APPENDIX F

PROJECT DESIGN – KICK-OFF CHECKLIST

Includes

- Checklist
- Project Management Plan
- Consultant Expectations
- Agency Sign-Off for Project Closeout & Acceptance
- Project Report & Fact Sheet (Short Form)
# REAL ESTATE AND CONSTRUCTION SERVICES (RECS) PROJECT DESIGN KICK-OFF CHECKLIST

**Key Items and Tasks for Architect/Engineer/Consultant to complete**

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<td>State Project No. Consultant:</td>
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<td>Project Name:</td>
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<td>Facility &amp; Location:</td>
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<td>RECS Project Manager:</td>
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**Instructions:** A-E Consultant checks Yes / No if they have completed the item listed. If N/A is checked, an explanation is entered in the “ITEM/TASK” column, directly below the item.

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<tr>
<th>Yes</th>
<th>No</th>
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<td>1. Review your contract for all required services and deliverables prior to beginning work. See the attached “Consultant Performance Expectations”</td>
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<td>2. Do not begin work until a Notice To Proceed is received from the RECS Contract Coordinator.</td>
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<td>3. No additional work resulting in a contract change/fee adjustment shall be started or performed until approval from the RECS Project Manager is received and funds for the work have been encumbered into the contract. The State will not approve or pay additional fees unless prior approval has been given by the RECS Project Manager and the Supplemental Agreement to the contract has been fully executed.</td>
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<td>4. The facility is not authorized to approve work that results in scope changes or a fee increase. Only the RECS Project Manager can authorize additional work.</td>
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<td>5. As early as possible, obtain a code review from the AHJ for plan review.</td>
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<td>6. Review the Project for all requirements:</td>
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<td>□ Agency has legislative authority to fund project with operating funds (16B.30)*</td>
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<td>□ Scope of Work is per language of the Appropriation</td>
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<td>□ Predesign required (when construction cost is $750,000 or greater)</td>
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<td>□ Legislative Notification &amp; Approval (all bonded projects)</td>
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<td>□ State Designer Selection Board ($200 K + design; $2 Mill + Project Cost)</td>
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<td>□ Historical Designation (&amp; involvement by State Historical Preservation Office)</td>
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<td>□ EAW (Environmental Assessment Worksheet) requirement</td>
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<td>□ B3 – MN Sustainable Building Guidelines (all new buildings &amp; major remodel)</td>
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<td>□ Hazardous Materials Abatement Survey (required for all remodelings)</td>
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<td>□ Hazardous Materials Abatement Design &amp; Const’n needed prior to construction</td>
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[1] *Note: The asterisk (*) indicates a requirement under Minnesota Statutes, section 16B.30.
* 16B.30 …a state agency may not undertake improvements of a capital nature without specific legislative authority.

(b) Specific legislative authority is not required for repairs or minor capital projects financed with operating appropriations or agency receipts that:
(1) are undertaken for asset preservation or code compliance purposes; or
(2) do not materially increase the net square footage of a facility; and in either case
(3) do not materially increase the cost of agency programs.

(c) Unless the commissioner determines that an urgency exists, the commissioner of an agency undertaking a project with a cost in excess of $50,000 pursuant to paragraph (b) shall notify the chairs of the senate Finance Committee, the house of representatives Capital Investment Committee, the house of representatives Ways and Means Committee, the appropriate house of representatives and senate finance divisions, and the director of the Legislative Coordinating Commission prior to incurring any contractual obligation with regard to the project.

7. See RECS website for forms, Design Guidelines, Sustainable Design Guidelines, Predesign Manual, Payment Request forms, Supplemental Agreement Forms, and General Information
   http://www.admin.state.mn.us/recs/cs/cs.html
   Link to Designer Procedures Manual - Table of Contents webpage
   http://www.admin.state.mn.us/recs/cs/mg-dpm-toc.html

8. Predesign – Bonding Bill projects require a predesign to be submitted prior to beginning design – when the construction cost is $750,000 or more. See
   b. Link to RECS Predesign Manual webpage
   http://www.admin.state.mn.us/recs/cs/mg-pred-toc.html

9. Statute requirements for State Buildings and/or projects – Obtain “Applicable Statutes” Table/List. This is to be included in all predesigns along with all associated costs of the mandated requirements.

