DEVERE CONSTRUCTION PROJECT MANAGER SOP

Version: 2025.1

Role: Project Manager (GC ? Commercial, Institutional, and Self-Perform Projects)

Prepared By: Chief Process Officer, Devere Construction

Systems: Sage CM | OneDrive | Microsoft Planner | GoCodes | Sage 100 Contractor | MS Office 365

Last Updated: [Insert Date]

Executive Summary

These manual outlines comprehensive standard operating procedures (SOPs) and detailed work instructions for Project Managers (PM) managing commercial and institutional construction projects exceeding $10M at Devere Construction. It integrates all project elements, from inception through closeout, emphasizing our core values: Excellence, Discipline, Truth, Integrity, and Safety.

Project Manager Mission Statement

"Devere Construction Project Managers are dedicated leaders committed to delivering projects on time, within budget, and exceeding quality and safety expectations, utilizing streamlined processes, proactive communication, and integrated technology."

[1.0] Project Integration and Scope Management (SOP) {#integration}

Tools Used: Microsoft Word, Teams, OneDrive, Sage CM

Outputs/Deliverables: Charter, Scope Summary, Change Log, Updated Scope Drawings

Escalation Path: Chief Project Officer (CPO) ? CPO ? Owner/Architect (if client-driven)

Objective

To ensure all scopes of work across disciplines are correctly defined, tracked, and updated as the project evolves from award to closeout. PMs are responsible for locking in the baseline and preserving contractual scope alignment.

Definitions

Project Charter: A foundational document stating the project's purpose, goals, stakeholders, high-level scope, and overall strategy.

Scope Drift: When actual work performed exceeds, falls short of, or deviates from the agreed scope. Can lead to change orders or disputes.

Baseline: The original approved plan used for comparison throughout the project.

Key Responsibilities

Draft and route the Project Charter for approval.

Establish a master Scope Folder in OneDrive.

Log and document all scope changes using Sage CM.

[1.1] Scope Definition and Change Control (Work Instruction) {#scope-control}

When to Perform

At project kickoff

Upon any scope revision (addendum, ASI, RFI, field condition, etc.)

Who Performs This Task

PM initiates and maintains the change documentation

CPO or CPO reviews major changes

How to Execute Step-by-Step

Open Word > create draft charter template.

Define high-level objectives, DFOWs (definable features of work), and critical constraints.

Save draft to Projects > [Project Name] > 01. Administration > Charter.docx

Review with Chief Project Officer (CPO) (via Teams or in person).

Submit approved charter to owner/architect if required.

Begin change log (Sage CM > Change Management > Scope Changes).

Assign sequential change order ID and track approvals.

Blocking Logic

? Work shall not proceed on revised scope without written approval logged in Sage CM.

Outputs/Deliverables

Signed Charter

Scope Change Log (Sage CM entries)

[1.2] Charter Drafting, Review, and Distribution (Work Instruction) {#charter}

Definitions

DFOW: Definable Features of Work. Major scope categories like sitework, structure, envelope, MEP, etc.

Stakeholders: All parties with vested interest (Owner, Architect, PM, Site Manager, DMS PMs)

Step-by-Step

Use Devere Charter Template

Customize the following sections:

Project Name + Number

Executive Summary

Goals / Milestones

Stakeholders

High-Level Risks

Save to OneDrive > Projects > [Project Name] > 01. Administration

Route for approval: PM ? CPO ? Owner/Client (if required)

Confirm approval via Teams (add timestamp and file version number)

[1.3] Scope Management Folder Setup and Change Log Workflow (Work Instruction) {#scope-folder}

Step-by-Step

Confirm folder structure exists:

Projects > [Project Name] > 01. Administration > Scope

If not present, create it and document the creation in PM notes

In Sage CM > Change Management:

Create initial Change Log entry with: ID, Description, Originator, Date, Impact

Attach any related documents (e.g., ASI, RFI response)

Do not mirror in Excel unless required by Owner or special client protocol.

Review log weekly.

Summarize and email outstanding change activity to:

CPO

Site Manager (if affected)

DMS PMs

[2.0] Budget Management (SOP) {#budget}

Tools Used: Sage 100 Contractor, Sage CM, OneDrive, Excel, Teams

Outputs/Deliverables: Integrated budget, cost code structure, SOV approval, Budget Control Action Plan

Escalation Path: PM ? Finance ? CPO

Objective

To establish a standardized system for managing construction project budgets from setup through closeout. Budget management ensures cost control, financial transparency, and alignment with scope and schedule. Project Managers are responsible for implementing the tools and workflows required to track, report, and escalate cost-related issues using Devere?s integrated platforms.

Definitions

SOV (Schedule of Values): A categorized line-item breakdown of the project budget, used for cost tracking, procurement alignment, and progress billing.

Budget Lock: A state in Sage CM where all baseline values are imported, mapped, and approved; prevents accidental changes.

Budget Action Plan: A task-driven record tracking key financial processes such as SOV upload, cost-to-complete updates, and variance reviews.

Policy

All project budgets must originate from Devere?s estimating team using Sage 100 Contractor. No revisions to the budget may be made in the field without approval from Finance and the Chief Project Officer (CPO). All budget data must be available in Sage CM within 5 business days of project award. The PM must maintain weekly cost tracking, ensure Action Plan compliance, and support monthly budget reviews with Finance.

Scope of Responsibility

The Project Manager is responsible for:

Coordinating with Estimation and Finance for budget setup

Importing the final estimate into Sage CM

Aligning cost codes with the contract scope

Launching the Budget Control Action Plan

Ensuring real-time visibility of costs to Finance and Executives

Weekly and Monthly Expectations

Folder Structure & File Locations

Related Work Instructions

2.1 Budget Creation and Sage 100 Import

2.2 Weekly Cost Tracking and Reporting

2.3 SOV Storage and OneDrive Integration

[2.0] Budget Management (SOP) {#budget}

Tools Used: Sage 100 Contractor, Sage CM, OneDrive, Excel, Teams

Outputs/Deliverables: Integrated budget, cost code structure, SOV approval, Budget Control Action Plan

Escalation Path: PM ? Finance ? CPO

Objective

To establish a standardized system for managing construction project budgets from setup through closeout.

Budget management ensures cost control, financial transparency, and alignment with scope and schedule. Project Managers are responsible for implementing the tools and workflows required to track, report, and escalate cost-related issues using Devere?s integrated platforms.

Definitions

SOV (Schedule of Values): A categorized line-item breakdown of the project budget, used for cost tracking, procurement alignment, and progress billing.

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Related Work Instructions

2.1 Budget Creation and Sage 100 Import

2.2 Weekly Cost Tracking and Reporting

2.3 SOV Storage and OneDrive Integration

[2.1] Budget Creation and Sage 100 Import (Work Instruction) {#budget-setup}

Tools Used: Sage 100 Contractor, Sage CM, OneDrive

Outputs/Deliverables: Imported Sage CM Budget, Action Plan for Budget Management

Escalation Path: CPO ? Finance

Objective

To set up the complete project budget using Sage 100 Contractor, and ensure integration into Sage CM for tracking and reporting. The PM must lead this setup and initiate the project-specific Budget Action Plan.

Definitions

Estimate: Line-by-line costing using bid values, unit rates, and labor/equipment assumptions.

SOV (Schedule of Values): A detailed breakdown of work categories used for billing and budget control.

Action Plan: A structured file that outlines the task, responsible person, timeline, and required outputs.

When to Perform

Upon project award, prior to kickoff meeting.

Who Performs This Task

PM initiates the process

Estimator assists with handoff

Finance imports to Sage CM

Step-by-Step

Coordinate a Handoff Meeting with Estimator and Finance.

Confirm bid details, alternates, assumptions, labor productivity, unit rates.

In Sage 100 Contractor:

Open the final estimate.

Verify against Owner Contract scope.

Clean up unused codes.

Export full estimate to CSV format.

Import to Sage CM:

Sage CM > Budget > Import from CSV

Match cost codes and line items

Verify no duplication or decimal errors

Save the approved SOV to:

Projects > [Project Name] > 02. Contracts > SOV.pdf

Create Budget Management Action Plan:

Use Devere Action Plan Template

Fill out:

Title: ?Budget Control + Tracking?

Responsible: PM, Finance

System: Sage CM, Sage 100 Contractor

Checkpoints: SOV upload, budget lock, monthly variance reviews

Save to: Projects > [Project Name] > 23. Logs & Reports > Action Plans

Blocking Logic

? Do not allow project kickoff unless SOV is loaded and Sage CM budget is locked.

Outputs/Deliverables

Approved SOV.pdf

Budget imported to Sage CM

Budget Control Action Plan

[2.2] Weekly Cost Tracking and Reporting (Work Instruction) {#budget-tracking}

Tools Used: Sage CM, Sage 100 Contractor, Excel, OneDrive, Teams

Outputs/Deliverables: Weekly Cost Tracking Log, Variance Report, Escalation Summary

Escalation Path: PM ? Finance ? CPO (if unresolved or critical deviation)

Objective

To ensure the project remains financially aligned with the approved budget by conducting weekly cost tracking and reporting. The Project Manager must evaluate real-time data, identify variances, and communicate cost performance to leadership.

Definitions

Variance: The difference between the budgeted cost and the actual cost. Can be positive (under) or negative (over).

Committed Cost: Any contracted/subcontracted amount that has been executed and entered into Sage CM.

Incurred Cost: Actual payments made or pending approval for billing.

Forecast to Complete (FTC): The anticipated cost to finish the remaining scope.

When to Perform

Weekly, on the designated day for cost reviews (typically Friday morning)

Prior to all major progress billing or schedule meetings

Who Performs This Task

PM is responsible for cost review and reporting

Finance/Accounting supports data pulls if needed

PM must collaborate with Site Manager and DMS PMs for field validation

Step-by-Step

Open Sage CM > Financials > Budget to Actuals Report

Filter by current month and job number

Review columns: Original Budget, Committed, Incurred, Forecast, Variance

Compare SOV and Approved Subcontracts

Validate major subcontract values in:

Projects > [Project Name] > 02. Contracts

Check for over/under commitments

Assess Labor & Equipment Usage for DMS Crews

Review:

Projects > [Project Name] > 23. Logs & Reports > Timecards

GoCodes equipment utilization log

Validate that hours, quantities, and usage match progress

Document Findings in Weekly Cost Tracking Log

Use Devere Excel Template: "Weekly Cost Snapshot"

Record:

Line-item performance (under, over, on-track)

Notes for large variances (>$5,000 or 10%)

Forecast Adjustments

Save to: Projects > [Project Name] > 23. Logs & Reports > Financials > [Week Ending].xlsx

Initiate Escalation for Unexplained Variances

Log concerns in:

Sage CM > Issues > Category: Financial Variance

Notify Finance via Teams if variance exceeds $10,000 or affects critical path

Update Action Plan if Major Trend Detected

Reopen: Projects > [Project Name] > 23. Logs & Reports > Action Plans

Edit "Budget Control + Tracking" entry

Add corrective steps, assignments, and timeline

Blocking Logic

? Progress billing or buyout discussions shall not proceed if major cost items are flagged with unresolved variance.

Outputs/Deliverables

Weekly Cost Snapshot Log (Excel)

Updated Forecast-to-Complete (FTC) values in Sage CM

Action Plan update (if applicable)

Escalation entry (if triggered)

[2.3] SOV Storage and OneDrive Integration (Work Instruction) {#sov}

Tools Used: OneDrive, Sage CM, Microsoft Excel

Outputs/Deliverables: SOV PDF, current CSV backup, Action Plan tie-in, documentation assurance

Escalation Path: PM ? Project Administrator ? CPO

Objective

To ensure the Schedule of Values (SOV) is stored, documented, and version-controlled in Devere?s official OneDrive structure and Sage CM. This provides source-of-truth visibility for contract values and field cost coordination.

Definitions

SOV PDF: Final signed Schedule of Values exported to PDF and stored in OneDrive.

SOV CSV: The exportable version of the cost structure used for Sage CM upload.

Master Repository: Centralized folder location for the current version of contract documents.

When to Perform

Upon award and contract finalization

Every time a change order alters the contract value (requires SOV update)

Who Performs This Task

PM is responsible for verification and upload

Project Admin may assist in version control and folder management

Step-by-Step

Verify Final SOV is Signed and Accurate

Confirm that PM, CPO, and Finance have signed off.

Check for coordination with Owner Contract.

Export Final SOV to PDF and CSV

From Sage 100 Estimating: Export SOV as CSV

Create a clean PDF copy from finalized Excel format with signature blocks

Upload to Official Folder Path

PDF: Projects > [Project Name] > 02. Contracts > SOV.pdf

CSV: Projects > [Project Name] > 02. Contracts > Backup > SOV_[Date].csv

Create Backup folder if not present (task to be documented in Action Plan)

Log Upload in Project File Registry

Add entry to Master File Index in:

Projects > [Project Name] > 01. Administration > Master File Register.xlsx

Include: File name, upload date, uploaded by, link

Link SOV to Budget Action Plan

Navigate to: Projects > [Project Name] > 23. Logs & Reports > Action Plans

In ?Budget Control + Tracking? Action Plan:

Note: ?SOV uploaded on [date] to 02. Contracts. CSV backup in Backup folder.?

Blocking Logic

? Do not proceed to procurement, schedule development, or subcontract buyout unless final SOV is uploaded and verified in OneDrive.

Outputs/Deliverables

SOV.pdf (Signed)

SOV.csv (Backup)

Updated Master File Register

Cross-reference in Action Plan

[2.4] Cost Code Alignment and Buyout Mapping (Work Instruction) {#costcodes}

Tools Used: Sage 100 Estimating, Sage CM, Excel, OneDrive, Teams

Outputs/Deliverables: Cost Code Map, Buyout Tracker, Reconciliation Report

Escalation Path: PM ? Estimator ? Procurement ? CPO (if unresolved)

Objective

To ensure that every budget line item and cost code is correctly mapped to its corresponding subcontract or vendor commitment and categorized within the project?s buyout tracker. This ensures accurate financial tracking and cost performance reporting throughout the life of the project.

Definitions

Cost Code Alignment: Mapping budget line items from the estimate to cost codes and buyout packages for tracking.

Buyout Package: A logical grouping of scope elements to be procured under one subcontract or purchase order.

Reconciliation Report: A document showing which cost codes have been bought out and any gaps or duplications.

When to Perform

Immediately after finalizing SOV and prior to issuing the first subcontract or PO

Who Performs This Task

Project Manager (lead)

Estimator (support)

Procurement Lead (review and contract creation)

Step-by-Step

Open Final Estimate in Sage 100 Contractor

Identify cost codes and description headers

Compare against bid package structure used during estimating

Create a Cost Code Mapping Sheet

Download Excel template "Cost Code Alignment Log"

List all cost codes and assign:

Description

Subcontract/PO responsibility

Buyout Package ID

Budgeted amount

Save to: Projects > [Project Name] > 23. Logs & Reports > Buyout Tracker > Cost Code Alignment.xlsx

Validate Against SOV and Contract Scopes

Confirm each SOV line item is linked to a cost code and has a matching commitment plan

Highlight unmapped codes and assign temporary holding account

Reconcile with Procurement Tracker

Coordinate with Procurement lead

Ensure Sage CM > Procurement matches the buyout tracker

If any scope is double-covered or missing, create a scope gap log

Document Issues in Reconciliation Report

Use template in: Projects > [Project Name] > 23. Logs & Reports > Buyout Tracker > Reconciliation_Report.xlsx

Flag red-coded cells for unresolved conflicts

Upload and Log

Upload both logs to OneDrive path above

Log entry in: 01. Administration > Master File Register.xlsx

Blocking Logic

? Do not issue subcontract agreements unless cost code mapping is complete and conflicts are resolved.

Outputs/Deliverables

Cost Code Alignment Log

Reconciliation Report

Master File Register entry

[2.5] Budget Action Plan Creation and Usage (Work Instruction) {#budgetactionplan}

Tools Used: OneDrive, Excel, Teams

Outputs/Deliverables: Budget Control Action Plan (Live), Assigned Task Log, Task Completion Tracker

Escalation Path: PM ? Project Administrator ? CPO

Objective

To deploy and maintain a dynamic Budget Action Plan that assigns responsibility and tracks task completion across financial activities (e.g., SOV uploads, cost code alignment, variance reports) using Devere?s standard folder and file structure.

Definitions

Action Plan Template: A standardized Excel-based file used for budgeting workflows.

Live Action Plan: The active, project-specific version saved in OneDrive and continuously updated.

Blocking Task: Any task which must be completed before dependent activities can proceed.

When to Perform

Upon initial budget upload to Sage CM

Weekly for review, update, and reissue of any overdue tasks

Who Performs This Task

Project Manager (leads execution)

Project Administrator (tracks and updates status)

CPO (final oversight)

Step-by-Step

Download Budget Action Plan Template

Navigate to: Company Templates > Budget Templates > Budget Action Plan.xlsx

Save as: Projects > [Project Name] > 23. Logs & Reports > Action Plans > Budget_Action_Plan.xlsx

Customize Project-Specific Milestones

Update the following fields:

Assigned To (PM, PA, Estimator, Finance)

Task Due Date (per project start timeline)

Task Type (Budget Lock, Cost Code Alignment, SOV Upload, etc.)

Status (Not Started / In Progress / Complete)

Track Completion Each Week

Review during weekly PM/Admin meeting

Update the tracker: add comments, blockers, or task transfers

Escalate Overdue Items

If any task is > 3 business days past due, escalate to CPO

Note blocker in column and include in Weekly Finance Summary (OneDrive > 23. Logs & Reports > Financials)

Log Completion Summary in File Register

Add an entry to:

Projects > [Project Name] > 01. Administration > Master File Register.xlsx

File Type: "Action Plan ? Budget"

Blocking Logic

? Tasks related to Budget Lock, Cost Code Mapping, and Buyout Release must be marked COMPLETE before first subcontract or PO is issued.

Outputs/Deliverables

Budget_Action_Plan.xlsx (Live, project-specific)

Weekly Task Status Updates

Entry in Master File Register

[2.5] Budget Action Plan Creation and Usage (Work Instruction) {#budgetactionplan}

Tools Used: OneDrive, Excel, Teams

Outputs/Deliverables: Budget Control Action Plan (Live), Assigned Task Log, Task Completion Tracker

Escalation Path: PM ? Project Administrator ? CPO

Objective

To deploy and maintain a dynamic Budget Action Plan that assigns responsibility and tracks task completion across financial activities (e.g., SOV uploads, cost code alignment, variance reports) using Devere?s standard folder and file structure.

Definitions

Action Plan Template: A standardized Excel-based file used for budgeting workflows.

Live Action Plan: The active, project-specific version saved in OneDrive and continuously updated.

Blocking Task: Any task which must be completed before dependent activities can proceed.

When to Perform

Upon initial budget upload to Sage CM

Weekly for review, update, and reissue of any overdue tasks

Who Performs This Task

Project Manager (leads execution)

Project Administrator (tracks and updates status)

CPO (final oversight)

Step-by-Step

Download Budget Action Plan Template

Navigate to: Company Templates > Budget Templates > Budget Action Plan.xlsx

Save as: Projects > [Project Name] > 23. Logs & Reports > Action Plans > Budget_Action_Plan.xlsx

Customize Project-Specific Milestones

Update the following fields:

Assigned To (PM, PA, Estimator, Finance)

Task Due Date (per project start timeline)

Task Type (Budget Lock, Cost Code Alignment, SOV Upload, etc.)

Status (Not Started / In Progress / Complete)

Track Completion Each Week

Review during weekly PM/Admin meeting

Update the tracker: add comments, blockers, or task transfers

Escalate Overdue Items

If any task is > 3 business days past due, escalate to CPO

Note blocker in column and include in Weekly Finance Summary (OneDrive > 23. Logs & Reports > Financials)

Log Completion Summary in File Register

Add an entry to:

Projects > [Project Name] > 01. Administration > Master File Register.xlsx

File Type: "Action Plan ? Budget"

Blocking Logic

? Tasks related to Budget Lock, Cost Code Mapping, and Buyout Release must be marked COMPLETE before first subcontract or PO is issued.

Outputs/Deliverables

Budget_Action_Plan.xlsx (Live, project-specific)

Weekly Task Status Updates

Entry in Master File Register

[2.6] Monthly Budget Review and Finance Coordination (Work Instruction) {#budgetreview}

Tools Used: Teams, OneDrive, Sage CM, Excel

Outputs/Deliverables: Finance Review Meeting Minutes, Variance Report Summary, Budget Review Approval Notes

Escalation Path: PM ? Finance ? CPO

Objective

To conduct formal monthly budget reviews with Finance and Executive leadership, verifying cost accuracy, forecast integrity, and action item resolution from the Budget Action Plan. This ensures Devere?s projects maintain financial health and early detection of at-risk line items.

Definitions

Finance Review: Monthly meeting led by PM and Finance to examine performance-to-budget, cost-to-complete, and variances.

Variance Report: A summary of cost over/under compared to baseline budget.

Forecast Integrity: Accuracy and rationale behind projected costs based on field activity.

When to Perform

During the first week of each month

After cost tracking is updated for the previous month?s data

Who Performs This Task

Project Manager (lead presenter)

Finance (reviewer and risk evaluator)

CPO (final reviewer and decision maker)

Step-by-Step

Prepare Variance Report

Open prior month?s cost tracking Excel file from:

Projects > [Project Name] > 23. Logs & Reports > Financials > [Week Ending].xlsx

Filter for all cost codes with budget vs. actual deviations

Export as: Variance_Summary_[Month].xlsx

Update Budget Control Action Plan

Confirm all overdue tasks are noted and escalated

Add notes to task status column for discussion

Schedule Finance Review Meeting

Send calendar invite via Outlook for Week 1 of new month

Include link to: Projects > [Project Name] > 01. Administration > Meetings > Budget Review

Host Meeting and Present Summary

Use Teams screen share

Present:

Budget-to-Actuals (Sage CM)

Key variances from Variance_Summary_[Month].xlsx

Forecast challenges (material, labor, sub cost projections)

Capture and Upload Meeting Minutes

Use template Budget_Review_Minutes.docx

Save to: Projects > [Project Name] > 01. Administration > Meetings > Budget Review

Log entry in Master File Register.xlsx

Blocking Logic

? If budget variance exceeds 5% in any cost division without corrective action, PM must submit escalation summary to CPO for resolution plan.

Outputs/Deliverables

Variance_Summary_[Month].xlsx

Updated Budget Action Plan

Budget Review Meeting Minutes

[2.7] Budget Reforecasting and Cost-to-Complete Updates (Work Instruction) {#budgetreforecast}

Tools Used: Sage CM, OneDrive, Excel, Teams

Outputs/Deliverables: Cost-to-Complete Log, Reforecast Approval Summary, Updated Variance Tracker

Escalation Path: PM ? Finance ? CPO

Objective

To perform accurate budget reforecasting based on current field conditions, crew performance, vendor changes, and known cost shifts. This supports Devere?s financial control framework and prevents unnoticed overruns.

