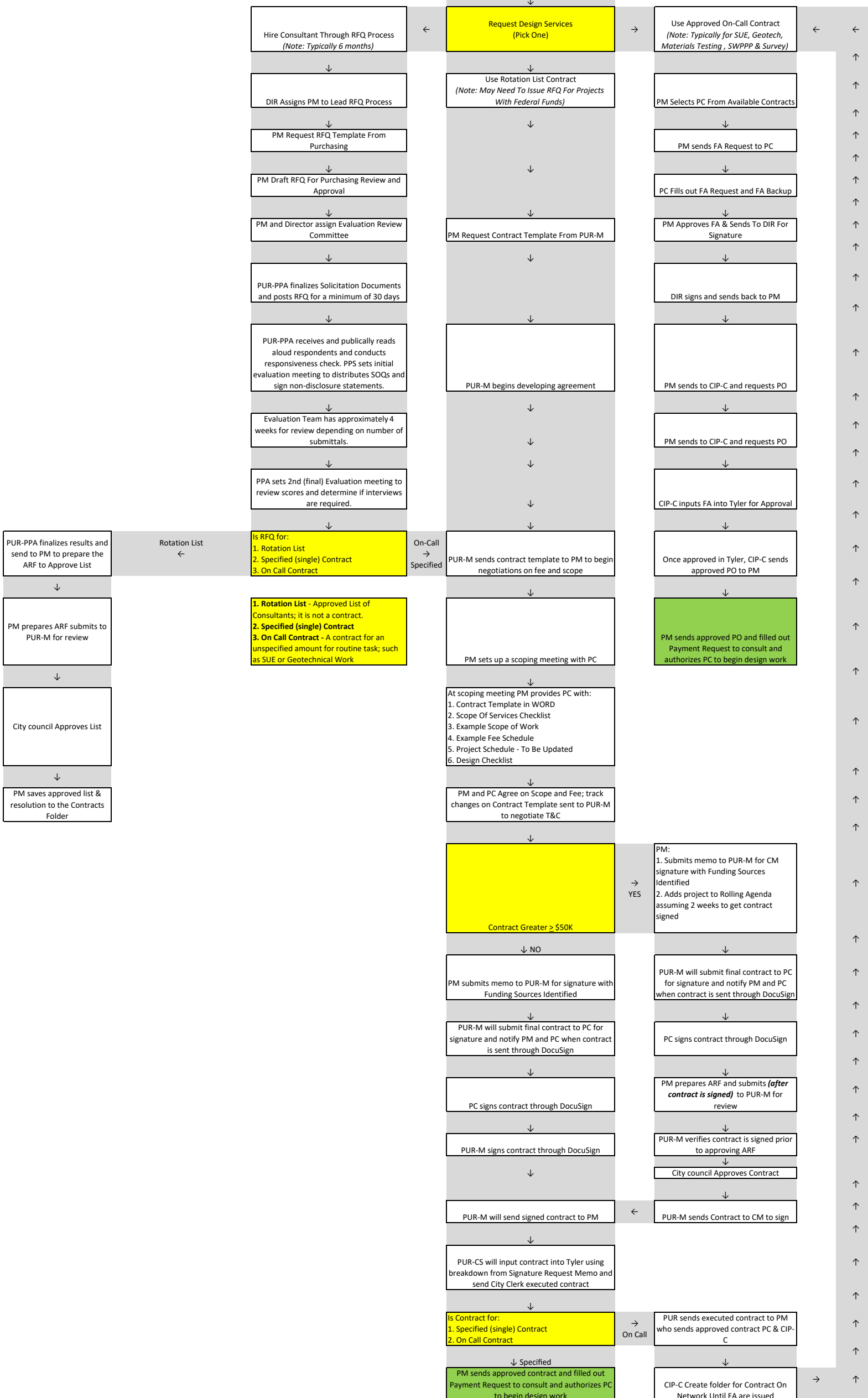
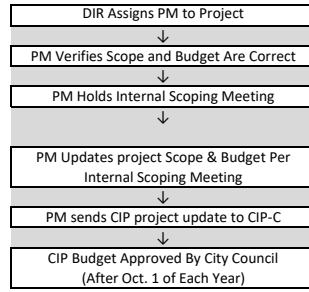
