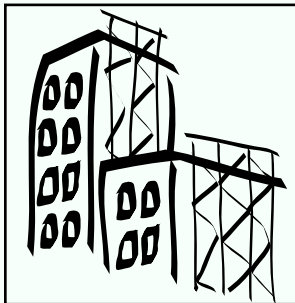




Federation of Canadian Municipalities Municipal Building Retrofits



Section 7 Project Implementation

Templates

All templates in this guide are available in text and PDF format on the accompanying CD ROM or on the Knowledge Network at <http://kn.fcm.ca>.

Information Requirement Checklist

	Responsibility	
	In-house managed	ESCO-managed
Item		
Certificate of Insurance		
Performance Bond		
Payment Bond		
Work Schedule		
Work Arrangements – Outside Normal Hours		
Design & Construction package		
ECM Installation Quality Control Inspection Program		
Commissioning Plan		
Safety & Health Plan		
Notification of Utility Interruption		
Operation Work Procedure		
Maintenance Work Procedure		
O&M Manuals		
Post-Installation Monitoring and Verification Report		
As-built Drawings		
Annual Monitoring and Verification Report on ECM Performance		
Notes:		

Document Submission Checklist

Item	Complete
Operating procedures	
Maintenance procedures	
Operation check lists	
Maintenance check lists	
Operation and maintenance manuals	
Lists of recommended spare parts	
Contact information for any questions	
As-built drawings	
Construction and installation reports	
Construction and installation inspection reports	
Commissioning reports including set points	
Performance test reports including test and balance reports	
Trial run reports including operating parameter readings	
Waste disposal reports	
Material safety data sheets	

Project Management Checklist Template

	Responsibility	
	In-house managed	ESCO-managed
Safety & Environmental		
Carry out job site safety walk-down and develop supervisor orientation schedule.		
Evaluate and identify safety aspects of job; inform workers.		
Check worker licensing and certifications.		
Clarify burn permit approval requirements.		
Ensure appropriate health cards up-to-date as required by site.		
Sign scaffolding inspections signed.		
Check job site for any confined spaces and ensure compliance with entry.		
Check to ensure any underground utilities have been located and identified.		
Check to ensure any in-the-wall utilities have been located and identified.		
Check to ensure all hazardous materials, either stored or as a part of the facility, have been located and identified. Site-specific requirements for hazardous material handling identified.		
Ensure all personnel have been made aware of fire exit corridors and procedures.		
Review site injury reporting and response requirements.		
Establish emergency notification process.		
Secure environmental permits prior to construction.		
Organization and Communications		
Identify and list key contractor and site contacts (names/phone/cell/pager).		
Establish schedule for design/construction update meetings.		
Clarify change order review and approval process.		
Establish emergency notification process.		
Timeline – Design/Construction Schedule		
Establish design and design approval schedule.		
Establish construction schedule.		

Project Management Checklist Template

	Responsibility	
	In-house managed	ESCO-managed
Design		
Establish engineering drawings approval requirements – prior to construction.		
Establish redline authority approved for as-built drawings during construction.		
Establish equipment data sheets submittal and approval requirements.		
Facility Access & Security Requirements		
Contractor personnel site and/or building access requirements.		
Security badges.		
Requirements for site escorts.		
Allowable equipment.		
Vehicle access approval requirements.		
Outages		
Utility service interruption permits approval.		
Utility reconnect permits approval (including hot-wire permits).		
Site personal support for outages.		
Construction		
Excavation permits approval requirements.		
Crane movements and locations reviewed for overhead hazards.		
Construction start-up co-ordination requirements (building manager and occupants).		
Materials and equipment confirmed at job site or scheduled to arrive prior to need.		
Establish acceptable lay-down yard and/or office space allocations for contractors.		
Job/work lists prepared and approved.		
All worker certifications (welding, electrical, etc.) up-to-date.		
All vehicle licensing up-to-date.		