STANDARD OPERATING PROCEDURE # FDO 3.006

Subject: Project Folder Contents Checklist

Purpose and Scope: Provide project files that enable auditors and FPC staff to review project folders during and after completion. All Project Managers are required to maintain their file folders and ensure that all information shown below is up to date and in the proper tab. The folders will be End-Tab Classification type and will be kept in an accessible office location.

Procedures:

Tab 1 – History
  • Work Orders
  • Project Request Form
  • Scope Statement
  • Contact List
  • Start & Scheduled Completion
  • Building Permit
  • Substantial Completion
  • Certificate of Occupancy

Tab 2 – Correspondence / Reports
  • Correspondence / Meeting Minutes
  • Letters
  • E-Mails/Telephone Notes
  • Transmittals
  • Permit Inspection Reports
  • Field Reports

Tab 3 – Financial Information
  • Estimates and Quotes
  • Fee Proposal Request
  • Fee Proposal Responses
  • Purchase Requisitions
  • Purchase Orders
  • Change Orders
  • Additional Services

Tab 4 – Invoices / Pay Applications
  • Invoices/ Pay Applications
  • Expense / Budget Tracking Spreadsheet

Tab 5- Specifications / Drawings
  • Specifications
  • Cut Sheets
  • Design Documents
  • Addenda
Tab 6 – Close-out
  • Warranties / Waivers / Liens / Affidavits
  • Punch List
  • Close Out Documents Checklist
  • Contractor Evaluation

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