

## Chapter 4 – Submission Phase Guidelines

### 4.0 INTRODUCTION

#### 4.0.2 INITIAL SITE VISIT

#### *What is the **PURPOSE** of the Initial Site Visit?*

The project Initial Site Visit is the first step for the Consultant/Designer to review project scope and existing conditions with the project team, Client representatives and Division of Construction staff. **Initial Site Visits should be scheduled within two (2) weeks of Project Acceptance.**

**It is important to note that no consultant work shall be done without an approved Consultant Work Order (WO).**

#### *Consultant/Designer **RESPONSIBILITIES***

##### **C1 Project Commencement**

- C1.1** Review the design schedule and the milestones, including the time allowed for the deliverables and approvals required at each milestone. Consultant /Designer shall confirm that they have all the available resources and commitment to perform the work for the site visit, program report and all subsequent phases according to the project schedule. This commitment includes confirmation with all sub-consultants. Direct any questions regarding the schedule to the PM.
- C1.2** Become familiar with all contractual requirements and be prepared to perform all services required. Direct all questions regarding the requirements to the PM.
- C1.3** Review the Design Procedures Manual (DPM) and become familiar with its requirements. Review the specific phase submissions and guidelines applicable to the project and comply with the requirements. Direct any questions regarding the requirements to the PM.
- C1.4** Do not perform consultant work until an approved WO has been issued.
- C1.5** Develop an agenda for the Initial Site Visit with the PM to be used as a basis of discussion. At a minimum, include the following: scope, options, design and construction schedule, budget, contact information, communications protocol, and future site investigations.
- C1.6** The Consultant/Designer shall be responsible to take, prepare and promptly distribute meeting minutes for all project phases including the Initial Site Visit. Provide draft copies of meeting minutes for the PM's review and input prior to issuing final meeting minutes. For this initial Site Visit Phase these meeting minutes are referred to as the "Initial Site Visit Meeting Minutes". Refer to sub-paragraph C2.8 below.

- C1.7** Existing building plans, site plans, geotechnical information, etc. may be available from OGS D&C or from the Client facility. The Consultant/Designer shall gather and review existing drawings, reports and documentation that pertain to the project area if available. Discuss whether the PM can provide assistance in obtaining data. Provide a list of document deficiencies, if any, in the existing drawings and data. Discuss findings and deficiencies with the PM.

## **C2 Initial Site Visit Meeting Minutes**

- C2.1** Schedule the site visit with the PM. Site visits may require security clearances at certain facilities which may take several days to process.
- C2.2** Determine the appropriate project team members that will need to attend the Initial Site Visit. Try to limit attendees to only essential personnel for this initial visit.
- C2.3** The Consultant/Designer shall attend the kick-off meeting and perform an initial site inspection to briefly assess and evaluate the existing conditions of the project work areas.
- C2.4** The Consultant/Designer shall review and clarify the project intent and scope (from the BDC 153) with the PM, Client and the appropriate facility staff during the initial site visit. Scope should be reviewed in detail and questioned if there are any perceived inadequacies, discrepancies, contradictions, unrealistic requirements, etc. Document any added scope.
- C2.5** The Consultant/Designer will be responsible for all necessary field investigations needed to confirm and document the existing conditions. All required investigations that will affect the project estimate should be accomplished during the Program Phase. Provide a list of all testing required to adequately design the project such as: geotechnical investigations, utility surveys, topographic surveys, test borings, hazardous material testing, destructive testing (masonry investigation, concrete cores, window removals), hydrant flow tests, etc. to be reviewed by the PM.
- C2.6** Become familiar with factors and restrictions that may affect the project. Review equipment proposed for the project and confirm if space is available and/or adequate for installation and maintenance.
- C2.7** The Consultant/Designer shall include the list of attendees and titles in the Initial Site Visit Meeting Minutes.
- C2.8** The Consultant/Designer shall submit the Initial Site Visit Meeting Minutes to the PM. If the PM has comments or inclusions to the minutes, the Consultant/Designer shall make these corrections and re-submit the minutes to the PM.
- C2.9** OGS has no standard template for the meeting minutes. Do NOT use the Program Report Template for the Initial Site Visit Meeting Minutes.

