





Project Turnover Workflow

In the construction industry, effective project turnover is crucial for ensuring a seamless transition from the estimating phase to the operational execution of a project. At OVI General Contracting, we have developed a comprehensive Project Turnover process that meticulously ensures all necessary information, documentation, and resources are handed over to the respective teams. This process facilitates better communication and coordination, enhancing the overall efficiency and success of our projects.

The Project Turnover process involves several key artifacts and stages, beginning with the customer's Request for Proposal (RFP) and culminating in the mobilization of construction activities.

In this workflow, you will find a map of all the activities and tasks that comprise project turnover. This workflow provides an estimating-centric view of the body of work, detailing the inputs and outputs from the perspective of the estimating department. Outputs from the Turnover Workflow serve as inputs to downstream workflows for the Construction and Operations departments.

Assumptions: The Turnover Workflow assumes that the Proposal Workflow has been completed successfully and that the customer has issued the company a project award. The Proposal Workflow is an upstream prerequisite to turnover, detailing the mapping of the proposal workflow.

Figure 1 outlines the flow of critical documents and information across different departments, from the initial bidding stage to the operational phase. By understanding this flow, all team members can appreciate the interconnectedness of their roles and the importance of timely and accurate information exchange.

Figure 1: Project Turnover Workflow

```
graph LR
    subgraph Turnover
        direction LR
        style Turnover fill:#ffd700,stroke:#333,stroke-
        width:2px,padding:10px,color:#000,font-weight:bold,text-transform:uppercase

        subgraph Estimating
            direction LR
            style Estimating fill:#ff8c00,stroke:#333,stroke-
            width:2px,padding:10px,color:#000

            subgraph Activity
                direction LR
                style Activity fill:#dda0dd,stroke:#333,stroke-
                width:2px,padding:10px,color:#000
                A1["Material Stocking Report"]:::darkBox
                B1["Man Hours Report"]:::darkBox
                C1["Field Proposal"]:::darkBox
                D1["Sub Rough Scope Narrative"]:::darkBox
                E1["Award Letter"]:::darkBox
                F1["Owner Proposal"]:::darkBox
                G1["Vendor Quote"]:::darkBox
            end
        end
    end
```



```
H1["PreBid RFI"]:::darkBox
I1["PreBid Photos"]:::darkBox
J1["Subcontractor Bids"]:::darkBox
K1["Permit /IFC Set Plans"]:::darkBox
L1["Permits"]:::darkBox
M1["Bid Set Plans"]:::darkBox
end

subgraph Activity2
  direction LR
  style Activity2 fill:#dda0dd,stroke:#333,stroke-
width:2px,padding:10px,color:#000
  A2["Sub Rough Scope Narrative"]:::darkBox
  B2["Owner Proposal"]:::darkBox
  C2["Estimate"]:::darkBox
  D2["Award Letter"]:::darkBox
  E2["Vendor Quote"]:::darkBox
  F2["Subcontractor Bids"]:::darkBox
end
end

subgraph Construction
  direction LR
  style Construction fill:#9370db,stroke:#333,stroke-
width:2px,padding:10px,color:#000
  N["Field Specs"]:::darkBox
end

subgraph Operations
  direction LR
  style Operations fill:#9370db,stroke:#333,stroke-
width:2px,padding:10px,color:#000
  G["Subcontracts"]:::darkBox
  H["Prime Contract"]:::darkBox
  I["AP"]:::darkBox
  J["Compliance"]:::darkBox
end
end

A1 --> N
B1 --> N
C1 --> N
D1 --> N
E1 --> N
F1 --> N
G1 --> N
H1 --> N
I1 --> N
J1 --> N
K1 --> N
L1 --> N
M1 --> N

A2 --> G
B2 --> H
C2 --> H
D2 --> H
E2 --> I
F2 --> J
```



```
classDef darkBox fill:#333,color:#fff,stroke:#333,stroke-width:2px
```

Activity 1: Outputs to Construction

Material Stocking Report Man Hours Report Field Proposal Sub Rough Scope Narrative Award Letter
Owner Proposal Vendor Quote PreBid RFI PreBid Photos Subcontractor Bids Permit /IFC Set Plans
Permits Bid Set Plans

Activity 2: Outputs to Operations

Subcontracts Prime Contract AP Compliance



Resources:

Diagram Source Code (temporary)

```
@startuml
title Artifacts Flow Diagram for Estimating

left to right direction

package "Customer" as customer {
    rectangle "RFP" as rfp #yellow
    rectangle "Bid Acceptance" as bidAcceptance #yellow
}

package "Estimating" as eb {
    rectangle "Material Stocking Report" as artifact1 #orange
    rectangle "Man Hours Report" as artifact2 #orange
    rectangle "Field Proposal" as artifact3 #orange
    rectangle "Sub Rough Scope Narrative" as artifact4 #orange
    rectangle "Award Letter" as awardLetter #orange
    rectangle "Owner Proposal" as ownerProposal #orange
    rectangle "Vendor Quote" as vendorQuote #orange
    rectangle "PreBid RFI" as preBidRFI #orange
    rectangle "PreBid Photos" as preBidPhotos #orange
    rectangle "Subcontractor Bids" as subcontractorBids #orange
    rectangle "Permit /IFC Set Plans" as permitIFCPlans #orange
    rectangle "Permits" as permits #orange
    rectangle "Bid Set Plans" as bidSetPlans #orange
}

package "Construction" as construction {
    rectangle "Field Specs" as fieldSpecs #purple
}

package "Operations" as operations {
    rectangle "Prime Contract" as primeContract #purple
    rectangle "Subcontracts" as subcontracts #purple
    rectangle "Compliance" as compliance #purple
    rectangle "AP" as ap #purple
}

rectangle "Closed Lost" as closedLost #red

rfp --> ownerProposal
ownerProposal --> bidAcceptance
bidAcceptance --> awardLetter : Yes
bidAcceptance --> closedLost : No

artifact1 --> fieldSpecs
artifact2 --> fieldSpecs
artifact3 --> fieldSpecs
artifact4 --> subcontracts
awardLetter --> primeContract
permits --> fieldSpecs
permitIFCPlans --> fieldSpecs
subcontractorBids --> compliance
```



```
bidSetPlans --> fieldSpecs  
preBidPhotos --> fieldSpecs  
preBidRFI --> fieldSpecs  
vendorQuote --> ap
```

@endum1