Definitions

Cost-to-Complete (CTC): Forecast of remaining cost to finish each scope or division.

Reforecast: Adjusted prediction of final cost based on updated assumptions.

When to Perform

After each monthly financial review (Section 2.6)

Anytime there is a major change in labor rate, unit pricing, or subcontractor exposure

Who Performs This Task

Project Manager (owns inputs and changes)

DMS PMs (labor rate projections)

Finance (review/approval)

Step-by-Step

Open Existing Variance Summary

Path: Projects > [Project Name] > 23. Logs & Reports > Financials > Variance_Summary_[Month].xlsx

Create new tab: "CTC_[Month]"

Consult DMS PMs for Labor Forecasts

Request projected hours and production assumptions by scope

Document assumptions in CTC sheet under Notes column

Estimate Remaining Sub/Vendor Exposure

Review committed vs. remaining PO/contract values

Consult Procurement Log (OneDrive > 05. Field > Procurement > Tracker.xlsx)

Add Material Cost Updates

Verify quotes or escalations (fuel surcharge, steel pricing, etc.)

Pull backup to folder: Projects > [Project Name] > 14. Procurement > Material Quotes

Complete CTC Column and Forecast Final Cost

For each cost code, compute: Actual + Committed + CTC = Forecast Final Cost

Compare Forecast to Original Budget (gain/loss)

Save Reforecast File and Notify Finance

Save as: CTC_Reforecast_[Month].xlsx

Upload to: Projects > [Project Name] > 23. Logs & Reports > Financials

Notify Finance via Teams tag in channel #BudgetUpdates

Blocking Logic

? No major procurement release or scope additions may proceed without an updated CTC if known cost swings exceed $5,000 or 2% of division value.

Outputs/Deliverables

CTC_Reforecast_[Month].xlsx

Updated cost projections for major scope items

Communication log of budget delta justifications

[2.8] Contingency Management and Owner Risk Communication (Work Instruction) {#budgetcontingency}

Tools Used: Sage CM, Excel, OneDrive, Teams, Meeting Minutes Templates

Outputs/Deliverables: Contingency Log, Risk Communication Record, Owner Forecast Update Summary

Escalation Path: PM ? Project Executive ? Owner

Objective

To ensure transparent and controlled management of contingency funds throughout the project while maintaining open lines of communication with the Owner regarding known risks, forecasts, and exposure updates.

Definitions

Contingency: A reserve fund included in the budget to cover scope gaps, unforeseen conditions, or owner-directed changes.

Owner Risk Log: A running log of potential owner-impacting financial events including RFIs, design gaps, and delays.

When to Perform

After monthly reforecasting or whenever a potential change event is identified

Before all monthly Owner meetings

Who Performs This Task

Project Manager (log keeper, lead communicator)

Project Executive (owner-facing advocate)

Step-by-Step

Maintain Contingency Log

File: Contingency_Log.xlsx

Path: Projects > [Project Name] > 23. Logs & Reports > Financials

Columns include: Date, Event Description, Forecasted Cost, Action Taken, Approved (Y/N)

Log Owner Risk Events

File: Owner_Risk_Log.xlsx

Path: Projects > [Project Name] > 19. Risk Management

Capture all known RFIs, clarifications, delays, or pricing gaps

Color-code: RED = Active Threat, YELLOW = Monitoring, GREEN = Resolved

Review Before Monthly Owner Meeting

Include updated logs in prep folder: Projects > [Project Name] > 01. Administration > Meetings > Owner Coordination

Prepare summary slide: Forecast Risk Delta + Pending Contingency Usage

Conduct Owner Meeting and Log Discussion

Discuss each active risk item and contingency trigger

Save meeting minutes using template: Owner_Meeting_Minutes_Template.docx

Upload to: Projects > [Project Name] > 01. Administration > Meetings > Owner Coordination

Escalate Any Budget Position Change > 5%

Use Teams to notify Project Executive and CPO of risk forecast shift

Initiate formal communication with Owner only after internal signoff

Blocking Logic

? No contingency use may occur without itemized entry and narrative justification logged. ? Forecast changes >5% to overall contingency must be reviewed by the CPO before Owner presentation.

Outputs/Deliverables

Contingency_Log.xlsx

Owner_Risk_Log.xlsx

Forecast Risk Delta Slide

Meeting Minutes with Owner

Communication summary to Executive Team

[2.9] Allowances and Unit Rate Tracking (Work Instruction) {#budgetallowances}

Tools Used: Sage CM, Excel, OneDrive, Estimating Logs

Outputs/Deliverables: Allowance Tracker, Unit Cost Summary, Owner Notification Log

Escalation Path: PM ? Project Executive ? Owner

Objective

To track the usage and cost performance of project allowances and unit rate items accurately and transparently throughout the project lifecycle. This ensures that Owner-directed funds are not exceeded without documentation and that billing reflects actual quantities installed.

Definitions

Allowance: A set budget for a defined item or service where the exact specification or quantity is not known at the time of contract execution.

Unit Rate Item: A scope item billed per measurable quantity (e.g., per linear foot, square yard, cubic yard), typically tracked in field logs.

When to Perform

Whenever allowance-funded or unit-rate scope work begins or is updated

Prior to each Owner billing cycle and project meeting

Who Performs This Task

Project Manager (lead tracking and Owner communications)

Field Engineer or Site Manager (logs actual quantities)

Step-by-Step

Maintain Allowance Tracker

File: Allowance_Tracker.xlsx

Path: Projects > [Project Name] > 23. Logs & Reports > Financials

Track Item, Budgeted Allowance, Used to Date, Remaining, Notes, Owner Approved (Y/N)

Track Unit Rate Quantities in Field Log

File: Unit_Quantity_Log.xlsx

Path: Projects > [Project Name] > 05. Field > Logs

Columns: Date, Description, Crew, Quantity, Reference Drawing, Photo Link

Match quantities with Daily Log and RFI/Submittal clarifications

Compare Actual to Budgeted Rate

Pull from Sage CM > Budget vs. Actuals module

Highlight overruns or underruns in Allowance_Tracker.xlsx

Prepare Owner Update or Billing Support

Include tracker summary in OAC meeting materials

Save backup (e.g., drawings, logs, photos) to: Projects > [Project Name] > 01. Administration > Meetings > Owner Coordination

Notify Owner of overruns or early completion in writing

Escalate Overruns >10% of Allowance

Discuss with Project Executive for strategy

Issue Change Request if needed via Sage CM > Change Management

Blocking Logic

? No reimbursement for unit rate items unless actual installed quantity is logged and documented. ? No Owner communication on allowance overruns without Project Executive involvement.

Outputs/Deliverables

Allowance_Tracker.xlsx

Unit_Quantity_Log.xlsx

Meeting backup and update notes

Owner notification email or letter

3.0] Subcontractor Buyout and Commitment Alignment (SOP) {#buyout}

Tools Used: Sage CM, OneDrive, Excel, Microsoft Teams

Outputs/Deliverables: Executed subcontracts, commitment logs, buyout summary, vendor risk mitigation notes

Escalation Path: PM ? CPO ? Legal/Contracts (as needed)

Objective

To define a clear and enforceable process for the procurement, negotiation, and commitment of subcontracted scopes. This SOP ensures that subcontractor buyout aligns with the original estimate, awarded scope, project budget, and Devere's contract requirements, while maintaining schedule and quality control.

Definitions

Buyout: The formal process of procuring and contracting each trade or scope item based on the estimate and project award.

Commitment: A signed subcontract or purchase order recorded in Sage CM, linked to the relevant cost codes.

Scope Reconciliation: The process of comparing bid scope inclusions/exclusions to estimate assumptions and project documents.

Policy

Subcontractor buyout must be completed within 30 calendar days of project award. All commitments must:

Be entered and tracked in Sage CM.

Use Devere?s AIA A401 template and include all required Exhibits (A?E).

Match awarded scope and budget unless approved by CPO.

No field work may begin by any subcontractor until:

The subcontract is fully executed.

Certificates of insurance and safety documents are received.

A pre-construction scope review and kickoff meeting has occurred.

Scope of Responsibility

The Project Manager is responsible for:

Verifying scope alignment before award

Generating subcontracts using Devere?s approved template

Logging commitments and payment terms in Sage CM

Uploading backup documentation to OneDrive

Leading subcontractor preconstruction onboarding

Buyout Workflow

Folder Structure & File Locations

Blocking Logic

? Do not allow field mobilization without executed contract. ? Do not award if major exclusions conflict with Devere?s deliverables. ? Do not split contracts without CPO and Finance approval.

Outputs/Deliverables

Executed AIA A401 + Exhibits A?E

Scope Gap Log

Commitment Log (Sage CM)

Preconstruction Scope Review Minutes

[3.1] Subcontractor Compliance and Safety Onboarding (SOP) {#subcompliance}

Tools Used: OneDrive, Sage CM, Teams, Excel, DocuSign

Outputs/Deliverables: Completed compliance packet, Safety onboarding records, Insurance verification, Sub contact log

Escalation Path: PM ? Contract Compliance (Amy) ? Safety Director ? CPO

Objective

To ensure that all subcontractors working under Devere are fully compliant with contractual, insurance, and safety onboarding requirements prior to mobilizing on site. This guarantees legal protection, safe working environments, and clear roles and responsibilities from day one.

Definitions

Compliance Packet: A collection of required documents including COIs, W-9s, safety policy acknowledgment, subcontract signature, and site-specific onboarding forms.

Jobsite Safety Orientation: The in-person or digital onboarding of subcontractor personnel by the Site Manager or Safety team, prior to allowing work.

Policy

No subcontractor may mobilize or perform any task on a Devere project without:

Fully executed subcontract

Verified compliance packet

COI on file that meets Devere?s insurance minimums

Completed Safety orientation with attendance log signed

Required Compliance Documents (before mobilization)

Step-by-Step Procedure

Distribute Compliance Packet

Use standard template from OneDrive > Templates > Compliance_Packet

Email via Teams and request DocuSign or scanned copies

Verify Insurance Compliance

Forward COIs to Amy in Contract Compliance for review

If rejected, notify sub and request revision

Confirm Safety Requirements

Schedule safety orientation with Site Manager

Collect sign-in sheet and upload immediately

Complete Sub Onboarding Checklist

PM ensures all forms are completed and filed in the correct folder

Submit checklist to CPO via Teams for mobilization approval

Blocking Logic

? No access to jobsite unless all compliance documents are submitted and verified. ? No insurance = no mobilization. ? No Safety acknowledgment = no work authorization.

Outputs/Deliverables

Completed Subcontractor Compliance Packet

Subcontractor Safety Orientation Log

COI & Insurance Documentation

Signed Safety Plan Acknowledgment

Sub Onboarding Checklist

Mobilization Approval from CPO

[3.2] Subcontractor Cleaning, Coordination, and Accountability Procedures (SOP) {#subcleaning}

Tools Used: Sage CM, OneDrive, Teams, Site Logs, Comply Notice Template

Outputs/Deliverables: Subcontractor Cleaning Compliance Log, Comply Notices, Safety Infraction Reports, Escalation Records

Escalation Path: Site Manager ? PM ? CPO ? Subcontractor Management Rep

Objective

To ensure a clean, organized, and OSHA-compliant jobsite by defining enforceable subcontractor cleaning expectations, monitoring protocols, and accountability procedures. This SOP supports Devere?s zero-injury culture, subcontractor compliance policy, and daily productivity objectives.

Definitions

Daily Cleaning Obligation: The requirement that subcontractors remove debris, materials, and waste generated by their crews at the end of each workday.

Comply Notice: A formal documented notice issued to subcontractors for failure to comply with jobsite cleanliness or safety expectations, triggering remediation and escalation.

Policy

Each subcontractor is responsible for maintaining a clean and safe work area daily. Failure to comply results in documented notices, backcharges, or removal from site. Cleaning infractions must be documented in Sage CM, and the Site Manager must issue verbal and written warnings prior to formal escalation.

Cleaning and Coordination Expectations

Step-by-Step Procedure

Pre-Mobilization Cleaning Expectation Meeting

Review cleaning expectations with each sub during onboarding

Document agreement in OneDrive > 17. Safety > Sub Cleaning Expectations

Daily Inspection and Documentation

Site Manager conducts daily walkthrough

Log any violations in Sage CM > Safety > Observations

Issue Verbal Warning or Comply Notice

First offense: verbal reminder with photo backup

Second offense: formal Comply Notice using template

File in OneDrive > 17. Safety > Comply Notices > [Subcontractor Name]

Escalation and Remediation

Notify PM and Subcontractor Rep

Assign cleanup backcharge if not resolved in 24 hours

Escalate to CPO if repeated infractions

Blocking Logic

? No final inspection signoff unless cleaning issues resolved. ? Repeat offenders are subject to removal per contract terms. ? No cleaning performed by Devere labor without approved backcharge.

Outputs/Deliverables

Daily Cleaning Compliance Logs

Comply Notices

Safety Observations and Photos

Sub Coordination Meeting Minutes

Backcharge Documentation (if applicable)

[3.3] Coordination with Self-Perform Crews and Field Layout Oversight (SOP) {#dmscoordination}

Tools Used: Sage CM, OneDrive, GoCodes, Layout Plans, Microsoft Teams

Outputs/Deliverables: Verified layout records, crew daily reports, obstruction reports, coordination meeting minutes

Escalation Path: DMS PM ? Site Manager ? PM ? Project Executive

Objective

To ensure seamless coordination between Devere?s self-performing crews (DMS) and overall project field operations, with proper oversight of layout verification, obstruction removal, and construction tolerances. This SOP safeguards production integrity and prevents rework or delay due to misaligned field execution.

Definitions

Self-Perform Crews (DMS): Internal Devere labor performing trades such as excavation, concrete, carpentry, layout, and select steelwork.

Layout Obstruction: Any physical or schedule-related condition preventing layout or installation work from proceeding as planned.

Surveyor?s Control: Official benchmarks and layout baselines established by licensed surveyors for use by DMS layout leads.

Policy

Devere?s Site Manager and PM must collaborate with DMS PMs to:

Confirm surveyor layout control prior to starting each DFOW.

Verify all field layout work using a two-party cross-check method.

Use only current drawings marked "Issued for Construction (IFC)."

Log layout and obstruction issues in Sage CM > Daily Log or RFI (if formal clarification is needed).

No layout or installation activity may proceed without:

Validated surveyor control in place

Current drawings verified onsite

Obstruction-free work areas approved by Site Manager

Step-by-Step Procedure

Pre-Task Coordination Meeting

Weekly coordination huddles between Site Manager and all DMS PMs

Review DFOWs, layout milestones, potential conflicts

Record minutes in OneDrive > 15. Meetings > Field Coordination Logs

Layout Verification

DMS layout lead receives surveyor control data

Uses total station/GPS to establish key points

Second crew member verifies critical points via cross-check

Log verification status in OneDrive > 05. Field > Layout Reports

Obstruction Identification

If layout cannot proceed, log issue in Sage CM > Daily Log > Field Obstruction

Alert PM and Site Manager via Teams immediately

Assign responsible party for removal and reinspection

Tool and Equipment Management

Check GPS, robotic total station, levels via GoCodes asset scan

Confirm calibration log is up to date

Store verification in OneDrive > 20. Equipment Logs

Folder Structure & File Locations

Blocking Logic

? Do not proceed with layout without surveyor control confirmation. ? Do not install from outdated drawings. ?

Do not layout in areas with unresolved obstructions.

Outputs/Deliverables

Verified Layout Logs

Weekly Field Coordination Meeting Minutes

Field Obstruction Reports

GoCodes Equipment Scan Logs

Surveyor Control Verification Checklist

[3.4] Field Obstruction Management and RFI Escalation (SOP) {#rfiobstructions}

Tools Used: Sage CM, OneDrive, Microsoft Teams, Drawings/Specs, OneDrive Mobile Uploads

Outputs/Deliverables: Obstruction Log, Issued RFIs, RFI Response Archive, Delays Mitigation Record

Escalation Path: Site Manager ? PM ? Design Team ? CPO

Objective

To document, track, and escalate any condition preventing work from proceeding as planned, including physical obstructions, missing design details, or coordination conflicts. This SOP outlines when and how to escalate to a formal Request for Information (RFI) and how to log impacts to schedule or safety.

Definitions

Obstruction: Any physical, logistical, or contractual item preventing planned installation or layout (e.g., buried conduit, steel embed conflict, access blockage).

RFI (Request for Information): A formal written request submitted to the Architect/Engineer seeking clarification or direction on a conflict, missing detail, or ambiguity in contract documents.

Policy

All field obstructions must be reported the day they are discovered. If resolution is not available on-site via drawings or clarification from Site Manager or PM, an RFI must be issued within 24 hours using Sage CM.

Obstruction tracking must continue until:

Physical conflict is removed OR

RFI is answered with direction

Delay or schedule impact is logged (if applicable)

Step-by-Step Procedure

Obstruction Identification

Site Manager or DMS PM identifies a condition blocking layout or installation

Document with photos using OneDrive mobile upload: Projects > [Project Name] > 05. Field > Obstructions

Describe condition in Sage CM > Daily Log > Field Obstruction

Immediate Attempted Resolution

Site Manager/PM checks plans/specs or previously issued RFIs

Contact relevant subcontractor or DMS PM to assess fix

RFI Escalation Protocol

If unresolved, initiate RFI in Sage CM > RFIs

Attach photos and backup; describe clearly what clarification is needed

Submit to design team with PM copied; track RFI number

Tracking & Mitigation

Update obstruction log daily with RFI status

Notify Scheduler and CPO of potential delay if RFI exceeds 72-hour open window

Add workaround or reschedule plan in Sage CM > Schedule Notes

Folder Structure & File Locations

Blocking Logic

? Do not install any work without clarification if an obstruction presents unknowns. ? Do not proceed on assumptions that conflict with plans or specs. ? Do not wait more than 24 hours after discovery to initiate RFI.

Outputs/Deliverables

Obstruction Log

Issued RFI with attached photos

RFI Response and resolution direction

Delay mitigation plan (if applicable)

Documentation in Daily Logs and RFI Register

[3.5] Subcontractor Change Management and Impact Mitigation (SOP) {#subchanges}

Tools Used: Sage CM, OneDrive, Microsoft Teams, Outlook, Excel (Change Logs)

Outputs/Deliverables: Change Event Log, Updated Budget, Schedule Impact Notes, Change Order Package

Escalation Path: PM ? CPO ? Owner/Architect (if external)

Objective

To formalize the process for identifying, tracking, pricing, and approving subcontractor-initiated changes to scope. This SOP ensures change events are documented, priced fairly, approved through proper channels, and integrated into cost, contract, and schedule tracking tools.

Definitions

Change Event: Any scope-related issue, discovery, or instruction that may result in a subcontract change order.

Potential Change Order (PCO): A preliminary record in Sage CM representing a change event, which is under review for pricing and approval.

Change Order (CO): A formally approved modification to the subcontract, entered in Sage CM.

Policy

All subcontractor-driven changes must be documented and approved before execution. Work performed without authorization may not be reimbursed.

All PCOs must:

Be logged in Sage CM > Change Management > Potential Change Orders

Include cost, schedule, and scope impact analysis

Be supported by photos, backup documentation, and justification

Be escalated to CPO if impact exceeds threshold ($5,000 or 3 days schedule impact)

Step-by-Step Procedure

Identify Change Event

Site Manager or PM documents condition using Daily Log or Field Report

Gather photos and issue documentation

Log PCO in Sage CM

Create new PCO entry: Change Management > Potential Change Orders

Attach description, scope impact, drawings, and backup

Assign to trade subcontractor and designate internal reviewer

Sub Pricing & Negotiation

Send request for pricing to subcontractor via Outlook

Confirm labor/material breakdown, markups, and unit pricing align with contract

Schedule review meeting via Teams if clarification needed

Approval and Integration

Submit PCO to CPO for approval

Upon approval, convert to formal Change Order in Sage CM

Update schedule if necessary (notify Scheduler)

Upload signed CO to OneDrive > 02. Contracts > Change Orders

Track Impacts

Log schedule impacts to OneDrive > 23. Logs & Reports > Delay Tracking

Record all COs in Excel Change Log for reconciliation

Folder Structure & File Locations

Blocking Logic

? Do not proceed with additional scope unless approved CO is issued. ? Do not rely on verbal pricing agreements. ? Do not alter the budget in Sage CM until CO is fully approved.

Outputs/Deliverables

Logged PCO with backup documentation

Signed Change Order (Sage CM + PDF in OneDrive)

Updated schedule and delay records

Subcontractor pricing review documentation

PM Change Log reconciliation sheet

[3.6] Contract Compliance, Insurance Tracking, and License Enforcement (SOP) {#compliance}

Tools Used: Sage CM, OneDrive, Excel Compliance Logs, Microsoft Teams, Outlook

Outputs/Deliverables: Updated subcontractor compliance log, insurance verification, deficiency notices, resolution confirmations

Escalation Path: PM ? Contract Administrator ? CPO

Objective

To ensure all subcontractors maintain full contract compliance, active insurance, and valid licensure throughout the project duration. This SOP defines proactive tracking, deficiency notification, and enforcement mechanisms for contractual obligations.

Definitions

Compliance Log: Centralized spreadsheet or Sage CM module tracking insurance certificates, licenses, and contract conditions.

Deficiency Notice: A written notice sent to a subcontractor identifying non-compliant documentation or expired credentials.

Hold Status: A restriction placed on a subcontractor barring work until deficiencies are resolved.

Policy

All subcontractor documentation must be verified and logged prior to mobilization. Active monitoring is required monthly, or sooner if a policy expiration nears. Any non-compliance must trigger a hold status until resolved.

Step-by-Step Procedure

Document Collection at Award

Contract Admin collects:

Certificates of Insurance (COI)

State Licenses and Trade Certifications

Signed Subcontract

Safety Plan and Project-Specific SDS

Save to OneDrive > 06. Subcontracts > [Trade] > Compliance Docs

Create/Update Compliance Log

Input vendor details into Excel or Sage CM > Vendors > Compliance Tracker

Include insurance carrier, expiration dates, license numbers, and special conditions

Monthly Verification Cycle

At the first of each month, PM or Admin reviews all upcoming expirations

Send 7-day and 3-day reminders via Outlook to vendor contacts

Log follow-up in Teams thread under #SubcontractorCompliance

Deficiency Escalation

If documents are not received before expiration:

Issue Deficiency Notice via Sage CM > Correspondence

Place subcontractor in HOLD status (no mobilization or payment)

Log in OneDrive > 06. Subcontracts > [Trade] > Compliance Notices

Resolution & Closeout

Upon receipt of updated documents, remove HOLD

Update compliance tracker and close the deficiency ticket

Notify Site Manager and Accounting

Folder Structure & File Locations

Blocking Logic

? Do not allow mobilization without verified COI and license. ? Do not process pay apps while under HOLD status. ? Do not accept substitutions for expired coverage without PM/CPO approval.

