



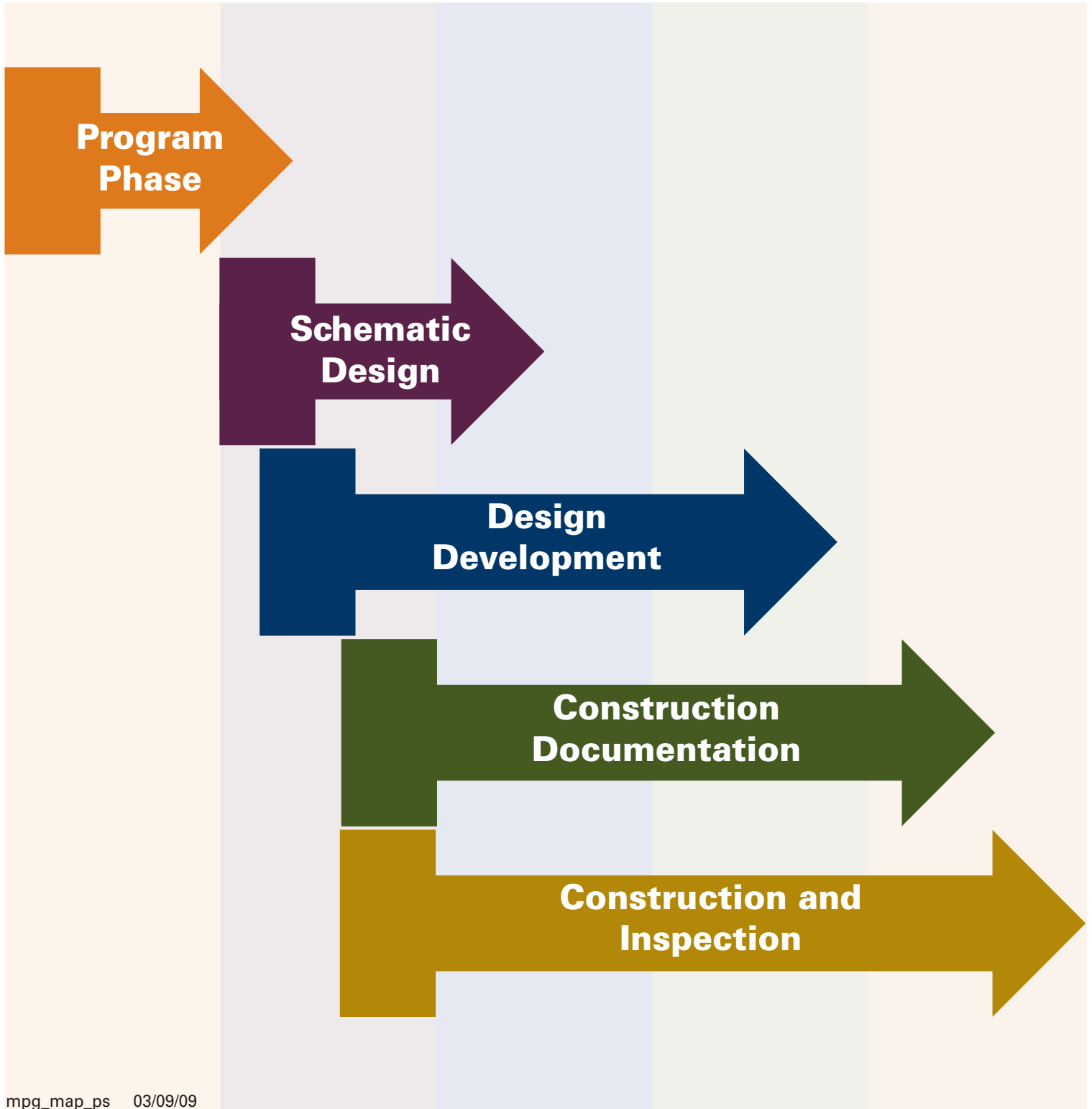
# CITY OF PORTLAND, OREGON BUREAU OF DEVELOPMENT SERVICES



1900 SW Fourth Avenue, Portland, Oregon 97201, [www.portlandonline.com/bds](http://www.portlandonline.com/bds)

**IN PARTNERSHIP WITH: BUREAU OF ENVIRONMENTAL SERVICES, PORTLAND WATER BUREAU,  
PORTLAND FIRE AND RESCUE, AND PORTLAND OFFICE OF TRANSPORTATION**

## Major Projects Group Process



## Program Phase

### Developers

**Intent:** The developer is design team leader and sets the standard for working collaboratively with all interest groups. Establish realistic pro-forma for the project.

