City Engineer: Jim Wolfe

Public Projects Principal Engineer: Andrew Zwieg

Sanitary Sewer Principal Engineer: Mark Moder

Senior Water designer: Adam Wiederhoeft

Storm Sewer Principal Engineer: Janet Schmidt

Rain Garden designer: Phil Gaebler/Sarah Lerner

Vegetation Coordinator: Maddie Dumas

Traffic Engineering Operations and Safety Section Head: Sean Malloy

Assisted City Traffic Engineering Director/Pedestrian Bicycle Administrator: Renee Callaway

Signal/Lighting Section Lead: Dave Hansen

IT Fiber Manager: Taletha Skar

GIS Specialist: Lesley Parker

Landscape Architect: Carrisa Wegner

Engineering Public Information Officer: Hannah Mohelnitzky

**City of Madison Engineering Street and Paths Public Project Task List**

Project number: \_\_\_\_\_

Project name: \_\_\_\_\_\_\_\_\_\_

Project limits: \_\_\_\_\_\_\_ to \_\_\_\_\_\_\_

1. Determine contract number.
2. Determine the Alder name and district.
3. Create basemap from original field survey drawing (basemap is the survey with no elevations associated).
   1. Tree sizes (in inches) need to be in the basemap drawing.
      1. Complete in the field survey drawing and copy to the basemap drawing.
      2. Place all tree (TR and TRE) cogo points into a point group called TREES\_ALL.
      3. Create a new point label style MSN FULL DESC ONLY by copying MSN DESC ONLY and changing the text to Full Description (Layout>>text in the layout style composer) and then applying that label style to TREES\_ALL.
      4. Change the text to be colored “by layer” and change the text size to 0.06 for both regular and dragged state.
      5. Under Toolspace>>Settings>>Point>>Description Key Sets, adjust the MSN Survey keys for TR and TRE.
      6. Under the ‘format’ column, change the entries to $1”, which maps to the second word typed (after a space) in the raw description, adds a quotation mark for inches, and outputs the result to the full description.
      7. Under Prospector, right click on TREES\_ALL, apply description keys.
      8. Copy to basemap drawing.
   2. Check basemap with existing conditions, does the survey match what’s out there?
4. Review ownership drawing, use existing plats as a guide for checking R/W and property lines.
   1. Add property owner names to the drawing.
      1. See workflow: M:\DESIGN\C3D\Workflows\Parcel Labeling
5. Ask Streets GIS Specialist to create project location map.
6. Check w/Public Projects Principal Engineer, Sanitary Sewer Principal Engineer, or Storm Sewer Principal Engineer about who the sanitary and storm designer is.
7. Check w/Public Projects Principal Engineer or Senior Water Engineer (Water Utility) about who the water designer is.
8. Check w/Public Projects Principal Engineer or Traffic Engineering Operations and Safety Section Head (Traffic Engineering) about who the traffic designer is.
9. If project may include street lighting and/or traffic signal work, check w/Signal/Lighting Section Lead for assigned engineer.
10. Check who the Forestry contact is and ask for the existing Tree Inventory spreadsheet.
11. Review if archaeology areas overlap the project boundary. Coordinate with Sewer Section Landscape Architect.
12. Set up Project Schedule and determine preliminary dates for project milestones.
13. Create project overview exhibit showing an aerial photo, street names, and approximate project limits.
    1. Add it to the survey folder in the CAD directory.
14. Setup assessment district
    1. Complete assessment declaration document.
    2. Contact Alder and get their sponsorship to establish the assessment district. Attach the assessment declaration document and overview exhibit.
    3. Assessment declaration document and Alder sponsorship due to BPWagenda ([BPWAgenda@cityofmadison.com](mailto:BPWAgenda@cityofmadison.com)) email a minimum of 1 week before the BPW meeting by 12pm.
       1. This will go to BPW and CC.
15. Setup a kickoff meeting with all project designers, IT Fiber (IT Fiber Manager), traffic engineer (Assisted City Traffic Engineer & Pedestrian Bicycle Administrator), & metro (Tim Sobota) to determine the scope of the project.
    1. Remind team that PnP sheets are required prior to the BPW meeting.
    2. Here are a few questions to think about.
       1. Are we replacing sanitary sewer? Storm sewer? Water main? Signals/Lighting? Are there impacts to City fiber or new City fiber needs?
