



COUNTY OF SAN LUIS OBISPO
 DEPARTMENT OF PLANNING & BUILDING
 Table of Contents: Public Facilities

HSG-3004
 07/25/2018

PROJECT MANAGER: _____

Initials	Date Completed	Item	Supporting Documents	Notes
Position 1 – Application/Award – Overall Grant Management				
		1	Project File Table of Contents	
		2	Project Eligibility Summary Form	<i>Completed by County Staff</i>
		3	Subrecipient Contacts and Org Chart	
		4	Subrecipient Application	<i>Include attachments requested, such as Audit</i>
		5	Subrecipient Agreement – Exhibit A	
		6	Letters & correspondence with the County	
		7	Amendments	
		8	Subrecipient written procedures <ul style="list-style-type: none"> ➢ Grant management (Including eligibility documentation) ➢ Purchase and financial procedures ➢ Procurement policies & procedures 	
		9	Subrecipient Proof of Insurance	
Position 2 – Pre-Activity Delivery				
		10	Environmental Review	<i>Completed by County Staff</i>
		11	Permits	<i>(as needed)</i>
		12	Procurement documentation <ul style="list-style-type: none"> ➢ Project cost analysis/Estimate ➢ Bid Packet & Addendums ➢ Advertisement of Bid/Affidavit ➢ Bids/Quotes Received ➢ Pre-Bid Meeting Sign-in sheet ➢ Bid award ➢ Wage Determination Lock-In Notice ➢ Applicable Federal Wage Decision 	<i>(Small purchases, professional services, or competitive sealed bids, depending on project)</i>
		13	SAM checks for contractors/subs	
		14	Contract Award Decision - Minutes	
		15	Subrecipient/Prime Contractor Contract	
		16	Contractor/Subcontractor Contracts	
		17	Pre-construction Meeting Acknowledgement	
		18	Contractor & subcontractor certification forms	
		19	Proof of Insurance of contractor/subcontractor	
		20	Contractor/Subcontractor Licenses & Bonding	
		21	Wage Decision Lock-In Form	
		22	Notice to Proceed to Subrecipient	
		23	Final project plans/specs	
		24	MBE/WBE Documentation	<i>(as needed)</i>
		25	Section 3 Documentation	<i>(as needed)</i>
		26	Client Eligibility Documentation <ul style="list-style-type: none"> ➢ Income Eligibility 	
Position 3 – Activity Implementation				
		27	Land Acquisition <ul style="list-style-type: none"> ➢ Title Report ➢ Purchase Agreement ➢ Property Acquisition Notice 	
		28	Displacement & Relocation Plan	
		29	Construction	

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			<ul style="list-style-type: none"> ➤ Daily reports from site manager ➤ Change orders ➤ Lead based paint ➤ Section 504 	
		30	Davis Bacon and Related Acts Documentation <ul style="list-style-type: none"> ➤ Proof of posters on site ➤ Weekly certified payrolls ➤ Applicable federal wage decision ➤ Labor interviews 	
		31	Signed off Permits	
		32	Financial <ul style="list-style-type: none"> ➤ Ledger of eligible expenses ➤ Payment requests, including documentation of expenses <ul style="list-style-type: none"> ○ Purchase Receipts ○ Invoices 	
		33	Quarterly Progress Reports	(Exhibit E)
		34	Final Completion Report	
		35	Construction – photo documentation <ul style="list-style-type: none"> ➤ Posters on site 	
POSITION 4 – POST ACTIVITY / MONITORING				
		36	Single Audit (most recent)	
		37	Lien releases	
		38	Recognition of project completion	<i>By city council, architect or engineer – may include public hearing minutes</i>
		39	Final change order	
		40	As-built drawings	
		41	Consent of Surety	
		42	Walk-through inspections	
		43	Previous monitoring findings/concerns	
		44	Monitoring Notification Letter	
		45	Monitoring Report Letter	
		46	Subrecipient Response to Monitoring Findings	
		47	Monitoring Risk Assessment	<i>Completed by the County project manager in the final closeout stage</i>