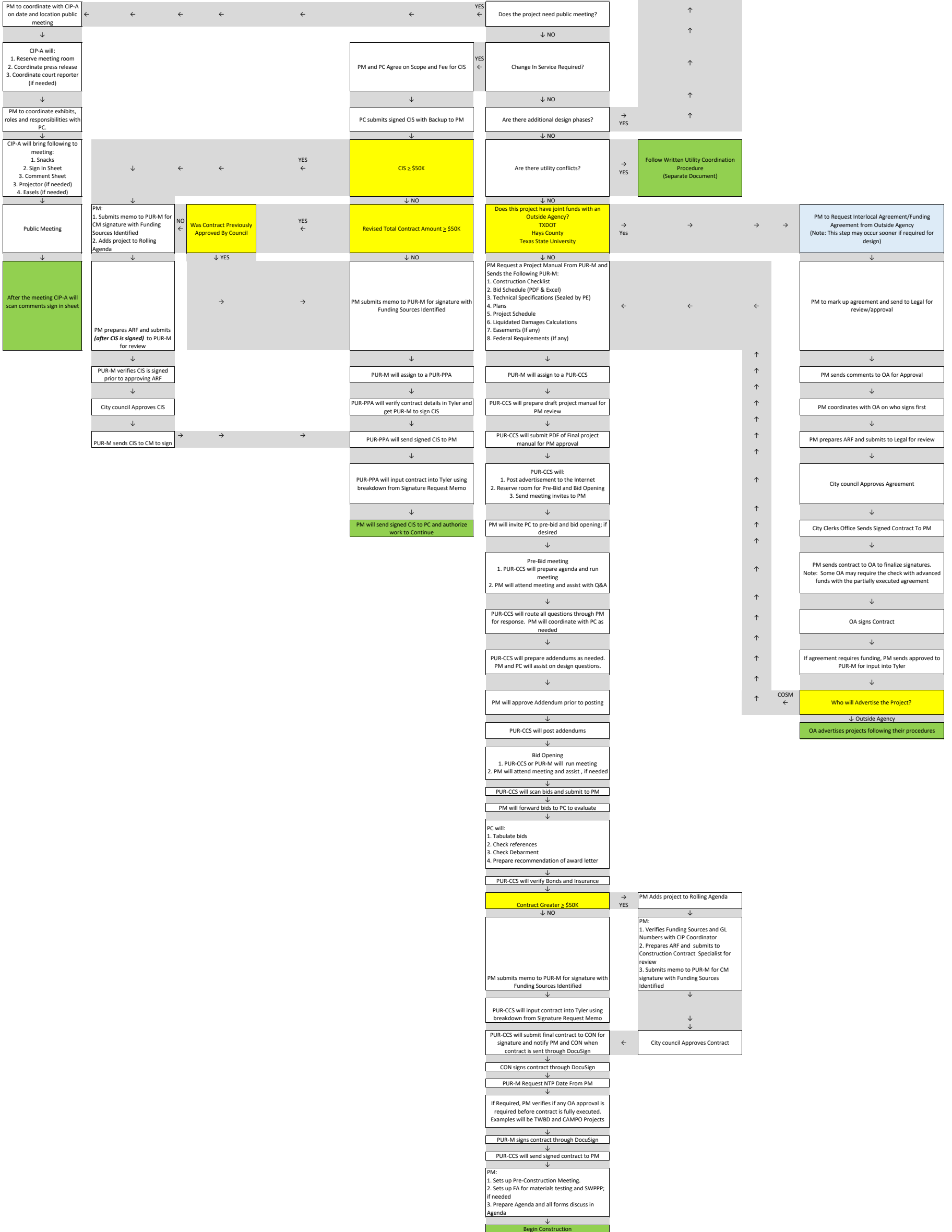


