

**PROJECT ORGANIZATION**

**FILING SYSTEM & PROJECT MANUAL**

**FILING SYSTEM STRUCTURE**

1. General Correspondence
2. Owner Contract

* Contract Summary
* Insurance Certificates, Bonds
* Roles & Responsibilities
* Payment Requests
* Incentives statusing

1. Changes in Owner Contract
2. Purchase Orders & Subcontracts

* Insurance Certificates/Bonds
* Payment Log

1. Submittals in Process

* Submittals Approved

1. Requests for Information in Process

* Requests for Information Finalized

1. Engineering Correspondence

* Design Agreement
* Documents Status
* Billings/Payment

1. Vendor Files (reports, submittals, evaluations)
   1. Mechanical
   2. Electrical
2. Safety Plan - Meetings, Inspections, & Reports
3. Quality Plan - Meetings, Inspections & Reports
4. Progress Meetings, Reports
5. 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

1. Control Estimate
2. Schedule Information
3. Permits, Authorities, Inspections
4. Independent Lab Tests & Reports
5. Project Execution Plan
6. 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
   1. Updated Start Schedule, when applicable
   2. Updated Completion Schedule, when applicable
   3. Updated Delivery and Installation Schedules

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

1. Meetings
   1. Copy of current and previous two Main Office Job Progress Meeting Minutes, with summary sheet on top.
   2. Copy of current plus previous two Job Progress Jobsite Subcontractor Meeting Minutes, when applicable.
   3. Any other current meeting notes and/or minutes that document or describe problems or situations which may require attention.
2. Procurement
   1. 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)
   * + - 1. Purpose. To be used as a guide to determine that most major areas of responsibility are being addressed.
         2. Responsibility. Project Manager
         3. When Required. Initially and for project's duration
         4. Scope. Lists significant items, activities and milestones from start through completion of a project.
         5. Action required.

Review periodically

List the date that each area of responsibility is completed.

Get results and do not procrastinate.

* + - * 1. Forms: Project Control List

1. Document control logs
2. Requests and Changes Log
3. Contract and P.O. Log.
4. Submittals Log