

**GUIDELINES FOR PREPARATION OF THE
PROJECT SCHEDULE
(Updated January 2008)**

Project schedules for budget requests/approvals and implementation submittals are for the purpose of general budgetary and administrative review and for project approval, and should be limited to a simple, diagrammatic presentation of the primary project activities outlined below. For clarity and ease of review, the specific format of the attached example should be used consistently.

Heading:

Campus: Identify Campus, Office of President Division, or DOD Laboratory facility responsible for the project.

Project Title: Provide a complete and accurate title as approved in Regents Budget or Regents Capital Improvement Program.

Project Number: Project plant account number of record for the project.

Date: Provide the date the schedule was prepared or revised. For submittal of a PPG Addendum or design package, enter the current date to indicate that the project schedule was reviewed and reaffirmed, even if not revised.

Schedule by Activity:

Provide all of the following elements for State-funded projects, except the Equipment line if no Equipment funding phase is involved in the project. Project schedules for Non-State projects will not include the lines for external review of Preliminary Plans or Working Drawings that are necessary for State projects. For State projects, if the appropriation delegates review to the Office of the President, title those lines as "Preliminary Plans Review" and "Working Drawings Review"; otherwise title them "SPWB Review" and "DOF Review". Additional detail should be avoided on this schedule to the extent possible; campus staff will maintain other more detailed schedules as required for management of the project.

Preliminary Plans: The phase defined as "Preliminary Plans" includes both schematic design and design development.

SPWB Review: For State-funded projects only. "Standard" preliminary plans appropriations involve submittal of the completed plans to the State Public Works Board (SPWB) for approval, allowing the State Department of Finance (DOF) to release funds for the working drawings phase (requires approximately two months). An appropriation with provisions for "streamlined" processing delegates review to the Office of the President; time requirements are substantially reduced and should be discussed with the Office of the President for your project.

Working Drawings: Construction contract documents.

Agency Review: Involves campus submittal of working drawings directly to code review agencies for approval (OSA, SFM, OSHPD, etc.). The State requires that all required stamps be affixed to the documents before submittal to the DOF and release to bid.

DOF Review: For State-funded projects only. The normal process involves submittal of completed working drawings (the actual bid documents) to DOF for approval and release of construction phase funds. It requires approximately two to four weeks under good conditions (typically show one month). A working drawings appropriation with provisions for "streamlined" processing delegates review to the Office of the President; time requirements are substantially reduced and should be discussed with the Office of the President for your project. As noted above, all required Fire Marshal and Access Code stamps must be affixed.

When the project is funded by State lease revenue bonds, it is thereby legally owned by the SPWB, is designed and constructed for the SPWB by the University under contractual agreement, and is leased to the University. The submittal goes to the SPWB with related action by The Regents, UC General Counsel, DOF, and State Treasurer. Such State revenue bond projects have two phases of processing, one to release the project for bid (requiring approximately two months under good conditions), and one after bid to allow award of contract (requiring approximately one to two months). Time requirements for State revenue bond projects should be discussed with responsible staff in the Office of the President on a case-by-case basis. The campus should assume that the "standard" DOF process will be used for a submittal unless the fund source for the construction appropriation is identified in the Governor's Budget or final Budget Act as State revenue bonds.

Bid/Award of Contract: This is the first part of the formal construction phase of the project, and includes advertisement. Formal authorization is required for bid of a State-funded project.

Construction: Includes work done by independent specialty contractors or by campus work forces as well as the general contractor.

Equipment: Purchase and installation of Group 2 and 3 moveable equipment if included as part of the project of record. If funding for moveable equipment is not part of a particular project, do not include this line.

Signature:

For State projects, the project schedule should be signed by the same persons authorized by the campus to sign for capital budget commitments on the project CIB. Note that the schedule represents a formal commitment and is expected to be met. For State projects involving "streamlined" processing in particular, it is an explicit and important part of the agreement for special processing.

Note that, when the month for completion of a phase is identified in State documents (e.g. Legislative Supplemental Language), the State has conventionally defined it as the month immediately following the last work shown on the project schedule for that phase. On State forms requiring designation of month, day, and year, indicate the first, middle or last day of the month if not otherwise more precisely defined.

EXAMPLES AND TEMPLATES

For projects funded under "Standard" process ([template](#), example)

For projects funded under "Streamlined" process ([template](#), example)