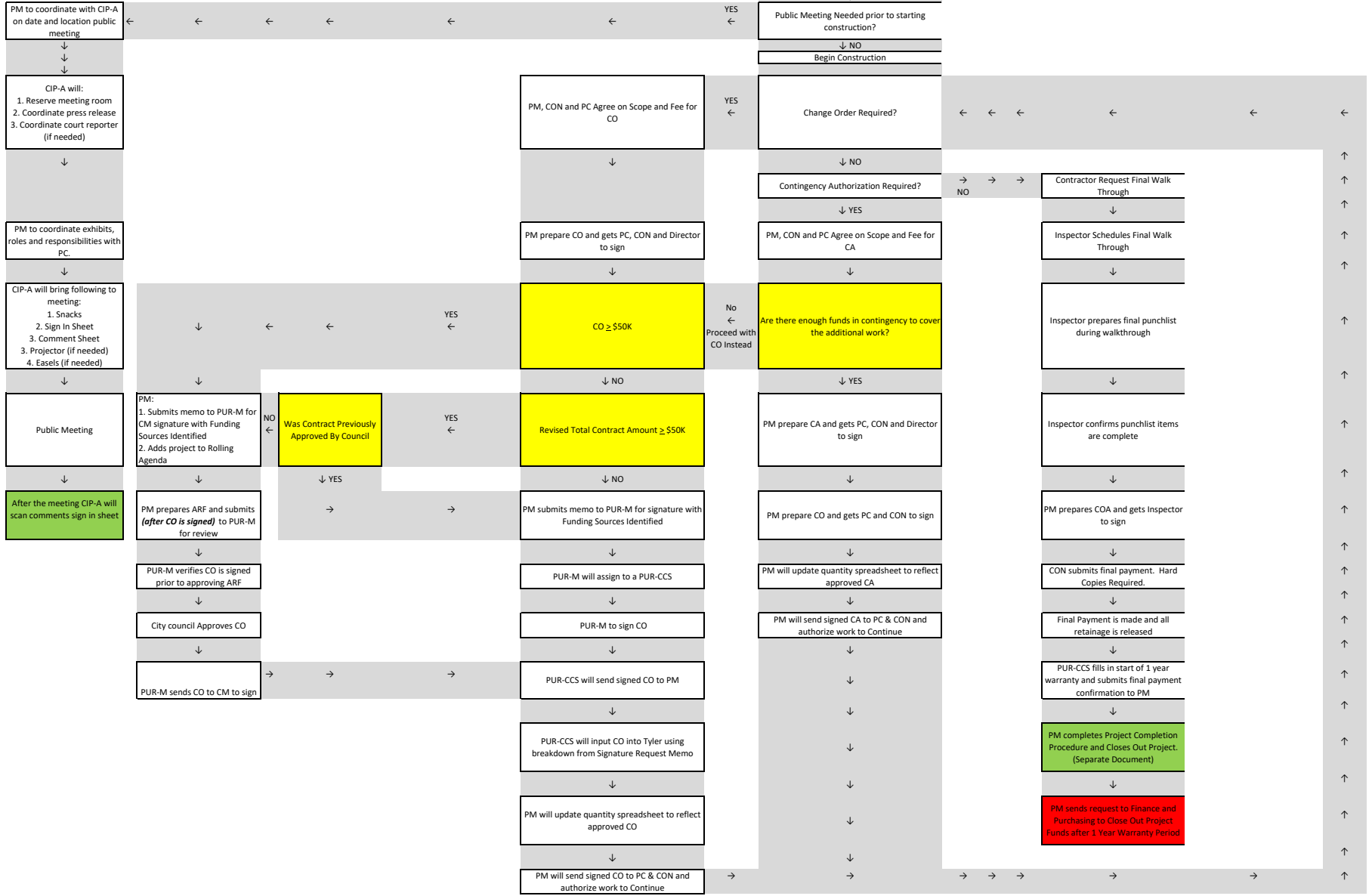
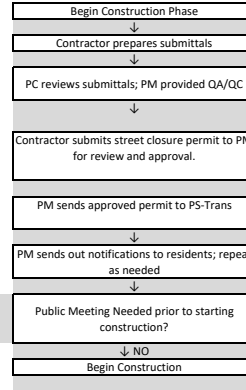
Legend		
Abbreviation	Title	Current Person
PM	Varies	CIP Project Manager
CIP-C	CIP Coordinator	Kayla Foxworth
DIR	Director	Laurie Moyer
PC	Private PC	
PUR-PPA	Purchasing Program Administrator	Veronica Bradshaw
PUR-CCS	Construction Contract Specialist	Rachel Shelton
PUR-M	Purchasing Manager	Lynda Williams
ARF	Agenda Request Form	N/A
CIP-A	CIP Administrative Assistant	Nancy Hyde
CON	Construction Contractor	
PS-Trans	Public Services - Transportation Department	Iris Castro
RFQ	Request for Qualifications	



