

Workflow for Partner Greening Projects: Planning through Closeout

This workflow is intended to provide assistance with project planning, but is not comprehensive. Please refer to the How-To Guide and additional LAUSD reference materials for additional guidance.

	LEGEND
	LAUSD
	LAUSD or Partner
	Partner
	Contractor

*The timeframe for each phase may vary depending on the project

PRE-GRANT APPLICATION	POST GRANT AWARD	CONCEPT/PRELIMINARY SCHEMATIC DESIGN	50% AND 100% CDs	DSA	TRANSITIONING TO CONSTRUCTION	CONSTRUCTION	PROJECT CLOSEOUT
DURATION: 3-4 months*	DURATION: 3-5 months*	DURATION: 1-2 months*	DURATION: 2-3 months*	DURATION: 2-3 months*	DURATION: 1 month*	DURATION: 2-8 months*	DURATION: 2-3 months*
MILESTONES: Grant opportunity is identified Site selection Scope development Application submission	MILESTONES: Grant is awarded Board approval Agreement execution	MILESTONES: Community Outreach and School Engagement Kick-off/scope definition meeting Site walk to verify on-site conditions LAUSD Concept Design Signoff	MILESTONES: Submittal and review of 50% and 100% design (the intake and review process is the same for both phases) Design is finalized	MILESTONES: DSA exemption or DSA project submittal Architect of Record (AOR) obtains DSA approval	MILESTONES: Project bidding/contract execution Notice to Proceed (NTP) is issued	MILESTONES: Job Start Meeting Groundbreaking - start of construction	MILESTONES: Contract completion
DELIVERABLES:	DELIVERABLES:	DELIVERABLES:	DELIVERABLES:	DELIVERABLES:	DELIVERABLES:	DELIVERABLES:	DELIVERABLES:
List of Schools	Grant Agreement	Outreach	OAR Assignment	Non-DSA	Contractor List and Bid Review	Job Start Meeting	Certificate of Substantial Completion
Partner provides a finalized list of proposed schools and justification used for review and coordination to ensure that schools with high greening needs are prioritized	Partner to provide executed grant agreement, a preliminary schedule, and budget	Partner provides proposed schedule for planned outreach activities and materials (i.e. presentations, handouts, surveys and results, photos, flyers, etc.)	LAUSD will assign an OAR to provide construction oversight	If DSA review is not required, ESO PM will prepare a non-DSA form	ESO provides current list of LAUSD prequalified contractors upon request	ESO PM and OAR will schedule a job-start meeting with Partner, contractor, inspector, and other relevant LAUSD staff	Partner initiates the substantial completion phase by submitting the Request for Certificate of Substantial Completion to the OAR
Reviewed by ESO	Reviewed by ESO	Reviewed by ESO PM	50% and 100% CD Submittal	DSA Registration	Partner provides bid package to ESO PM to conduct a review to ensure LAUSD requirements are incorporated into bid documents (if LAUSD is not managing bidding process)	Required Items from Partner	LAUSD issues Certificate of Substantial Completion
Grant Guidelines	Board of Education Approval	Budget and Schedule	Partner submits 50% and 100% CDs via Bluebeam and notifies the ESO PM two weeks before a design review is needed, and again when the submission is in the folder and ready for review	Partner registers project at least 6 to 8 weeks before the submittal date and may choose to have a DSA pre-application meeting (if a DSA pre-application meeting is held, LAUSD shall be present)	Reviewed by ESO PM	Proof of Insurance consistent with the requirements of the Development Agreement	Contractor submits the final As-Built documents and CAD files to the OAR
Partner provides grant guidelines	ESO PM, LAUSD Real Estate, and Business Development prepare Board Documents. ESO PM provides Stamped Order of Business indicating Board approval.	Partner provides monthly detailed project budget and schedule	Reviewed by ESO PM, Architecture Unit, Civil Unit, Landscape Architecture Unit, OAR, TQST, Physical Education Coordinator, OEHS (playground equipment) - intake with a 10 day review	DSA Submittal	Testing and Special Inspections	Proof of payment and performance bonds consistent with the requirements of the Development Agreement	Reviewed by ESO PM and OAR
Reviewed by ESO and Grants & Funding	Development Agreement	Reviewed by ESO PM	Budget and Schedule	Partner submits the complete DSA package	Partner provides DSA Form 103 List of Required Structural Tests and Special Inspections for DSA projects; Partner provides List of Required Structural Tests & Special Inspections (T&I) form for Non-DSA projects	Funding for FETU Phase 3 if applicable, funding for the OAR/M&O Support, funding for Inspection, and funding for A&E services	Punchlist
Cost Estimate and Project Budget	LAUSD Real Estate & Business Development provides Partner with Development Agreement for Signature.	Greening Calculations	Partner provides updated project budget and schedule with each CD submittal	Reviewed by DSA	Reviewed by ESO PM and Civil Unit	Partner to provide a list of submittals for review by LAUSD and inspector at the start of construction.	Contractor has 60 days to complete punchlist items. For smaller Design Bid Build projects, the Contractor has 30 days to correct the punchlist items.
ESO PM provides cost estimate for services (design review, FETU asphalt testing, CEQA, DSA submittal (if required), and other optional services)	Partner to sign or respond with requested changes	ESO PM provides worksheet template, instructions and examples for reference to calculate greening metrics	Reviewed by ESO PM	Backcheck - Partner responds to any comments received from DSA and resubmits the plans and specifications to DSA	Laboratory of Record	Reviewed by ESO PM and OAR	Reviewed by ESO PM and OAR
Partner provides estimated project construction budget and total project budget including breakdown for LAUSD fees and contingency	Bluebeam Review	Partner includes required greening calculations and metrics on the site plan page of the plan set	Greening Calculations	If CD revisions are needed, the ESO PM will review them with relevant LAUSD departments before resubmitting to DSA	LAUSD or Partner hires Laboratory of Record to implement any required testing and special inspections	Required Items from Contractor - prior to start of construction	Final Cleaning
