

## SMALL WORKS PROJECT CHECKLIST

**(Projects > \$35,000 ≤ \$300,000)**

The intent of this checklist is to help users identify key procedures. It is comprehensive. Please note that NOT all projects will require us to follow all of these outlined tasks (as noted).

✓ Done	Task	Responsible Party	Timeframe
_____	Identify Need	Department	TBD
_____	Create Specs	Department	TBD
_____	Create Plans	Department	TBD
_____	Prepare Bid Items	Department	TBD
_____	Prepare Amendments to WSDOT Standard Specs	Department	TBD
_____	Prepare Special Provisions	Department	TBD
_____	Prepare Supplemental Bidder Responsibility Criteria (if needed)	Department/Procurement	TBD
_____	Prepare Small Works Project Request Form	Department	15 min
_____	Forward Documents to Procurement	Department	5 min
_____	Prepare Quote Package (including any documents required by funding source)	Procurement	3-5 days
_____	Forward Draft Quote Package to PM for Review & Edits	Procurement	5 min
_____	PM Reviews Quote Package/Forwards Comments to Procurement	Department	TBD
_____	Update Quote Package	Procurement	1 Day
_____	Forward Final Draft of Quote Package to PM for Review	Procurement	5 min
_____	PM Reviews Final Draft	Department	TBD

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✓ Done	Task	Responsible Party	Timeframe
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_____	PM Sends Final Comments to Procurement/Approves Quote Package	Department	TBD
_____	Prepare Quote Package for Review by Procurement Manager	Procurement	1 hr
_____	Procurement Manager Reviews/Approves Quote Package	Procurement	3-5 days
_____	Prepare Quote Package for Copying/Distribution	Procurement	1 day
_____	Post Quote Package to Builder's Exchange of Washington Web Site	Procurement	10 min
_____	Set up Project on City Web Site to Appear on Day of Release	Procurement	15 min
_____	Make Copies of Quote Package	Procurement	2 days
_____	Create Bidders List	Procurement	15 min
_____	Distribute Quote Package to Internal Stakeholders	Procurement	1 day
_____	Post Project in City Hall Lobby	Procurement	5 min
_____	Send Project Notices to Contractors	Procurement	5 min
_____	Prepare Bid Tab for Project	Procurement	1 hr
_____	Schedule Pre-Bid Meeting (if needed)	Department/Procurement	10 min
_____	Hold Pre-Bid Meeting (if needed)	Procurement/Department	2 hr
_____	Prepare Responses to Questions (if needed)	Department	TBD
_____	Post Responses to Questions (if needed)	Procurement	15 min
_____	Contact PM to see if Addendum is Needed	Procurement	5 min

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<b>✓ Done</b>	<b>Task</b>	<b>Responsible Party</b>	<b>Timeframe</b>
_____	Develop Specs for Addendum (if needed)	Department/Procurement	TBD
_____	Prepare Addendum for Distribution (if needed)	Procurement	1 hr
_____	Send Addendum to PM for Review (if needed)	Procurement	5 min
_____	PM Reviews Addendum (if needed)	Department	TBD
_____	PM Sends Comments to Procurement (if needed)	Department	5 min
_____	Addendum Updated (if needed)	Procurement	10 min
_____	Addendum Approved by Procurement Manager (if needed)	Procurement	1 day
_____	Distribute Addendum (if needed)	Procurement	5 min
_____	Collect Substitution Requests (if needed)	Department	TBD
_____	Review Substitution Requests (if needed)	Department	TBD
_____	Prepare Addendum to Respond to Substitution Requests (if needed)	Procurement	1 hr
_____	Send Addendum to PM for Review	Procurement	5 min
_____	PM Reviews Addendum	Department	TBD
_____	PM Sends Comments to Procurement	Department	5 min
_____	Addendum Updated (if needed)	Procurement	1 hr
_____	Addendum Approved by Procurement Manager (if needed)	Procurement	1 day
_____	Distribute Addendum Containing Responses to Substitution Requests (if needed)	Procurement	15 min
_____	Prepare and Submit Proposals	Contractors	13 days

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<b>✓ Done</b>	<b>Task</b>	<b>Responsible Party</b>	<b>Timeframe</b>
_____	Open Proposals	Procurement	30 min
_____	Review Proposals for Responsiveness	Procurement	1 hr
_____	Review Proposals for Contractor Responsibility	Procurement	1 hr
_____	Complete Bid Tabulation	Procurement	1 hr
_____	Publish Bid Tabulation	Procurement	10 min
_____	Forward Bid Tab to PM	Procurement	5 min
_____	Request Department to Verify Documentation Required by Funding Source	Procurement	5 min
_____	Verify and Inform Funding Source Required Documentation	Department	TBD
_____	Prepare and Submit Protests	Contractors	2 days
_____	Respond to Bid Protests	Procurement	10 days
_____	Prepare & Submit Appeal Decision	Contractors	3 days
_____	Consider and Respond to Appeal	City Attorney	10 days
_____	Request Supplemental Bidder Responsibility Criteria from Apparent Low Bidder	Procurement	30 min
_____	Receive Supplemental Bidder Responsibility Criteria	Procurement	2 days
_____	Send copy of Supplemental Criteria to PM	Procurement	5 min
_____	Review Procurement Relevant Supplemental Criteria	Procurement	TBD
_____	Review Department Relevant Supplemental Criteria	Department	TBD
_____	Send Results of Review to Procurement	Department	5 min

