Purpose:

The purpose of this Standard Operating Procedure is to communicate all known knowledge of the project from the estimator to the project construction team. This meeting utilizes the Pre-Construction Planning Meeting form to initiate team conversations regarding onsite project setup, customer concerns, long lead time concerns, and potential safety issues. This meeting is to occur prior to mobilization onsite.

Procedure:

SCHEDULE PRE-CONSTRUCTION MEETING: No later than one week following the assignment of the Project Manager and Project Superintendent the meeting shall be established.

1) Required Attendees:
   A) Vice-President who supervises the Project Manager
   B) Vice-President of Preconstruction
   C) Project Manager
   D) Project Superintendent
   E) Preconstruction Manager
   F) Sub Step one

2) The Preconstruction Manager will send a calendar invite establishing the time and location of the meeting.

3) The Project Manager and Project Superintendent will be issued contract project documents in advance of the meeting. This needs to occur far enough in advance for their review ahead of the meeting for better dialogue. Should include but not limited to:

   a) Contract Drawings & Specifications
   b) Crain Construction Proposal and Bid Form (if applicable)
   c) Preconstruction Schedule (if available)

   A) PRE-CONSTRUCTION PLANNING MEETING FORM:
      1) 1. This form will be located at the Crain Construction company P:\\ Drive at Forms\01-Office Forms\Pre-Construction Planning Meeting. Print a copy for your use.
      2) Fill in the sections listed on the top of the form including:
         a) Job Name & Number:
         b) Pre-Con Meeting Date:
         c) Mobilization Date:
4) Print a copy of the filled-in form for everyone attending the meeting.
5) 4. Preconstruction Manager responsible for recording notes and comments on their personal copy during the meeting. All other attendees are read-only for each.

B) DOCUMENTS REQUIRED FOR REVIEW AND DISCUSSION:

1) Job Cost Estimate
    a) Should be synced with accounting (ERP) ahead of meeting.
    b) A .PDF copy must be located in the Crain Construction company P:\\ Drive in the project folder labeled Office Estimates.
2) Proposal Clarifications

C) OPTIONAL DOCUMENTS USEFUL DURING DISCUSSIONS:

3) Significant drawings – Site Layouts, Floor Plans, Elevations, etc.
4) Geotechnical Reports and other Supplementary documents
5) Satellite imagery of the project site
6) Specific Subcontractor proposals
7) Preconstruction Manager's Notes and Sketches

D) COMPLETING THE PRE-CONSTRUCTION PLANNING MEETING FORM:

1) Preconstruction Manager to issue out for each attendee a copy of the form, office estimate, and clarifications. Copies of any additional documentation to be discussed can be issued as best determined for review.
2) Preconstruction Manager responsible for leading the discussions, following the meeting format listed on the left column. Take time to discuss each item until there are no questions. Form includes four (4) blank columns for specific notes that should be filled in as applicable:
    a) Action Items
    b) Discussion Notes
    c) Responsible
    d) Completed By
3) This form is not intended as a lecture, but rather intentionally prompting to engage all attendees to consider various perspectives of the project. Preconstruction Manager should allow time for Project Manager and Project Superintendent to include thoughts and opinions.

E) END OF MEETING AND FINAL SIGNATURES:

1) Back page of the Pre-Construction Planning Meeting form includes four signatures that must be filled in by the attendees. This includes:

a) Preconstruction Manager
b) Project Manager
c) Project Superintendent
d) President/Vice-President

F) STORING COMPLETED MEETING FORMS:

1) Upon completion of the meeting, signed forms should be scanned into the Preconstruction Manager's computer. Once it is in a .PDF file format, place copies in two (2) locations:

a) Crain Construction company P:\\ Drive in the Pre-Con & Post Job Meeting folder.
b) Upload to Procore in the project's Documents\Internal Documents\Post Job Mtg folder.
c) Give the completed signed Pre-Construction Planning Meeting form to the Project Manager for their use.

