

Work Plan Checklist/Template

The Work Plan Checklist/Template serves as a general outline to follow while completing a Work Plan. This document will serve as guidance in completing a broad scope of work plan size and complexity therefore, use of the Checklist/Template will vary and not all fields will apply to all projects. For smaller projects, completing the check list and adding text to the form with minimal attachments may be sufficient. For more complex projects with work in multiple categories, use of the document as a check off list with attachments will be necessary. Please be as comprehensive as possible to assist in an efficient review and approval process. The Work Plan Checklist/Template also provides an example Work Plan for reference. This document is available in electronic fillable pdf format on the MMSD website.

Municipality:

Type of Work:

- ☐ A. Planning and Design
- ☐ B. Investigative
- ☐ C. Construction, Implementation, Rehabilitation (CIR)

- ☐ 1) Cover Letter:
 - a. This should consist of a letter originating from the Municipality
 - b. Identify the **Type** of work.
 - c. Include a brief description of the work, the basis for the scope of work chosen, and who will be carrying out the work plan, e.g., professional service providers, internal resources, etc.
- ☐ 2) Map of the municipality system or project sewershed.
 - a. This map should offer an overview of the entire system or the sewershed of which the project resides within.
- ☐ 3) Map of project area.
 - a. This map should be a larger detail map of the specific area of work with relevant municipal features identified, e.g., manholes, pipe function (sanitary, storm, or combined), mainline pipe id, mainline pipe types/sizes, pump stations as well as project specific private property addresses affected by the work.
- 4) Background information including the basis for choosing the targeted area.
 - a. For Planning and Design work this may include historical data, observations, flow data, etc.
 - b. For Investigative this may include recommendations from design/planning work, historical data, observations, flow data, etc.
 - c. For CIR work this may include recommendations from investigative work, previous televising reports, house inspection report summaries, design analysis, other relevant documentation, etc.

☐ Narrative:

☐ Attached Documents

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- 5) Description of work to be performed including strategies and methods.
- a. For Planning and Design work this may include investigative data analysis, flow data analysis, plan and specification creation, etc.
 - b. For Investigative work this may include storm water data collection, lateral televising, dye testing, flow monitoring, house inspections, surveying, etc.
 - c. For CIR work this should include materials to be used and the basis of these selections such as engineering report recommendations, contractor recommendations, Municipality standard specifications, etc.

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Narrative:

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- 6) For CIR work, if plans have been prepared, e.g., excavations, new construction; please submit a print copy and efile pdf of final plans sealed by the designer and endorsed by Municipal official.

- 7) Public information and education (I&E) plan. Who is completing the I&E effort and how is the information being distributed?

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- 8) Cost estimate of work proposed including as much detail as available. If work is being completed internally, a cost estimate of internal labor by category, e.g. engineering, planning, utility personnel, etc.; should be included in the cost estimate.

- a. For Investigative and CIR work

- i. include quantity and value of unit bid items, e.g. number of lateral to be televised and cost/lateral, number of house inspections and \$/inspection, number of laterals to be lined and \$/ft of lining, number of footing drain disconnects and \$/each, etc.
- ii. Separate costs for professional services such as engineering and field inspection.

- 9) Schedule of work

- a. For Planning and Design work include start date, milestones, and date of anticipated completion.
- b. For Investigative and CIR work, include mobilization date, progress milestones, and date of anticipated completion.

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- 10) Estimated schedule of reimbursement requests to the District. (Monthly progress payments, single request at the end of the project?)

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- 11) What will the procurement process be? e.g., public bid, RFP, individual homeowner, etc.

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- 12) If applicable, data that will be collected, media type in which it will be collected, and format of the data storage.

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- 13) Goals and anticipated outcomes of the work.

- a. For Investigative work and CIR work include means and methods that are anticipated to be used to establish a pre-work baseline. What will define the measure of success for the work?

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- 14) Outline of proposed project completion report including strategy for documenting and reporting lessons learned throughout the project.

- a. For Design and Planning this may simply include the final plans and design report.
b. For Investigative and CIR work, this should include summary of results, defect scoring, test results, results of analysis, etc.

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- 15) Photo and/or video documentation plan including file management, types of media to be used and storage format. Comprehensive photo documentation will be a useful resource for the Municipality for reporting and presenting results and should be expected from the consultants and contractors that are hired to complete the work.

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- 16) For CIR work, a summary of tests and methods planned for verification of successful completion of work including plans for documenting, e.g., field inspectors; post work video, pressure testing, exfiltration testing, etc.

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- 17) For CIR work, plan for tracking work quality, integrity, and performance, e.g. flow metering, run time meters, warranty inspections, surveys, etc.

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