Outputs/Deliverables

COI and license verification files

Compliance Tracker with current status

Issued Deficiency Notices

Updated vendor folder for each trade

HOLD status communication log

[3.7] Submittal Management and Approval Tracking (SOP) {#submittals}

Tools Used: Sage CM, OneDrive, Microsoft Teams, Outlook, Submittal Register Templates

Outputs/Deliverables: Submittal log, reviewer status tracking, approved submittals folder, delayed item escalation log

Escalation Path: PM ? Architect/Engineer ? Owner (if design delay) ? CPO

Objective

To control the timely collection, review, tracking, and approval of all required submittals, ensuring project materials and systems are pre-approved prior to fabrication or delivery. This SOP prevents unauthorized installations and ensures contractual compliance.

Definitions

Submittal: Any shop drawing, cut sheet, sample, product data, or mock-up submitted for design team approval.

Submittal Register: Master log tracking each item, responsible subcontractor, due date, reviewer, and status.

Action Submittal: A submittal that requires approval prior to fabrication (vs. informational-only).

Policy

All submittals must be listed in the Submittal Register within 10 days of contract award. The PM is responsible for maintaining status updates weekly and escalating any overdue items.

No fabrication or material release may proceed without formal approval recorded in Sage CM and the signed submittal uploaded to OneDrive.

Step-by-Step Procedure

Submittal Register Setup

In Sage CM > Submittals > Register, import default template

Populate with spec section, description, subcontractor, due date, reviewer

Save a backup Excel version to OneDrive > 03. Submittals > Register.xlsx

Assign Responsibilities

Each subcontractor submits individual submittals to PM

PM logs, checks for completeness, and routes to A/E (via Sage CM workflow)

Reviewer assigns one of: Approved / Revise and Resubmit / Rejected

Tracking and Status Management

PM updates status weekly in Sage CM > Submittals

Upload returned copies to OneDrive > 03. Submittals > Approved > [Spec Section]

Track late or overdue items and notify subcontractors via Outlook

Escalation for Delay

If reviewer delay exceeds contract terms (typically 10 business days):

Escalate via Teams to Architect/Engineer

Notify Owner and log delay in OneDrive > 23. Logs & Reports > Submittal Delays

Adjust schedule if item is critical path (notify Scheduler)

Field Distribution

Upon approval, PM ensures Site Manager and DMS PMs have the correct version

Print if necessary and store in Field Files folder or hard copy binder

Folder Structure & File Locations

Blocking Logic

? Do not install any material without approved submittal. ? Do not fabricate off of unapproved shop drawings.

? Do not allow submittals to age beyond contract limits without escalation.

Outputs/Deliverables

Full submittal register with reviewer tracking

Approved submittals organized in OneDrive

Submittal delay reports (if needed)

Email and escalation history for overdue reviews

[3.8] Project Schedule Integration and Lookahead Maintenance (SOP) {#scheduling}

Tools Used: Microsoft Project, Primavera P6, Sage CM (Schedule Module), Microsoft Planner, OneDrive

Outputs/Deliverables: Master schedule (baseline), updated 3-week lookaheads, milestone tracking sheets, delay log

Escalation Path: PM ? Scheduler ? CPO ? Owner (if contractual milestone missed)

Objective

To ensure project milestones are tracked, field activities are forecasted, and delays are promptly mitigated using a structured scheduling approach. This SOP enables the PM to own, adjust, and communicate schedules that align with contract obligations and resource constraints.

Definitions

Baseline Schedule: The original schedule established at the start of the project and approved by the Owner.

Lookahead Schedule: A short-term schedule (usually 3 weeks) used for daily and weekly planning in the field.

Critical Path: The sequence of activities determining the project?s minimum completion time.

Policy

All projects must maintain an up-to-date baseline and rolling 3-week lookahead. Delays must be identified within 48 hours and an updated recovery plan developed.

Step-by-Step Procedure

Schedule Development

Use Primavera or MS Project to build master schedule with critical path

Include major milestones: NTP, mobilization, structural tops, dry-in, MEPs, CO, substantial completion

Submit baseline for Owner and Architect review

Save to OneDrive > 05. Field > Schedule > Baseline

Lookahead Creation and Updates

Weekly, PM and Site Manager create 3-week lookahead in Excel or Planner

Assign activity owners (e.g., DMS PMs, subcontractors)

Upload to OneDrive > 05. Field > Schedule > Lookaheads

Tracking and Reporting

Log updates in Sage CM > Daily Log > Schedule Progress

Identify critical activities or tasks at risk

Adjust lookahead during coordination meetings

Delay Escalation

Log delay cause in Sage CM > Project Logs > Delay

Update Owner via email if milestone is impacted

Develop recovery schedule and update milestone forecasts

Folder Structure & File Locations

Blocking Logic

? Do not schedule critical activities without resource coordination. ? Do not delay updating lookahead?must be current weekly. ? Do not proceed with delay-prone items without PM and Scheduler acknowledgment.

Outputs/Deliverables

Baseline schedule (Primavera/MS Project)

Weekly lookahead (Excel or Planner)

Daily schedule progress logs (Sage CM)

Documented delay logs with recovery actions

[3.9] Material Procurement Tracking and Delivery Coordination (SOP) {#procurement}

Tools Used: Sage CM, Microsoft Excel, Outlook, OneDrive, MS Teams

Outputs/Deliverables: Procurement Tracker, Delivery Logs, Submittal-linked Procurement Plan, Long Lead Item Report

Escalation Path: PM ? Site Manager ? Scheduler ? CPO

Objective

Ensure all major materials and equipment are procured, tracked, and delivered on schedule, avoiding field delays. Align procurement with submittal approvals, lead times, installation sequences, and the overall construction schedule.

Definitions

Procurement Log: A tracker outlining all required materials, submittals, vendors, lead times, and expected delivery dates.

Long Lead Item (LLI): Any material or component requiring over 4 weeks to be fabricated or delivered.

Delivery Log: Field log of all materials received on-site.

Policy

All submittal-driven materials must be tracked from approval through delivery. Procurement plans must be complete within 15 business days of NTP. Long lead items must be identified early, monitored weekly, and escalated when delays threaten the critical path.

Step-by-Step Procedure

Initial Procurement Log Creation

Populate Excel log with:

Spec section

Submittal item

Vendor

Procurement responsibility (Sub/PM)

Lead time

Required-on-site (ROS) date

Save log to OneDrive > 05. Field > Procurement > Procurement Tracker.xlsx

Link Submittals and Schedule

Cross-reference submittal approvals (OneDrive > 03. Submittals > Approved)

Verify item matches schedule sequence (OneDrive > 05. Field > Schedule)

Highlight LLIs and assign PM/scheduler follow-up owners

Ordering and Vendor Confirmation

PM ensures PO or vendor confirmation within required window

Log PO# or delivery estimate in tracker

Save PO backup to OneDrive > 05. Field > Procurement > Orders

Field Delivery Coordination

Site Manager or DMS PM logs receipt date in Daily Log (Sage CM)

Verify count, condition, and delivery location

Photograph and upload packing slip to OneDrive > 05. Field > Procurement > Deliveries

Escalation and Delay Mitigation

Review LLI tracker weekly with Scheduler and CPO

Update Owner if delay affects milestone

Document mitigation plan and upload to OneDrive > 23. Logs & Reports > Procurement Delays

Folder Structure & File Locations

Blocking Logic

? Do not proceed with ordering unapproved submittals. ? Do not allow field crews to install unverified deliveries. ? Do not ignore LLI flags without weekly mitigation update.

Outputs/Deliverables

Procurement tracker spreadsheet

PO records and vendor confirmations

Delivery logs and site receipt documentation

Weekly updates for LLIs and mitigation actions

[4.0] Subcontractor Coordination Meetings and Communication Protocols (SOP) {#subcoordination}

Tools Used: Microsoft Teams, Outlook, OneDrive, Sage CM, Meeting Minutes Templates

Outputs/Deliverables: Weekly Coordination Meeting Minutes, Issue Logs, Schedule Alignment Records, Escalation Notes

Escalation Path: PM ? Site Manager ? Executive PM ? CPO (as needed)

Objective

To ensure structured communication with all subcontractors, aligning project execution with safety, quality, and schedule requirements. This SOP sets the standard for meeting cadence, documentation, escalation, and coordination.

Definitions

Coordination Meeting: Weekly or milestone-based meetings held by the PM and Site Manager with all relevant subcontractors and self-perform leads.

Issue Log: A running list of unresolved items, constraints, or needed decisions.

Meeting Minutes: Formal notes capturing discussions, action items, and responsibilities.

Policy

Weekly coordination meetings are mandatory on all active Devere projects. These meetings must follow a structured agenda and be documented in real time. Meeting outputs are archived and shared across PM, Site, and executive teams.

Step-by-Step Procedure

Schedule Standing Meetings

Set recurring Teams invite (e.g., Wednesdays at 9AM)

Invite Site Manager, DMS PMs, subcontractor reps, Safety, and Quality leads

Save calendar to OneDrive > 01. Administration > Meeting Agendas & Minutes

Prepare Agenda

Use standard template:

Safety/Incidents

Current Work in Place

Upcoming Work / Lookahead Conflicts

Submittals/RFIs/Inspections

Change Orders / Open Issues

Deliveries

Site Constraints

Save agenda to OneDrive > 01. Administration > Meeting Agendas & Minutes

Run Meeting & Log Notes

Begin with safety briefing

Review each agenda item, allow contractor input

Capture action items with due dates and responsible parties

Save minutes in .docx format, upload to OneDrive > 01. Administration > Meeting Agendas & Minutes

Issue Log Maintenance

Update unresolved issues in Sage CM > Project Logs > Open Issues

Highlight urgent constraints for executive review (notify via Teams)

Follow-Up and Escalation

PM ensures follow-up occurs weekly

If action is not completed within 7 days, escalate to Exec PM or CPO

Document escalation and upload to OneDrive > 23. Logs & Reports > Escalations

Folder Structure & File Locations

Blocking Logic

? Do not allow site work to proceed without weekly subcontractor check-ins. ? Do not issue change directives without meeting-level alignment. ? Do not permit schedule rebaselining without review in coordination meeting.

Outputs/Deliverables

Weekly coordination meeting agenda and minutes

Updated issue log and action register

Escalation notes and responsible party assignments

[4.1] Subcontractor Scope Enforcement and Clarification (SOP) {#scopeenforcement}

Tools Used: Subcontracts, Plans, Specifications, RFIs, Meeting Minutes, Sage CM, OneDrive

Outputs/Deliverables: Clarification Logs, Scope Alignment Memos, Change Order Justifications, Escalation Records

Escalation Path: PM ? Site Manager ? Executive PM ? CPO

Objective

To ensure subcontractors perform only their contracted work, with clear expectations on deliverables, layout responsibility, and change order boundaries. This SOP defines how scope is communicated, enforced, and documented across the lifecycle of the project.

Definitions

Scope Clarification Memo: A written summary outlining any verbal clarification of subcontractor scope.

Layout Responsibility: The obligation of subcontractors to verify locations in the field based on the contract documents.

Scope Enforcement: PM oversight to ensure a subcontractor does not exceed or ignore defined responsibilities.

Policy

Devere does not provide layout dimensions. Subcontractors are responsible for layout verification, referencing plans and specs. Scope disagreements must be documented in writing and referenced during pre-installation meetings.

Step-by-Step Procedure

Contract Review with Subcontractors

At kickoff, walk subs through their scope, referencing contract Exhibit A

Clarify exclusions and limits of work

Save scope summary to OneDrive > 02. Contracts > Scope Clarifications

Layout Enforcement

Reiterate policy in meetings: no field dimensions provided by Devere

Require subs to verify via drawings and submit RFIs if unclear

Document reinforcement in meeting minutes (OneDrive > 01. Administration > Meeting Agendas & Minutes)

Field Conflict Identification

When layout conflicts arise:

PM investigates whether the issue stems from unclear design or sub error

Submits RFI if needed to clarify design intent

Logs conflict in Sage CM > Project Logs > Issues

Escalation and Documentation

If sub insists on deviation or claim:

Draft Scope Clarification Memo

Upload to OneDrive > 02. Contracts > Scope Clarifications

Log issue in Sage CM > Issues with reference to subcontract section

Escalate unresolved issues to Executive PM

Folder Structure & File Locations

Blocking Logic

? Do not issue verbal scope clarifications without written follow-up. ? Do not provide dimensional layout info?subs must verify. ? Do not process claims for work that was never contractually scoped.

Outputs/Deliverables

Scope Clarification Memos

Meeting minutes with scope confirmations

RFI responses for field layout disputes

Issue log updates and escalation records

[4.2] Subcontractor Cleanup Obligations and Enforcement (SOP) {#cleanup}

Tools Used: AIA A401 §4.5, Daily Logs (Sage CM), Cleaning Violation Template, OneDrive, Team Notifications

Outputs/Deliverables: Cleaning Compliance Logs, Violation Notices, PM/Site Manager Verification Records

Escalation Path: Site Manager ? PM ? Cleaning Supervisor ? CPO

Objective

To enforce daily and final cleanup by subcontractors in accordance with AIA contract language and Devere expectations, ensuring site cleanliness, safety, and warranty protection.

Definitions

Daily Cleanup: The requirement that each sub removes its trash, debris, and excess materials at the end of each workday.

Final Cleanup: The requirement to fully clean all work areas, remove equipment, and deliver broom-clean condition prior to final inspection.

Cleaning Violation Notice: A formal notification to a subcontractor citing a cleanup failure with timeline for resolution.

Policy

As stated in AIA A401 §4.5, subcontractors are required to keep the premises clean at all times. Devere reserves the right to backcharge or stop work for violations. Cleanup enforcement is documented daily and violations must be resolved within 24 hours.

Step-by-Step Procedure

Expectations in Subcontract Kickoff

Review AIA A401 §4.5 during scope alignment

Reinforce daily and final cleanup expectations

Log kickoff in OneDrive > 01. Administration > Meeting Agendas & Minutes

Daily Enforcement by Site Manager

Observe cleanliness at end of day

Log photos and notes in Sage CM > Daily Log > Cleanup

Alert non-compliant subs via Teams or text

Violation Issuance

If issue persists, complete Cleaning Violation Notice form

Email to sub and upload PDF to OneDrive > 17. Safety > Cleaning Violations

Notify PM and Cleaning Supervisor

Verification and Resolution

Re-inspect the next morning

If resolved, note compliance in Sage CM > Daily Log

If not resolved, initiate backcharge or work stoppage escalation

Final Cleanup

5 days prior to Substantial Completion, notify all subs of final cleanup expectations

Conduct walk with Cleaning Supervisor, log deficiencies

Upload list to OneDrive > 25. Closeout > Final Cleanup Logs

Folder Structure & File Locations

Blocking Logic

? Do not allow progress payments if final cleanup not verified. ? Do not allow trades to leave jobsite without closing out cleanup responsibilities. ? Do not reassign cleaning to another trade without logging original sub?s failure.

Outputs/Deliverables

Cleaning Violation Notice

Daily Log cleanup entries

Final cleanup logs and photos

Backcharge documentation (if applicable)

[4.3] Subcontractor Access Control and Site Restrictions (SOP) {#accesscontrol}

Tools Used: Site Logistics Plan, Access Control Logs, OneDrive, Badge/Sign-In Sheets, Sage CM Safety Observations

Outputs/Deliverables: Site Access Roster, Access Violation Reports, Visitor Logs, Restricted Area Maps

Escalation Path: Site Manager ? PM ? Safety Supervisor ? CPO

Objective

To control access to active construction sites by subcontractors, visitors, and vendors, ensuring all personnel follow Devere?s safety and security protocols.

Definitions

Restricted Area: Any portion of the site requiring additional authorization, PPE, or escort.

Access Violation: Any entry into restricted zones or work areas without clearance.

Site Access Roster: A master log of all cleared subcontractors and authorized personnel.

Policy

All subcontractor access must comply with site-specific logistics and access control measures. Unauthorized access will trigger formal warnings, documentation, and possible removal from site.

Step-by-Step Procedure

Access Review During Pre-Mobilization

Review logistics and restricted zones with subcontractors

Distribute project-specific access rules

Save to OneDrive > 17. Safety > Access Control > Project Access Plan

Site Entry Protocol

Subcontractors sign in daily using paper log or digital form

Badge/vest or hard hat sticker must be visible at all times

Logs filed in OneDrive > 17. Safety > Access Control > Daily Logs

Restricted Area Control

Clearly mark restricted areas on signage and plans

If escorted access is needed, PM or Site Manager must log escort in Daily Log (Sage CM)

Violations recorded in Sage CM > Safety > Observations

Visitor and Vendor Access

All non-contracted visitors must:

Sign in at site trailer

Receive visitor PPE

Be accompanied by Devere staff at all times

File visitor logs in OneDrive > 17. Safety > Access Control > Visitor Logs

Violation Response

Site Manager issues verbal warning

Second violation triggers Access Violation Notice (Word template)

File to OneDrive > 17. Safety > Access Control > Violations

Escalate to Safety Supervisor and PM for enforcement

Folder Structure & File Locations

Blocking Logic

? Do not allow subs onsite without reviewed access plan. ? Do not allow work in restricted areas without clearance. ? Do not permit unescorted visitors under any circumstance.

Outputs/Deliverables

Project Access Plan

Subcontractor Daily Access Logs

Visitor Logs

Access Violation Notice and escalation record

[4.4] Subcontractor Safety Compliance and Enforcement (SOP) {#subsafety}

Tools Used: Sage CM Safety Module, Devere Safety Work Instructions, OneDrive, Daily Logs, Toolbox Talk Sign-In Sheets

Outputs/Deliverables: Safety Violations Log, Corrective Action Reports, Safety Meeting Minutes, Termination Records (if applicable)

Escalation Path: Site Manager ? Safety Supervisor ? PM ? CPO

Objective

Ensure all subcontractors comply with Devere?s safety policies and OSHA regulations. Establish mechanisms to observe, report, correct, and escalate violations.

Definitions

Safety Violation: Any act or omission by a subcontractor or worker that breaches Devere?s or OSHA?s safety rules.

Corrective Action: A documented step to fix a safety issue and prevent recurrence.

Repeat Offender: A subcontractor who receives multiple safety violations within the same project.

Policy

Subcontractors are contractually obligated to follow Devere?s site-specific safety plan and general OSHA requirements. Non-compliance will result in escalating corrective actions and may include backcharges, stop work orders, or removal from the project.

Step-by-Step Procedure

Orientation and Acknowledgement

During onboarding, subs must:

Receive Devere Safety Handbook

Attend site safety orientation

Sign Safety Acknowledgement Form (file in OneDrive > 17. Safety > Acknowledgements)

Daily Observation and Log

Site Manager or Safety Supervisor observes subcontractor behavior daily

Record unsafe acts in Sage CM > Safety > Observations

Include photo evidence when possible

Violation Documentation and Response

First Offense: Issue verbal warning, document in Daily Log

Second Offense: Complete Safety Violation Notice and assign corrective action

File in OneDrive > 17. Safety > Violations > [Subcontractor Name]

Notify PM and Safety Supervisor

Repeat Offender Protocol

If violations persist:

Conduct formal safety meeting with sub?s supervisor

Escalate to PM and CPO for determination of stop work, backcharge, or removal

Record resolution in OneDrive > 17. Safety > Violations > Resolved

Toolbox Talks and Retraining

Require affected subcontractors to conduct trade-specific toolbox talk

Site Manager to verify participation using Sign-In Sheet

File to OneDrive > 17. Safety > Toolbox Talks > [Date]

Folder Structure & File Locations

Blocking Logic

? Do not allow subcontractors to continue work after a third safety violation without CPO review. ? Do not allow toolbox talks to be unverified or unfiled. ? Do not approve final payment until all safety documentation is closed.

Outputs/Deliverables

Safety Observation Logs

Violation Notices and Corrective Actions

Toolbox Talk Sign-in Sheets

Escalation Records and Final Resolutions

[4.5] Subcontractor Equipment and Material Storage Protocol (SOP) {#storageprotocol}

Tools Used: OneDrive Site Logistics Plan, Sage CM Daily Logs, Site Manager Observation, Subcontractor Orientation Checklist

Outputs/Deliverables: Approved Storage Locations Map, Non-Compliance Logs, Backcharge Notifications

Escalation Path: Site Manager ? PM ? Safety Supervisor ? CPO

Objective

To maintain safe and organized project sites by regulating where and how subcontractors store their tools, equipment, and materials. Ensures clear access paths, protection of in-place work, and compliance with the site logistics plan.

Definitions

Storage Violation: Any instance of subcontractor equipment or materials being stored in non-approved locations, blocking access routes, or creating safety hazards.

Designated Storage Zone: A clearly marked area on the site logistics plan approved for a subcontractor?s temporary storage needs.

Policy

No subcontractor may store materials or equipment outside designated zones without Site Manager approval.

Blocking drive lanes, staging areas, or safety access points will trigger enforcement.

Step-by-Step Procedure

Initial Assignment of Storage Zones

During subcontractor onboarding, assign a storage location based on the Site Logistics Plan

Upload annotated plan to OneDrive > 05. Field > Site Logistics > Storage Maps

Document assignment in Sage CM > Project Logs > Storage Permissions

Daily Monitoring

Site Manager walks site each morning to verify storage areas

Log violations in Sage CM > Safety > Observations > Material Storage

Take photo documentation as needed

Violation Enforcement

First Violation: Issue verbal instruction and note in Daily Log

Second Violation: Submit Storage Violation Form

Upload to OneDrive > 05. Field > Site Logistics > Violations

Notify PM and Safety Supervisor

Backcharge or Relocation

Continued non-compliance authorizes Devere to relocate or dispose of improperly stored materials

Complete backcharge log in Sage CM > Change Events

Share backup to OneDrive > 02. Contracts > Backcharges > [Subcontractor Name]

Weekly Review

Conduct weekly review of storage areas during coordination meeting

Revise storage zones as site conditions change

Update logistics plan and reissue to all affected subs via Teams and OneDrive

Folder Structure & File Locations

Blocking Logic

? Do not allow unauthorized storage within critical egress or drive lanes. ? Do not approve final pay apps until all materials are cleared and stored per plan. ? Do not permit tool trailers or equipment staging in concrete pour zones without express approval.

Outputs/Deliverables

Annotated Site Logistics Plan with Storage Zones

Storage Violation Logs and Photos

Subcontractor Storage Assignments

Backcharge Notices (if applicable)

[4.6] Subcontractor Tools, Trailer, and Parking Protocol (SOP) {#subparking}

Tools Used: OneDrive Site Logistics Plan, Sage CM Daily Logs, Safety Observation Module, Parking Assignment Register

Outputs/Deliverables: Subcontractor Parking Map, Trailer Placement Log, Violation Reports

Escalation Path: Site Manager ? PM ? Safety Supervisor ? CPO

Objective

To ensure subcontractor tool storage, trailer placement, and vehicle parking is orderly, safe, and compliant with the project?s logistics plan.