- Tasks
- Set goals and vision of the project and define parameters. Establish protocols for collaborative relationship between all parties
  - Establish total estimated cost of project including all related permit fees
  - Establish schedule for duration of construction
  - Establish team, including contractor at earliest possible phase

### Designers

**Intent:** Test program and project intent against budget and site constraints.

- Tasks
- Review local zoning codes (building height/FAR)
  - Define site easements and development restrictions
  - Prepare site survey
  - Prepare multiple massing/block diagrams
  - Prepare \$/SF order of magnitude by program type
  - Prepare initial project schedule outlining documentation and construction time lines
  - Work with process manager to identify all anticipated permit charges and fees, including SDCs

### City

**Intent:** Collect project information from applicant, provide preliminary fee and schedule information, plan work assignments, forecast staffing, and assess policy challenges.

- Tasks
- Brief applicant about the MPG program, roles and responsibilities, and lessons learned
  - Work with process manager to identify all anticipated permit charges and fees, including SDCs
  - Attend early briefing meeting with applicant
  - Consult with applicant regarding proposed project schedule
  - Provide early design review assistance and zoning code information
  - Review geo-technical report
  - Provide MPG team directory and contact info

### Contractor

**Intent:** Formulate budget and preliminary project schedule.

- Tasks
- Note: GC may not be part of team at start of program phase
  - Provide high level budget, schedule and constructability review for program options
  - Provide general site logistics options for hoisting, traffic, earthwork and how they may limit design options.
  - Provide input into initial design bid/permit document schedule

### All Parties Schedule:

- Provide input into projected schedule

## Schematic Design

### Developers

**Intent:** Continue to explore possible configurations/designs/elements and secure financing for same.

- Tasks
- Establish team, including contractor at earliest possible phase
  - Determine multi-phasing and schedule of projects
  - Identify deal-breakers
  - Address FAR and tax abatement issues
  - Request input/response from City to design ideas and changes
  - Request feedback/commitment from the City on design ideas that are alternative approaches or innovations in order to establish feasibility from physical/financial aspects
  - Monitor collaboration/communication between developer, design team and the City during this phase. Ensure City is present

### Designers

**Intent:** Explore building design concept. Develop initial building plans, elevations and sections based upon accepted performance.

- Tasks
- Develop initial floor plans, with options based on building program; finalize on a single plan option for development in next phase
  - Identify and hire engineers and related consultants
  - Study exterior massing, elevations and glazing
  - Develop building sections; establish floor to floor elevations
  - Create physical and computer generated models to explore relationship of building to the site/context
  - Identify mechanical and electrical systems options for study
  - Identify structural system; create conceptual framing plan
  - Meet with City officials to review project scope and schedule; identify significant plan review issues
  - Complete initial code and fire/life safety summary review with City officials
  - Identify areas where code appeals are desired. Prepare supporting documentation; review alternate means of compliance
  - Develop system-based Outline Specification to summarize design intent; provide mechanical, electrical and plumbing narratives
  - Identify sustainability targets; hold eco-charrette
  - Hold pre-application conference with City officials
  - Hold first Design Advice Request hearing
  - Confirm schematic design budget
  - Develop strategy for phased construction and prepare documentation accordingly

### City

**Intent:** Provide early building and zoning code input and guidance to applicant; obtain information from applicant in order to forecast City involvement and challenges; provide input to applicant on design alternatives.

