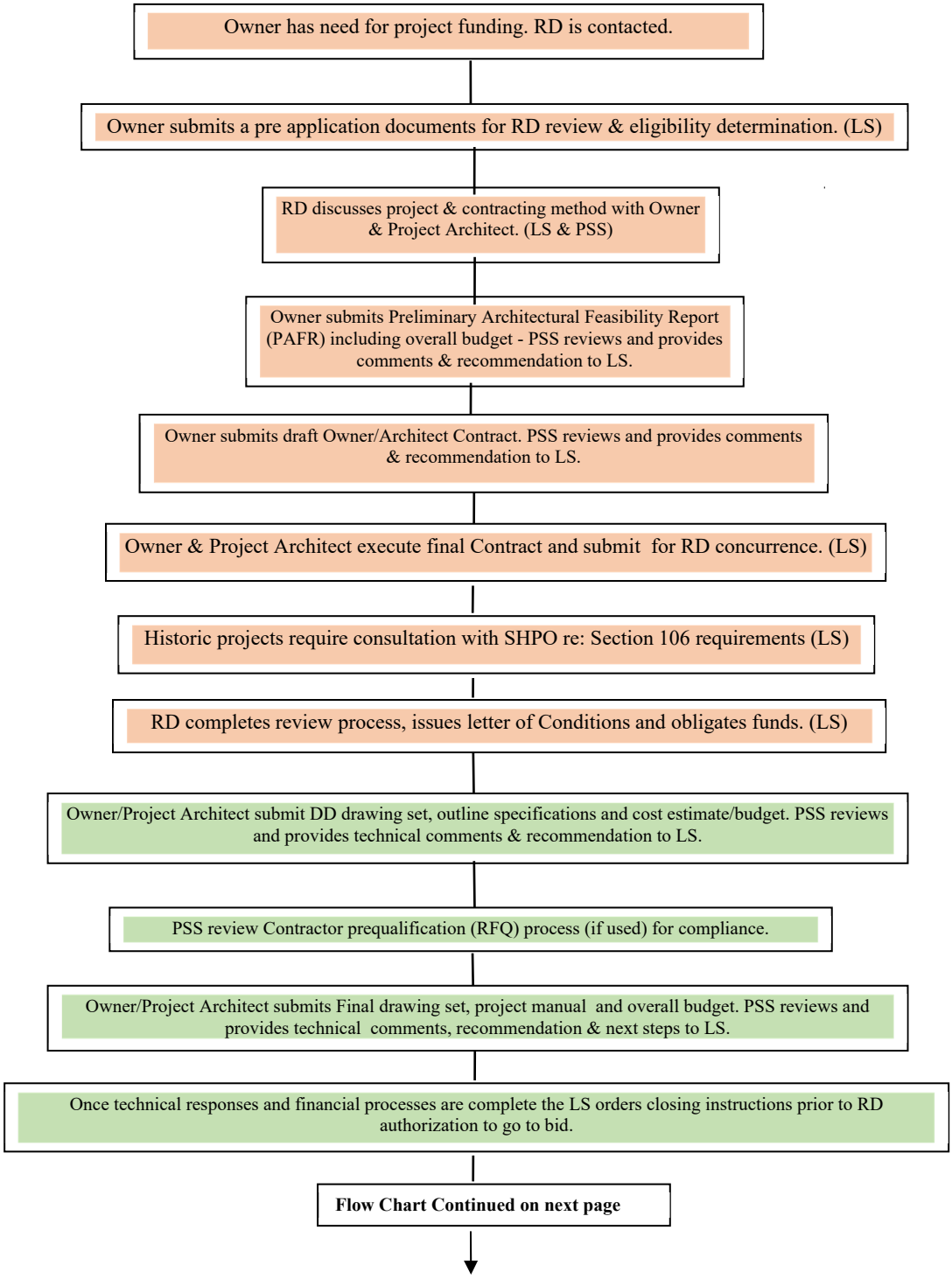
Community Facility Loans/Grants Process Flow Chart



LS receives closing instructions from OGC and notifies the Owner by email/letter they are authorized to go out to bid.

Owner/Project Architect advertises for bids, issues addenda, receives bids and performs bid opening.

Owner/Project Architect submit Bidding Documentation. PSS reviews and provides comments & recommendation to LS.

LS gives concurrence for Owner to issue Notice of Award.

Owner/Project Architect submit draft of required Contract Documentation. PSS reviews and provides comments and recommendation to the LS. PSS works w/ Owner/Project Architect to make sure all required documentation at this stage is in order prior to a preconstruction conference.

Owner submits executed Construction Contract and bonds. PSS reviews and provides comments and recommendation to LS. Confirm all documentation is in place and set Preconstruction Conference date.

Preconstruction conference is held with Owner, Architect, Contractor, Resident Inspector, RD representatives and others as needed. Include use of RD form 1924-16 Record of Preconstruction Conference or similar (LS & PSS)

With all documents in place and Precon complete, RD gives concurrence for Owner to issue Notice to Proceed. (LS)

Owner, Project Architect, RD, and other funders as required, review and approve monthly pay applications. RD signature cover sheet with AIA. Soft costs are also reviewed and approved per the Owner's (MPBR) monthly project budget report. (LS & PSS)

All change orders must be approved by the Owner, Project Architect, and RD prior to the work being completed and being included in a pay application. RD signature cover sheet with AIA and detailed backup for PSS review. (LS& PSS)

Owner, Project Architect, Contractor, Clerk of Works & RD representatives attend substantial completion inspection. Project Architect records results in the form of a punchlist and provides copies to all interested parties.

Project Architect provides copy of Substantial Completion Certificate & punchlist with values. Once punchlist work and required documentation is complete, retainage is released for final payment and Loan Closing.

A final inspection will be made by the Owner, Project Architect, and RD before final payment is made.

Deliver As-built plans and O&M manuals to the Owner & RD for record. Thumb drive or electronic file.

Project Architect, Owner, and RD representative perform 11-month inspection. If no items of concern noted during the inspection the project is complete. (LS)