Definitions

Trailer Violation: Placement of a tool or storage trailer in unauthorized areas or blocking access routes.

Parking Violation: Any subcontractor vehicle parked outside of designated areas, fire lanes, or restricted zones.

Tool Storage Zone: An assigned location for safe, secured storage of small tools and rolling gang boxes.

Policy

All subcontractors must park vehicles, place trailers, and store tools only in locations designated in the Site Logistics Plan. Unauthorized placement will result in escalation and possible removal from site.

Step-by-Step Procedure

Pre-Mobilization Assignment

Assign parking areas and trailer zones based on Site Logistics Plan

Upload map to OneDrive > 05. Field > Site Logistics > Parking & Trailers

File assignments in Sage CM > Project Logs > Trailer/Parking Registry

Tool Storage Approval

Require subcontractors to submit plan for gang box/tool trailer usage

Site Manager approves locations

Update tool storage assignments in OneDrive > 05. Field > Site Logistics > Tool Storage

Daily Monitoring

Site Manager verifies parking and trailer locations during daily walks

Log violations in Sage CM > Safety > Observations > Parking & Trailer

Enforcement Steps

First Offense: Verbal notice, Daily Log entry

Second Offense: Written Violation Notice uploaded to OneDrive > 05. Field > Site Logistics > Violations

Third Offense: Trailer or vehicle towed or relocated at subcontractor expense; backcharge logged in Sage CM > Change Events

Weekly Logistics Review

Update assignments as site access and phasing evolves

Communicate changes during subcontractor coordination meeting

Folder Structure & File Locations

Blocking Logic

? Do not allow trailers or vehicles in fire access, ADA, or emergency lanes. ? Do not allow tool trailers to block pedestrian walkways or pour zones. ? Do not approve final payment until all trailers and vehicles are removed from the jobsite per schedule.

Outputs/Deliverables

Annotated Parking and Trailer Map

Subcontractor Assignment Register

Safety Observation Logs

Violation Reports and Backcharges (if applicable)

[4.7] Subcontractor Daily Sign-In, Orientation, and Access Badge Protocol (SOP) {#subsignin}

Tools Used: Sage CM > Safety Module, OneDrive Orientation Files, Physical Sign-in Sheet, Badge Tracking Log

Outputs/Deliverables: Daily Sign-in Log, Completed Orientation Acknowledgments, Badge List, Access Compliance Record

Escalation Path: Site Manager ? Safety Lead ? PM ? HR ? CPO

Objective

To ensure that all subcontractor personnel entering the jobsite are fully oriented, logged, and accounted for with verified safety compliance and badge access. This protocol ensures access control, safety enforcement, and contractor accountability.

Definitions

Orientation Packet: A collection of safety and site-specific documents that must be reviewed before working on-site.

Badge Access Control: A system of jobsite access that includes unique identification for each authorized worker.

Daily Sign-In Log: A physical or digital record that tracks the arrival and departure of each subcontractor worker.

Policy

No subcontractor employee is permitted to perform work on-site until they:

Complete a Devere safety orientation

Sign the orientation acknowledgment form

Are issued a unique site access badge or sticker

Appear on the daily sign-in log

Any violation triggers immediate removal from site and notification to subcontractor management.

Step-by-Step Procedure

Pre-Mobilization Orientation Setup

Upload orientation packet to OneDrive > 17. Safety > Orientation > [Project Name]

Print orientation sign-in/acknowledgment forms for use at site trailer

Create Sage CM contact records for subcontractor foremen and safety reps

First Day Orientation (Per Crew)

Site Manager or Safety Lead administers orientation using Devere standard packet

Each worker signs the Orientation Acknowledgment form

Assign access badge or sticker (color-coded by company or trade)

Log completion in Sage CM > Safety > Orientation Log

Daily Sign-In and Badge Verification

Subcontractor workers sign in at designated check-in location

Site Manager or designated staff verifies badge

Enter arrivals in physical logbook or digital site entry system

Non-Compliance Enforcement

Anyone without badge or orientation is escorted off-site

Record incident in Sage CM > Safety > Incidents

Notify subcontractor PM and upload record to OneDrive > 17. Safety > Violations

Weekly Review and Reconciliation

Safety Lead compares sign-in sheets to badge log

Remove access for non-returning workers

Archive logs to OneDrive > 17. Safety > Logs > [Week Ending YYYY-MM-DD]

Folder Structure & File Locations

Blocking Logic

? Do not allow access to the site for any person not listed on the current sign-in sheet or without a badge. ? Do not allow orientation acknowledgment forms to be incomplete or unsigned. ? Do not issue final completion reports unless all orientation logs are archived.

Outputs/Deliverables

Daily Sign-in Logs

Orientation Acknowledgment Forms

Subcontractor Badge Lists

Incident and Violation Records (if applicable)

[4.8] Subcontractor Daily Reporting and Crew Hours Verification (SOP) {#subdailyreports}

Tools Used: Sage CM > Daily Logs, OneDrive Daily Report Folder, Timecard Verification Sheet, RFI Module

Outputs/Deliverables: Subcontractor Daily Report Log, Labor Hour Record, Activity Report, Non-Reporting Violation

Escalation Path: Site Manager ? Project Manager ? Subcontractor PM ? CPO (if repeat violation)

Objective

To ensure that every subcontractor documents work performed, labor hours, equipment usage, and delays daily to maintain accurate project records, track productivity, and resolve issues proactively.

Definitions

Subcontractor Daily Report: A standardized form capturing the date, manpower, work performed, equipment used, weather delays, and coordination notes.

Labor Verification Log: A table recording crew names and hours, used to validate subcontractor billing and productivity.

Policy

All subcontractors must submit a daily report by 6:30 PM on any day they work on-site. Failure to report within 24 hours is a violation subject to backcharges and documentation of non-compliance.

Step-by-Step Procedure

Orientation and Setup

Issue standard Sub Daily Report form to each subcontractor during orientation

Save blank master form to OneDrive > 05. Field > Daily Reports > [Trade Folder]

Train subcontractor PM/foreman on submittal process (email, upload, or paper drop-off)

Daily Report Submission (by Subcontractor)

Foreman fills out Daily Report with:

Trade

Number of workers

Names & hours

Description of work

Equipment used

Delays or coordination issues

Submit to Site Manager via:

Email to project distribution

Upload to OneDrive > 05. Field > Daily Reports > [Trade Folder]

Paper copy to field trailer

Daily Review (by Site Manager)

Cross-check labor hours against on-site headcount

Log report into Sage CM > Daily Logs > [Subcontractor Entry]

Note weather, production concerns, or scheduling impacts

Non-Compliance Documentation

If not received within 24 hours:

Log violation in Sage CM > Safety > Observations

Save record to OneDrive > 05. Field > Daily Reports > Violations

Notify subcontractor PM and escalate after second offense

Weekly Summary and Reconciliation

Compile weekly labor and production reports

Submit to Project Manager for labor tracking and coordination

Archive to OneDrive > 05. Field > Daily Reports > Weekly Summary

Folder Structure & File Locations

Blocking Logic

? Do not accept invoices from subcontractors who did not submit daily reports. ? Do not validate timecards without labor verification logs. ? Do not mark subcontractor work as complete in Sage CM without matching daily report documentation.

Outputs/Deliverables

Daily Report Log

Labor Hour Verification Logs

Equipment Use Records

Non-Reporting Violation Notices

Weekly Summary Uploads

[4.9] Subcontractor Job Hazard Analysis (JHA) and Pre-Task Planning Compliance (SOP) {#subjhaptp}

Tools Used: Sage CM > Safety Observations, OneDrive > Safety > JHAs & PTPs, Microsoft Teams

Outputs/Deliverables: JHA forms, PTP sign-in logs, violation reports, escalation memos

Escalation Path: Site Manager ? Safety Lead ? Subcontractor PM ? PM ? CPO

Objective

To ensure every subcontractor performs and documents Job Hazard Analyses (JHAs) and Pre-Task Planning (PTP) meetings daily prior to beginning any physical work. These measures uphold safety, reduce incidents, and confirm scope readiness.

Definitions

JHA (Job Hazard Analysis): A document identifying the steps of a task, hazards involved, and mitigation strategies.

PTP (Pre-Task Plan): A daily meeting where subcontractor foremen review the day?s work, safety concerns, and coordination needs with their crew.

Policy

No subcontractor may begin work on any given day without a PTP and current JHA on file. Missing documentation is a violation. PTPs must be conducted prior to the start of shift, signed by the full crew, and submitted to Devere staff.

Step-by-Step Procedure

Initial JHA Submission and Review

Prior to start of scope, subcontractor submits JHA for each major task or trade activity

Save reviewed and approved JHAs to:

OneDrive > 17. Safety > JHAs > [Trade Name]

Reference JHAs in Sage CM > Safety > Documents

Daily Pre-Task Planning (PTP)

Foreman conducts PTP before work begins

Discuss:

Work location

Task(s) for the day

Hazards and mitigations

PPE required

Crew assignments

All crew members sign the PTP form

Submit signed PTP to:

OneDrive > 17. Safety > PTPs > [Trade Name] > [Date]

Daily Verification and Spot Audits

Site Manager or Safety Lead spot-checks:

Was PTP conducted?

Are crew members aware of hazards?

Are required PPE and controls in place?

Note findings in Sage CM > Safety > Observations

Violation Handling and Escalation

No PTP or unsigned PTP:

Immediate stop work

Record in Sage CM > Safety > Incidents

Upload violation record to OneDrive > 17. Safety > Violations > [Date]

Notify subcontractor PM and escalate

Weekly Review and Compliance Trends

Compile signed PTPs and spot-check records

Save weekly compliance summary:

OneDrive > 17. Safety > PTPs > Weekly Summary

Review trends in weekly Devere Safety Sync

Folder Structure & File Locations

Blocking Logic

? Do not allow subcontractor work to begin without a signed PTP. ? Do not validate scope progress without daily safety documentation. ? Do not clear work for payment or milestone without proof of JHA/PTP compliance.

Outputs/Deliverables

Approved JHA Files (by task/trade)

Daily Signed PTP Forms

Sage CM Observations and Violations

Weekly PTP Compliance Summary Logs

[5.0] Field Coordination with DMS Self-Perform Crews (SOP) {#dmsfieldcoordination}

Tools Used: Sage CM > Daily Logs, RFIs, Budget, Punch List, OneDrive Project Folders, GoCodes, Microsoft Teams

Outputs/Deliverables: Verified Layouts, Equipment Assignments, Lookahead Tasks, RFI Feedback, Safety/Quality Checks

Escalation Path: DMS PM ? Site Manager ? GC PM ? CPO

Objective

To coordinate all fieldwork involving Devere?s self-perform crews (DMS: Concrete, Carpentry, Excavation) through clear task assignment, layout verification, quality enforcement, and schedule integration. This SOP ensures alignment between DMS PMs and the overall GC delivery structure.

Definitions

DMS PM: Project Manager for Devere?s in-house self-perform trades

Verified Layout: Field-validated locations for work, staked or confirmed using surveyor controls or Trimble files

Lookahead Schedule: Weekly task list showing crew targets and dependencies

Policy

All field activities executed by DMS crews must be coordinated through the GC Site Manager and documented in Sage CM. Layouts must be field verified. Work may not proceed without approved safety plans, quality hold points cleared, and supporting documentation in place.

Step-by-Step Procedure

Daily Crew Task Coordination

Review daily lookahead with Site Manager by 6:00 AM

Assign crew activities in Microsoft Planner

Post assignments to:

OneDrive > [Project Name] > 05. Field > Lookahead Tasks

Enter activity notes in Sage CM > Daily Logs > [DMS Trade]

Layout and Survey Verification

Confirm layout via Trimble or survey stakes

Log verification in Sage CM > Daily Log > Layout Confirmed

Store layout docs in OneDrive > 05. Field > Layouts > Verified

RFI and Submittal Feedback Loop

If a DMS crew encounters a drawing conflict or unclear condition:

Submit issue to Site Manager and log in Sage CM > RFI > [Discipline]

Track response and provide markups if needed

Save resolution files in OneDrive > 04. RFIs > [Discipline]

Safety and Quality Alignment

Before starting work:

Confirm Action Plan, JHA, and Pre-Task Planning is filed

Review checklists and hold points

Spot audits are logged in Sage CM > Safety and Quality

Equipment and Resource Allocation

Use GoCodes to check out required tools and equipment

Assign equipment on log sheet and save in OneDrive > 13. Equipment > Daily Use Logs

End-of-Day Reporting

DMS PM submits:

Crew hours

Equipment use

Photos of progress

Any delays or coordination issues

Upload to:

Sage CM > Daily Logs > DMS

OneDrive > 05. Field > Daily Reports > [DMS Trade] > [Date]

Folder Structure & File Locations

Blocking Logic

? Do not allow DMS crews to mobilize without verified layout and safety plans. ? Do not proceed with work that has unresolved RFIs or submittal conflicts. ? Do not approve labor logs without matching equipment logs and photographic confirmation.

Outputs/Deliverables

Daily Logs in Sage CM

Verified layout documentation

Lookahead assignments

Crew labor and equipment logs

Issue logs and RFI resolutions

[5.1] DMS Crew Labor Tracking and Task Verification (Work Instruction) {#dmscrewtracking}

Tools Used: Sage CM > Daily Logs, OneDrive > Daily Reports, Teams, GoCodes

Output: Verified labor reports, time tracking logs, task closeout records

Escalation Path: DMS Foreman ? DMS PM ? Site Manager ? PM ? CPO

Objective

Ensure accurate daily documentation of crew hours, task completion, equipment usage, and issues for all DMS (self-perform) field crews.

Step-by-Step Procedure

Start of Day ? Crew Assignment Confirmation

DMS PM confirms daily crew assignments posted in:

OneDrive > 05. Field > Lookahead Tasks

Communicate assignments during 6:30 AM huddle with DMS Foreman

Throughout Day ? Labor Time and Task Progress Tracking

Foreman or Lead updates:

Hours worked per crew member

Tasks completed vs. planned

Location photos taken with time stamp

Flag incomplete tasks for roll-forward

Notes captured in field notebook or mobile device

End-of-Day ? Report Submission

Foreman submits:

Timecard for each crew member (signed)

Photo of each work area

List of completed vs. incomplete tasks

Equipment used (linked to GoCodes)

Save all files to:

OneDrive > 05. Field > Daily Reports > [DMS Trade] > [Date]

Daily Log Entry in Sage CM

DMS PM or Site Manager enters:

Summary of crew hours

Issues or delays

Link to OneDrive report folder

Tag ?Task Verified? status if complete

Location: Sage CM > Daily Logs > [DMS Trade]

Verification and Signoff

Site Manager reviews photos and crew reports

Approves labor time and marks task complete in lookahead planner

Escalates issues or incomplete work as needed

Outputs/Deliverables

Daily crew timecards (scanned or uploaded)

Photographic proof of work (linked to date folder)

Sage CM Daily Log entries

Verified task status (complete/incomplete)

Planner checklist marked for task completion

[5.2] DMS Daily Equipment Use Logs and GoCodes Integration (Work Instruction) {#dmsequipmenttracking}

Tools Used: GoCodes, Sage CM > Equipment, OneDrive > Equipment Logs, Field Tablets/Phones

Output: Daily equipment logs, checkout timestamps, maintenance flag reports

Escalation Path: DMS Foreman ? DMS PM ? Site Manager ? PM ? Equipment Manager

Objective

Ensure proper tracking, usage, and reporting of Devere-owned and jobsite-assigned equipment used by DMS crews, utilizing GoCodes and integrated log tracking.

Step-by-Step Procedure

Start-of-Day Equipment Checkout

Foreman scans equipment QR codes using GoCodes app

Assigns equipment to task and crew member

Log auto-saved to GoCodes and synced to OneDrive > 13. Equipment > Daily Use Logs > [Date]

Active Monitoring During Task Execution

Field crew records issues (e.g., fuel, downtime, malfunctions)

Use mobile device to flag item as "Requires Maintenance" in GoCodes

DMS PM notified and logs downtime in:

Sage CM > Equipment > Downtime Tracking

End-of-Day Check-In and Summary

Crew scans equipment again to check-in

Foreman uploads:

Use hours/mileage

Fuel or material refills

Maintenance requests

Save to:

OneDrive > 13. Equipment > Daily Use Logs > [Date]

Weekly Review and Reconciliation

DMS PM downloads GoCodes report

Compares to:

Sage CM > Equipment Logs

Daily use logs in OneDrive

Investigate discrepancies or unlogged usage

Folder Structure & File Locations

Outputs/Deliverables

Daily scanned checkout/check-in records

Fuel/refill and maintenance logs

Downtime logs in Sage CM

Weekly GoCodes report linked to DMS crew usage

[5.3] DMS Pre-Task Action Plans and Hold Point Readiness (Work Instruction) {#dmspre-taskplans}

Tools Used: OneDrive > 17. Safety > Action Plans, Sage CM > Inspections, Checklists, Teams

Output: Completed Action Plan Forms, Checklist Approvals, Hold Point Signoffs

Escalation Path: DMS Foreman ? DMS PM ? Site Manager ? Quality or Safety Lead ? PM

Objective

Ensure that no DMS crew begins critical activities without a submitted Action Plan, required safety documentation, and cleared quality/safety hold points.

Step-by-Step Procedure

Pre-Task Coordination

DMS PM reviews daily lookahead for hold-point-triggered tasks

Pull correct Action Plan template:

OneDrive > 17. Safety > Action Plans > [Discipline or Task Type]

Customize for that day?s task: crew size, work location, safety plan, submittal references

Action Plan Completion

DMS Foreman fills form on tablet or prints and writes manually

Must include:

Task description and location

Equipment used

Safety controls

Required submittals, checklist ID

Crew sign-in with printed names and signatures

Upload signed version to:

OneDrive > 17. Safety > Action Plans > Executed > [Date]

Hold Point Signoff

DMS PM notifies Site Manager and Quality Lead via Teams

Checklist is reviewed using:

Sage CM > Inspections > [Discipline or DFOW]

If complete, Site Manager or Quality Lead marks HOLD POINT CLEARED

Document approval in OneDrive > 18. Quality > Hold Point Logs

Pre-Task Toolbox Talk and Kickoff

DMS Foreman conducts 5?10 min site talk using plan and checklist

Take crew photo next to posted Action Plan on jobsite board

Log talk in:

Sage CM > Safety > Toolbox Talks

Upload photo to OneDrive > 17. Safety > Toolbox Talks > [Date]

No-Go Without Hold Point Clearance

Site Manager inspects area

If no Action Plan or unverified hold point ? STOP WORK

DMS PM escalates and schedules re-review

Outputs/Deliverables

Daily Pre-Task Action Plan (signed and archived)

Checklist and inspection log with hold point clearance

Toolbox Talk photo and log

Sage CM entries for Safety and Inspections

Blocking Logic

? No crew work may begin without:

Signed Action Plan uploaded to OneDrive

Hold Point checklist confirmed in Sage CM

Toolbox Talk logged and photo proof provided

[5.4] DMS Field Layout, Controls, and As-Built Survey (Work Instruction) {#dmslayoutcontrol}

Tools Used: Trimble (TBC), OneDrive > Layouts & As-Builts, Sage CM > Layout Confirmations, Teams, GoCodes

Output: Verified layout files, point logs, layout confirmation entries, as-built documentation

Escalation Path: DMS PM ? Site Manager ? Project Manager ? Surveyor ? Quality Lead

Objective

Ensure all DMS self-perform work is laid out using approved survey controls and project drawings. All layouts must be verified prior to work, with deviations documented and as-built records maintained.

Definitions

Survey Controls: Official benchmarks or points set by licensed surveyor used as reference

As-Built Survey: Final field verification showing installed condition vs. design

TBC: Trimble Business Center ? layout and modeling software used by DMS teams

Step-by-Step Procedure

Initial Layout Coordination

DMS PM requests layout files (CAD/PDF/Control Points) from PM

Store working files in:

OneDrive > 05. Field > Layouts > Raw Files

Coordinate layout review with Site Manager and Surveyor

Field Layout and Point Verification

Use Trimble equipment to:

Load project model or linework

Stake and mark layout locations

Record point logs

Save point logs to:

OneDrive > 05. Field > Layouts > Verified

Confirm layout in Sage CM:

Daily Logs > Layout Confirmed

Layout Documentation and Photos

Take photo of marked layout with scale reference or tags

Save to:

OneDrive > 05. Field > Layouts > Photos > [Date]

Enter Sage CM note:

?Layout Confirmed ? [Task], verified using Trimble. Point log and photo uploaded.?

As-Built Tracking and Markups

At completion of each phase:

Record as-built data with Trimble

Overlay against design for variances

Save as-built PDF/DWG to:

OneDrive > 18. Quality > As-Built > [Discipline or Date]

Document major deviations with redline and notify PM

Final Layout Signoff and Storage

Surveyor or Site Manager reviews layout or as-built

Signs digital confirmation sheet

Save signed version to:

OneDrive > 05. Field > Layouts > Signoffs

Folder Structure & File Locations

Blocking Logic

? Work may not proceed if:

No layout verification documented in Sage CM

Control points or layout tags are missing on-site

As-built data not submitted post-completion of layout-sensitive work

Outputs/Deliverables

Field point logs and Trimble exports

Layout confirmation photos and signoffs

As-built overlays and deviation reports

Sage CM entries for layout verification

[5.5] Pre-Pour, Pre-Build, and Pre-Bury, etc. Field Readiness Checks (Work Instruction) {#preconstructionchecks}

Tools Used: OneDrive > 18. Quality > Checklists, Sage CM > Inspections, Microsoft Teams, Daily Logs, RFIs

Output: Completed Pre-Task Checklists, Hold Point Clearance, Field Photos, Sage CM Inspection Records

Escalation Path: DMS PM ? Site Manager ? Quality Lead ? Project Manager

Objective

Ensure that all pre-activity conditions are verified before critical operations such as concrete pours, framing, or utility burial. This process prevents defects and safety violations by enforcing hold point inspections and formal field readiness.