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<b>✓ Done</b>	<b>Task</b>	<b>Responsible Party</b>	<b>Timeframe</b>
_____	Determine Whether Supplemental Criteria Meets Requirements	Procurement	15 min
_____	Inform Department	Procurement	15 min
_____	Inform Apparent Low Bidder	Procurement	15 min
_____	Protest Review of Supplemental Criteria Decision	Contractor	1 day
_____	Address Protests Due to Supplemental Bidder Responsibility Criteria Decision	Procurement	2 Days
_____	Add Contractor to MRSC Roster/ Collect Insurance Certificate (if needed)	Procurement	TBD
_____	Make Award Recommendation	Procurement	15 min
_____	Make Award Decision	Department	TBD
_____	Prepare Requisition	Department	15 min
_____	Approve Requisition	Department	TBD
_____	Schedule Pre-Con Briefing	Department	15 min
_____	Send Award Letter/Contract/P&P Bond Form to Contractor	Procurement	30 min
_____	Signs/Returns Contract & Secures P&P Bond	Contractor	10 days
_____	Collect City Signatures for Contract	Procurement	TBD
_____	Attend Pre-Con Briefing	All Parties	2 hr
_____	Prepare PO/Notice to Proceed	Procurement	15 min
_____	Approve PO/Notice to Proceed	Procurement	4 hours
_____	Mail PO/Notice to Proceed	Procurement	5 min
_____	Supervise/Manage Construction	Department/Construction	TBD
_____	Prepare Request to Sublet	Contractor	15 min

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<b>✓ Done</b>	<b>Task</b>	<b>Responsible Party</b>	<b>Timeframe</b>
_____	Prepare Intents to Sublet	Construction	15 min
_____	Prepare Payrolls (if needed)	Contractor	TBD
_____	Review Payrolls (if needed)	Procurement	1 hr
_____	Prepare Change Order (if needed)	Construction/Department	TBD
_____	Review/Approve Change Order (if needed)	Construction/Department/ Contractor	TBD
_____	Sign Change Order (if needed)	Construction/Department/ Contractor	TBD
_____	Prepare Requisition for Change Order (if needed)	Department	15 min
_____	Approve Requisition for Change Order (if needed)	Department	15 min
_____	Add Change Order to PO (if needed)	Procurement	10 min
_____	Approve Amended PO (if needed)	Procurement	10 min
_____	Receive/Review/Approve Prevailing Wage Documentation	Procurement	15 min
_____	Prepare Invoice	Contractor	TBD
_____	Submit Invoice	Contractor	TBD
_____	Review Invoice	Department	TBD
_____	Prepare Progress Reports	Department	TBD
_____	Review Progress Reports	Department	TBD
_____	Prepare PAY EST	Construction/Department	TBD
_____	Distribute Draft PAY EST for Review/Signatures	Construction/Department	TBD
_____	Return Signed PAY EST	Contractor	TBD
_____	Review & Sign PAY EST	Department/Construction	TBD

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<b>✓ Done</b>	<b>Task</b>	<b>Responsible Party</b>	<b>Timeframe</b>
_____	Send Signed PAY EST to Procurement	Construction/Department	TBD
_____	Review PAY EST	Procurement	30 min
_____	Approve PAY EST and Release Payment	Procurement	15 min
_____	Forward PAY EST to Accounts Payable	Procurement	5 min
_____	Pay Invoice	Accounts Payable	TBD
_____	Prepare Final Invoice	Contractor	TBD
_____	Submit Final Invoice	Contractor	TBD
_____	Prepare Final Payment Request Certification	Construction/Department	TBD
_____	Prepare Completion of Construction Form	Construction/Department	TBD
_____	Request Funding Source Required Documentation from Contractor	Department/Procurement	TBD
_____	Review Funding Source Required Documentation	Department	TBD
_____	Approve Funding Source Required Documentation	Department	TBD
_____	Review Funding Source Required Documentation	Procurement	TBD
_____	Approve Funding Source Required Documentation	Procurement	TBD
_____	Prepare Final Payment Request	Construction/Department	TBD
_____	Distribute Draft of Final PAY EST for Review/Signatures	Construction/Department	TBD
_____	Return Signed Final PAY EST	Contractor	TBD
_____	Review & Sign Final PAY EST	Department/Construction	TBD

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_____	Send Signed Final PAY EST to Procurement	Construction/Department	TBD
_____	Review Final PAY EST	Procurement	30 min
_____	Approve Final PAY EST and release payment	Procurement	15 min
_____	Forward Final PAY EST to Accounts Payable	Procurement	5 min
_____	Pay Final PAY EST	Accounts Payable	TBD
_____	Request Affidavits of Wages Paid from Contractor	Procurement	10 min
_____	Collect Affidavits of Wages Paid	Procurement	TBD
_____	Prepare Notice of Completion	Procurement	30 min
_____	Submit Notice of Completion to L&I, Dept of Revenue and Employment Security for Review and Approval	Procurement	5 min
_____	L&I, Dept of Revenue and Employment Security Review Notice of Completion	L&I, DOR, ESD	45-60 days
_____	Receive Releases from L&I, DOR and ESD	L&I, DOR, ESD	TBD
_____	Review Releases	Procurement	10 min
_____	Authorize Release of Retainage	Procurement	15 min
_____	Forward Retainage Release Authorization to Accounts Payable	Procurement	5 min
_____	Release Retainage	Accounts Payable	TBD
_____	Close out Project File	Procurement	1 hour
_____	Close out Project File	Department	TBD
_____	Close out Project File	Construction	TBD

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