       2. Why is this project budgeted for construction?
       3. Are we maintaining the existing street width?
       4. Does the street need traffic calming?
       5. Is this project in a sidewalk replacement district during construction?
       6. How will the design of this project implement complete green streets (CGS)? Begin/work on proposed geometry and/or design alternatives in street drawing(s).
          1. Identify CGS street type, including widths of various street components and any overlays.
16. Create PIM mailing list.
    1. Send a map which clearly shows mailing boundary to the GIS Specialist.
17. Schedule Virtual PIM (Alder and Engineering Public Informational Officer must be available).
    1. Email Alder potential dates.
    2. Discuss scope and include project map.
    3. Once Alder approves dates, send to the Engineering Public Informational Officer and project team (including Alder and any other stakeholders) Outlook meeting invites “holding” the date.
    4. Consider any other necessary meetings with stakeholders – are there businesses adjacent or near the project? Schools? Parks? Neighborhood or advocacy groups (examples – neighborhood associations, “Friends” groups such as Lake Wingra, Starkweather, etc.)
    5. Use these links for public meeting mailings and presentation examples: <https://www.cityofmadison.com/employeenet/engineering/communications/documents-templates>
    6. <https://www.cityofmadison.com/employeenet/engineering/communications/public-engagement-program/public-involvement-plan>
18. Establish project schedule (30% plans, PIM, assessment mailing, 60% plans, BPW, CC, bidding, construction, etc.) and send to designers.
19. A meeting with Alder to discuss scope and schedule may be required Begin/work on project website creation document.
20. Begin/work on public questionnaire document using a new standard template (do not copy/paste from past project).
    1. Will Terrace Rain Gardens be offered (check with rain garden designer)? Will Native Terrace Plantings be offered (check with Vegetation Coordinator)?
    2. Any additional questions about traffic calming or street design alternatives?
    3. Adjust standard template to suit project type – if resurfacing, maybe driveway apron question is not included.
21. Send to Public Projects Principal Engineer for review.
    1. Send to City Engineer to review once Public Projects Principal Engineer signs off.
    2. Once City Engineer signs off, send to Engineering Public Informational Officer to create it in survey monkey.
    3. Send Engineering Public Informational Officer a meeting invite to remind them when to close the survey.
    4. Close the survey 1 week after public meeting at 5pm.
    5. Send Engineering Public Informational Officer a meeting invite the day of the PIM to gather preliminary survey results, if needed.
22. Site visit.
    1. Invite Sewer Designer, Water Designer, and Forestry.
    2. Bring preliminary PnPs showing basemap, aerial for referencing and taking notes.
23. Create PIM (postcard and/or letter) mailing materials (must be approved by City Engineer before sending).
    1. If postcard is sent, an email needs to be sent notifying design team and stakeholders of the meeting.
    2. Add “hard copy” questionnaire language to the postcard.
    3. Public Projects Principal Engineer need to review and approve mailing materials before sending to City Engineer
    4. City Engineer needs to review and approve mailing materials ahead of sending to admin.
    5. Postcard and/or letter needs to be sent to EnAdmin ([enadmin@cityofmadison.com](mailto:enadmin@cityofmadison.com)) email 3 weeks before the meeting so it can be mailed 2 weeks before the meeting.
24. Send 30% plans to Public Projects Principal Engineer for initial review. Plans should have a minimum of horizontal layouts for streets and utilities. Private utilities should be labeled on the plans.
25. Create potential conflict map for private utilities on 30% plans and send to utilities in the project limits.
26. Create PIM presentation.
    1. Email (PDF) final presentation to Engineering Public Informational Officer the day of the meeting to post to the website.
    2. Add Complete Green Streets and Vision Zero slides to the presentation.
    3. Setup meeting with Alder ahead of PIM to discuss the presentation.
27. Hold PIM.