Definitions

Hold Point: A required pause in field operations until quality/safety checks are approved

Pre-Pour/Pre-Build/Pre-Bury: Task-specific checkpoints used before irreversible work begins

Step-by-Step Procedure

Initiate Pre-Task Readiness Form

Select appropriate checklist from:

OneDrive > 18. Quality > Checklists > [Trade] > [Form Type]

Examples:

Pre-Pour ? Foundations

Pre-Build ? Rough Framing

Pre-Bury ? Sanitary Lines

Fill out digitally or print to mark in field

Conduct Field Review with Site Manager or Quality Lead

Use checklist to verify:

Layout matches approved drawings

Safety systems in place (shoring, guardrails, SWPPP)

Submittals and RFIs are resolved

Equipment and access confirmed

Mark pass/fail on checklist and save in:

OneDrive > 18. Quality > Checklists > Completed

Hold Point Clearance Entry in Sage CM

If all conditions met:

Go to Sage CM > Inspections > [Task Type]

Select ?Pass? and upload checklist photo or PDF

Note hold point cleared in Daily Log > DMS ? ?Hold point cleared for [Task], checklist attached.?

If failed:

Document reason

Escalate to Quality Lead and PM

Pre-Task Meeting Documentation (if required)

For critical scopes (e.g., slab pours, envelope tie-ins):

Schedule Teams call or on-site huddle

Review key drawings, specs, and safety conditions

Save meeting notes to:

OneDrive > 15. Meetings > Pre-Task > [Task Name].docx

Folder Structure & File Locations

Additional Required Action Plans & Checklists (To Be Authored in Quality SOP)

These templates and their hold point logic will be created and stored in: ? OneDrive > Projects > [Project Name] > 18. Quality > Checklists > [Trade/Scope]

Blocking Logic

? Never proceed with work if checklist fails or documentation is incomplete

? Do not perform pour/bury/build without Sage CM inspection approval or hold point clearance noted

Outputs/Deliverables

Signed Pre-Task Checklists

Sage CM inspection entries

Hold Point clearance logs in Daily Log

Optional pre-task meeting record

[5.6] Coordination with Survey, Controls, and Layout for DMS and Subcontractors (Work Instruction) {#surveycontrols}

Tools Used: Trimble Equipment, Surveyor Stakeout, OneDrive Layouts Folder, CAD Drawings, Sage CM Daily Logs, Teams for RFI communication

Output: Field-verified layout confirmation, RFI escalation trail, staked layout photos, alignment to control points

Escalation Path: DMS PM ? Surveyor ? Site Manager ? GC PM ? Project Executive

Objective

To ensure all layout and staking activities performed for Devere?s self-perform crews and subcontractors are verified against project control, coordinated with the surveyor, and properly documented. This section enforces the critical need for dimensional accuracy and protects Devere from layout-based claims.

Definitions

Control Points: Primary survey coordinates provided by the licensed project surveyor.

Trimble: Field GPS equipment used by Devere DMS and surveyors to generate layout points.

Staking Verification: Field check showing work was performed within the correct tolerance based on provided controls.

Step-by-Step Procedure

Coordinate Layout Scope and Sequence

Review with surveyor the daily and weekly layout plan

Sequence layout per critical path (foundations before framing, etc.)

Save annotated layout schedule to:

OneDrive > [Project Name] > 05. Field > Layouts > Schedule

Staking and Verification Procedure

Surveyor performs stakeout using Trimble coordinates

DMS crew confirms with photos and laser measurements

Document layout as ?verified? in:

Sage CM > Daily Logs > DMS > Notes: ?Layout verified ? [location]?

OneDrive > [Project Name] > 05. Field > Layouts > Verified > [Date/Location].pdf

Subcontractor Layout Communication

Subcontractors are responsible for verifying layout from controls

Devere does not provide dimensional measurements beyond control lines

This must be stated:

In pre-installation meetings

Via written confirmation (email or RFI)

In subcontractor coordination meeting minutes (stored in OneDrive > 15. Meetings)

RFI Escalation (if discrepancies arise)

DMS or subcontractor submits RFI via Sage CM > RFIs

Include photos and discrepancy notes

Store RFI and final marked-up answer in:

OneDrive > 04. RFIs > Layout Coordination

Blocking Logic

? No layout may proceed without control points from surveyor

? Do not allow subs or DMS to base layout off unverified or assumed benchmarks

? All layout conflicts must be resolved prior to pour or install

Outputs/Deliverables

Verified layout files and photos

RFI escalation trail

Meeting documentation of layout coordination

Trimble data logs if available

[5.7] DMS Production Tracking, Variance Analysis & Lookahead Review (Work Instruction) {#dmsproductiontracking}

Tools Used: Sage CM > Daily Logs & Budgets, Microsoft Planner, OneDrive > 23. Logs & Reports, Primavera P6/MS Project, GoCodes

Outputs: Daily production logs, variance reports, schedule lookaheads, quantity benchmarks

Escalation Path: DMS PM ? Site Manager ? GC PM ? CPO

Objective

To measure actual field performance of DMS self-perform crews (Concrete, Carpentry, Excavation), compare against budgeted benchmarks, and ensure upcoming activities are planned, resourced, and coordinated to maintain project milestones.

Definitions

Production Units: Measurable quantities (e.g., CY placed, SF framed) tied to specific cost codes

Variance: The delta between planned (budgeted) vs. actual labor, materials, and equipment

Lookahead Review: Weekly task alignment between GC PM, Site Manager, and DMS PMs

Step-by-Step Procedure

Capture Daily Production in Sage CM

DMS PM logs quantities installed using:

Sage CM > Daily Logs > Trade > Notes (e.g., ?Placed 75 CY ? Slab A ? 6-man crew ? 10 hrs?)

Attach photos and crew/equipment usage from GoCodes logs

File backup logs in:

OneDrive > Projects > [Project Name] > 23. Logs & Reports > Daily Production > [Trade]

Weekly Variance Review

Every Friday, GC PM leads variance meeting with DMS PM and Site Manager:

Pull report from Sage CM > Budget > Actual vs. Budget > Labor & Equipment

Use filters by Cost Code (e.g., 03 3000 Concrete Forming)

Compare installed quantities to budgeted production rates (CY/day, SF/day)

Document major overruns/underruns and reasons

Save minutes to:

OneDrive > 15. Meetings > Weekly Coordination > Variance Logs

Schedule Lookahead Update

GC PM and Site Manager sync upcoming 2-week lookahead with DMS PMs

Confirm:

Resources (crew, materials, equipment)

Layout/controls availability

Safety and quality hold points cleared

Log updates in:

Microsoft Planner > [Project Name] Board

OneDrive > 05. Field > Lookahead Tasks > Updated [Date].xlsx

Variance Root Cause Analysis

For repeated variances:

GC PM initiates Root Cause Form

Fields include: Cost Code, Work Description, Crew/Hours, Issue Type, Resolution

File to:

OneDrive > 23. Logs & Reports > Variance RCA > [Date/Trade]

Field Visual Board (Optional)

Print lookahead and production charts weekly

Post in trailer ?Job Scoreboard?

Used during toolbox talks to align crew with schedule and performance expectations

Folder Structure & File Locations

Blocking Logic

? Do not proceed with major scope if variance trend exceeds 15% from benchmark without corrective plan

? Do not issue pay approvals to DMS without reviewed logs and photographic confirmation

? Schedule lookahead must be updated every 7 days or crew planning is considered noncompliant

Outputs/Deliverables

Daily production logs with Sage CM + photo backup

Variance analysis reports with RCA logs

Lookahead task board updated and shared

Crew awareness and scoreboard alignment

[5.8] DMS Equipment Management, Tagging, and Maintenance Logs (Work Instruction) {#dmsequipmentmanagement}

Tools Used: GoCodes, Sage CM > Equipment, OneDrive > 13. Equipment, Daily Logs, Microsoft Teams, QR Tagging App (mobile) Outputs: Equipment tags, assignment logs, maintenance tracking, daily use documentation, replacement/escalation notifications

Escalation Path: DMS PM ? Site Manager ? GC PM ? Shop Foreman ? CPO

Objective

To manage the lifecycle, usage, and condition of all tools and equipment deployed by Devere?s self-perform crews (DMS), ensuring proper tagging, daily tracking, scheduled maintenance, and escalation procedures for loss or damage.

Definitions

GoCodes: Asset tracking system used by Devere to tag and monitor equipment with QR codes

Tagging: Process of assigning unique identification codes and scan tags to each field-deployed item

Maintenance Log: Chronological record of usage, inspections, and repair actions

Step-by-Step Procedure

Initial Tagging of Equipment

When new equipment is purchased or mobilized to a site:

Assign asset ID in GoCodes

Affix QR tag (scanable barcode or metal plate) to unit

Enter asset in:

GoCodes > [Project Name] > Asset Library

OneDrive > Projects > [Project Name] > 13. Equipment > Master Equipment Register.xlsx

Daily Equipment Check-in and Assignment

Each morning:

Crew foreman or DMS PM scans equipment via GoCodes mobile app

Log name of operator, hours used, and equipment condition

File daily record to:

OneDrive > Projects > [Project Name] > 13. Equipment > Daily Use Logs > [Date].xlsx

Maintenance Tracking and Service Requests

Weekly:

DMS PM checks maintenance intervals for high-use tools (saws, generators, etc.)

If service required:

Fill out Equipment Service Request Form

Log request in Sage CM > Equipment > Maintenance Event

Notify Shop Foreman via Teams

Archive completed form in:

OneDrive > 13. Equipment > Maintenance Logs

Loss/Damage Escalation Protocol

If equipment is damaged, lost, or malfunctioning:

Log incident in Sage CM > Equipment > Issue Log

Escalate immediately to Site Manager and Shop Foreman

Provide photos and witness documentation

File final resolution report in:

OneDrive > 13. Equipment > Incident Reports > [Date]_[AssetID].pdf

Equipment Audit and Inventory Review

Monthly:

DMS PM and Shop Foreman conduct inventory audit

Cross-check GoCodes data with field inventory

Note missing items or tags and update register

Save audit summary in:

OneDrive > 13. Equipment > Inventory Audits > [Month-Year].xlsx

Folder Structure & File Locations

Blocking Logic

? Never issue equipment without active GoCodes tag and user assignment

? Do not allow unlogged or expired-use equipment on active worksite

? Maintenance intervals must be honored?failures due to neglect will trigger RCA

Outputs/Deliverables

Equipment log entries in GoCodes and Sage CM

Daily and monthly equipment use records

Maintenance tracking reports and audit logs

Escalation trail for damage, failure, or loss

QR-tagged, assigned, and inspected tools at all times

[5.9] DMS Material Inventory Management, Tracking, and Returns (Work Instruction) {#dmsmaterialinventory}

Tools Used: Sage CM > Procurement/Inventory, OneDrive > 12. Materials, Excel > Inventory Logs, GoCodes (if tagged), Daily Logs Outputs: Material quantity logs, usage tracking sheets, return tickets, material shortage/escalation reports Escalation Path: DMS PM ? Site Manager ? PM ? Procurement Lead ? CPO

Objective

To provide a repeatable, documented process for managing on-site materials assigned to self-perform crews. This includes inventory tracking, documenting use, and coordinating returns for unused or excess materials.

Definitions

Inventory Log: Project-level spreadsheet used to track materials received, issued, and returned

Material Return Ticket: Devere-standard form used to document and authorize return of unused materials to vendor or shop

On-Hand Inventory: Materials currently in possession of DMS team and available for use

Step-by-Step Procedure

Receiving and Logging New Material

When materials arrive:

DMS PM or Foreman confirms count against delivery ticket

Enter into:

OneDrive > Projects > [Project Name] > 12. Materials > Inventory Log.xlsx

Optional: Assign GoCodes tag if tool-like or reusable

Issuing Material to Crew

Prior to task start:

DMS PM logs quantity removed for specific crew/task in Inventory Log

Include date, crew lead name, material type, and planned usage area

Example: 24 2x4 studs ? Framing Wall C2 ? Jaime ? 6/1/25

Daily Use and Depletion Tracking

End of day:

Foreman or DMS PM updates log with quantity used, damaged, or excess

Adjust on-hand inventory accordingly

Log issues in Sage CM > Daily Log > Material Notes

Return of Unused Material

If material is excess, unused, or returnable:

Fill out Material Return Ticket

Take photo and note condition

Submit for PM approval

Once approved:

Return to vendor or warehouse

Save final copy to:

OneDrive > 12. Materials > Returns > [Date]Return[MaterialName].pdf

Shortage or Deficiency Escalation

If material is missing or short:

Log in Sage CM > Procurement > Issue

Notify Site Manager and Procurement Lead

Investigate cause (vendor, crew usage, delivery error)

Resolve and file summary to:

OneDrive > 12. Materials > Issue Logs > [Date]_Material_Issue.pdf

Folder Structure & File Locations

Blocking Logic

? Do not issue materials without logging receipt and on-hand quantity

? No returns accepted without completed and approved return form

? All shortages must be logged and investigated

Outputs/Deliverables

Material tracking spreadsheets and logs

Return authorization and vendor notifications

Inventory updates and use records

Escalation logs for material issues

Coordinated material supply with minimal waste

[6.0] DMS Daily Reporting and Documentation Standards (Work Instruction) {#dmsdailyreporting}

Tools Used: Sage CM > Daily Logs, Sage CM > Punch List, Sage CM > Safety, OneDrive > 23. Logs &

Reports, Microsoft Teams, Microsoft Planner Outputs: Complete daily logs, labor/equipment hours, safety observations, material tracking, punch list updates, escalation reports Escalation Path: DMS PM ? Site Manager ? GC PM ? Project Executive ? CPO

Objective

To ensure consistent, complete, and system-integrated documentation of all DMS daily field activity. This supports accurate project forecasting, accountability, and escalation visibility for self-perform work.

Definitions

Daily Log: Sage CM module where DMS PMs report crew activity, quantities placed, safety issues, and general jobsite status

Punch List: Ongoing log of issues or deficiencies requiring correction

Field Log Folder: Centralized OneDrive location for saving any attachments not directly uploaded to Sage CM

Step-by-Step Procedure

Start-of-Day Forecast and Planner Setup

In Microsoft Planner:

Open the DMS Task Board for the project

Verify today?s tasks are assigned and marked as ?Ready?

Add any new tasks not yet captured

Coordinate with Site Manager for changes to jobsite logistics, access, weather plans

Enter Crew, Labor, and Equipment Usage in Sage CM

In Sage CM > Daily Log > Labor:

Log headcount per crew (e.g., Concrete, Carpentry)

Track hours worked

Log any equipment use (e.g., skid steer, generator)

Optional: Include GoCodes scan records

Log Quantities Placed and Progress

In Sage CM > Daily Log > Production:

Input line items such as CY Concrete placed, LF installed, SF of framing, etc.

Note weather conditions and productivity constraints

If applicable, include related photo evidence:

Upload directly to Sage CM > Daily Log > Photos

Save backup to OneDrive > Projects > [Project Name] > 23. Logs & Reports > Photos

Safety Reporting and Observations

In Sage CM > Safety > Observations:

Report near misses, hazards, violations

Assign corrective actions

If third-party safety inspector is on-site, include their verbal notes or findings

If incident occurs:

Start Incident Report in Sage CM > Safety > Incidents

Alert Site Manager immediately via Teams

Attach photos and witness statements

Punch List Maintenance

In Sage CM > Punch List:

Add any deficiencies created during the day

Tag responsible trade (e.g., DMS Concrete)

Assign resolution deadline

Upload before/after photos if corrected same day

End-of-Day Summary and Forecast for Tomorrow

In Sage CM > Daily Log > Summary:

Write general site summary, weather impact, vendor coordination

Forecast next day's key tasks and expected headcounts

Send end-of-day snapshot via Teams to Site Manager and GC PM

Folder Structure & File Locations

Blocking Logic

? Do not close out a day without completing Sage CM > Daily Log > Summary

? Missing crew/equipment entries will result in lost hours and forecasting errors

? Unresolved safety observations must be escalated within 24 hours

Outputs/Deliverables

Fully completed Sage CM Daily Log

Accurate labor, quantity, and equipment entries

Escalated safety and punch items logged and tracked

Daily forecasting visibility for GC and Site Manager

Clean photo and document archive per day

[6.1] DMS PM Weekly Lookahead Reporting and Coordination (Work Instruction) {#dmslookahead}

Tools Used: Microsoft Planner, Sage CM > Schedule, OneDrive > 05. Field > Lookahead, Teams, Excel Outputs: Two-week crew/task plan, material forecast, safety pre-planning, schedule updates Escalation Path: DMS PM ? Site Manager ? GC PM ? Scheduler ? CPO

Objective

To drive proactive planning for DMS work scopes through weekly lookahead coordination with the GC team. Ensures labor, materials, safety, and equipment are aligned with the master schedule and project milestones.

Definitions

Lookahead Schedule: A detailed two-week plan that outlines task sequencing, crew assignments, and coordination needs

Planner Task Board: Microsoft Planner layout tracking DMS work items by day/crew/type

Pull Plan Coordination: Weekly meeting where trades confirm task readiness and dependencies

Step-by-Step Procedure

Review Master Schedule and Project Milestones

Open Sage CM > Schedule

Identify critical path items and DMS-controlled milestones

Highlight any delays, weather risks, or constraints

Populate Two-Week Lookahead in Excel or Planner

Create/update schedule in:

OneDrive > Projects > [Project Name] > 05. Field > Lookahead > [Week Range]_DMS_Lookahead.xlsx

Include:

Tasks by day and crew

Material delivery needs

Hold points or inspections

Safety plans and logistics constraints

Distribute and Present at Weekly Coordination Meeting

Share draft lookahead with Site Manager and GC PM

Attend Pull Plan or Weekly Coordination Meeting

Adjust based on:

Subcontractor impacts

Owner priorities

Inspection availability

Save meeting minutes to:

OneDrive > 01. Administration > Meetings > [Week]_Lookahead_Minutes.docx

Update Microsoft Planner Board

Add task cards per lookahead to Planner board:

Assign to foremen or leads

Use tags (Concrete, Framing, Excavation, etc.)

Attach inspection forms or material cut sheets if available

Confirm Material, Crew, and Equipment Readiness

Verify material deliveries align with forecast

Confirm equipment needs in GoCodes and maintenance logs

Adjust crew schedule if needed based on scope sequencing

Blocking Logic

? Do not submit lookahead without cross-referencing Sage CM Schedule

? Incomplete coordination may cause inspection or production delays

? Failure to forecast material needs results in procurement lags

Outputs/Deliverables

Two-week lookahead file (Excel or PDF)

Updated Planner board with tasks and notes

Meeting minutes filed in OneDrive

Coordination record to support schedule compliance

[6.2] DMS PM Weekly Reporting to Project Manager and Site Manager (Work Instruction) {#dmsweeklyreporting}

Tools Used: OneDrive > 23. Logs & Reports > Weekly Reports, Sage CM > Daily Logs/Reports, Microsoft Teams

Outputs: Weekly summary of DMS work progress, material usage, equipment log, crew performance, issues/escalations, safety/quality updates

Escalation Path: DMS PM ? Site Manager & PM ? CPO (if unresolved)

Objective

To provide consistent, timely, and structured reporting from DMS PMs to the GC Project Manager and Site Manager, supporting schedule control, issue escalation, labor forecasting, and material accountability.

Step-by-Step Procedure

Download Weekly Template and Input Log Data

Template location: OneDrive > Projects > [Project Name] > 23. Logs & Reports > Templates > DMS_Weekly_Field_Report.xlsx

Pull data from:

Sage CM > Daily Logs

Equipment records from GoCodes

Daily Safety Logs and Checklists

Complete All Weekly Fields

Include:

Work completed by DFOW (Definable Features of Work)

Issues encountered (weather, design, access)

Material installed and remaining stock

Equipment status

Crew headcounts and hours worked

Punch list status

Open submittal/RFI issues

Include Safety and Quality Summary

Total safety observations

Incidents or near misses

Number of QC hold points passed or failed

Any open NCRs (non-conformance reports)

Upload to OneDrive and Alert Team

Save completed report to:

OneDrive > Projects > [Project Name] > 23. Logs & Reports > Weekly Reports > DMS_Weekly_Field_Report_[Week Ending].xlsx

Notify Site Manager and PM via Teams message

Blocking Logic

? Do not reuse old report without updating data ? Missing fields must be flagged in yellow with reason ? Failure to submit on time is a breach of SOP and may delay coordination meetings

Outputs/Deliverables

Weekly PDF or Excel report in shared folder

Notification sent to Site Manager and PM

Safety and Quality summary shared for management tracking

[6.3] DMS PM Daily Equipment and Tool Tracking (Work Instruction) {#dmsequipmenttracking}

Tools Used: GoCodes, OneDrive > 14. Equipment & Tools, Sage CM > Daily Log > Equipment, Microsoft Teams

Outputs: Verified daily equipment log, asset use summaries, damaged/lost item reports, maintenance needs

Escalation Path: DMS PM ? Site Manager ? Equipment Manager ? PM/CPO (if critical or unresolved)

Objective

To ensure accountability, prevent tool loss, and maintain readiness of all assigned DMS equipment through daily field verification, GoCodes scans, and escalation of maintenance issues.

Definitions

GoCodes: Asset tracking software used by Devere to manage and verify location/status of all tools and equipment via QR code scans

Equipment Log: Section in Sage CM Daily Log to record tool usage and condition each day

OneDrive Equipment Folder: Central archive of checklists, inspection sheets, and tool allocations per project

Step-by-Step Procedure

Start-of-Day Equipment Check

Physically inspect all key DMS tools and equipment (e.g., laser levels, compactors, generators)

Scan each tool?s GoCodes QR label using mobile app

Confirm:

Present on site

Operational status

Assigned crew

Flag any missing, damaged, or misassigned tools

Record Equipment in Sage CM Daily Log

Go to Sage CM > Daily Log > Equipment

List all tools used during day with:

Description

Crew using it

Status (operational, in repair, lost)

Notes (if issues or abnormal use)

Upload Photos or Notes to OneDrive

For damaged/lost equipment:

Upload photos of damage to OneDrive > Projects > [Project Name] > 14. Equipment & Tools > Damaged

Include description and repair/replacement request form

For maintenance needs:

Save checklists or forms under:

OneDrive > Projects > [Project Name] > 14. Equipment & Tools > Maintenance

Notify Site Manager and Equipment Manager of Any Issues

Send Teams message to Site Manager and Equipment Manager if:

Equipment is down

Loss or theft occurred

Maintenance is overdue

Attach photos and GoCodes report

End-of-Day Reconciliation

Confirm all equipment is returned to designated storage

Scan again to verify location

Note any tools left with subcontractors (must be approved)

Reconcile log vs. actual onsite tool count

Blocking Logic

? Do not skip GoCodes scans?assumptions result in lost equipment

? Missing Sage CM > Daily Log > Equipment entries can cause budget overages

? Delayed maintenance reporting leads to production downtime

Outputs/Deliverables

Verified GoCodes scan log per tool

Sage CM > Equipment log entries

Maintenance and damage folders updated in OneDrive

Escalation to Site Manager/Equipment Manager as needed

Ready to continue with 6.4.