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City of San Marcos Capital Improvements Department Utility Coordination Procedure

1. **Annual New Projects List** – COSM will send all utilities a list of new projects on annual basis which may contain utility conflicts.
2. **Internal Scoping Meeting** – PM should hold internal meeting 1 year before the project is approved in the CIP.
 - a. Check with water, sewer, drainage and electric to see if they need utilities replaced within the project limits.
 - b. PM to adjust the CIP budget, as needed.
 - c. If PM anticipates conflicts but other utilities don't need to be replaced...add CIP funding to be safe.
 - d. With SMEU; ask them to check the condition of their poles or if they plan to relocate overhead associated with this project. Ask about underground.
 - e. Document with meeting minutes.
3. **Notify Utilities** - Once the CIP for the project is approved
 - a. Send out an email to the utility providers giving them a heads up about the upcoming project. Provide the rough schedule and location map.
 - b. Ask them to provide any maps or if they have service in the area.
4. **Identify Conflicts** - During PER/30 % design phase
 - a. Have the design engineer identify potential conflicts.
 - b. Have the design engineer create a list and corresponding exhibit.
5. **Meet with Utilities after PER** - Set up review meeting after the utility conflict analysis is completed
 - a. Create an agenda
 - b. Update the schedule based off their needs.
 - c. External utilities don't want to start their design until the plans are 100% completed; although SMEU will start earlier if you talk with them.
 - d. City PM will typically have a greater success in getting response out of the utility companies than the design engineer; therefore, it's recommend that the City PM take the lead on this instead of the design engineer.
 - e. Document the meeting with meeting minutes
6. **Notification Letters** – PM to send out notification letters a minimum of 120 days before the utilities need to be moved.
 - a. Required by our ordinances.
7. **Follow Up Meetings** – PM to hold follow up meetings as required.
 - a. Update utilities on plan revisions
 - b. Check their schedule.
8. **Construction Procedure For Utilities**
 - a. Street closure permit is submitted directly to City PM; not the permit center
 - i. City PM approves permit
 - ii. Send permit to Inspection Manager to assign an inspector.
 - iii. Forward approved permit to PS for traffic report
 - b. Attachment Permit is submitted directly to SMEU; not the permit center.

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Revised June 13, 2018

Utility Coordination Procedure

- c. During construction, check installation to make sure the utilities are keeping on assignment and not creating conflicts with minor field adjustments.
9. **Things To Consider**
 - a. Projects that require utility conflicts add 6-12 months to the project schedule
 - b. Water Projects – Typically don't have utility conflicts.
 - c. Street & Drainage Project - 90% of the time you will have conflicts. Keep them on your schedule when you prepare it during the CIP process.
 - d. Don't count on the utilities to identify the conflicts during plan reviews. We need to tell them what needs to move and where.
 - e. I will typically pothole the gas main; they will typically not pothole.
 - f. If your project involves widening the street or adding sidewalk; make sure they use survey to stake the alignments.
 - i. This is an issue with gas; because they don't do it use survey.
 - ii. SMEU will do it if you ask...just make sure your account for it in your budget. They may ask you to have your design engineer stake it....it depends if they design the poles in-house or using a design engineer.
 - iii. You may want to stake the other OH as well...it's your call....but they won't typically survey either.



City of San Marcos
Capital Improvements Project Completion Procedure

The following procedures are to be used for closeouts on all CIP projects.

Please check appropriate box when step is completed.

- _____ 1. **Project Manager** accepted and approved Consultant final invoice once record drawings are approved.
 - a. The consultant’s final invoice cannot be paid until final construction invoice is paid.
 - b. Final invoice must be original documents with signatures; no scanned documents.

- _____ 2. **Project Manager** shall perform the following tasks, when all invoices have been paid:
 - a. Verify hard copies of project documents have been scanned and saved to the file. Hard copies may be recycled.
 - b. Send Certificate of Acceptance to the Administrative Coordinator.

- _____ 3. **Administrative Coordinator** set up a reminder 60 & 30 days prior to warranty period ending in the Warranty Calendar.

- _____ 4. **Project Manager** shall perform the following tasks, after the 1 year warranty is up:
 - a. Copy the emails from the “Public Folder” to the electronic project folder.
 - b. Move the electronic folder from “ActivePrj” to “Completed”
 - c. Verified all invoices have been paid in Tyler and contracts are closed
 - d. Request project close out with Finance

The project is 100% complete and is ready to be closed out by finance:

Completed	N/A	Description
		Design Engineer – Final Invoice Paid
		Design Engineer – Record Drawings Received
		Contractor – Final Pay Application Paid
		Contractor – Certification Of Acceptance Issued
		Materials Testing Firm – Final Invoice Paid
		SWPPP Inspections – Final Invoice Paid
		ROW – Final ROW cost Paid
		Reimbursements – All Reimbursements From Outside Entities Received