

## **MAJOR PHASES AND STEPS IN THE PROCESS**

The following sections outline the major phases of a construction project and examples of the tasks that need to be accomplished during each phase. To the right of each activity is a chart that indicates which of the major participants plays the primary (P), secondary (S), or optional (O) responsibility role with the activity.



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ASSOCIATES

## PLANNING PHASE (PRE-DESIGN)

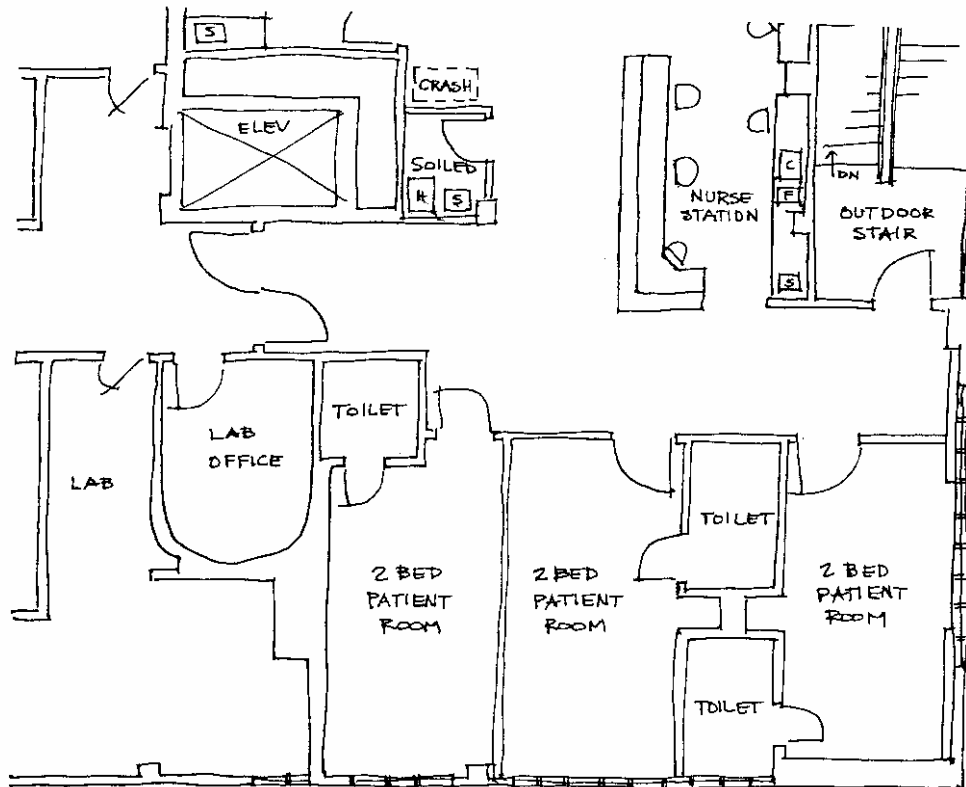
PLANNING OR PRE-DESIGN STEPS	Owner	Designer	Contractor
PROJECT FEASIBILITY			
Marketing studies	P		
Economic feasibility studies	P		
PROJECT DEFINITION			
Space and Functional Programming	S	P	
Project budgeting	S	P	O
Project scheduling	S	P	O
SITE ANALYSIS			
Site Evaluation and Selection	P	O	
Site analysis	S	P	
Site master planning	S	P	
Utility studies	S	P	
Soils studies	S	P	
Site surveys	S	P	
Environmental studies	P	S	
Building surveys	S	P	O