10. Complete the Predesign Checklist. Review the predesign to ensure all requirements and costs for delivering the project are included in the project budget (Site acquisition, site and utilities development, design, construction, design and sustainability guidelines, alternative energy systems, commissioning, moving, occupancy.)

11. Review your contract services and deliverables required for each design phase.

12. Review and implement the State’s CAD guidelines.
   a. RECS CAD Guidelines webpage
   http://www.admin.state.mn.us/recs/cs/mg-cadd-toc.html

13. Prepare Design Kick-off Meeting Agenda
   a. RECS as Key Contact for project and contract
   b. Consultant’s Key Contacts
   c. Agency Team Contacts
   d. Identify Project Criteria & Requirements
   e. Establish and schedule regular/periodic design meetings
   f. Identify Budget and Design expectations
   g. Consultant is responsible for Sign-In Sheet, Meeting Minutes, and
distribution (in a timely manner).

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<th>Yes</th>
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<td>14. Obtain existing drawings and information from facility</td>
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<td>15. If needed for the project, request a site survey from the RECS PM. Determine survey requirements. If geotechnical services are needed, prepare scope statement for RECS PM use in soliciting proposals. Assist RECS PM with evaluation of proposals.</td>
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<td>16. For all remodeling projects, determine if facility has an abatement survey for the project area. Inform the RECS Project Manager if a hazardous materials survey is needed. The RECS Project Manager will submit an order to obtain this. <strong>NOTE:</strong> The survey must be published with the project manual/specifications.</td>
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**DESIGN - continued**

| ☐   | ☐  | ☐   | 17. For Bonded projects, at the end of Schematic Design Phase, assist the RECS Project Manager with preparation of a submittal package for LEGISLATIVE NOTIFICATION. |
| ☐   | ☐  | ☐   | a. Submittal package is to contain current cost, scope and schedule information |
|     |    |     | Response from legislative chairs must be received PRIOR to entering Construction Document Phase |
| ☐   | ☐  | ☐   | 18. Review the State’s Design Guidelines and incorporate requirements into the project. |
| ☐   | ☐  | ☐   | a. Link to RECS website for Manuals, Guidelines, and Forms: [http://www.admin.state.mn.us/recs/cs/cs-mgf.html](http://www.admin.state.mn.us/recs/cs/cs-mgf.html) |
| ☐   | ☐  | ☐   | 19. Submit Design Guideline variance requests to the RECS Project Manager for approval. (Form is in the back of the Predesign Manual) |
| ☐   | ☐  | ☐   | 20. Review and incorporate Sustainability Guideline requirements into the project design. |
| ☐   | ☐  | ☐   | a. Provide link to RECS State of Minnesota Sustainable Building Guidelines (MSBG-B3) [http://www.msbg.umn.edu/](http://www.msbg.umn.edu/) Technical questions, related to a specific guideline or overall application of the guidelines, use the contact located on the B3 website. |
| ☐   | ☐  | ☐   | 21. Implement a “Project Management Plan” and update on a monthly basis. Example: |
| ☐   | ☐  | ☐   | [Project Management Plan.doc](#) |
| ☐   | ☐  | ☐   | 22. Verify code review procedures with the State and the City. |
| ☐   | ☐  | ☐   | a. Submit Preliminary Application to State Building Codes and Standards Division Minnesota State Department of Labor and Industry they will determine who has authority for Plan Review and Inspections (State or local municipality or split between State and City). Webpage link: [http://www.doli.state.mn.us/buildingcodes.html](http://www.doli.state.mn.us/buildingcodes.html) |
| ☐   | ☐  | ☐   | b. Determine zoning ordinances that apply |
| ☐   | ☐  | ☐   | c. Present design work that is to conformance with local zoning ordinances |
| ☐   | ☐  | ☐   | d. Provide Storm water calculations, requirements from Watershed Districts; SWPP permits; and Who the Authority Having Jurisdiction is (State or City) See [http://www.pca.state.mn.us/rulesregs/index.html](http://www.pca.state.mn.us/rulesregs/index.html) |
| ☐   | ☐  | ☐   | e. Obtain Fire Marshal reviews. Local or State. (Does the State defer to the local municipality?) |
| ☐   | ☐  | ☐   | f. Obtain Plumbing and Health reviews- Minnesota State Department of
ITEM / TASK