Reviewed by ESO PM	ESO PM schedules meeting to review LAUSD submission requirements, the Bluebeam project folder organization and submission process, and share available resources	Reviewed by ESO PM and by the Landscape Architecture Unit	Partner provides updated greening calculations and metrics on site plan page of plan set		DOJ clearance	Contractor conducts agronomy soil testing in accordance with Specification 32 9000 (if needed)	Contractor performs a thorough cleaning of all site areas and buildings (if applicable) and installed materials and equipment
Site Materials	LAUSD Invoice	Play Station and Clearance Calculations	Reviewed by ESO PM and by the Landscape Architecture Unit		Contractor submits fingerprinting/DOJ clearance certification to the Insurance and Risk Finance Branch before entering school site	Schedule of Values	Reviewed by OAR
ESO PM provides: plot plans, existing topos and surveys, firelane and POT, Arbor Pro Tree Report, preliminary ADA review, LAUSD greening Priority Lists, Green Schoolyards Data Viewer	ESO PM provides invoice for LAUSD fees	ESO PM provides Play Station Analysis Template with school specific data, instructions, and examples for reference	Play Station and Clearance Calculations		Reviewed by ESO PM and OAR	Superintendent resume and safety representative resume	Document Submittal
Partner provides a concept design or project area showing project scope with grant and LAUSD required concept design metrics	Partner transfers funding to LAUSD for services (e.g., asphalt testing, design review, construction related tasks etc.)	Partner submits completed Play Station Analysis Template and subsequently submits an updated version with each design submission	Partner submits updated Play Station Analysis Template		Job Start Requirements	Required safety plans: Injury Illness Prevention Plan, Job Hazard Analysis, and Lead Abatement Work Plan (if applicable)	The Contractor submits required documents as listed in Specs 00 7000 (General Conditions), 01 7700 Contract Closeout and Spec Divisions 2-33
Reviewed by ESO PM	ESO PM confirms funding is received	Reviewed by ESO PM and by Physical Education Coordinator (as needed)	Reviewed by ESO PM and by Physical Education Coordinator (as needed)		ESO PM will share Job Start requirements with Partner and schedule a meeting to review the requirements as the project transitions into construction	Reviewed by ESO PM and OAR	Reviewed by ESO PM
Grant Materials		Concept Plan Submittal	Backcheck		NTP	Required Items from Contractor - during construction	Warranties and Guarantees
Prior to grant application submittal, LAUSD will provide a Letter of Commitment for grant application		Partner submits concept plan via Bluebeam and must notify the ESO PM two weeks before a design review is needed, and again when the submission is in the folder and ready for review	Partner submits the backcheck CDs via Bluebeam and notifies the ESO PM		ESO PM provides Partner signed NTP to begin construction	4-week schedule, previous two weeks and 2-week look ahead	Contractor provides Warranties and Guarantees which certify that all work (including materials and equipment) has been provided in accordance with the Contract Documents
Partner prepares and submits grant application		Reviewed by LAUSD A&E Services (Landscape and Civil units) and TQST - intake with a 10 day review period	Reviewed by ESO PM, Architecture Unit, Civil Engineering Unit, Landscape Architecture Unit, OAR, and TQST as needed - intake with a 5 day review		Inspector of Record (IOR) Assignment	Compliance with the applicable components of the LAUSD Facilities School Maintenance and Operations Repair & Construction Safety Standards	Reviewed by ESO PM and OAR
		Asphalt Testing	Final CD/Specificaion Files		LAUSD will assign an IOR to provide inspection services during construction	Provide daily reports to OAR	Contract Completion
		Partner provides Site Plan showing asphalt removal area	Partner provides 100% CD CAD files and 100% Specifications in PDF and packaged in Word with track changes		Labor Compliance	Provide weekly project schedule updates	Partner sends the Notice of Contract Completion & Acceptance letter signed by the contractor, with attachments, to ESO for record keeping
		ESO PM provides FETU RFA	Reviewed by ESO PM		Partner provides: Bid invitation/advertisement (if any), executed contract, Request for Proposals/Request for Qualifications, contact information of Prime Contractor and Subcontractor, PWC 100, and NTP	Weekly progress meetings with the LAUSD team	Reviewed by ESO
		FETU provides RTA and Phase 1 and, if applicable, Phase 2 Report - 40 calendar days			Reviewed by ESO PM and Labor Compliance Program representative	Weekly Certified Payroll Reports	ESO prepares a Project Finalization Form
		Soil Testing			Storm Water Pollution Prevention Plan	Inspections scheduled as needed with LAUSD inspector	
		Partner's soil consultant provides OEHS Site Assessment PM with soil sampling plan			Projects disturbing less than one acre of land shall follow the requirements of specification Section 01 7418 Water Pollution Control	Requests for Clarification and Construction Change Directive (CCD)	
		OEHS Site Assesment PM reviews and approves or requests revisions			Projects disturbing one acre or more must comply with Section 01 7416 SWPPP, including a SWPPP, a QSD, a Qualified SWPPP Practitioner, and other required components	Contractor maintains: request for change log, change order request log, change order log, construction cost log-schedule of values, CCD log, construction schedule, safety record, old business, new business	
		Partner's soil consultant provides OEHS Site Assessment PM with soil testing results				Construction Waste Management Plan	
		OEHS Site Assesment PM provides soil determination letter				If the project requires indoor work, provide a construction Indoor Air Quality Plan	
						Reviewed by ESO PM and OAR	