28. Present to the Transportation Commission (TC) (if applicable).
    1. PowerPoint presentation & overall CAD exhibits may be needed.
    2. Send to Traffic Engineering, Ann Kovich, [annelizabethkovich@gmail.com](mailto:annelizabethkovich@gmail.com) and Aidan Larson, [ALarson2@cityofmadison.com](mailto:ALarson2@cityofmadison.com) the Thursday before the meeting.
    3. TC attendance guidance.
       1. Once your agenda item comes up, turn your camera on.
       2. Introduce yourself.
       3. Start by telling the TC why you’re here. Seeking TC recommendation for (*project name*) (*from where to where*).
       4. Share your screen with the presentation.
       5. Follow a presentation. (if applicable)
       6. Provide information on CGS components of the project and how that was factored into design
       7. Once finished explaining the project, ask if there are any questions.
29. Help Pedestrian Bicycle Administrator W/Complete Green Streets Checklist.
    1. Pedestrian Bicycle Administrator creates it, designer reviews it.
30. Create assessment spreadsheet (http://enfme/fmeserver/apps/ScheduleOfAssess).
    1. Begin calculations.
31. Create assessment letter and fact sheet.
    1. Include information about private tree pruning, if appropriate.
32. Finalize assessment spreadsheet, letter, and fact sheet for mailing.
33. Work w/admin to mail assessments 10 days before Board of Public Works (BPW) date.
    1. The mailing 10 days before the BPW is required per state statute.
    2. Public Projects Principal Engineer needs to review and approve mailing materials before sending to City Engineer
       1. Send to Principal Engineering a minimum of 1 week prior to mailing date.
    3. City Engineer needs to review and approve mailing materials ahead of sending to admin.
       1. Send to City Engineer a minimum of 3 days prior to mailing date.
    4. After assessments are mailed, copy the assessments (excel & PDF) to the folder.
       1. F:\Encommon\Assessments\(year folder).
34. Email Alder project schedule ahead of BPW meeting to remind them of the project. (\*Important\*).
35. BPW preparation items.
    1. Get budget accounts from Chase to formulate cost estimate.
    2. Formulate cost estimate (For BPW).
       1. Need lump sum cost estimates for all accounts. Request deadline from designers at least the Friday before the BPW deadline.
          1. Confirm cost estimates with Engineering Accounting, Chase Obrien.
    3. Create BPW exhibits.
    4. Overview exhibit w/sewer & water proposed line work, plan set (if available), and questionnaire results.
    5. Create BPW project notes.
    6. Public Projects Principal Engineer needs to review and approve mailing materials before sending to City Engineer
    7. Send BPW items to the BPW agenda email.
    8. Include a paragraph (3-5 sentences) describing the project, which will be placed on the agenda.
    9. Update project website informing residents of date/time of BPW meeting.
36. Create title sheet.
37. Create typical section sheet.
38. Send 60% plans (title sheet, typical sections, street plan/profile sheets, and storm plan/profile sheets) to utilities (MGE, Spectrum, AT&T, etc.).
    1. Continue to follow up w/utilities until conflict/coordination/their work is complete.
    2. Email the week of the BPW meeting.
39. Attend BPW (zoom), present design and ask for approval of design, specifications, and assessments.
    1. BPW attendance guidance.
       1. Once your agenda item comes up, turn your camera on.
       2. Introduce yourself.
       3. Start by telling the BPW why you’re here. Seeking BPW approval of the plans, specs., and assessments for (*project name*) (*from where to where*).
       4. Share your screen with the overall exhibit.
          1. Remind the BPW where the project is.
       5. Discuss the project, follow your BPW notes as a guide, no need to share the notes on the screen.
       6. Once you are finished explaining the project, ask if there are any questions.
40. Update website with BPW approval and date/time for when project will go to Common Council
    1. Send to ENGWebsite [(ENGweb@cityofmadison.com](mailto:(ENGweb@cityofmadison.com)).
41. Start/continue w/corridor drawing.
42. Create cross section sheets.
43. Finalize cost estimate.
44. Begin/create writing project specifications.
    1. Determine Small Business Enterprise (SBE) goal.