- Tasks
- Attend weekly design team meetings
  - Review schematic design drawings
  - Attend applicant's eco-charrette
  - Review design review schedule
  - Assist applicant with first Design Advice Request
  - Hold PDOT and Parks meeting 1 week prior to DAR to review submission
  - All bureau MPG contacts (including special inspections and inspector) to attend pre-application conference. Use meeting to highlight alternative proposals, projected work in the ROW; encroachments, code, City policy challenges, contractor submittal/special inspections requirements, political involvement and project schedule
  - Hold multi-bureau/agency meetings as necessary
  - Hold PDOT Predesign meeting when appropriate to review schematic drawings and coordinate design considerations with City requirements
  - Review Fire/Life Safety summary and phased occupancy proposals
  - Assist applicant with appeals process
  - Coordinate phased review and plan submittal strategy
  - Identify all anticipated permit charges and fees, including SDCs

### Contractor

**Intent:** Explore alternatives for budget, construction systems and schedule.

- Tasks
- Provide input for Bid and Permit Package schedule and align with construction schedule
  - Provide budgets, and constructability updates for major systems and schematic design
  - Participate in Design meetings and eco-charrette

### All Parties Schedule:

- Discuss strategy for phased permit submittal review and approval

## Design Development

### Developers

**Intent:** Lock in financing/equity at end of schematic or during design development. Communications and collaboration among design team and City agencies essential to enable developer to establish GMP for financing.

- Request comprehensive list of adjusted fees for project
- Complete design review
- Authorize start of early construction
- Authorize design bid contractor selection
- Lock in equity

### Designers

**Intent:** Identify/resolve all major decisions relating to the project design.

- Create site grading, drainage and erosion control plans
- Develop structural plans, foundation plans, framing plans at each floor level and lateral force resisting systems designs
- Identify deferred submittals, notify and confirm with building officials, and incorporate review time into schedule
- Transmit background information to subcontractors for their use in preparing submittal documents
- Identify all interior and exterior building materials
- Develop exterior elevations to indicate all materials used
- Lay out all sheets to be used during Contract Document phases
- Create all building and wall sections to identify wall construction
- Select all mechanical and electrical systems. Determine space requirements, coordinate issues related to interconnection of systems
- Define fire/life safety strategies; review with City
- Identify areas where code appeals are desired. Prepare supporting documentation and review alternate means of compliance with City
- Hold second Design Advice Request hearing
- Identify areas where zoning modifications are desired
- Compile design review application materials; submit to City
- Prepare Design Development project specification
- Confirm cost estimate using systems-based cost estimate

### City

**Intent:** Provide feedback and problem solve major obstacles and code challenges or constraints that have been identified.

- Attend weekly design team meetings
- Hold multi-bureau/agency meetings as necessary
- Assist applicant with second Design Advice Request
- Receive and process design review application
- Update fee estimate for building permit fees and SDC's
- Hold PDOT Predesign meeting during design development when appropriate
- Review 75% or 100% Design Development documents as appropriate
- Review excavation/shoring plans in an early meeting with all bureaus present
- Coordinate interbureau meetings regarding review of excavation and shoring submittal
- Develop, review, and sign hold harmless agreements as needed
- Hold deferred submittal meeting with City representatives including building inspector, special inspections manager and City structural reviewer along with designer, developer, contractor and engineer before related permits are submitted

### Contractor

**Intent:** Prepare detailed cost estimate analysis of construction systems and implementation strategy.

- Confirm purchasing/bid strategy with Owner/Architect defining all design build or design assist subcontractors
- Align bid strategy with bid package schedule and designs initial deferred submittal list
- Confirm bid permit schedule aligns with construction schedule assumptions
- Identify deferred submittals, notify and confirm with building officials, and incorporate review time into schedule
- Continue with budget and constructability reviews
- Provide VE input into major systems and finishes
- Verify that project schedule reflects changes made and permit schedule aligns with construction schedule

### All Parties - Schedule:

- Discuss deferred submittal requirements
- Review plan review time line and schedule
- Complete and timely submittals are key

## Construction Documentation

### Developers

**Intent:** Approve final design, construction budget and schedule. Procure construction financing, execute construction contracts and authorize construction.

- Tasks
- Execute GMP
  - Sign contracts
  - Lock in construction financing
  - Chart marketing decisions and effect on unit plan
  - Shift project lead responsibility to contractor

### Designers

**Intent:** Compile drawings and specifications for use by contractors in bidding and constructing the project. Submit documentation to City to demonstrate compliance with codes and regulations.