23. For Projects on the Capitol Complex, the below link is the “Preferred List of Equipment” Link: [http://www.admin.state.mn.us/recs/cs-mgf.html](http://www.admin.state.mn.us/recs/cs-mgf.html)

24. Review and Specify Project CLOSEOUT items contained in the State’s Design Guidelines.
See [http://www.admin.state.mn.us/recs/cs/design/dg-noappendix.pdf](http://www.admin.state.mn.us/recs/cs/design/dg-noappendix.pdf) (page 33)

25. Link to RECS website to obtain Consultant Pay Requests:
[http://www.admin.state.mn.us/recs/cs-mgf.html](http://www.admin.state.mn.us/recs/cs-mgf.html)

**BID DOCUMENT PREPARATION & BIDDING**

26. Obtain, complete and submit a BID REQUEST Form to the RECS Project Manager Link to form: [http://www.admin.state.mn.us/recs/cs-forms/bidreq.doc](http://www.admin.state.mn.us/recs/cs-forms/bidreq.doc)
   a. Bid Request Form is used to establish:
      - bid dates, insurance requirements, type of front-end,
   b. After receipt of the “Bid Request” Form, the A201 “General Conditions” will be generated and the targeted business goals will be identified. They will become part of the specifications.
   c. See RECS PM for requirements for other project delivery methods.

27. After receipt of contract “Front-end”, edit the Ad for bids and Bid Forms, Assign a Specification Division Number to each front-end section in the Table of Contents.

28. Edit the State’s “Special Conditions” Specification Section (attached to the contract “Front-end”) 
   a. Insert Substantial and Final Completion Dates or number of calendar days following the “Notice To Proceed”
   b. Insert the Liquidated Damages Amount if applicable.
   c. Provide and reference the Facility Security Requirements for Contractors

29. Obtain facility security requirements (to be published in the bid documents)


31. Verify and publish project facilities and utilities that are available for the contractor’s use.

32. Obtain and publish the Prevailing Wage Rates (for the county where the project is located). These are available at the Dept of Labor & Industry website: [http://www.doli.state.mn.us/pw_rates.html](http://www.doli.state.mn.us/pw_rates.html)
   Publishing the Prevailing Wages for the county where the project is located is REQUIRED BY LAW.

33. For projects located on the Capitol Complex, Obtain and publish the Capitol Complex Guidelines for Contractors
   Link: [http://www.admin.state.mn.us/pmd/5-3_job_site_guidelines.htm](http://www.admin.state.mn.us/pmd/5-3_job_site_guidelines.htm)

34. Obtain and publish the State’s “HotWorks” Capitol Complex Guidelines for Contractors
   Link: [http://www.admin.state.mn.us/pmd/5-3_job_site_guidelines.htm](http://www.admin.state.mn.us/pmd/5-3_job_site_guidelines.htm)

35. The project will be bid out via the State’s Online Bidding system. Deliver documents to the State in electronic format (pdf)
   Instructions for the Online Distribution of Construction Plans and Specifications
are located at:  http://www.admin.state.mn.us/recs/cs/cs-mgf.html

Yes  No  N/A  ITEM / TASK

36. Instructions for Construction Solicitations
http://www.mmd.admin.state.mn.us/pdf/constructioninstructions.pdf
Link to MMD ALP Manual Appendices
http://www.mmd.admin.state.mn.us/alpappendices.htm

BID DOCUMENT PREPARATION & BIDDING

37. Ensure Project Close-out documents are published with the bid set
See http://www.admin.state.mn.us/recs/cs/design/dg-noappendix.pdf (page 33)