[6.4] DMS PM Survey, Layout, and As-Built Coordination (Work Instruction) {#dmssurveyasbuilt}

Tools Used: GoCodes (GPS tagging), Sage CM > Daily Logs > Layout, Microsoft Teams, OneDrive > 22. As-Builts, CAD/PDF files from surveyors

Outputs: Confirmed layout records, elevation benchmarks, GPS logs, as-built documentation, layout hold points

Escalation Path: DMS PM ? Site Manager ? GC PM ? Surveyor ? Architect/Engineer (if dimension conflicts)

Objective

Ensure accurate layout verification, as-built tracking, and survey coordination for all DMS self-perform scopes. Protects structural quality, reduces rework, and reinforces subcontractor accountability for layout confirmation.

Definitions

Layout Coordination: Confirming field benchmarks, offsets, and alignment of installed work against contract drawings

As-Built: Documentation of what was installed vs. what was designed?required for closeout, utilities, and owner records

Hold Point: Required check or approval prior to progressing (e.g., before backfill or slab pour)

Step-by-Step Procedure

Receive and Review Surveyor Control Points

Confirm receipt of site layout benchmarks and CAD files from licensed surveyor

Save under OneDrive > Projects > [Project Name] > 04. RFIs > Survey Layout

Compare to project plans (structural, civil) for discrepancies

Coordinate with Site Manager for Layout Confirmation

Review locations for:

Foundations, anchor bolts, slab recesses

Utilities, curb lines, and major penetrations

Wall framing and stair landings

Record any conflicts as RFI in Sage CM > RFIs > Survey/Layout

Tag Major Layouts in Sage CM

Use Sage CM > Daily Logs > Layout:

Mark areas staked out by surveyor

Note who verified layout (DMS PM, Foreman, Site Manager)

Indicate next steps: excavation, rebar, inspection

Implement Hold Points Before Critical Work

Add layout verification as a required step in:

Concrete Pre-Pour Checklist

Utility Pre-Bury Checklist

Structural Framing Layout Checklist

Confirm via Teams with Site Manager before pour/backfill

Capture and Archive As-Built Conditions

At each milestone (e.g., footing placement, utility install):

Record as-built with field markups on PDF or redline set

Save under OneDrive > Projects > [Project Name] > 22. As-Builts > [DFOW]_[Date]_As-Built.pdf

Where applicable, upload GoCodes GPS scan of buried utility or installed equipment

Escalate Layout Conflicts Promptly

If discrepancies arise:

Submit RFI in Sage CM > RFIs

Call out dimension issue in Teams (include plan snip)

Tag Architect/Engineer if needed

Blocking Logic

? Do not pour concrete or backfill without verified layout approval

? Failure to log layout actions removes legal defensibility

? Missing as-builts delay closeout and may void warranty

Outputs/Deliverables

Layout logs in Sage CM > Daily Log > Layout

RFIs submitted for survey conflicts

Archived as-builts in OneDrive > 22. As-Builts

GPS trace of installed conditions (if applicable)

Hold point confirmations logged before critical installations

[6.5] DMS PM Field Issue Resolution and RFI Escalation (Work Instruction) {#dmsrfi}

Tools Used: Sage CM > RFIs, Microsoft Teams, OneDrive > 04. RFIs, Drawings (PDF), Submittals folder

Outputs: Logged RFI, documented resolution path, updated drawing set or submittal, change tracking

Escalation Path: DMS PM ? Site Manager ? PM ? Architect/Engineer ? Owner (if unresolved)

Objective

To standardize the response procedure for field issues, discrepancies, or information gaps by submitting, tracking, and resolving RFIs (Requests for Information) in Sage CM while coordinating responses through the appropriate team members.

Definitions

RFI (Request for Information): Formal query sent to the design team when drawings, specifications, or site conditions are unclear

Field Issue: A conflict, question, or deviation encountered during self-perform work that requires design clarification or direction

Resolution Path: Documentation trail from RFI identification through response and implementation

Step-by-Step Procedure

Identify Field Issue

Monitor self-perform scopes for issues like:

Conflicting dimensions

Missing details or unclear specs

Unexpected site conditions

Discuss with crew foreman and Site Manager for confirmation

Create Draft RFI in OneDrive and Notify Site Manager

Use RFI Template (OneDrive > Projects > [Project Name] > 04. RFIs > Templates)

Include:

Description of issue

Relevant plan/spec reference

Proposed solution if applicable

Photos or sketches

Save as: RFI_###_Draft_[Date]_[ShortTitle].docx

Notify Site Manager via Teams to review before submission

Submit RFI via Sage CM

Navigate to Sage CM > RFIs > New RFI

Populate all required fields:

Subject

Location

Drawing/spec reference

Question and background

Attachments (photos, snips, draft form)

Assign reviewer (Architect, Engineer, PM)

Log submission in OneDrive > 04. RFIs > Sent

Track and Escalate RFI Response

Monitor Sage CM > RFIs > Status

If unresolved in 3 business days:

Follow up via Teams with Architect/Engineer

Escalate to PM for owner involvement if needed

Record notes of all escalations in RFI comment section

Implement Answered RFI

Review RFI response with Site Manager and DMS Crew

If changes impact contract scope or design:

Upload updated drawing or detail to OneDrive > 01. Contract Documents > Revised Drawings

Save final RFI under OneDrive > 04. RFIs > Final

Tag item as complete in Sage CM > RFIs

Blocking Logic

? Do not proceed with field work in a conflict zone until RFI is submitted and approved

? RFIs without documented responses are not valid for claims or change orders

? Failure to escalate in time causes jobsite delays and budget risk

Outputs/Deliverables

RFI created, submitted, and tracked in Sage CM

RFI and all supporting files saved to OneDrive > 04. RFIs

Escalation and communication history logged

Final answer integrated into drawing set or submittals as needed

[6.6] DMS PM Daily Punch List Entry and Closeout Verification (Work Instruction) {#dmspunchlist}

Tools Used: Sage CM > Punch List, Microsoft Teams, OneDrive > 26. Punch List, Photos app, Markup PDFs

Outputs: Daily punch list entries, closed items, visual verification, closeout-ready status

Escalation Path: DMS PM ? Site Manager ? Project Manager ? Quality Manager ? Owner Rep

Objective

Ensure that DMS self-perform scope punch list items are documented, resolved, verified, and communicated daily. Enables closeout tracking, rework prevention, and GC-level coordination for zero-defect handoff.

Definitions

Punch List: A list of items that need correction, completion, or inspection before project closeout

Daily Entry: The practice of logging outstanding and resolved punch list issues every day to maintain transparency and progress

Verification: Documented photographic and checklist-based evidence that an item has been corrected to project standards

Step-by-Step Procedure

Identify and Document Punch Items in Field

During DMS crew walkthroughs or quality checks:

Identify incomplete or non-conforming work (e.g., chips, misalignments, paint overspray, cleanup needs)

Take photos with timestamps

Log verbally in huddle, assign crew for correction

Create or Update Punch Items in Sage CM

Navigate to Sage CM > Punch List > Add Item

Complete fields:

Location

Trade (DMS ? Concrete, Carpentry, etc.)

Description

Assignee (DMS Foreman or PM)

Attach photos and expected correction date

Save to OneDrive > Projects > [Project Name] > 26. Punch List > [Date]_PunchEntry.pdf

Coordinate with Site Manager and Foreman

Review daily punch list log with Site Manager

Confirm:

Who is assigned to fix what and when

Any blockers (e.g., access, sequencing)

Any potential rework to other trades

Verify and Close Out Items

Once item is corrected:

Re-inspect

Take ?After? photos with timestamp

Mark item complete in Sage CM > Punch List

Upload photo evidence to OneDrive > 26. Punch List > Completed > [Date]_ResolvedItem.jpg

Escalate Stagnant Items

If item is unresolved > 2 working days:

Notify Site Manager in Teams

Add notes in Sage CM > Punch List > Comments

If over 5 days, escalate to PM and Quality Manager

Blocking Logic

? Never mark a punch item resolved without verification photo

? Missing punch documentation at end-of-project delays closeout release

? Unresolved items may lead to backcharges or inspection failure

Outputs/Deliverables

Sage CM punch list with daily updates

OneDrive photo documentation folder (Before/After)

Coordinated plan for resolution between Site Manager and DMS

Escalation notes for unresolved punch items

[6.7] DMS PM Coordination with Quality and Safety Leads (Work Instruction) {#dmsqscoordination}

Tools Used: Sage CM > Inspections, Observations, Microsoft Teams, OneDrive > 17. Safety, 18. Quality, DMS Pre-Task Plans

Outputs: Joint inspections, pre-task verification logs, escalated safety/quality issues, checklist completions

Escalation Path: DMS PM ? Site Manager ? Quality Lead and Safety Lead ? PM ? Executive (if unresolved)

Objective

To define how DMS PMs must coordinate with Devere?s Safety and Quality leads to uphold jobsite standards, execute pre-task planning, and jointly respond to deficiencies during field execution.

Definitions

Safety Lead: Devere or third-party safety manager responsible for compliance with OSHA, site-specific safety plans, and field inspections

Quality Lead: Staff responsible for checklist enforcement, inspections, and hold point verification on self-perform and subcontractor work

Pre-Task Plan (PTP): Documented plan before starting a scope (e.g., formwork, excavation) that addresses risks, safety, and quality steps

Step-by-Step Procedure

Pre-Task Safety and Quality Planning

Before starting any major DFOW:

Complete Pre-Task Plan using DMS template (OneDrive > Projects > [Project Name] > 17. Safety > Pre-Task Plans)

Review with Site Manager, Safety Lead, and Quality Lead

Include checklists to be used, planned inspections, and blocking logic

Perform Joint Walkthroughs

Conduct field walkthroughs at:

First installation of each DFOW (e.g., first slab, first framing bay)

Weekly safety audits

Any rework zone with recent NCR or incident

Log findings in Sage CM > Observations (Safety) or Inspections (Quality)

Address and Track Deficiencies

For any observation or failed checklist item:

Assign corrective task to DMS crew

Record time/date committed for fix

Follow-up with Quality/Safety lead to verify resolution

Escalate Unresolved Safety or Quality Issues

If unresolved after 48 hours:

Notify Site Manager and log in Sage CM

Escalate to Project Manager and tag in Teams

If still open after 5 days, include in PM?s weekly executive report

Store Documentation

Save all safety coordination checklists to OneDrive > 17. Safety > Inspections

Save quality-related joint checks to OneDrive > 18. Quality > Joint Walkthroughs

Cross-reference Sage CM record in file naming convention

Blocking Logic

? Do not proceed with DFOW if Pre-Task Plan is not approved

? Do not ignore observations from Safety or Quality

? Failure to close out NCRs or Observations disqualifies work from signoff

Outputs/Deliverables

Completed PTPs and checklist logs

Sage CM Observations and Inspections records

OneDrive folder logs for quality/safety

Resolved deficiencies or escalated exceptions

[6.8] DMS PM Toolbox Talks and Daily Crew Briefings (Work Instruction) {#dmstoolboxtalks}

Tools Used: Microsoft Teams, OneDrive > 17. Safety > Toolbox Talks, Printed Sign-In Sheets, Sage CM (optional log)

Outputs: Daily crew huddles, safety topic logs, sign-in sheet archive, issue escalation

Escalation Path: DMS PM ? Site Manager ? Safety Lead ? Project Manager

Objective

To ensure each DMS crew receives a focused, documented daily briefing on safety topics, scope-specific risks, jobsite conditions, and logistical constraints before beginning work.

Definitions

Toolbox Talk: A short daily safety meeting held on the jobsite covering specific risks, lessons learned, or planned operations

Crew Briefing: Combined safety and production discussion between DMS PM and field crew, typically conducted each morning

Sign-In Sheet: Required daily proof of attendance for toolbox talks and required field communication

Step-by-Step Procedure

Prepare Toolbox Talk and Briefing Topic

Download approved safety topics from:

OneDrive > 17. Safety > Toolbox Talks > [Trade Category]

Choose topic relevant to today?s task (e.g., Excavation Hazards, Ladder Safety, Rebar Protection)

Print and review before shift

If custom topic needed, use blank form template and route for Safety Lead approval

Conduct Daily Crew Huddle On-Site

Gather entire DMS crew for a 10?15 minute meeting

Discuss:

Daily safety topic (Toolbox Talk)

Scope of work and risks (e.g., live traffic, weather, cranes nearby)

PPE reminders and equipment assignments

Visitor restrictions and adjacent trade coordination

Encourage field input or hazard reports

Document Attendance and Participation

Use printed sign-in sheet (or tablet-based form) to capture:

Names and signatures

Date and topic

Upload daily to OneDrive > 17. Safety > Toolbox Talks > Sign-Ins > [Date].pdf

Optionally log event in Sage CM > Safety > Daily Log (not mandatory but encouraged)

Escalate Safety Observations or Field Concerns

If hazard is identified:

Address immediately

If unresolved, note during huddle and report via Teams to Site Manager

Log issue for Safety Lead follow-up

Store and Track Compliance

DMS PM is responsible for ensuring 100% attendance

Safety Lead or Project Manager may audit files at any time

Blocking Logic

? Do not begin work until toolbox talk is held

? Missing sign-in sheets can result in audit failure or safety violation

? Failure to log daily safety focus undermines team compliance culture

Outputs/Deliverables

Completed daily toolbox talk and crew briefing

Signed attendance sheet uploaded to OneDrive > 17. Safety

Safety observations escalated if necessary

Optional entry in Sage CM > Safety > Daily Log

[6.9] DMS PM Daily Forecast Review and Risk Flagging (Work Instruction) {#dmsdailyforecast}

Tools Used: Weather.gov, Accuweather Pro, Sage CM > Daily Log, OneDrive > 19. Risk Management > Weather Logs.xlsx, Microsoft Teams

Outputs: Daily weather forecast logs, flagged schedule risks, documented mitigation steps

Escalation Path: DMS PM ? Site Manager ? Project Manager ? Scheduler or Executive Team (if critical risk)

Objective

Ensure DMS PMs proactively review weather and schedule-impacting factors daily to flag and mitigate risks before field impact.

Definitions

Forecast Review: Morning evaluation of weather conditions (rain, temperature, wind) for impact to scheduled DMS work

Risk Flag: Identification of any condition that may cause delay, quality issue, or safety concern

Mitigation Plan: A planned adjustment to crew tasks or sequencing to avoid disruption

Step-by-Step Procedure

Review Morning Weather Forecast

By 6:00 AM each day:

Check www.weather.gov and Accuweather Pro for:

Temperature swings

Rain, lightning, or snow forecasts

Wind speed (for crane/formwork safety)

Dew point (affects concrete and painting)

Assess Impacts to Scope of Work

Compare forecast to scheduled DMS tasks for the day:

Will rain affect trenching?

Will temperature delay concrete curing?

Will wind affect formwork or scaffolding?

Log Forecast and Risk Assessment

Enter key weather data and risk notes in OneDrive > Projects > [Project Name] > 19. Risk Management > Weather Logs.xlsx

Add entry to Sage CM > Daily Log > Weather and include screenshot if necessary

Flag Risk Items and Notify Site Manager

If forecast poses a threat:

Flag in Sage CM > Daily Log > Risks

Message Site Manager via Teams by 6:30 AM

Propose adjusted crew assignments or sequencing

Escalate Critical Risks

If risk may delay milestone or impact safety:

Escalate to PM for consideration in schedule update

PM may notify Scheduler or Executive Team

Blocking Logic

? Do not pour concrete with forecast < 35°F unless approved protection is documented

? Do not trench with forecasted > 0.25" rain without stabilization plan

? Unlogged weather risks are considered PM accountability failures

Outputs/Deliverables

Logged daily forecast in OneDrive weather log

Sage CM Daily Log entry with screenshot

Adjusted crew plan if weather-sensitive scope affected

Risk flag and escalation when appropriate

[7.0] DMS PM Communication and Collaboration Standards (Work Instruction) {#dmscommunication}

Tools Used: Microsoft Teams, Outlook, Sage CM, OneDrive, Jobsite Radios (as applicable)

Outputs: Meeting attendance, documented issue resolutions, message logs, linked RFIs/submittals

Escalation Path: DMS PM ? Site Manager ? Project Manager ? Executive Team (if unresolved)

Objective

To ensure DMS PMs maintain consistent, professional, and proactive communication with all stakeholders including Devere staff, subcontractors, and the owner/AE team.

Definitions

Communication Standard: Established expectations for professionalism, responsiveness, and format across verbal, written, and digital exchanges

Formal Channel: Systems used for recordkeeping (Teams, Outlook, Sage CM, OneDrive)

Informal Channel: Non-recorded, verbal, or ad hoc exchanges (radios, field chats)

Step-by-Step Procedure

Use of Microsoft Teams for Internal Collaboration

Each project must have a Teams channel structured by:

General (site-wide updates)

Safety, Quality, Procurement, Schedule, DMS PM subchannels

Use @mentions to tag issues, request responses

Upload supporting docs to OneDrive and link in chat

Mark critical issues as ?URGENT? in post title

Email and Outlook Communication

Use Outlook for:

Owner, Architect, and Consultant communications

Subcontractor correspondence

Scheduling formal meetings

Save all critical communications to OneDrive > 01. Administration > Correspondence

Sage CM as the Record of Truth

All official RFIs, submittals, and issue logs must be entered into Sage CM

Link RFIs to Plans and Submittals

Include supporting photos/files in Sage CM entry and OneDrive mirror folder

Verbal and Onsite Communication

DMS PMs must:

Attend daily huddles with Site Manager

Carry radio or phone for immediate crew support

Defer complex or legal-sensitive issues to written channels

Meeting Cadence and Minutes

Weekly Trade Coordination Meeting: Attend and provide DMS update

Safety & Quality Walks: Participate and follow up

Pre-installation Meetings: Ensure DMS scope is covered

Save meeting minutes in OneDrive > 15. Meetings > [Meeting Type]

Blocking Logic

? Do not issue direction without documenting in Sage CM or OneDrive

? Never substitute verbal instruction for required submittal/RFI response

? Untracked communications may lead to claim or rework risk

Outputs/Deliverables

Teams threads linked to documentation

Outlook message archive in OneDrive

RFIs/Submittals filed in Sage CM

Attendance at required meetings and follow-up documentation

[7.1] DMS PM Coordination with Project Manager and Site Manager (Work Instruction) {#dmscoordpm}

Tools Used: Microsoft Teams, OneDrive, Daily Logs in Sage CM, Weekly Lookaheads, RFIs/Submittals, Meetings

Outputs: Joint decisions, approvals, lookahead alignment, escalation trail, task ownership

Escalation Path: DMS PM ? Site Manager ? Project Manager ? Division Leadership

Objective

Ensure consistent, two-way communication between the DMS PM, Site Manager, and Project Manager to manage self-perform operations in full alignment with overall project needs.

Definitions

Alignment Meeting: Informal or scheduled interaction to review DMS scope status, resolve conflicts, or coordinate resources

Lookahead Sync: Confirmation that DMS crews are sequenced and staffed appropriately for next week?s planned activities

Step-by-Step Procedure

Participate in Daily Huddle with Site Manager

Confirm:

Work area readiness

Conflicts with subs

Shared access (e.g., scaffolding, crane picks)

Use Teams chat or field notes in Sage CM > Daily Log if Site Manager is not present

Submit and Review Weekly Lookahead with PM

Submit Lookahead (Microsoft Excel or Planner) each Thursday

PM will:

Compare to master schedule

Flag discrepancies (e.g., missing formwork before pour)

Coordinate inspections or 3rd-party testing

Log Issues and Escalate in Sage CM + Teams

All unresolved items must be:

Logged in Sage CM > Issues or Punch List

Cross-tagged in Teams thread if requiring quick response

Review Budget and Quantity Conflicts with PM

If labor, quantity, or material usage deviates from estimate:

Schedule alignment call with PM

Document decisions in OneDrive > 23. Logs & Reports > DMS Reports > Budget Conflict Log.xlsx

Attend Weekly PM Coordination Meeting

Bring:

Progress updates

Crew schedule

Safety/quality items

PM logs meeting notes in OneDrive > 15. Meetings > DMS Coordination

Blocking Logic

? Do not modify DMS crew plans without informing PM and Site Manager

? Uncoordinated work sequencing leads to punch issues and lost production

? Skipping lookahead reviews creates missed inspections or hold point conflicts

Outputs/Deliverables

Daily log entries with joint input

Updated lookahead reviewed and approved weekly

Budget conflict notes in shared folder

Meeting minutes stored and distributed

7.2] DMS PM Use of Planner Boards and Task Assignment (Work Instruction) {#dmsplannerboards}

Tools Used: Microsoft Planner, Teams, Outlook, Sage CM > Daily Log and Punch List, OneDrive > 05. Field > Planner Boards

Outputs: Assigned crew tasks, schedule confirmations, accountability trail, delay documentation

Escalation Path: DMS PM ? Site Manager ? Project Manager (if milestone affected)

Objective

To ensure the DMS PM uses Microsoft Planner consistently for trade task visibility, tracking, and accountability across crews and site supervision.

Definitions

Planner Board: A Microsoft 365 visual task tracker with buckets for "To Do," "In Progress," and "Done"

Crew Card: A task card assigned to a crew with due date, notes, attachments, and checklists

Bucket: Organizational column within the board based on crew, DFOW, or time horizon (e.g., This Week)

Step-by-Step Procedure

Access and Structure Project Planner Board

Navigate to Teams > [Project Channel] > Planner Tab (or OneDrive link)

Create buckets:

This Week, Next Week

Concrete, Carpentry, Excavation

Create crew cards under each bucket as needed

Assign Crew Tasks via Planner

For each day?s scope:

Create a card for crew activity (e.g., ?Strip Formwork ? Grid A-C?)

Assign to DMS Foreman or Superintendent

Add:

Description of scope

Start and due dates

Linked checklist (OneDrive > 18. Quality > Checklists)

Attachments (e.g., sketches, pour maps)

Review Task Status Daily

During huddles or mid-day walkthrough:

Update task card status (move to "In Progress" or "Done")

Note blockers (e.g., missing materials, delayed inspections)

Log blockers in Sage CM > Daily Log or Issue Log

Use Planner as Lookahead Verification Tool

Use weekly review to:

Confirm labor/equipment matches task list

Sequence next week?s cards

Align lookahead with PM

Escalate Issues via Linked Tasks

If task delays critical path:

Flag card with ?@ PM? in comments

Cross-log delay in Sage CM > Schedule Impact

Notify Site Manager immediately

Blocking Logic

? Do not run DMS crews without task board visible and updated

? Unassigned tasks result in lost accountability

? Missed crew prep due to unreviewed Planner cards leads to rework or lost time

Outputs/Deliverables

Updated Planner board shared with team

Crew task cards completed or flagged

Delays documented in both Planner and Sage CM

Checklists and supporting docs attached

[7.3] DMS PM Coordination with External Subcontractors (Work Instruction) {#dmssubcontractorcoordination}

Tools Used: Microsoft Outlook, Teams, Sage CM > Subcontractor Directory, Sage CM > RFIs, Submittals, Sage CM > Issues and Punch List, OneDrive > 13. Subcontractors

Outputs: Confirmed scope alignments, updated coordination logs, documented deficiencies, escalation documentation

Escalation Path: DMS PM ? Site Manager ? PM ? Contract Compliance (Amy Herrenkohl) if unresolved

Objective

To define how DMS PMs coordinate with external subcontractors when scopes overlap, impact sequencing, or create potential quality/safety risks.