## OGS Project Manager **RESPONSIBILITIES**

### P1 Site Visit Preparation

- P1.1 Consultant/Designer Commitment:** The PM should discuss the project specifics with the Consultant's term contract liaison. Verify that the Consultant is interested in the project and that they can perform the work to the PM's expectations and within the project constraints.
- a. Scope Complexity:** If the project is complex or scope is specialized, determine if the Consultant/Designer has qualified staff and resources available to perform the work.
  - b. Best Practice:** Send the inquiry in an email noting scope and scheduling requirements of the project and request an acceptance email from the Consultant. File this correspondence into the Consultant folder.
  - c. Designer Commitment:** Once the Consultant assigns designers to the project, the PM may need to further reevaluate the firm's staffing commitment to the project schedule.
- P1.2 Existing Documentation:** Review available drawings (OGS Plan File Room archives), documentation, past investigations, past studies, geotechnical data, surveys or any relevant program reports that may be of value with the Consultant/Designer. Investigate whether there are relevant past or ongoing projects that may impact the project.
- a. Best Practice:** The PM should perform a facility search of ongoing projects at that facility using the DCNet project search feature.
    - i.** This project may affect other ongoing projects or projects may be recommended to be coordinated or combined with each other to optimize coordination or cost savings. Review design and construction strategies with the Client prior to implementation.
    - ii.** Review building history using the DCNet project search feature. This may provide insight into the current request for services.
  - b.** Check with the facility to verify if they have existing documentation.
  - c.** Provide relevant DCNet information to design team (related projects, concurrent projects investigation, client specific guidelines, etc.).
- P1.3** Answer Consultant/Designer questions regarding contractual requirements and Design Procedures Manual (DPM) requirements and agency specific requirements.
- P1.4 Develop Initial Site Visit WO**
- a.** The PM initiates all WO to the Consultant.
  - b.** The PM initiates a WO prior to visiting the project site to review the project conditions as a preliminary site evaluation / investigation. See Guideline and Sample Scope for Typical Kick-off Meeting-Initial Site Visit.doc in DCNet.
  - c.** No work shall commence until an approved WO is issued.
  - d.** The WO shall contain the following: Scope, Milestones, Deliverables and Fee Payment (NTE, LS or combination).

- e. The PM shall write a fee proposal or obtain a fee proposal based on agreed upon man hours needed for the Initial Site Visit.
- f. The Consultant shall be required to write the Initial Site Visit Meeting Minutes.
- g. The initial visit is the basis for establishing the project scope and associated fees for the Program Phase WO.
- h. OPC inputs WO data in DCNet - General Project Information / [Related Consultants](#) and files WO's in the ConsultantContract folder.

**P1.5 Schedule Initial Site Visit**

- a. Schedule the Initial Site Visit within two (2) weeks of Project Acceptance. In some cases this may not be practical. For example, a roofing project site visit during the winter with snow accumulation on the roof work area.
- b. The Initial Site Visit is the first step for reviewing project scope and existing conditions. At a minimum, invite the Client, key facility staff, OGS field staff and any related Consultants to attend the Initial Site Visit. Verify if related OGS in-house reviewers, consultant designers (trades) and/or sub-consultants need to be present.
- c. The PM should attend the site visit.
- d. When required, acquire facility security clearances for the Consultant/Designers.
- e. An agenda should be developed with the Consultant to be used as a basis of discussion. At a minimum, include the following: scope, options, design and construction schedule, budget, contact information, communications protocol, and future site investigations.
- f. Confirm project scope from the BDC 153 with the Client. Document any added scope.

**P1.6 Update DCNet Schedule**

- a. Review Preliminary Forecast dates in DCNet and adjust using Project Manager Milestone Update.
- b. Provide milestone information for 'scheduled' and 'actual' site visit to OPC.

**P1.7 Initial Site Visit Meeting Minutes**

- a. Review and approve the Initial Site Visit Meeting Minutes.
- b. Discuss additional site investigations that will be needed to determine project scope.
- c. Best Practice: The Initial Site Visit Meeting Minutes should contain sufficient information to be the basis for the Program Phase WO. The Client and PM should review and comment as required to facilitate this. Scope, budget and itemized options to be included in the Program Report should be covered.

**P1.8 Project Management Plan**

- a. **Best Practice:** After the Site Visit has been made, the PM may review and update the PMP scope, schedule, team listing, special conditions that are noted as "U" unknown, and remarks in DCNet.
- b. The PM should discuss the PMP with the TL or BUL.



*What happens **NEXT?***

After the approval of the Initial Site Visit Meeting Minutes, the PM and Consultant shall start drafting a WO for the Program Phase. Subsequent site visits by the design team would occur during the Program Phase.

**Revision History:**

<i>Rev</i>	<i>Date</i>	<i>Description</i>	<i>Reviewed by:</i>	<i>Approved by:</i>
0	08/05/13	New chapter	Parnett	Dostie
1	04/21/14	Changed PMP to best practice after site visit	Parnett	Dostie
2	6/20/14	Minor revisions	Parnett	Dostie