

The Owners Project: Submission Standards

Minimum Requirements Checklist

To ensure we provide the highest level of oversight and keep project approvals moving, we've established these **Minimum Requirements Checklists** for all CM and GC submissions.

These checklists standardize the way **Trade Award Requests, Staffing Letters, and PCOs** are presented to the Owner. Our goal is to eliminate the "back-and-forth" by ensuring every request is complete—with all necessary **Request Letters, Attachment summaries, and Backup Documentation**—before the review even begins.

What We Look For:

Trade Awards: We require full transparency to validate subcontract awards. This includes submission dates, comprehensive bid matrices, savings/overrun summaries, and final leveling sheets.

Staffing: To maintain budget integrity, all non-WBS staffing changes or bonus requests must include clear role definitions and rate verifications that comply with the approved GC plan.

Change Orders (PCOs): For any Anticipated or Proposed Change Orders, we require a "deep dive" into the costs. This means detailed breakdowns, a thorough schedule impact analysis, and supporting labor/unit rate sheets are mandatory for every submission.

By adhering to these standards, we ensure that every financial and operational change is validated and audit-ready, allowing the Owner to make informed decisions with confidence.

CM - Trade Award Request Minimum Requirements Checklist		Trade Award Letter
	Item	Required
1. REQUEST LETTER	Detail Request Letter on CM/GC letterhead with submission date.	X
	Clear title with related project and define scope	X
	<i>Timeline of Award Process</i>	X
	<i>Trade Partner's Invited to Bid Matrix</i>	X
	<i>MWLBE Participation Summary statement</i>	X
	<i>List of Alternates (Accept or Defer)</i>	X
	<i>Signature requirements (Owners)</i>	X
2. ATTACHMENT "A"	Attachment A - Summary of Award Breakdown	X
	<i>Bid Package Buy Target List</i>	X
	<i>Sub Contract Award Value</i>	X
	<i>Hold Lists</i>	X
	<i>Total Savings / (Overrun)</i>	X
	Trade Partner Allowance List	X
	Summary of Award Based on Approved Budget	X
3. BACKUP DOCUMENTATION	Final Closing Notes & Record of Negotiation	X
	Trade Partner Signed Scope of Work Pages	X
	Final Leveling Sheet	X
	Bid Recording Sheets	X
	Copy of applicable Labor Rate Sheets for Review and Approval	X
	Copy of applicable Unit Rate Sheets for Review and Approval	X
4. OTHER		

Staffing Letter (Non-WBS Process) Minimum Requirements Checklist <i>Example: CM staffing changes, or bonus request</i>		Staffing Letter (SL)
	Item	Required
1. REQUEST LETTER	Detail Request Letter on CM/GC letterhead with submission date.	X
	Clear title with related project and define scope	X
	<i>Summary Breakdown including:</i>	X
	<i>Employee Name</i>	X
	<i>Project Start Date</i>	X
	<i>Project Role</i>	X
	<i>Project Involvement - Full or Part Time (%)</i>	X
	<i>Budget Rate Estimate</i>	X
	<i>Current Rate</i>	X
	<i>Requested New Rate</i>	X
	Confirmation that new request maintains the approved GC Plans	X
Signature requirements (Owners)	X	
2. BACKUP DOCUMENTATION	Resume (for New Employees Only)	X
	Copy of Staff Monitor Report with noted request	X
	Copy of GC Plan with noted request	X

Potential Change Order Request Minimum Requirements Checklist		ANTICIPATED CHANGE ORDER	PROPOSED CHANGE ORDER	PROPOSED CHANGE ORDER Scope Holds or Scope Transfers Approval Letter (AL)
	Item	Required	Required	Required
1. REQUEST LETTER	Detail Request Letter on CM/GC letterhead, numbered, with submission date.	X	X	X
	Clear project and scope title with defines change event	X	X	X
	Detail scope and reason for change	X	X	X
	Define Reference Documents	X	X	X
	Type of Change (Select One)	X	X	X
	<i>Additional Phase / Unbought Scope</i>			
	<i>Unforeseen Condition</i>			
	<i>Design Errors / Omissions</i>			
	<i>Owner Change in Scope</i>			
	<i>Coordination</i>			
	<i>Schedule Change</i>			
	<i>Client Requested Change in Scope</i>			
	<i>Closeout</i>			
	<i>Alternates</i>			
	Schedule Impact (if any)	X	X	X
Cost Allocation Summary Breakdown	X	X	X	
<i>Includes PCO #, Trade Partner, Description, Amount Proposed</i>	X	X	X	
Exposures drawdown process. For T&M scope, use hold-withdrawal request letter process			X	
2. COST BREAKDOWN SHEET	CM Estimated Cost Breakdown Worksheet	X		
	<i>Includes: Item Description, Quantities, Unit Type, Unit Rates, Total Cost. (see Attachment-1 example)</i>	X		
	<i>If multiple trade partners listed in single PCO, please breakdown by trade partner (sub) with name and subtotals.</i>	X	X	X
2. COST BREAKDOWN SHEET	CM Proposed Cost Breakdown Worksheet		X	X
	<i>Breakdown of subcontractor proposed values on left side with CM evaluated/adjusted values on right side (see Attachment-2 example)</i>		X	X
3. BACKUP DOCUMENTATION	Trade partners detail, dated, proposal with Labor and Material cost breakdown		X	X
	Copy of approved applicate Labor Rates	X	X	X
	Copy of approved applicate Unit Rates sheet	X	X	X
	Copy of Contract Documents (if applicable)	X	X	X
	Copy of "Project Detail Budget Report" line items summary			X
	Copy of "Sub Contract Award Letter" with highlighted Hold item			X
	Reference documents attachments (Summary sheets for large sets)	X	X	X