

**GUIDELINES FOR PREPARATION OF THE
PROJECT SCHEDULE
For General Funds Financed (GFF) Projects
(April 2014)**

Project schedules for budget requests/approvals and implementation submittals enable 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 DOE 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 projects, include lines for "Preliminary Plans Review" and "Working Drawings Review" and "Bid"..

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

UCOP Review: Assembly Bill 94 delegates review of GFF project plans to the Office of the President; time requirements are substantially reduced and may be discussed with the UCOP Campus Planner 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 UCOP and release to bid.

UCOP Review: Assembly Bill 94 delegates review of GFF project plans to the Office of the President; time requirements are substantially reduced and may be discussed with the UCOP Campus Planner for your project. As noted above, all required Fire Marshal and Access Code stamps must be affixed.

Bid/Award of Contract: This is the first part of the formal construction phase of the project, and includes advertisement. Formal authorization from UCOP is required for bid of GFF projects.

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

Equipment: Pertains to purchase and installation of Group 2 and 3 moveable equipment. . 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 between the University and the State.

Note that, when the month for completion of a phase is identified ,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, please indicate the first, middle or last day of the month if not otherwise more precisely defined.

EXAMPLES AND TEMPLATES

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