Planning and Scheduling

Project work plans and construction schedules (established along with your general contractor) should include major benchmarks, action steps, and completion dates that will help you keep track of key activities, components, and individual assignments. To help you create your own, the following chart lays out a sample project schedule with action steps and suggested time periods covered in The Answer Key.

**Action Steps:**

<table>
<thead>
<tr>
<th>Concept</th>
<th>(1) PROJECT CONCEPT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
<td>Defines scope of project</td>
</tr>
<tr>
<td></td>
<td>▶ Analyzes how school fulfills an unmet need</td>
</tr>
<tr>
<td><strong>Timing:</strong></td>
<td>Varies</td>
</tr>
<tr>
<td></td>
<td>▶ Develop during early concept phase</td>
</tr>
<tr>
<td></td>
<td>▶ Incorporate into business plan if necessary</td>
</tr>
<tr>
<td></td>
<td>▶ Refine as necessary during entire life of project</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Predevelopment</th>
<th>(2) ASSEMBLE DEVELOPMENT TEAM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
<td>Identifies necessary team members, both internal and external</td>
</tr>
<tr>
<td></td>
<td>▶ Defines roles for team members</td>
</tr>
<tr>
<td></td>
<td>▶ Outlines process/criteria for consultant selection</td>
</tr>
<tr>
<td><strong>Timing:</strong></td>
<td>Varies</td>
</tr>
<tr>
<td></td>
<td>▶ Identify team members during early concept phase and predevelopment phase</td>
</tr>
<tr>
<td></td>
<td>▶ Identify cost of consultants during preliminary budgeting</td>
</tr>
</tbody>
</table>
### (3) SITE SELECTION

**Purpose**
- Details site selection process based on criteria

**Timing:** Varies
- Identify site selection criteria during predevelopment phase
- Identify potential sites during predevelopment phase
- Define site costs during preliminary budgeting
- Purchase and prepare site before construction

### (4) SCHEMATIC DESIGN

**Timing:** Four weeks
- Get site information and survey
- Meet with development team to develop design
- Develop multiple schemes
- Present to development team, stakeholders, third parties, and funders (if necessary)
- Prepare design of preferred scheme
- Present design drawings for approval
<table>
<thead>
<tr>
<th>Design and Pre-Construction</th>
<th>(5) DESIGN DEVELOPMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timing: Four weeks</td>
<td></td>
</tr>
<tr>
<td>▶ Design team and consultants finalize work</td>
<td></td>
</tr>
<tr>
<td>▶ Prepare design development documents</td>
<td></td>
</tr>
<tr>
<td>▶ Review design development documents with development team, staff, and board</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Design and Pre-Construction</th>
<th>(6) CONSTRUCTION DOCUMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timing: 18 weeks</td>
<td></td>
</tr>
<tr>
<td>▶ Begin project management planning, scheduling, base drawings</td>
<td></td>
</tr>
<tr>
<td>▶ Survey, soil test, give criteria to engineers for their design</td>
<td></td>
</tr>
<tr>
<td>▶ Deliver base drawings to engineers for drafting</td>
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<tr>
<td>▶ Develop construction systems</td>
<td></td>
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<tr>
<td>▶ Get building code check</td>
<td></td>
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<tr>
<td>▶ Make material selections</td>
<td></td>
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<tr>
<td>▶ Find food service and library consultants</td>
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<tr>
<td>▶ Undergo progress reviews with school board</td>
<td></td>
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<tr>
<td>▶ Prepare specifications and consult with supplier representatives</td>
<td></td>
</tr>
<tr>
<td>▶ Undergo quality control review</td>
<td></td>
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<tr>
<td>Financing</td>
<td>(7) FINANCING</td>
</tr>
<tr>
<td>-----------</td>
<td>---------------</td>
</tr>
<tr>
<td><strong>Purpose</strong></td>
<td></td>
</tr>
<tr>
<td>▶ Outlines steps to secure financing for the project</td>
<td></td>
</tr>
<tr>
<td>▶ Determines levels of debt vs. grant/gift financing</td>
<td></td>
</tr>
<tr>
<td>▶ Defines fundraising process if necessary</td>
<td></td>
</tr>
<tr>
<td>▶ <strong>Timing</strong>: Varies</td>
<td></td>
</tr>
<tr>
<td>▶ Define during concept phase</td>
<td></td>
</tr>
<tr>
<td>▶ Refine as necessary during budgeting, fundraising, and building process</td>
<td></td>
</tr>
<tr>
<td>▶ Secure/close prior to construction</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Design and Pre-Construction</th>
<th>(8) BIDDING AND PERMITS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
<td></td>
</tr>
<tr>
<td>▶ Outlines steps and time frames for any required regulatory, governmental, or third-party approvals</td>
<td></td>
</tr>
<tr>
<td>▶ Secures actual budget figures for construction costs</td>
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<tr>
<td><strong>Timing</strong>: Varies (between three weeks and 12 weeks)</td>
<td></td>
</tr>
<tr>
<td>▶ Identify all necessary approvals during budgeting</td>
<td></td>
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<tr>
<td>▶ Incorporate permit and approval schedule into project timeline</td>
<td></td>
</tr>
<tr>
<td>▶ Contact bidders and hold pre-bid conference</td>
<td></td>
</tr>
<tr>
<td>▶ Perform formal bid opening</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Design and Pre-Construction</th>
<th>(9) AWARD CONTRACT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
<td></td>
</tr>
<tr>
<td>▶ Evaluates bids</td>
<td></td>
</tr>
<tr>
<td><strong>Timing</strong>: Three weeks</td>
<td></td>
</tr>
<tr>
<td>▶ Negotiate price/contract</td>
<td></td>
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<tr>
<td>▶ Prepare contract</td>
<td></td>
</tr>
<tr>
<td>▶ Issue “Notice to Proceed”</td>
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</tr>
<tr>
<td>Construction</td>
<td>(10A) CONSTRUCTION</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------</td>
</tr>
<tr>
<td><strong>Timing:</strong> 14 months</td>
<td></td>
</tr>
<tr>
<td>▶ Six to 12 months for renovation projects</td>
<td></td>
</tr>
<tr>
<td>▶ Eight to 15 months for new construction projects</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(10B) CONTINGENCY</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>▶ For allowable days (weather, etc.)</td>
<td></td>
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</table>

**Timing:** Two months

<table>
<thead>
<tr>
<th>(11) MOVE IN</th>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>Before students arrive</strong></td>
<td></td>
</tr>
<tr>
<td>▶ Furniture, fixtures, and equipment</td>
<td></td>
</tr>
<tr>
<td>▶ Staff training</td>
<td></td>
</tr>
</tbody>
</table>

**Timing:** One to two months