38. Publish the Dept of Revenue Form IC-134 (used
IC-134 link   http://www.admin.state.mn.us/recs/cs/cs-mgf.html
For Final payment, Contractor and subs must complete this form, submit it to the
Dept of Revenue, receive Revenue’s signature and submit the document with final
payment request. – See “Project Closeout”

39. Determine minimum qualifications for the contractors. Incorporate and publish
these with the bid documents.

BIDDING PHASE

40. Consultant is to Schedule and conduct a PRE-BID Conference.
   a. Prepare a Pre-Bid Agenda & provide Sign-In Sheet to verify attendance.
      Inform contractors that in order to receive addenda, they need to download
      plans from MMD’s QuestCDN site.
   b. Inform bidders of unique requirements, particularly those that relate to their
      bid:
      1) Contractor is responsible for all SAC/WAC charges, permits, fees
      2) Contractors must pay Prevailing Wages and are required to submit
         certified payrolls – every 2 weeks
      3) Parking costs
      4) Hours of Work
      5) Requirements for health tests
      6) Requirements for security background check
   c. Inform contractors that the General Contractor is responsible for paying all
      permits & fees, including SAC / WAC charges.

41. If special inspection and/or testing services are needed, prepare scope statement
    for RECS PM use in soliciting proposals; assist in evaluation of proposals.

42. Following receipt of bids, Consultant conducts reviews bid with apparent low
    bidder and provides a letter of recommendation to award to the RECS PM.

43. After receipt of Consultant’s recommendation, the RECS PM prepares a
    Recommendation To Award/Reject and forwards to the Construction Projects
    Operations Manager.

CONSTRUCTION

44. Prepare the Pre-Construction Meeting Agenda, schedule and chair the meeting
    Link to template:  http://www.admin.state.mn.us/recs/cs/cs-forms/preconmtg.doc
    - Inform contractor of prevailing wages & reporting requirements
    - Inform contractor of other requirements i.e. mock-ups etc.

45. Contractor is to obtain all necessary permits.
46. Communication Guidelines.
   a. Contractor is to go through the Architect with all communications
   b. Architect is to go through and copy the RECS PM with all communications.
   c. Voice mails & emails are to be responded to within 24 hours.
   d. Contractor shall not do additional work without prior authorization by the RECS PM. The facility is NOT AUTHORIZED to add work

47. No “end-of-project” delay claims are allowed. Contract time extensions are per the contract and based on changes to the work and delays that are outside the contractor’s control (i.e. weather). And Contractor shall provide written notification and justification to substantiate the claim.

48. Consultant is to establish regular Project Meetings and confirm meeting date within 24 hours of each meeting.

49. Contractor shall post prevailing wage rates on the job site, and in a location that is accessible to all workers.

50. Contractor Pay Requests Forms are available at the following link: http://www.admin.state.mn.us/recs/cs/cs-mgf.html

51. Consultant prepares Developing Encumbrance (DE) forms for change orders and forwards to RECS PM. Then, when pricing is received, Consultant prepares a Supplemental Agreement (SA) for review by RECS PM.
   a. Consultant shall ensure all change order documentation (labor units, material units, their unit costs and totals are included).

52. Procedures for enforcing Owners Rights (notices of non-conforming work, etc) file:///S:/web/pdfs/OwnerRightsProced%20050503mtg.pdf

53. Conduct Punchlist Walkthrough

54. Issue Certificate of Substantial Completion – Attach full punchlist to Certificate
   a. Include the number of days the contractor has to complete punchlist items.

PROJECT CLOSEOUT / POST CONSTRUCTION PHASE

55. Obtain all project CLOSEOUT submittals: See http://www.admin.state.mn.us/recs/cs/design/dg-noappendix.pdf (page 33)


57. Schedule and Conduct 10-month warranty walk-through

58. Obtain Contractor and subcontractor’s completed IC-134 link (Withholding Affidavit for Contractors)
   Link: http://www.mmd.admin.state.mn.us/pdf/apx_q2_sampleIC134Form.pdf

59. Contractor Evaluation Form and Vendor Performance Report Form submitted at the conclusion of the project file:///S:/RECSWEB/internal/index.html
   NOTE: A Vendor Performance Report may be submitted at any time during the performance of the Contract.