G) FOLLOW-UP MEETINGS (IF REQUIRED):

1) It may be realized during the Pre-Construction Planning Meeting when some facet of the project cannot be finalized or requires more information gathering that a follow-up meeting may be required by all or part of the attendees. A follow-up meeting should be established to ensure there are no open discussions or unknown areas as the construction team heads toward mobilization.

Pre-Construction Planning Meeting

Job Name & No.:_____Pre-Con. Meeting Date: _____Mobilization Date: _____

Discussion Item	Follow-Up Actions	Discussion Notes	Responsible	Completion By
Contract Documents Issued to Project Mgr & Superintendent: ➢ Drawings & Specs (full set) Incl. Addendums ➢ Supplementary Documents ➢ Contract, Proposal or Clarifications ➢ Job Cost Estimate				
Contract Documents Uploaded to Procore Project Management: ➢ Bid Drawings & Specs ➢ Supplementary Documents ➢ Contract, Proposal or Clarifications				
Contract Documents Moved On Crain Construction P:\ Drive: ➢ Bid Drawings & Specs ➢ Supplementary Documents ➢ Preliminary Folder Locked				

Pre-Construction Planning Meeting

Discussion Item	Follow-Up Actions	Discussion Notes	Responsible	Completion By
Precon Mgr Review of Estimate, Scope, Plans & Specs: ➢ Drawings & Specs Incl. Addendums ➢ Clarifications ➢ Job Cost Estimate ➢ Variances Between Contract and Scope ➢ Outstanding RFI's ➢ Estimator Notes and Details				
Project Mgr Discuss Procore Project Setup: ➢ Subcontracts ➢ Purchase Orders ➢ Project Directory ➢ Construction Schedule ➢ Shop Drawings & Submittals				
Discuss Site Setup Items: ➢ Dr's Panel Information ➢ MSDS Information ➢ Trailer, Phone, Radios, Etc. ➢ Federal & State Posters				

Pre-Construction Planning Meeting

Discussion Item	Follow-Up Actions	Discussion Notes	Responsible	Completion By
Discuss Job Strategy: ➢ Potential risks & opportunities for margin improvement ➢ Job sequencing ➢ Crain Strengths & Weaknesses				
Discuss Project Team: ➢ Customer History ➢ Customer Hot Buttons ➢ Subcontractor Concerns & Issues				
Discuss Material Issues: ➢ Long Lead Items ➢ Material Ordering Responsibility ➢ Material Handling, Staging & Storage ➢ Delivery Schedule ➢ Vendor Arrangements				
Discuss Manpower Issues: ➢ Crew Size & Mix ➢ Hiring Needs ➢ Training Goals & Opportunities ➢ Travel & Per Diem ➢ Mileage ➢ Overtime & Off-Hours ➢ Expenses				
Discuss Equipment Issues: ➢ Lifts, Lulls, Cranes ➢ Trash Chutes ➢ Special Tools or Equipment				

Pre-Construction Planning Meeting

Discussion Item	Follow-Up Actions	Discussion Notes	Responsible	Completion By
Discuss Site Conditions: ➢ Extreme Heights ➢ Work Hours ➢ Utilities ➢ Access ➢ Parking ➢ Storage ➢ Trash Removal & Dumpsters ➢ Temporary Heat or Cooling ➢ Existing Operations				
Discuss Schedule Issues: ➢ Sequencing ➢ Starting and End Dates ➢ Shut Downs				
Discuss Safety Issues: ➢ Site Specific Requirements ➢ Emergency Treatment Procedures & Locations ➢ Safety Posters / PPE Requirements				
Other: ➢ Follow-Up Meeting Required? ➢ Forthcoming Design Changes ➢ Additional Pricing Efforts				

Pre-Construction Planning Meeting

Misc. Notes:

Meeting attendees' signatures:

Estimator _____

Project Manager _____

Superintendent _____

President / VP _____