## SCHEMATIC DESIGN PHASE

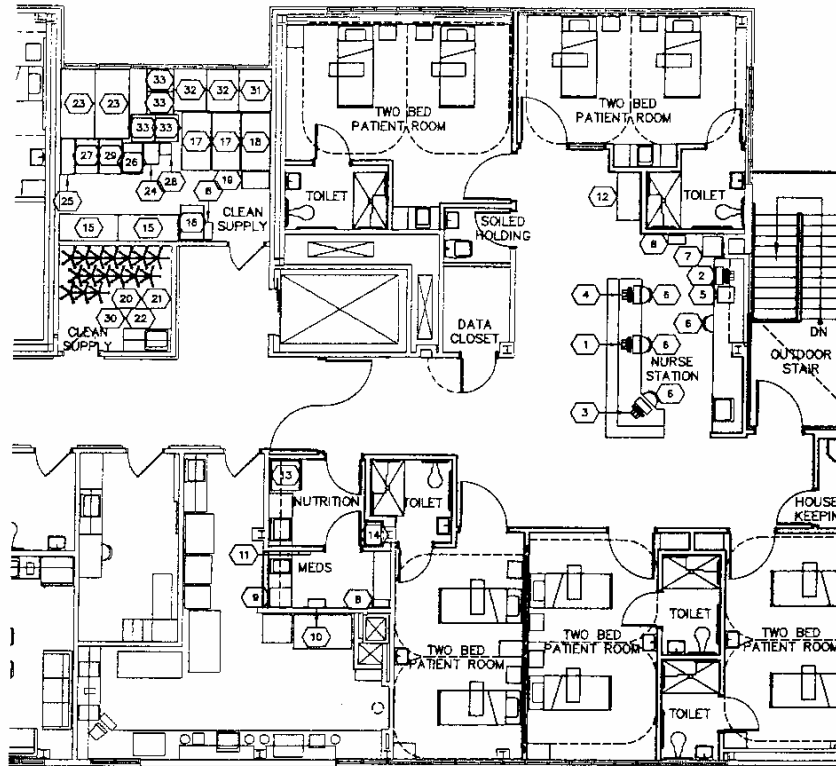
### SCHEMATIC DESIGN PHASE

	Owner	Designer	Contractor
Owner meetings	S	P	
Collection of Owner supplied data	P		
Development of alternatives		P	
Review alternatives with Owner	P	S	
Refine alternative until approved		P	
Code study		P	
Materials research		P	
Architectural and Engineering schematic design		P	
Preliminary review with Agencies	S	P	
Planning and Zoning review and permitting	S	P	
Statement of Probable Construction cost		P	O
Value Engineering	S	P	O
Project scheduling	S	P	O



