

designing the Project Work Plan

general guidelines for all projects

Post the Project Work Plan in a format and location to **allow access to it at all time using computers and other devices, but before you do that**, consult with the principal or the project manager.

USE THE WORK PLAN TO WRITE A GANTT SCHEDULE

You already identified tasks, services, milestones, budget, and resources

The project work plan is the most valuable tool for managing the project.

It allows you to track and control time, tasks, deliverables assignation of responsibilities, resources, and information.

Always try to put a project work plan together, even for small projects to use to track the project - you do not have to share it. With it you can always better plan your resources.

HOW TO USE YOUR SCHEDULE/WORK PLAN TEMPLATE

The templates for project WORK PLANS are designed to include the information necessary for all projects. Use them by deleting the rows and columns with information not applicable to your project and adding whatever information is missing..

- When presenting the schedule/work plan to the project team, make sure team members clearly understand the assignments and are aware of the completion dates, so any possible conflicts can be discussed.
- Communicate project status regularly and warn team members when problems occur. Incorporate changes to the schedule as they approved.
- Use the initial schedule as a baseline to track major changes. At the end of the project or a major milestone in larger projects, review the changes in the schedule and use that information for Quality Control.
- Use milestones to identify major project events and see if project is on schedule.
- Incorporate contingencies and report date modifications to the project team.
- Incorporate deliverables by consultants and tasks by others such as government agencies, inspections, etc.
- Monitoring the work components: resources, time, and deliverables. Changes in one will change the others.
- Examine relationships and dependencies before rescheduling tasks.
- Document completion of tasks as 0% and 100% unless there is a way of clearly measuring partial completion.
- Roll-out deliverables in phases as applicable to project type to better manage schedule problems. Consider identifying high-priority deliverables, and lower priority and non-mandatory deliverables to program their issue.
- Verify deliverables, resources, and dates changes that might affect the schedule periodically.

THE PROJECT PLAN CONTENTS

The template can be downloaded in Excel format. The first column is a list of the activities required by the Owner-Contractor agreement for the project in the sequence they typically occur. Delete or add the activities as required for your project. The next three columns list the documents associated with the task, who is responsible for the task, and what are the deliverables. The rest of the columns record the duration of the task. Weeks are 5 days; and do not forget to exclude holidays when recording time. The dark long lines that go across the schedule, divide the schedule into the project's stages. Note that tech-checking is included. Schedule as required for your project.

USING THE TEMPLATE TO DESIGN YOUR WORK PLAN

EXAMPLE:

This is the RMW Schedule/Working Plan Template based on the the **RMW Abbreviated Agreement for Interiors**. To use it, delete the rows which contain activities not included in your project's contract, and add rows for activities that might be particular to your project, if any.

Please note that TECH-Checking is always included in the project's activities. This is a REMINDER THAT TECH-CHECKING IS REQUIRED.

