.7 Project Closeout																	
1. Transmit Record documents & project binders				I				I	L									
2. Request Final Inspection				S				S	L									
3. Inspect & certify final completion	I			S	S			L	S	S	S							
4. Campus review record documents	S			S				S		L	S							
5. Transmit record documents	S							L	S		I	I						
6. Monitor remedies and performance solutions				S				I	S	L	S							
7. Designers final request for payment	A							L										
8. Schedule one year inspection				S	L			S	S	S	I							
9. Perform one year inspection				S				L	S	S	S							
10. Written Report of one year inspection				I				L	S	I								
11. Follow-up on Report Items									L	A	I							