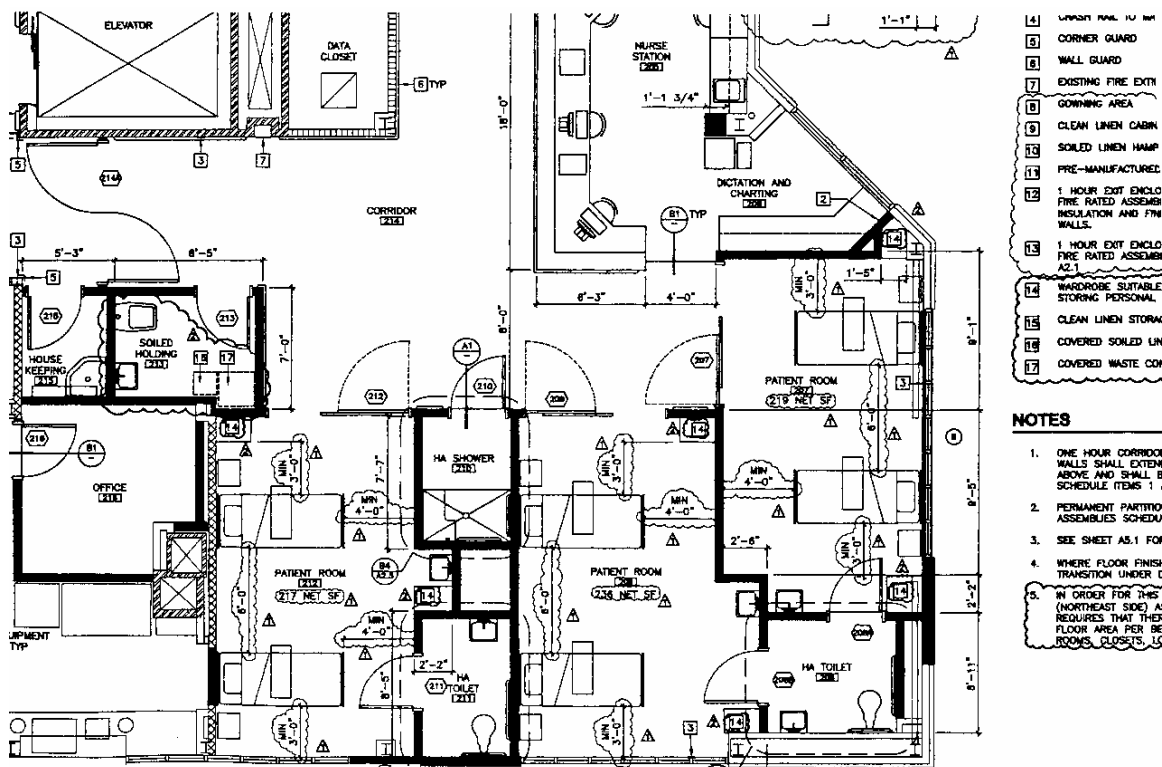
## DESIGN DEVELOPMENT PHASE

DESIGN DEVELOPMENT PHASE	Owner	Designer	Contractor
Owner meetings	S	P	
Collection of equipment, furnishings info	P		
Architectural and Engineering design development		P	
Addition of equipment, furnishings to drawings		P	
Decisions on all utility systems	S	P	
Review design development with Owner	P	S	
Revise design development until approved		P	
Outline specifications		P	
Update the probable construction cost	S	P	O
Value Engineering	S	P	O
Update the project schedule	S	P	O



## CONSTRUCTION DOCUMENTS PHASE

CONSTRUCTION DOCUMENTS PHASE	Owner	Designer	Contractor
Architectural and Engineering drawings		P	
Architectural and Engineering specifications		P	
Coordination of disciplines		P	
Materials and details research and development		P	
Bid Documents ('front end')	P	S	O
Quality assurance reviews (check set)	S	P	O



### AGENCY REVIEW PHASE

AGENCY REVIEW PHASE	Owner	Designer	Contractor
Agency application forms		P	
Submit project documents		P	
Respond to Agency review comments		P	
Revise until approved		P	



## BIDDING PHASE

BIDDING AND NEGOTIATION PHASE	Owner	Designer	Contractor
Select bidders	P	S	
Issue bid documents to bidders		P	
Develop pricing for project			P
Issue addenda		P	
Pre-bid conference	P	S	
Receipt of bids (develop bid tab)	P		
Evaluation of bids	P	S	
Analysis of Alternates	P	S	
Contract award	P		S



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ASSOCIATES

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## CONSTRUCTION PHASE

CONSTRUCTION PHASE	Owner	Designer	Contractor
Pre-construction conference	P	S	S
Obtain building permit		P	S
Schedule of Values (contract sum)		S	P
Approved project time (contract time)		S	P
Project Meetings	S	S	P
Shop drawings/submittals		S	P
Deferred approvals		P	S
Requests for Information (RFI)		S	P
Architect's Supplementary Instruction (ASI)		P	S
Inspections	P		S
Agency Inspections			P
Materials Testing	P		S
Equipment purchasing and coordination	P		
Signage	P		
Changes to the work	P	S	P
Contractor quotes	S	S	P
Change Order	P	S	P
Pay Application	P	S	P
Schedule monitoring	S	S	P
Close out		S	P
Punch list		P	S
Record Documents		P	S
Operating and Maintenance manuals		S	P
Warrantees		S	P
Agency approval			P

POST CONSTRUCTION PHASE	Owner	Designer	Contractor
Equipment and furnishing installation	P		
Owner move-in	P		
Commissioning		S	P
Post Occupancy Evaluation (POE)	S	P	