Definitions

External Subcontractor: Any trade partner not under DMS (e.g., plumbing, drywall, steel)

Coordination Log: Documentation of interface conditions, clarifications, and mutual responsibilities

Step-by-Step Procedure

Review Coordination Scope at Project Start

Cross-check subcontractor SOW with:

DMS planned scopes (e.g., formwork vs. stair pan steel install)

RFIs or notes in OneDrive > 13. Subcontractors > Scope Conflicts

Attend and Document Weekly Sub Coordination Meetings

Represent DMS interest on:

Site access

Sequence alignment

Shared resources (e.g., scaffolding, hoists)

Upload meeting minutes to OneDrive > 15. Meetings > Sub Coordination

Field Walks and Interface Observation

At least twice per week, walk active areas:

Confirm subs are not obstructing DMS crews

Identify early install overlaps (e.g., rough-in in slab zones)

Document in Sage CM > Issues if conflicts arise

Escalate Coordination Issues Proactively

Any unresolved issues that:

Create schedule impact

Affect DMS productivity

Pose a safety concern

Must be escalated in writing via Teams and logged in Sage CM > Punch List or Issues

Maintain Coordination Log

Use the shared template: OneDrive > 13. Subcontractors > Coordination Log.xlsx

Update weekly

Include:

Date

Description

Sub involved

Resolution status

Person responsible

Blocking Logic

? Do not assume sub will defer to DMS crew needs without written agreement

? Untracked conflicts can result in change order disputes or claims

? DMS crews must not work in unsafe or blocked areas without Site Manager approval

Outputs/Deliverables

Updated Coordination Log (OneDrive)

Weekly minutes with sub interface notes

Field observations and Sage CM Issues log

Written escalations via Teams/Outlook

Lessons learned recorded in project closeout

[7.4] DMS PM Use of Sage CM Work Orders as Alternative to Planner (Work Instruction) {#dmsworkorders}

Tools Used: Sage CM > Work Orders, Teams, Outlook, Sage CM > Daily Log, OneDrive > 05. Field > Work Orders

Outputs: Work Orders issued and tracked, Sage CM task updates, archived task histories, resource tracking

Escalation Path: DMS PM ? Site Manager ? Project Manager (if unresolved or milestone impacted)

Objective

To outline the process for using Sage CM Work Orders for task issuance and field accountability when Microsoft Planner is not suitable.

Definitions

Work Order (WO): A digital task directive in Sage CM used to assign scope, labor, and timing.

Assigned To: The foreman or supervisor responsible for completing the WO.

Step-by-Step Procedure

Create a New Work Order in Sage CM

Go to Sage CM > Work Orders > Create

Enter task name (e.g., ?Strip Footing Forms Area C?)

Fill in:

Description

Location

Assigned To

Start/End Date

Linked Documents (OneDrive > 18. Quality > Formwork Checklist)

Attach Reference Documents

Upload drawings or specs if applicable

Link to:

OneDrive > 11. Action Plans (if relevant)

OneDrive > 18. Quality > Checklists

Track WO Progress Daily

Monitor status in Sage CM > Work Orders Dashboard

Log updates in Daily Log > [Trade Section]

Add photos or comments to WO thread

Issue and Close Out

Mark WO ?Complete? in Sage CM once:

Task is verified complete in field

Checklist and photos uploaded

QC walkthrough done (if required)

Archive to OneDrive > 05. Field > Work Orders > Completed

Blocking Logic

? Do not issue verbal tasks without a WO or Planner assignment

? Missing checklist or incomplete documentation blocks WO closeout

? Milestone tasks must use WO if they replace Planner workflows

Outputs/Deliverables

Executed Work Orders in Sage CM

Linked Action Plan and Checklists

Logged updates in Sage CM > Daily Log

Archived WO documentation in OneDrive

[7.5] DMS PM Coordination of Manpower, Deliveries, and Access with Site Manager (Work Instruction) {#dmsmanpowerdeliveries}

Tools Used: Sage CM > Daily Logs, Teams, Outlook Calendar, OneDrive > 05. Field > Lookaheads, GoCodes

Outputs: Crew assignments verified, deliveries scheduled, site access clearances confirmed, field conflicts avoided

Escalation Path: DMS PM ? Site Manager ? Project Manager (for logistics failures)

Objective

Ensure smooth field logistics through constant coordination of manpower, delivery timing, and equipment/site access with the Site Manager.

Definitions

Manpower Forecast: Projected daily crew count and role allocation

Access Coordination: Scheduled gate entry, staging areas, hoist usage, road blocking

Step-by-Step Procedure

Submit Daily Crew Forecast to Site Manager

Log into Sage CM > Daily Log > Workforce

Enter DMS crew count, trades, and start times

Cross-reference against OneDrive > 05. Field > Lookaheads

Confirm Delivery Times and Access Requirements

Coordinate all deliveries (e.g., rebar, lumber, formwork) 24+ hours in advance

Email Site Manager and update Outlook shared Delivery Calendar

Include:

Driver/vendor name

Gate access needed

Time and offload crew

Request Equipment Staging and Crane/Hoist Access

If shared resource (e.g., crane):

Submit request via Teams at least 24 hours in advance

Include duration, location, and rigging needs

Verify hoist schedule for personnel/material transport

Walk Site Entry Points and Staging Zones Daily

Confirm:

Traffic plans not obstructed

Laydown is labeled and marked

Safety signage is present

Log and Resolve Access Conflicts

Document delays, miscommunications, or blocked access in:

Sage CM > Daily Log > Logistics Notes

Teams channel > #SiteCoordination

Blocking Logic

? Do not deliver to site without 24-hour coordination

? No laydown allowed outside marked zones without Site Manager approval

? Delivery delay >15 minutes must be reported in Sage CM and Teams

Outputs/Deliverables

Daily workforce logged in Sage CM

Delivery times and resources in shared Outlook Calendar

Hoist/crane schedules updated

Access notes in Teams and Sage CM logs

Zero surprise arrivals or uncoordinated site activity

[7.6] DMS PM Coordination with Project Scheduler for Activity Tracking and Critical Path Impacts (Work Instruction) {#dmscriticalpathcoordination}

Tools Used: Primavera P6 or Microsoft Project, Sage CM > Schedule Module, Teams, OneDrive > 05. Field > Lookaheads

Outputs: Activity updates, delay notations, resequenced schedules, mitigation logs

Escalation Path: DMS PM ? Scheduler ? Site Manager ? Project Manager (if critical path impacted)

Objective

Ensure that DMS field activities are accurately reflected in the master schedule and delays or acceleration are properly communicated and mitigated.

Definitions

Critical Path: Sequence of project tasks that determine project duration?any delay here directly delays completion.

Float: Amount of time an activity can be delayed without affecting the project deadline.

Step-by-Step Procedure

Provide Weekly Progress Feedback to Scheduler

During weekly PM coordination, review:

Completed activities

Delayed activities and cause

Any resequencing of work

Provide photos/logs from Sage CM > Daily Log > [Trade]

Verify Field Progress Against 2-Week Lookahead

Review tasks assigned in OneDrive > 05. Field > Lookaheads

Confirm alignment with master schedule milestones

Note schedule mismatch or incomplete work on time

Flag Impacts to Critical Path

If DMS work delay affects:

Slab pour

Structural inspections

MEP rough-in start

Envelope or weather barrier timing

Escalate immediately to Scheduler and Site Manager

Document cause in Sage CM > Daily Log > Schedule Notes

Reschedule/Mitigate Delayed Activities

Collaborate with Scheduler and PM to:

Shift manpower

Combine scopes

Extend shifts or resequence trades

Log updated mitigation plan in OneDrive > 23. Logs & Reports > Recovery Plans

Participate in Weekly Schedule Pull Plan Meetings (if used)

If Lean pull plan meetings are active:

Attend

Bring task readiness notes

Flag DMS resource bottlenecks

Blocking Logic

? Never start major DMS scope without confirmed schedule alignment

? Do not proceed on critical path scope without PM or Scheduler notification if delay is imminent

Outputs/Deliverables

Weekly status notes in Sage CM > Daily Log

Critical delays and resolutions tracked

Updated lookahead vs. baseline comparison

Recovery strategies logged in OneDrive

Scheduler informed before schedule slips become irreversible

[7.7] DMS PM Integration with Devere Safety SOP and Inspection Requirements (Work Instruction) {#dmssafetyintegration}

Tools Used: Sage CM > Safety > Observations, OneDrive > 17. Safety > Checklists, Red Cross escalation protocol, Microsoft Teams

Outputs: Integrated safety plans, resolved violations, coordinated audits, signed inspection sheets

Escalation Path: DMS PM ? Safety Lead ? Site Manager ? PM ? CPO (if unresolved)

Objective

Ensure DMS PMs are actively coordinating their crews with Devere?s overall Safety Program and integrating safety SOPs, site-specific action plans, and inspection protocols into daily execution.

Definitions

Safety SOP: Standardized protocols based on Devere?s zero-injury expectations, OSHA, and project-specific hazards.

Safety Checklist: Field audit and inspection tool covering PPE, equipment operation, trenching, fall protection, and more.

Step-by-Step Procedure

Review Safety SOP and Project-Specific Action Plans

Before mobilization, review:

OneDrive > 17. Safety > Action Plans > [Trade-Specific]

Devere Safety Work Instructions (SOP Section 2.0+)

Sage CM > Safety > Observations and Previous NCRs

Coordinate Daily Inspection Focus with Safety Lead

Meet with Safety Lead or designated contact daily or weekly to:

Identify focus areas (e.g., ladders, silica, excavation)

Review outstanding NCRs from Sage CM

Pre-stage crew reminders during Toolbox Talks

Conduct Pre-Task Briefings with Crew

Review applicable Action Plan with crew

Emphasize hold points, Red Cross escalation routes, and jobsite behavior expectations

Sign and file in:

OneDrive > 17. Safety > Jobsite Briefings

Include Sage CM > Daily Log notes of review

Participate in Scheduled Safety Audits

Coordinate walkthroughs with Safety or Site Manager

Log all safety issues in Sage CM > Safety > Observations

Immediately escalate any unresolved or repeated violations

Respond to Safety Violations or NCRs

If cited:

Meet with Safety Lead and PM

Implement corrective action

Upload verification documentation (photos, briefings, signed inspection forms) to:

OneDrive > 17. Safety > NCR Response

Link to Sage CM > Observations > Resolution Note

Blocking Logic

? Do not proceed with any task without crew briefing and safety checklist review

? Unresolved safety violations must be corrected before proceeding with critical path items

Outputs/Deliverables

Signed Toolbox Talk + Pre-Task Briefings (OneDrive)

Sage CM safety logs updated with DMS entries

Corrective actions completed and verified

Safety lead engagement documented in Teams or email

Zero tolerance maintained for high-risk violations

[7.8] DMS PM Coordination with Devere Quality SOP and Project-Specific Quality Plan (Work Instruction) {#dmsqualityintegration}

Tools Used: OneDrive > 18. Quality > Checklists, Sage CM > Quality > Inspections, Microsoft Teams, Devere

Quality SOP

Outputs: Pre-installation meeting notes, inspection logs, checklist completions, NCRs, QC signoffs

Escalation Path: DMS PM ? Quality Lead ? Site Manager ? PM ? CPO (for unresolved quality issues)

Objective

Ensure DMS PMs understand and implement the Devere Quality SOP expectations, including pre-installation requirements, checklist verification, and field documentation workflows for a zero-defect culture.

Definitions

Quality SOP: Devere Construction?s guiding standard for field-based quality management.

Pre-Installation Meeting: Structured coordination meeting reviewing submittals, layout, crew readiness, and hold points before work begins.

Step-by-Step Procedure

Review Applicable Quality Plan Documents

Access OneDrive > 18. Quality > [Project Name] > Project Quality Plan

Review:

Hold Points (by scope)

Checklist requirements

NCR tracking

Tolerance expectations

Schedule and Conduct Pre-Installation Meetings

Coordinate with Site Manager and Quality Lead

Schedule meeting in Teams Calendar

Prepare agenda: DFOW, checklist reference, layout review, safety overlap

Document and save to:

OneDrive > 18. Quality > Meetings > Pre-Install Minutes

Perform Work Using Quality Checklists

Prior to and during execution:

Reference the specific checklist from OneDrive > 18. Quality > Checklists

Validate dimensions, materials, layout against drawings and submittals

Capture signoffs from foreman and Site Manager or Quality Lead

Upload scanned or digital form to OneDrive > 18. Quality > Inspections

Document and Escalate Non-Conforming Work

If any tolerance, material, or install issue arises:

Open Sage CM > Quality > Non-Conformance Log

Describe issue and attach evidence (photos, checklist, drawings)

Notify Quality Lead via Teams

Close the Loop with Lessons Learned

Following correction or rework:

Complete Lessons Learned Form

Save to OneDrive > 23. Logs & Reports > Lessons Learned

Bring item to next PM/DMS Sync

Blocking Logic

? Do not perform any install work without completed Pre-Install Meeting and initial checklist start ? Do not bury or cover up work that has not been inspected or signed off

Outputs/Deliverables

Pre-Install Meeting Minutes (OneDrive)

Completed Quality Checklists (OneDrive)

NCRs logged and resolved in Sage CM

Lessons Learned logs updated for PM sync

Crew awareness reinforced via Toolbox Talks

[7.9] DMS PM Coordination with Project Management SOP for Integrated Oversight (Work Instruction) {#dmscoordinationpmsoverlay}

Tools Used: Devere PM SOP, Microsoft Teams, Sage CM > Project Logs, OneDrive > 01. Administration > SOP Integration

Outputs: Unified execution strategy, clarified role boundaries, escalation consistency, feedback into SOP revision cycle

Escalation Path: DMS PM ? Site Manager ? PM ? Chief Process Officer (CPO)

Objective

Align daily and weekly DMS PM operations with the overarching Project Management SOP to ensure consistent standards, effective escalation, and team-wide clarity.

Definitions

PM SOP: Devere?s governing standard for General Contractor-level project oversight, covering the cradle-to-grave lifecycle.

Overlay: An intentional comparison and cross-reference of responsibilities between GC PMs and DMS PMs.

Step-by-Step Procedure

Download Latest PM SOP and Related Project-Specific Action Plans

Go to OneDrive > 01. Administration > SOP Integration > PM SOP [latest version]

Review:

DMS PM roles

Escalation trees

Scope interfaces with GC PM

Schedule Monthly SOP Sync Meeting

Use Microsoft Teams to schedule recurring sync with PM, Site Manager, and Quality Lead

Agenda includes:

Interface gaps or duplications

Site conflict prevention

Escalation consistency

Feedback from current field realities

Minutes saved to:

OneDrive > 01. Administration > SOP Integration > Monthly PM Sync Notes

Coordinate Site-Level Documentation Responsibilities

Decide and document:

Which PM owns Sage CM > Daily Log > [Discipline]

Punch list entries (who logs, who closes)

RFI/Submittal reviews and field responses

Checklist assignment for Quality audits

Escalate Misalignment or Duplication to CPO

If unclear boundaries exist:

Raise issue in Teams or Sync notes

Draft suggested resolution

Send to CPO for standardization and SOP update

Integrate Learnings into Next SOP Revision

Maintain log of proposed SOP enhancements in OneDrive > 01. Administration > SOP Integration > SOP Feedback Tracker.xlsx

Submit during quarterly SOP review cycle

Blocking Logic

? No independent SOP deviation without CPO approval ? All jobsite interfaces must be clarified before start of work on each major scope item

Outputs/Deliverables

Unified PM/DMS roles documented in SOP

Escalation consistency logged in Teams/OneDrive

SOP Tracker updated and shared to CPO

Meeting notes saved for audit/review

[8.0] DMS PM Contribution to SOP Evolution and Field Feedback Loop (Work Instruction) {#dmssopevolution}

Tools Used: OneDrive > 01. Administration > SOP Integration > SOP Feedback Tracker.xlsx, Microsoft Teams, CPO Weekly Reports

Outputs: SOP feedback logs, system-based improvement submissions, revision tracking, training adjustment suggestions

Escalation Path: DMS PM ? Site Manager ? PM ? Chief Process Officer (CPO)

Objective

Ensure DMS PMs contribute actionable, field-based feedback to refine, update, and evolve Standard Operating Procedures based on real-world conditions and execution lessons.

Definitions

SOP Evolution: The continuous improvement and realignment of procedures based on jobsite feedback and systemic challenges or successes.

Feedback Tracker: The official log where Devere field and PM personnel enter improvement ideas, revision needs, and lessons learned.

Step-by-Step Procedure

Maintain Onsite SOP Binder or Digital Access Folder

Ensure the latest SOPs and Work Instructions are accessible via:

OneDrive > 01. Administration > SOP Integration > Current SOPs

(Optional) Printed binder at DMS desk trailer

Log Field-Based Challenges or Suggestions

When encountering inefficiencies or unclear SOP steps:

Draft note in Feedback Tracker

Save to OneDrive > 01. Administration > SOP Integration > SOP Feedback Tracker.xlsx

Include:

Section number

Description of issue

Recommended update

Impact observed

Submit Monthly Feedback Summary

On the final day of each month:

Review personal tracker entries

Submit compiled form to Site Manager and PM

Discuss during PM/DMS Sync Meeting

Participate in SOP Review Workshops

Join quarterly or project-specific workshops (Teams or onsite)

Review changes

Validate revisions based on prior feedback

Identify Training Adjustments

Propose new training needs via:

Teams message to PM and Training Lead

Input into SOP Feedback Tracker

Suggest toolbox talk or quarterly module

Blocking Logic

? Do not propose SOP changes verbally only?must be logged in Feedback Tracker ? Do not implement new procedures until CPO approval and SOP update is issued

Outputs/Deliverables

Field-logged SOP improvement ideas

Monthly feedback summary

SOP Tracker updated with DMS PM input

Continuous refinement of DMS Work Instructions and SOP language

[8.1] DMS PM Integration with Devere Field Operations Training Program (Work Instruction) {#dmsfieldtrainingintegration}

Tools Used: OneDrive > 01. Administration > Training > Field Ops Curriculum.xlsx, Microsoft Teams, Sage

CM (for assignment tracking)

Outputs: Confirmed training modules, verified system skills, updated sign-in logs, follow-up mentorship tracking

Escalation Path: DMS PM ? Training Lead ? Project Manager ? CPO

Objective

Ensure every DMS PM is actively participating in the Field Operations Training Program?both as a trainee for new systems and a mentor for new crew leads?and that learning is reinforced through documented performance and system usage.

Definitions

Field Ops Curriculum: The formal sequence of training Devere uses to onboard and develop site-based staff in tools, processes, and safety protocols.

Mentorship Pairing: System whereby experienced DMS PMs assist in training newer leads or field staff.

Step-by-Step Procedure

Access and Review Training Curriculum

Navigate to OneDrive > 01. Administration > Training > Field Ops Curriculum.xlsx

Review required modules under PM/DMS tab

Note:

Sage CM entries (Daily Logs, RFIs, Timecards)

OneDrive folder usage

GoCodes scans

Safety/quality alignment

Schedule Initial and Quarterly Refreshers

Coordinate with Training Lead

Attend Teams or in-person sessions (minimum: quarterly)

Save calendar invites and attendance logs in:

OneDrive > 01. Administration > Training > Attendance Logs

Track and Verify Participation

Use Sage CM to assign learning tasks

Report task completion in Sage CM > Training Logs

Maintain proof of:

Attended module

Field application examples (e.g., uploading daily logs independently)

Mentor New Field Staff or Crew Leads

When assigned a mentee:

Share practical workflows

Conduct two on-site check-ins

Log feedback in Teams > Mentorship Channel

Save documentation to:

OneDrive > 01. Administration > Training > Mentorship Logs

Report Gaps or Enhancements Needed

Input into SOP Feedback Tracker

Flag in Teams to Training Lead for module revision

Blocking Logic

? No DMS PM may skip Field Ops curriculum without written waiver from CPO ? Mentorship must be logged?verbal sharing is insufficient

Outputs/Deliverables

Verified training compliance

Mentorship documentation

System usage evidence (e.g., GoCodes scan logs)

Field-proven reinforcement of SOP and best practices

[8.2] DMS PM Integration with Devere Quality Assurance and Inspection Training (Work Instruction) {#dmsqualitytraining}

Tools Used:

OneDrive > 18. Quality > Training > QA Curriculum.xlsx

OneDrive > 18. Quality > Checklists > [Trade-Specific Checklists]

Sage CM > Inspections, Punch List, and Non-Conformance Reports

Teams > Quality Channel

Outputs:

Confirmed completion of QA training modules

Inspection participation records

Punch list initiation logs

Final QC sign-off sheets

SOP-adjusted practices based on QA feedback

Escalation Path:

DMS PM ? Quality Lead ? Project Manager ? CPO

Objective

Equip DMS PMs with deep understanding and system usage for project-specific quality expectations?ensuring crew execution meets checklist standards and lessons learned are incorporated across projects.

Definitions

Quality Assurance (QA): Preventative planning and inspection procedures used to ensure each Definable Feature of Work (DFOW) is installed correctly the first time.

Non-Conformance Report (NCR): A record used in Sage CM to formally identify, track, and resolve deviations from plans, specs, or quality requirements.