       1. Send an itemized cost estimate in excel format to Civil Rights, [contractcompliance@cityofmadison.com](mailto:contractcompliance@cityofmadison.com) and copy Tracy Lomax, [TLomax@cityofmadison.com](mailto:TLomax@cityofmadison.com) to get SBE goal a minimum of 10 days prior to first ad date.
    2. Add utility coordination documentation.
    3. Create time chart to determine project start/end and duration.
45. Send 90% Street Plans for comments to Public Projects Principal Engineer before routing.
46. Fill out routing sheet.
47. Put together plans, specs, and estimate for routing.
48. If an Engineer I or II, route to another Engineer I or II.
49. Route final plans, specs., and estimate for final approval a minimum of 5 days prior to bid advertisement to Engineering staff listed in the routing sheet.
    1. Send links of the plans, specs., estimate, and routing sheets to checklist team for sign off.
       1. Ask staff to review, provide comments, or sign-off on the checklist.
       2. Route plans to an Engineer I or II for review too.
    2. Project cannot be posted for bid until all the checklist items have been sign off.
50. Route final specs. to admin before routing for standard contract language to be added.
51. Create bid express estimate for the bid advertisement.
52. Use ACC to route final plans for stamps and signatures after Principals sign off.
    1. Use ACC workflow/videos.
53. Create proposal estimate after bid advertisement for our construction team.
54. Continue to work on utility coordination.
55. Once the plans are advertised for bids, changes to the plans, specs, and estimate can only happen via addenda that is signed off by Public Projects Principal Engineer and City Engineer.
    1. Use ACC workflow/videos for placing addenda in ACC.
    2. Changes to the plan via addenda are placed in the M:\PlanVault\ConstructionProjects/*project#* by EnAdmin
       1. Send EnAdmin an email on what the plan should be labeled.
          1. *Contract#\_projectplanname Addenda# Date.pdf*
       2. Include PDF of routing sheet – plan notice – in the email to EnAdmin.
56. Edit bid tab excel file to review bid prices with estimated bid prices.
57. Once the bids are posted and the low bidder is determined, changes to the plan can only happen via a plan revision that is signed off by Public Projects Principal Engineer and City Engineer.
    1. Use ACC workflow/videos for placing addenda in ACC.
    2. Changes to the plan via addenda are placed in the M:\PlanVault\ConstructionProjects/*project#* by EnAdmin
       1. Send EnAdmin an email on what the plan should be labeled.
          1. *Contract#\_projectplanname Revision# Date.pdf*
       2. Include PDF of routing sheet – plan notice – in the email to EnAdmin.
58. Schedule pre-construction (pre-con) meeting after contractor is selected.
    1. Coordinate with John Fahrney and Contractor schedules. Schedule at 10am or 1pm, duration should be 2 hours. The meeting cannot go beyond 3pm.
       1. How to setup a pre-con: call Contractor general number and ask the receptionist for the project lead for the City of Madison (state the project) project to coordinate a Pre-Construction meeting.
    2. Create an outlook/Microsoft teams meeting invite for the pre-con, send out as soon as you’ve coordinated with John Fahrney and the Contractor.
       1. Invite: City Project Team, City Construction Staff including City Surveyor, City Inspector, Water Utility Inspector, Contractor Staff, private utilities with facilities in conflict and not in conflict with the project, Forestry, & Metro, etc.
          1. Add more personnel to the meeting if adjacent to another Municipality, Private Development Project, another adjacent City or WisDOT project.
    3. Create (pre-con) agenda (using pre-con agenda template), send to invites the week of the meeting.
59. Mail construction start notification 2 weeks prior to the start of construction and update project webpage.
    1. City Engineer needs to review and approve mailing materials ahead of sending to admin.
    2. Add construction fact sheet to website.
    3. Send to EnAdmin ([enadmin@cityofmadison.com](mailto:enadmin@cityofmadison.com)) 3 weeks ahead of mailing.
60. Plan Revisions
61. Send post construction letter.
62. Finalize assessments (spring/summer after project is fully completed).