THIS DOCUMENT IS AVAILABLE IN EXCEL FORMAT

SCHEDULE TEMPLATE Based on RMW Abbreviated Agreement for Interiors															
TASK / DEADLINE (milestones)	Tools	Who is in charge	DELIVERABLES	THIS SECTION IS DOCUMENTING TIME ALLOWED FOR TASKS AND DEADLINES (example only)											
CHECK ADDITIONAL SERVICES WITH THE PRINCIPAL. There might be more than those included in this schedule.				1	2	3	4	5	6	7	8	9	10	11	12
PREP WORK															
MILESTONE: Contract Signed		PRINCIPAL - PM													
Prepare documentation for this stage		PM / PC	(1) Preliminary Project Schedule (2) List of Deliverables (3) Project Directory												
Schedule the Project		PRINCIPAL - PM													
Prepare list of deliverables		PRINCIPAL - PM													
Prepare the Project Directory		PA													
Download QM Package for project		PA													
Accounting		PM													
Send Invite to project team	Meeting Agenda	PM													
Prepare TECH-CHECK Documentation	TechCheck Lists	PM / PC													
MEETING: Chair kick-off project team meeting	Meeting Agenda - Preliminary Project Information Form.	PRINCIPAL - PM													
PRE-DESIGN SERVICES															
Owner/RMW Meeting - COLLECT Owner's project requirements information		PM / PC													
PREPARE "Acoustical Criteria"		PM / PC													
PREPARE "Alternate Blocking"		PM / PC													
Team Meeting - Assist in preliminary cost estimate and a preliminary Project Construction Schedule		PM / PC													
SCHEMATIC DESIGN															
DEADLINE: - Receive Owner's Information															
PREPARE preliminary diagrams.		PROJECT TEAM	Front end sheets and (1) Preliminary Diagrams - (2) Space Plan - (3) Studies - (4) Program Evaluation - (5) Block Plans.												
DEADLINE: - Send preliminary diagrams to the Owner for approval.															
DEADLINE: - Receive Owner-approved preliminary diagrams															
PREPARE space plan.		PM / PC													
TECH-CHECK Deliverables	TechCheck Lists	PM / PC													
DEADLINE: - Send Space Plan to the Owner for approval.															
DESIGN DEVELOPMENT															
DEADLINE: - Receive Owner-approved Space Plan documents.															
Prepare Design Development documents for approval by the Owner based on the approved Space Plan Documents and any adjustments authorized by the Owner to the Project program and budget.		PROJECT TEAM	Front end sheets and (1) Plans (2) Interior Elevations (3) Interior Sections (4) Details (5) Schedules (6) Consultants' documents.												
Prepare DD Drawings		PM / PC													
Recommend finishes, materials, colors, etc. not yet documented.		PM / PC													
Review code issues with building officials. Notify Owner of changes.		PM / PC													
Prepare additional documentation if needed.		PM / PC													
Update the cost estimate.		PM / PC													
TECH-CHECK Deliverables	TechCheck Lists	PM / PC													
DEADLINE: - Send Design Development documents for approval to the Owner.															
CONSTRUCTION DOCUMENTS															
DEADLINE: - Receive Owner-approved Design Development documents.															
Scope: Prepare Construction Drawings for approval by the Owner based on the approved Design Development Documents and any adjustments authorized by the Owner to the Project or to the budget.		PROJECT TEAM	Front end sheets and (1) Floor plans - (2) RCPs - (3) Finish plans and schedules - (4) Door and hardware schedules - (5) Interior elevations - (6) Power and communication - (7) Drawings by RMW consultants.												
Advise Owner of changes in the Cost Estimate.		PM / PC													
Coordinate RMW's design with the specifications and with the consultant's documents.		PM / PC													
Assist the Owner with permitting.		PM / PC													
Respond to permitting comments		PM / PC													
TECH-CHECK Deliverables	TechCheck Lists														
DEADLINE: SUBMIT DELIVERABLES															
CONTRACT ADMINISTRATION															
MILESTONE: - AWARD OF CONTRACT / NOTICE TO PROCEED															
Scope: Prepare CA forms and documentation - Always see SPECS to make sure you have the right work scope for CA (CA services are described in the specs)	Specifications, RMW CA forms	PM / PC / PA	(1) Clarifications (2) Bulletins and other modification documentation (3) Substitutions (4) Field observation reports (5) Submittal review documentation (6) Modified Contract Documents (7) Punch List (8) Certificate of Substantial Completion (9) Certificate of Completion.												
Attend or conduct pre-construction meeting.	Meeting Agenda	PM / PC													
Process communications between the Owner and the Contractor		PM / PC													
SITE MEETINGS and VISITS (every two weeks or as established in RMW's contract).	Meeting Agenda	PM / PC													
ADDITIONAL SERVICES: - Attend meeting and conducting visits in excess of those included in the RMW Proposal/Contract.		PM / PC													
Review Submittals required (initial submittal and one re-submittal)	Submittal schedule / RMW submittal Form	PM / PC													
ADDITIONAL SERVICES: - Review submittals in addition to initial submittal and one re-submittal.	Submittal schedule / RMW submittal Form	PM / PC													
Review RFIs (check specs to see when this becomes additional services to be paid by the Contractor)		PM / PC													
Prepare and process modifications to the Construction Documents.		PM / PC													
ALWAYS consult with the Owner when there is a cost change because of the modifications to the documents.		PM / PC													
SITE VISIT Conduct Substantial Completion inspection		PM / PC													
ADDITIONAL SERVICES: Conduct more than one Substantial Completion inspection.		PM / PC													
Issue Certificate of Construction Completion and associated documentation.	AIA Certificate of Substantial Completion	PM / PC													
SITE VISIT Conduct Final Completion review		PM / PC													
Issue Final Completion Documentation.		PM / PC													

- **FIRST COLUMN:** Typical activities in an interiors project in the sequence they typically occur. Delete the rows of the activities not included in your project.
- **NEXT THREE COLUMNS:** Typical documents associated with the task (tools); who is responsible for the task; and typical deliverables.
- The dark long lines that go across the schedule divide the typical project stages.
- Notice that tech-checking is included in all the stages of the project. You decide where you want tech-checking done and who will be involved, but try to keep tech-checking always, even if it is within the RMW team only.

The rest of the columns record the duration of the task. Weeks are 5 days, and holidays are not included in the schedule when recording time.

Questions? Call Gloria or Josie.

TASK / DEADLINE (milestones)	Tools	Who is in charge	DELIVERABLES
CHECK ADDITIONAL SERVICES WITH THE PRINCIPAL. There might be more than those included in this schedule.			
PREP WORK			
MILESTONE: Contract Signed		PRINCIPAL - PM	
Prepare documentation for this stage		PM / PC	(1) Preliminary Project Schedule (2) List of Deliverables (3) Project Directory
Schedule the Project		PRINCIPAL - PM	
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DEADLINE - Send Design Development documents for approval to the Owner.			