60. Consultant Evaluation Form is submitted at the conclusion of the project. file:///S:/RECSWEB/internal/index.html

61. See the attached “Agency Sign-Off for Project Closeout and Acceptance”
The consultant shall review this to ensure all items are completed.

☐ ☐ ☐ 62. Prepare a final report on the project. Using the “Project

SIGNATURES
I have read the above and reviewed the documents/links cited.

Consultant Principal in Charge

Printed Name ________________________ Signature_________________________ Date ________

Consultant’s Project Manager

Printed Name ________________________ Signature_________________________ Date ________

Return completed form to RECS Project Manager
CONSULTANT PERFORMANCE EXPECTATIONS

The success of any project is dependent upon a shared understanding of how the process works, open, effective, and positive communication and mutual respect. This represents the first step towards a successful project by clearly identifying the process, expectations, and our requirements for communication.

Expectations
- Consultant shall schedule regular Project Meetings.
- Consultant shall provide an Agenda prior to all Project Meetings.
- Consultant shall communicate project status on a monthly basis using the “Project Report and Fact Sheet”. There are numerous stakeholders that require ongoing status updates to monitor the project and funding.
- Consultant is responsible for Estimated Cost of Construction. Refer to Article 1.5 of the Basic Services Agreement.
- Consultant shall update the Estimated Cost of Construction at the conclusion of SD, DD, and CD phases. Refer to Articles 2 and 3 of the Basic Services Agreement. See 1.0.21, 2.02 and 3.0.8 of Exhibit A
- Consultant shall provide and update Project Schedule. Refer to Articles 2 and 3 of the Basic Services Agreement.
- Consultant requires “Authorization to Proceed”. Design Refer to Articles 2.4 and 3.3 of the Basic Services Agreement Bidding Refer to Article 5 of the Basic Services Agreement Construction Refer to Article 6 of the Basic Services Agreement

Contractual items
- Consultant shall complete Supplemental Agreements when the scope of work has changed. Refer to Article 8.4 of the Basic Services Agreement. This is the Consultant’s responsibility. See http://www.admin.state.mn.us/recs/cs/forms/contractor_supplemental_agreement.doc
- Exhibit A, 4.0 Referenced Documents Design Guidelines, see http://www.admin.state.mn.us/recs/cs/mg-dq2-toc.html Space Guidelines, see http://www.admin.state.mn.us/recs/sms/spaceguide.html Sustainability, see http://www.admin.state.mn.us/recs/cs/mg-sus-toc.html Energy Conservation/High Performance Buildings and Systems
- Meeting Minutes are to be prepared by the Consultant. Refer to Article 1.1.1, 2.1.1, 3.1.1, and 5.1.1

Your contract is not open-ended. It is a lump-sum amount that is budgeted for the project. By Statute and per the contract no additional work beyond the original contract and executed amendments is allowed unless agreement is reached on additional work, and an amendment to the contract is fully signed and executed. The Project Manager and customer agency that is funding the project must see a written proposal, reach agreement/approve it, and, if approved, then an amendment must be signed by all parties. Again NO work can be performed until a contract or amendment is fully executed. This is the State’s contracting law and there are no exceptions allowed; DO NOT submit a request for additional fees after work has been performed - it will not be approved.

Other links for the A/E
- Materials Management Division (MMD), see http://www.mmd.admin.state.mn.us/
- Minnesota Department of Labor and Industry, see http://www.dli.mn.gov/main.asp
o Bid Request Form (under "Construction Contracts"), see http://www.admin.state.mn.us/recs/cs/cs-mgf.html
o Consultants Pay Request Form, see http://www.admin.state.mn.us/recs/cs/cs-forms/consultantpayrequest.xls
o Pre Construction Meeting Requirements, see http://www.admin.state.mn.us/recs/cs/cs-forms/preconmtg.doc

Miscellany
o Sustainability is required on all projects, refer to B3 Guidelines, see http://www.msbq.umn.edu/index.html
o Review your contract and deliverables required for each design phase
o No additional work resulting in a contract change/fee adjustment shall be started or performed until approval from the RECS Project Manager is received and funds for the work have been encumbered into the contract.

