

In-House Project Task Review Checklist

Planning Event	Date	Complete
Contractor Planning		
Determine full scope of project	___/___/___	<input type="checkbox"/>
Conduct Area/site Reconnaissance	___/___/___	<input type="checkbox"/>
Establish work breakdown structure	___/___/___	<input type="checkbox"/>
Prepare chart of accounts directory/filing system	___/___/___	<input type="checkbox"/>
Develop cost estimate	___/___/___	<input type="checkbox"/>
Summarize materials by source	___/___/___	<input type="checkbox"/>
Prepare control schedule	___/___/___	<input type="checkbox"/>
Develop time-phased budgets	___/___/___	<input type="checkbox"/>
Develop risk management plan	___/___/___	<input type="checkbox"/>
Review insurance coverage	___/___/___	<input type="checkbox"/>
Determine construction equipment needs	___/___/___	<input type="checkbox"/>
Determine field staff requirements	___/___/___	<input type="checkbox"/>
Determine office equipment needs	___/___/___	<input type="checkbox"/>
Develop project execution plan	___/___/___	<input type="checkbox"/>
Assemble project procedures manual	___/___/___	<input type="checkbox"/>
Prepare emergency plans	___/___/___	<input type="checkbox"/>
Obtain permits	___/___/___	<input type="checkbox"/>
Plan layout of site for construction	___/___/___	<input type="checkbox"/>
Set up project files	___/___/___	<input type="checkbox"/>
Lease equipment	___/___/___	<input type="checkbox"/>
Coordinate with local authorities	___/___/___	<input type="checkbox"/>
Client/Contractor Joint Planning		
Conduct joint review of plans	___/___/___	<input type="checkbox"/>
Develop dispute resolution plan	___/___/___	<input type="checkbox"/>
Develop change management plan	___/___/___	<input type="checkbox"/>
Agree on progress payment plan	___/___/___	<input type="checkbox"/>
Subcontracting		
Determine subcontracting strategy	___/___/___	<input type="checkbox"/>
Prequalify subcontractors	___/___/___	<input type="checkbox"/>

Prepare bidding documents	___/___/___	<input type="checkbox"/>
Advertise subcontracts	___/___/___	<input type="checkbox"/>
Brief bidding subcontractors	___/___/___	<input type="checkbox"/>
Award subcontracts	___/___/___	<input type="checkbox"/>
Conduct subcontractor orientations	___/___/___	<input type="checkbox"/>
Inspect subcontractor work	___/___/___	<input type="checkbox"/>
Determine subcontractor progress	___/___/___	<input type="checkbox"/>
Approve subcontractor payments	___/___/___	<input type="checkbox"/>
Administer subcontractor changes	___/___/___	<input type="checkbox"/>
Purchasing and Warehousing		
Prequalify vendors	___/___/___	<input type="checkbox"/>
Review company surplus stocks	___/___/___	<input type="checkbox"/>
Seek quotations	___/___/___	<input type="checkbox"/>
Issue purchase orders	___/___/___	<input type="checkbox"/>
Track purchases	___/___/___	<input type="checkbox"/>
Expedite purchases	___/___/___	<input type="checkbox"/>
Inspect incoming materials	___/___/___	<input type="checkbox"/>
Store, inventory and issue materials	___/___/___	<input type="checkbox"/>
Office Administration		
Handle personnel administration	___/___/___	<input type="checkbox"/>
Receive and code time cards	___/___/___	<input type="checkbox"/>
Receive and code invoices	___/___/___	<input type="checkbox"/>
Code equipment charges	___/___/___	<input type="checkbox"/>
Prepare daily project diary	___/___/___	<input type="checkbox"/>
Maintain correspondence files	___/___/___	<input type="checkbox"/>
Prepare daily reading file	___/___/___	<input type="checkbox"/>
Maintain contract files	___/___/___	<input type="checkbox"/>
Maintain submittals register	___/___/___	<input type="checkbox"/>
Maintain drawing/spec files	___/___/___	<input type="checkbox"/>
Maintain manuals files	___/___/___	<input type="checkbox"/>
Chair weekly planning meeting	___/___/___	<input type="checkbox"/>
Prepare estimates for changes	___/___/___	<input type="checkbox"/>
Negotiate change orders	___/___/___	<input type="checkbox"/>

Maintain payroll	___/___/___	<input type="checkbox"/>
Prepare requests for payment	___/___/___	<input type="checkbox"/>
Take project photographs	___/___/___	<input type="checkbox"/>
Field Controls and Reporting		
Receive/process crew daily reports	___/___/___	<input type="checkbox"/>
Measure completed work	___/___/___	<input type="checkbox"/>
Mark up drawings as built	___/___/___	<input type="checkbox"/>
Maintain on-project status charts	___/___/___	<input type="checkbox"/>
Prepare weekly schedule update	___/___/___	<input type="checkbox"/>
Prepare weekly budget update	___/___/___	<input type="checkbox"/>
Prepare manpower reports	___/___/___	<input type="checkbox"/>
Prepare monthly executive report	___/___/___	<input type="checkbox"/>
Safety & Security		
Perform Safety (OSHA) pre-work review	___/___/___	<input type="checkbox"/>
Conduct worker orientations	___/___/___	<input type="checkbox"/>
Conduct Site Security talks	___/___/___	<input type="checkbox"/>
Conduct daily inspections	___/___/___	<input type="checkbox"/>
Maintain safety & security files	___/___/___	<input type="checkbox"/>
Prepare safety & security reports	___/___/___	<input type="checkbox"/>
Investigate incidents	___/___/___	<input type="checkbox"/>
Construction Equipment		
Perform daily servicing	___/___/___	<input type="checkbox"/>