- Tasks
- Identify where code appeals are desired. Prepare supporting documentation and review alternate means of compliance with officials
  - Complete bidding and permitting documents. Include annotations to plans and additional details necessary to convey design intent
  - Coordinate work between disciplines to minimize construction difficulties
  - Identify deferred submittal items, notify and confirm acceptance with building officials
  - Complete structural calculations
  - Prepare project manual, general project contracting requirements and conditions for the work, and product/systems specifications

### Construction/deferred submittals

**Intent:** Review bidder-design systems for compliance with building design intent and code compliance. Gain approvals from City

- Tasks
- Transmit background information to subcontractors for their use in preparing submittal documents
  - Upon receipt of completed, stamped, engineered (in the State of Oregon) drawings from the General Contractor, review submittal for conformance with design requirements. Receive additional submittals or revisions as necessary to gain approval of architect/engineer
  - Approved submittal forwarded to General Contractor for review
  - Receive approval from City

### City

**Intent:** Facilitate submittal and review of final building permit plans and deferred submittals.

- Tasks
- Attend weekly job site meetings, inspectors and plan review staff to attend at job site as needed
  - Assist applicant with appeals process
  - Attend specialty meetings: structural review, encroachment challenges, alternative proposals, interbureau/agency problem solving
  - Attend Design Review hearing
  - Facilitate meeting with planners and designers to review collected changes that may lead to an additional land use review
  - Review project schedule, highlighting status of plan submittal and deferred submittal schedule
  - Follow-up deferred submittal meeting with City including building inspector, special inspections manager and City structural reviewer and project team including designer, developer, contractor, and engineer before related permits are issued
  - Monitor documentation process (bid packages, building plan submittals, CCD's and addendum) to ensure accurate records
  - Provide regular status updates on City review of plans
  - Review and issue phased permits

### Contractor

**Intent:** Coordinate and facilitate contract implementation and construction schedule.

- Tasks
- Subcontractor bids and awards
  - Coordinate permit submittals from MEP subcontractors
  - Coordinate deferred submittals from design build/design assist subcontractors
  - Facilitate pre-construction conferences with City inspection team and subcontractors
  - Facilitate coordination of special inspections with Owner's special inspector and City. Includes review of special inspections required and any adjustments by engineer of record.
  - Review and confirm deferred submittal and trade permit fees

### All Parties

**Schedule:** ● Continue to verify alignment of construction schedule with reviews. Communication is key

## Construction Phase

### Developers

**Intent:** Monitor the project development. Collaborate with the marketing, design and construction teams to provide timely decisions to ensure the budget, schedule and design are maintained.

- Tasks
- Authorize phased occupancy
  - Track schedule and budget
  - Track continuing revisions
  - Obtain temporary Certificate of Occupancy

### Designers

**Intent:** Oversee implementation of design concept and documents by General Contractor.

- Tasks
- Attend job site meetings to ensure compliance with project requirements
  - Provide written reports describing activities underway, decisions made, and observations made while on site
  - Provide interpretations of design intent through contractor Request for Information process
  - Modify drawings and specifications to meet changes in project scope or job site conditions
  - Provide copies of modifications to City
  - Transmit background information to subcontractors for their use in preparing submittal documents

### City

**Intent:** Continue the MPG involvement through the construction phase.

- Tasks
- Attend weekly job site meetings
  - Meet with contractor and applicant as needed to address inspection and job site concerns and issues
  - Review and issue plan revisions, phased permits and deferred submittals as necessary
  - Ensure that all conditions of approval and agreements are resolved and conditions met
  - Monitor applicant's documentation process (revisions) to ensure accurate records

### Contractor

**Intent:** Ensure building schedule, budget and designed are maintained.

- Tasks
- Coordinate deferred submittals, inspections and preconstruction meetings with City inspectors
  - Coordinate miscellaneous construction related permits
  - Coordinate constructability or code issues with design and City inspectors as necessary
  - Coordinate inspections, and AHJ reviews required for Certificate of Occupancy
  - Review and confirm deferred submittal and trade permit fees

### All Parties - Schedule:

- Work together to problem solve issues that affect schedule. Communication is key