Communication Expectations
o RECS’s Project Manager shall be copied on all emails and correspondence.
  o Consultant shall confirm the next meeting date within 48 hours of a Progress Meeting.
  o Consultant shall respond to Voice Mail messages within 24 hours.
  o Consultant shall respond to E Mail messages within 24 hours.
  o Update your client (the State stakeholders) with a Monthly Project Report (Appendix D).

The State Project Manager is accountable to our customer agency for delivering all projects within the available budget and schedule and to keep them informed of the status as the project progresses. This is a critical aspect of our business model and thus, we hold our consultants accountable to achieve the same goals. We will be looking for solid information for the updates you provide on the cost and schedule, with emphasis on explanation of budget creep if it occurs and meeting a completion date.
AGENCY SIGN-OFF for
PROJECT CLOSEOUT and ACCEPTANCE

Date: ________________________________

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CLOSEOUT SUBMITTALS/TASKS

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<td>1. I participated and provided input into the creation of the punchlist.</td>
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<td>2. Contractor has completed the punchlist items to my satisfaction</td>
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<td>3. Operations and Maintenance Manuals have been received, reviewed and are acceptable.</td>
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<td>4. A copy of the As-built (record documents) have been received.</td>
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<td>(1 hardcopy and 1 electronic set of specifications and drawings – 3 copies to PMD)</td>
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<td>5. If specified, training has been performed by the contractor</td>
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<td>6. Specified “attic stock” / spare material has been received</td>
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<td>7. Utility rebate documentation has been received.</td>
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<td>8. Final Cleaning by contractor has been completed</td>
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<td>9. Contractor and subs have submitted all IC-134s (for final payment)</td>
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<td>10. Other ________________________________</td>
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PROJECT ACCEPTANCE

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Reason(s) if not accepted:
___________________________________________________________________________
___________________________________________________________________________

AGENCY SIGNATURES:

Agency primary designee:

Printed Name __________________________ Signature ___________________________

Agency Technical or secondary designee:

Printed Name __________________________ Signature ___________________________

Return completed form to RECS Project Manager; PM places a copy in contract file

PROJECT REPORT & FACT SHEET (Short Form) – See Appendix D for long form
Date: January 2050

**Project**
Name: MCF Faribault Expansion – Phase 1  
State Proj #: 78900FLL

**Project Members**
Contracting Agency: Department of Administration, Real Estate & Construction Services-St Paul  
A/E Consultant: XYZ Architects, Inc.  
Contract #: 123456  
Contractor /Construction Manager at Risk: Construction, Inc. (CM@Risk)  
Contract #: 443509

**Budget/Costs**
Funding: Laws 2010 Chap 189 Sec 18 Subd 5  
Project Budget: $47,500,000  
Construction Budget: $39,108,290

**Scope**
- Total Area: 2 stories, 118,800 sq ft (new construction) and 33,000 sq ft of one story renovation. Includes 14,000 sq ft mechanical penthouse, 4,000 sq ft vehicle/equip. storage, and 1,800 sq ft addition to existing main building.
- Program: Functional spaces include support spaces for treatment program and infrastructure (physical plant spaces, food preparation).

**Construction Materials**
- Exterior walls: Architectural Precast Concrete, Brick veneer  
- Interior structure: Structural Steel  
- Interior walls: Gypsum Board on Metal studs, concrete masonry  
- Interior Security: Door Lockdown and detection, and camera surveillance  
- Exterior Security: High Security double row fence with concertina wire (razor wire), motion detection, camera surveillance, and patrol road

**Schedule**
- Current Schedule Status: Design DD Phase- 80% Complete  
- Design Completion/Bidding: August 1, 2050  
- Notice to proceed date- construction: September 21, 2050  
- Substantial Completion date: July 2052

**Current Status**
Construction of Footing & Foundation underway

**Issues**
Poor soils encountered during excavation. Replacement with engineered fill is underway