Step-by-Step Procedure

Access Project-Specific QA Requirements

Navigate to:

OneDrive > Projects > [Project Name] > 18. Quality > Quality Plan.docx

Review Action Plans, checklists, and required inspection hold points

Review QA Curriculum:

OneDrive > 18. Quality > Training > QA Curriculum.xlsx

Attend QA Orientation Session

Participate in Quality Lead?led walkthrough of:

Checklist usage

Hold point tracking

NCR process

Upload sign-in sheet and notes to:

OneDrive > Projects > [Project Name] > 18. Quality > Training Records

Participate in Inspections

Support or lead at least one inspection per DFOW type (e.g., footing, concrete pour, pre-slab)

Use: Sage CM > Inspections > Create New

Save punch list outcomes to:

Sage CM > Punch List

OneDrive > 18. Quality > Punch Logs

Initiate and Close NCRs

When field deviations are observed:

Create NCR in Sage CM > Quality > NCR

Attach photo evidence

Assign responsible party and log rework actions

Confirm closure with Quality Lead

Flag Quality Issues During Daily Reporting

When logging Daily Logs or Forecast:

Add tags: #Quality or #HoldPoint

Notify Quality Lead in Teams > Quality Channel

Blocking Logic

? No DMS work may pass inspection without checklist validation

? No concrete may be placed without punch log confirmation and hold point signoff

? No NCR may be closed without Quality Lead review

Outputs/Deliverables

Project-specific QA plan review confirmation

Inspection checklist logs with DMS PM participation

Closed NCR records in Sage CM

Punch list compliance metrics

Monthly QA feedback integrated into SOP tracker

[8.3] DMS PM Role in Internal Training Sessions, SOP Rollouts, and Crew Mentorship (Work Instruction) {#dmspmtrainingmentorship}

Tools Used:

OneDrive > 17. Safety > Training Sessions > [Date-Based Folders]

OneDrive > 18. Quality > Training > Mentorship Logs

Sage CM > Project Logs > Training

Teams > SOP Rollout Channel

Outputs:

SOP rollout attendance sheets

Recorded crew mentorship logs and task sheets

Daily Log training notes and post-session summaries

Escalation reports and peer reviews

Escalation Path:

DMS PM ? Project Manager ? Chief Process Officer (CPO)

Objective

Ensure DMS PMs serve as both recipients and transmitters of field training, SOP updates, and crew mentorship responsibilities. Their involvement in internal knowledge transfer and ongoing improvement is essential to sustainable performance.

Definitions

SOP Rollout: The formal introduction and explanation of new or revised Standard Operating Procedures to field staff.

Mentorship Log: A record maintained in OneDrive or Sage CM, documenting which crew members were mentored by a DMS PM, including what topics were covered and observed improvements.

Step-by-Step Procedure

Attend All Devere SOP Rollout Sessions

Required for all new SOPs or changes to field execution procedures

RSVP via Teams > SOP Rollout Channel

After each session:

Record takeaways in OneDrive > Projects > [Project Name] > 17. Safety > Training Sessions > [Date].docx

Update Sage CM > Project Logs > Training with summary

Translate SOPs Into Actionable Steps for Crews

During next Toolbox Talk or Crew Huddle:

Explain what changed, what is expected, and how they will be supported

Use field-specific examples from DMS work (concrete pour, stair installation, trench layout)

Note crew feedback and implementation barriers

Log Crew Mentorship Activities

Track field mentorship daily/weekly using:

OneDrive > 18. Quality > Training > Mentorship Logs > [Crew Member Name].xlsx

Capture:

What was taught (e.g., rebar tie pattern correction, broom finish sequence)

Who was taught

Field observation results post-mentorship

Review progress with Site Manager and Project Manager weekly

Support Peer Coaching and Accountability

Partner with another DMS PM for shared review

Conduct peer observations of crew performance and discuss:

Adherence to SOP

Suggestions for task improvement

Upload peer review forms to OneDrive > 18. Quality > Training > Peer Reviews

Elevate Training Needs or SOP Gaps

If gaps persist, log a formal issue via:

Sage CM > Issues > SOP Feedback

Notify PM and CPO via Teams thread (tag #SOPUpdate)

Blocking Logic

? No DMS PM may conduct work outside of SOP guidance without documented exception approval

? No new crew member may work independently until mentored and logged by a DMS PM

? All SOP rollouts must be acknowledged via attendance logs within 24 hours

Outputs/Deliverables

Attendance logs for each SOP training

Mentorship records per crew member

Summary notes in Sage CM > Project Logs > Training

Logged peer coaching documents and SOP feedback for review

[8.4] DMS PM Training Documentation, Records Management, and OneDrive Coordination (Work Instruction)

{#dmstrainingrecords}

Tools Used:

OneDrive > 17. Safety > Training Sessions

OneDrive > 18. Quality > Training > Attendance Logs, Sign-In Sheets, Curriculum

Sage CM > Project Logs > Training and Safety

Teams > Training Announcements Channel

Outputs:

Attendance confirmations (digital or scanned)

Uploaded sign-in sheets and scanned field forms

SOP revision acknowledgment logs

Updated DMS PM training files by crew and topic

Escalation Path:

DMS PM ? Site Manager ? PM ? CPO

Objective

Ensure all DMS PM-led and PM-received training activities are documented, stored, and reportable in a secure, system-integrated fashion, creating a traceable record of professional development and compliance with Devere procedures.

Definitions

Training Record: Any document verifying a training session took place, including attendance logs, agendas, SOP acknowledgment forms, and mentorship reports.

OneDrive Coordination: Maintaining standardized folder naming and record structure in the 17. Safety and 18. Quality directories to ensure easy access and compliance tracking.

Step-by-Step Procedure

Create and Maintain Project-Specific Training Folders

Location: OneDrive > Projects > [Project Name] > 17. Safety > Training Sessions

Subfolders:

01. Sign-In Sheets

Curriculum & SOPs

Training Notes and Feedback

Upload Sign-In and Attendance Logs

After each training, toolbox talk, or SOP briefing:

Scan and name file using format: [YYYY-MM-DD]_[Topic]_SignIn.pdf

Upload to: OneDrive > Projects > [Project Name] > 17. Safety > Training Sessions > 01. Sign-In Sheets

Log Training Summary to Sage CM

In Sage CM > Project Logs > Training:

Enter Date, Topic, DMS PM Host, Attendance #, Key Takeaways

Maintain a Running Training Register

OneDrive > Projects > [Project Name] > 18. Quality > Training > Training Tracker.xlsx

Columns: Date, Type, Who Attended, Trainer, SOP/Skill Trained, Follow-Up Notes

Document SOP Acknowledgment

For any SOP change, collect signed acknowledgment from DMS PMs and affected crew

File in: OneDrive > 18. Quality > Training > SOP Acknowledgments > [SOP Name].pdf

Cross-reference Sage CM Issues > SOP Feedback for procedural deviations

Coordinate via Teams Training Channel

Post reminders for training uploads or checklist completion

Tag Site Manager and PM when updates are posted or pending

Blocking Logic

? No SOP rollout or training session is considered complete until signed attendance is uploaded

? No DMS PM may operate independently without all prior SOP acknowledgments on file

? Incomplete training records will trigger PM escalation during weekly reviews

Outputs/Deliverables

Centralized digital archive of all training-related documentation

Verified SOP acknowledgments per crew and PM

Training tracker spreadsheet for QA/QC and audit support

Sage CM project log entries for every training instance

[8.5] DMS PM Responsibility for Supporting Field Staff Development, Certifications, and Readiness Tracking (Work Instruction) {#dmsstaffcertifications}

Tools Used:

OneDrive > 17. Safety > Certifications > [Trade or Crew Name]

OneDrive > 18. Quality > Training > Development Logs

Sage CM > Safety > Certifications, Training Logs

Microsoft Teams > Certification Reminders and CPO Review Thread

Outputs:

Field crew certification matrix (per project)

Updated CPR, fall protection, and equipment training logs

Skill progression checklist by role (apprentice, journeyman, lead)

PM/Site Manager readiness dashboard or report

Escalation Path:

DMS PM ? PM ? CPO ? Safety Lead or Trade Superintendent

Objective

To ensure each DMS PM supports career development, safety compliance, and job-readiness of the field crew by tracking certifications, facilitating training, and reporting skill-level status.

Definitions

Readiness Tracking: The process of confirming each crew member is trained, certified, and capable of executing assigned field duties.

Certification Matrix: A project-specific table listing crew members, required certifications, expiration dates, and status (up-to-date, pending, expired).

Step-by-Step Procedure

Maintain a Live Certification Matrix per Project

Download template from OneDrive > 17. Safety > Templates > Certification Matrix.xlsx

Save to: OneDrive > Projects > [Project Name] > 17. Safety > Certifications > Matrix.xlsx

Update monthly with:

CPR/First Aid

Fall Protection

Equipment (e.g., Lull, scissor lift)

OSHA 10/30 or job-specific certs

Update Sage CM Training Logs

Navigate to Sage CM > Safety > Certifications

Enter certification type, crew member name, issue/expiration date

Track Career Progression and Mentorship Status

Use OneDrive > 18. Quality > Training > Development Logs > [Crew Member].xlsx

Note promotion readiness, areas needing mentorship, and task performance

Coordinate with Safety Lead for Re-certifications

Notify 60 days before expiration via Teams thread

Schedule recertifications or training sessions

Upload proof of completion to: OneDrive > 17. Safety > Certifications > [Crew Name]

Monitor Daily Readiness

Weekly huddle with Site Manager and Superintendent to:

Review any limitations (e.g., expiring certs, injuries, skill gaps)

Reassign tasks or trigger training as needed

Blocking Logic

? No crew member may operate equipment without valid certification on file

? No high-risk task (e.g., trenching, elevated work) may be assigned without crew readiness check

? PM must be alerted within 24 hours of expiring certs via automated flag or manual review

Outputs/Deliverables

Current certification matrix in project OneDrive

Updated logs in Sage CM > Safety > Certifications

Development files in 18. Quality > Training

Dashboard view for PMs and CPO during weekly reviews

[8.6] DMS PM Support of Subcontractor Certification and Safety Documentation (Work Instruction) {#dmsubcertsafety}

Tools Used:

OneDrive > 17. Safety > Subcontractor Compliance > [Subcontractor Name]

Sage CM > Vendor Records > Compliance & Insurance Tabs

Sage CM > Safety > Incidents and Documentation

Teams > Sub Onboarding Channel

Outputs:

Validated subcontractor safety certifications (CPR, equipment ops, OSHA)

Subcontractor compliance checklists

Issue log entries in Sage CM when violations occur

Stored records of SDS sheets, fall protection plans, and task-specific certs

Escalation Path:

DMS PM ? Site Manager ? PM ? Safety Lead ? CPO

Objective

Ensure DMS PMs actively monitor, validate, and flag any deficiencies in subcontractor safety and certification documentation to maintain project readiness, compliance, and accountability.

Definitions

Subcontractor Certification Package: A required bundle of documents including CPR certification, OSHA cards, equipment certifications, and company safety plans, submitted prior to jobsite access.

SDS Sheets: Safety Data Sheets documenting chemical hazards required by OSHA for materials onsite.

Step-by-Step Procedure

Collect and Store Subcontractor Certification Packages

Before mobilization, receive packages from PM or Contract Admin

Save to: OneDrive > Projects > [Project Name] > 17. Safety > Subcontractor Compliance > [Subcontractor

Name]

Verify inclusion of:

CPR/First Aid for designated leads

Equipment operating certifications

OSHA 10/30 cards (role-specific)

Safety Plan, SDS sheets, fall protection plans

Verify Certification Expirations and Task Alignment

Confirm all certs are active and relevant to planned scope of work

Review during pre-task planning with Site Manager

Escalate any expired/lacking documentation via Teams

Update Sage CM Vendor Records

Navigate to: Sage CM > Vendors > [Subcontractor] > Compliance Tab

Upload all PDFs and record expiration dates

If subcontractor refuses to comply, log incident in Sage CM > Safety > Incidents

Flag Violations and Block Work if Necessary

DMS PM may stop subcontractor activity for:

Missing lift certifications

Lack of respirator fit testing

Noncompliance with SDS or PPE expectations

Document incident, notify PM and CPO immediately

Coordinate With Safety Lead on Spot Audits

Conduct periodic audits of sub safety folders

Use checklist template from OneDrive > 17. Safety > Templates > Sub Audit Checklist.xlsx

Upload completed checklist to subcontractor?s folder

Blocking Logic

? No subcontractor may perform work onsite without verified CPR, equipment, and OSHA documentation

? Work may not begin until all SDS sheets and safety plans are uploaded to project folders

? Subcontractor violations must be documented in Sage CM and escalated within 24 hours

Outputs/Deliverables

Digital record of all subcontractor safety documents per project

Compliance tracking log in Sage CM vendor module

Audit checklists and escalation history

Active monitoring via Teams threads and DMS PM logs

[8.7] DMS PM Oversight of Task Hazard Analysis (THA) and Pre-Task Planning Review (Work Instruction) {#dmsthapreplan}

Tools Used:

OneDrive > 17. Safety > THA Logs > [Date/Task]

OneDrive > 17. Safety > Toolbox Talks > [Trade/Task]

Sage CM > Safety > Task Hazard Analysis

Teams > Morning Huddle and THA Coordination Channel

Outputs:

Verified and uploaded THAs per task and crew

THA review notes logged in Sage CM

Pre-task safety confirmation documented per shift

Daily THA sign-off sheets filed in project OneDrive

Escalation Path:

DMS PM ? Site Manager ? Safety Lead ? PM ? CPO

Objective

Ensure DMS PMs actively verify completion and adequacy of Task Hazard Analyses and Pre-Task Plans before any work begins, holding crews accountable for understanding and mitigating risks.

Definitions

Task Hazard Analysis (THA): A short-form risk breakdown performed before any definable task that identifies hazards and preventive measures.

Pre-Task Plan: The tactical daily plan including labor assignments, equipment requirements, material readiness, and safety notes for each DFOW.

Step-by-Step Procedure

Review and Approve Daily THAs

Crews complete THAs each morning before start of task

DMS PM verifies:

Hazards listed match real site conditions

Preventative actions are feasible and accurate

PPE listed matches crew usage

Sign and scan THAs, upload to: OneDrive > Projects > [Project Name] > 17. Safety > THA Logs > [Date-Task].pdf

Log Review in Sage CM

Go to: Sage CM > Safety > Task Hazard Analysis

Enter record of THA approval, observations, and compliance level

Address Gaps During Morning Huddle

Discuss incomplete or unsafe THAs in daily huddle with Site Manager and Safety Lead

Rework THAs on the spot if needed, ensuring all crews understand risks

Maintain THA Archive

Create OneDrive subfolder structure by date/task:

e.g., 2025-07-15_ConcretePour_Footings.pdf

Include supporting documents such as:

SDS sheets

Jobsite photos of hazard zones

Toolbox talk record for the same task type

Reinforce Accountability Through Sign-Offs

Require crew leads to sign THAs prior to task commencement

Require DMS PM signature on all THAs

Blocking Logic

? No task may begin until THA is verified and uploaded

? Missing THAs will trigger a stop work and notification to Site Manager and Safety Lead

? Repeated THA noncompliance requires escalation to CPO

Outputs/Deliverables

Digitally archived THAs by date and task

Sage CM log entries for THA verification

Team coordination via Teams channel

Audit-ready folders in OneDrive > 17. Safety > THA Logs

[8.8] DMS PM Enforcement of Site-Specific Safety Protocols and Manufacturer Safety Requirements (Work Instruction) {#dmssitesafety}

Tools Used:

OneDrive > 17. Safety > Site-Specific Protocols

OneDrive > 17. Safety > SDS and Manufacturer Safety Sheets

Sage CM > Safety > Observations and Incident Reports

Teams > Site Safety Alerts Channel

Outputs:

Enforced adherence to site-specific rules and OEM safety guidelines

Documented review of new tools/materials with applicable SDS/manufacturer instructions

Daily logs of safety conformance and flagged deviations

Stop work documentation and escalation when safety compliance fails

Escalation Path:

DMS PM ? Site Manager ? PM ? Safety Lead ? CPO

Objective

Ensure DMS PMs enforce all project-specific safety standards and manufacturer-specific safety precautions, with no deviation allowed from posted plans or approved safety documentation.

Definitions

Site-Specific Safety Protocols: The tailored set of rules, restrictions, logistics, and mitigation plans unique to the jobsite (e.g., occupied campus, power line proximity).

Manufacturer Safety Requirements: Procedures provided by equipment or material vendors that detail PPE, handling, installation, and ventilation needs.

Step-by-Step Procedure

Review Site-Specific Safety Plans at Project Start

Retrieve plans from: OneDrive > 17. Safety > Site-Specific Protocols > [Project Name].pdf

DMS PM confirms key concerns with PM and Site Manager (e.g., live utilities, public access areas)

Enforce Compliance During Field Walks

Daily monitoring of:

Safety signage placement

Barricade presence and conditions

Access control fencing or warning lines

Fire watch and confined space control, if applicable

Log issues in Sage CM > Safety > Observations

Verify Manufacturer Safety Protocols

Before using new chemicals, materials, or tools:

Retrieve SDS or vendor safety instructions

Upload to: OneDrive > 17. Safety > SDS and Manufacturer Safety Sheets

Review with crew during toolbox talk

Document and Escalate Noncompliance

Stop work immediately for serious violations (e.g., incorrect PPE, ventilation hazards)

Log event in Sage CM > Safety > Incident Reports

Alert Safety Lead and PM via Teams for resolution plan

Track and Archive Safety Documentation

Keep a running record of all SDS reviewed for crew activities

Ensure all field notices, new material approvals, and site rule updates are stored in OneDrive

Blocking Logic

? No new chemical or tool may be used without reviewed SDS or OEM instructions

? Tasks requiring confined space, hot work, or exposure limits must follow posted jobsite restrictions

? Missing PPE or signage violations trigger immediate stop work and CPO notification

Outputs/Deliverables

Confirmed review and upload of site-specific and OEM safety documentation

Daily log entries in Sage CM > Observations

Archived SDS and OEM files in OneDrive

Escalation reports for violations

[8.9] DMS PM Coordination with Safety Lead on Audit Prep and External Inspector Interface (Work Instruction) {#dmssafetyauditprep}

Tools Used:

OneDrive > 17. Safety > Audit Reports and Logs

OneDrive > 17. Safety > 11. Action Plans

Sage CM > Safety > Inspections and Audits

Teams > Safety Coordination Channel

Third-party inspection reports and OSHA documents (if applicable)

Outputs:

Pre-audit field walkthroughs completed and documented

All punch list items and safety observations closed or updated

Audit checklist completed in OneDrive

Sage CM entries for Safety Logs and observations resolved

Escalation Path:

DMS PM ? Site Manager ? PM ? Safety Lead ? CPO

Objective

Ensure all DMS work areas are compliant with site safety standards prior to formal safety audits, and that DMS PMs serve as informed, proactive contacts when interfacing with external inspectors or compliance officials.

Definitions

Safety Audit: A formal internal or third-party review of jobsite conformance to safety standards, SOPs, OSHA regulations, and project-specific safety plans.

Inspector Interface: Any formal interaction between a field manager and an external auditor or code enforcement official.

Step-by-Step Procedure

Coordinate Internal Walkdown Prior to Audit

Conduct field safety walkthrough with Site Manager and Safety Lead

Identify and close out all prior observations

Check all signage, first aid kits, fire extinguishers, access points, and PPE compliance zones

Complete Safety Audit Readiness Checklist

Use template in: OneDrive > 17. Safety > Audit Reports and Logs > Pre-Audit Checklist.xlsx

Include sign-in sheets, inspection logs, THA samples, toolbox talk records

Review Unresolved Safety Observations in Sage CM

Go to: Sage CM > Safety > Observations

Confirm all issues closed or action planned

Flag high-risk unresolved items and escalate to Safety Lead

Interface with External Inspectors Professionally

DMS PM greets inspector and remains on-call during site walk

Do not speculate or guess?direct inspector to Safety Lead for clarification

Take notes on all inspector comments and requests

Document All Findings and Responses

Immediately after audit:

Upload field notes and report to OneDrive > 17. Safety > Audit Reports and Logs

Log any required follow-up actions in Sage CM > Safety > Incidents

Share findings with PM and Safety Lead via Teams

Blocking Logic

? No DMS PM is to sign off on an audit response without first reviewing with the Safety Lead

? Unaddressed observations from prior audits must be closed or justified with action plan in writing

? Failure to participate in audit prep will result in formal coaching report

Outputs/Deliverables

Completed pre-audit checklist signed and filed

Final inspection notes documented and uploaded

All action items assigned and tracked in Sage CM

Follow-up plan coordinated through Teams and OneDrive folders

[9.0] DMS PM Interface with Subcontractor Safety Personnel and Incident Response (Work Instruction) {#dmssubcontractorsafety}

Tools Used:

Sage CM > Safety > Incidents, Observations

OneDrive > 17. Safety > Subcontractor Safety Files

Teams > Subcontractor Coordination Channel

Project-specific Safety Plan, signed subcontractor agreements

Outputs:

Verified subcontractor safety documentation uploaded to OneDrive

Incident and near-miss reports logged in Sage CM

Subcontractor safety issues escalated and documented

Toolbox talk and THA compliance monitored and recorded

Escalation Path:

DMS PM ? Site Manager ? PM ? Safety Lead ? Subcontractor Safety Rep ? CPO

Objective

Ensure DMS PMs coordinate with subcontractor safety representatives to maintain consistent safety standards, respond to incidents, and enforce jobsite compliance under Devere?s protocols.

Definitions

Subcontractor Safety Rep: Designated field-level safety contact for each subcontractor. Required on all projects over $1M.

Incident Response: The procedural handling of injuries, near misses, or unsafe conditions involving subcontractor personnel.

Step-by-Step Procedure

Initial Subcontractor Safety Coordination

Ensure subcontractor has submitted:

Safety rep contact info

Safety plan

Emergency procedures and SDS list

Store to: OneDrive > Projects > [Project Name] > 17. Safety > Subcontractor Safety Files > [Company Name]

Establish Communication Protocol

Add subcontractor safety rep to Teams > Subcontractor Coordination Channel

Define who is contacted for:

Daily huddles

Incident reports

THA/TBT documentation

Emergency drills or alerts

Monitor Daily Compliance

Verify:

Subcontractor TBTs completed and filed

Proper PPE use by subcontractors

Participation in jobsite safety walks

Log deviations in Sage CM > Safety > Observations

Respond to Incidents Involving Subs

DMS PM collects witness statements, photos, and logs

Incident report entered in Sage CM > Safety > Incidents

Notify Safety Lead and PM via Teams

Ensure subcontractor files their own report and participates in root cause analysis

Escalate Repeat Offenses or Unsafe Subs

After 2 or more serious observations or 1 unresolved major incident:

Escalate to PM and CPO

Consider removal from project

Document pattern in Sage CM and OneDrive

Blocking Logic

? No subcontractor may work without a designated Safety Rep on file

? Incomplete incident reports halt subcontractor operations until resolved

? Continued safety violations trigger removal from site and possible contractual penalties

Outputs/Deliverables

All subcontractor safety documentation verified and archived

Incident and observation logs updated daily

Escalation records kept in Sage CM and OneDrive

Confirmed participation in drills, toolbox talks, and audits

[9.1] DMS PM Responsibilities for Safety Sign-In Sheets and Access Control Logs (Work Instruction) {#dmssigninlogs}

Tools Used:

OneDrive > 17. Safety > Sign-In Sheets and Access Logs

Sage CM > Safety > Daily Logs

Teams > Site Access Coordination Thread

Outputs:

Daily labor and visitor sign-in logs organized by date and crew

Access control documentation updated and archived

Alerts generated for unauthorized site entry or failure to sign in

Daily log entries validated for attendance compliance

Escalation Path:

DMS PM ? Site Manager ? Safety Lead ? PM ? CPO

Objective

To enforce accurate and complete sign-in tracking for all personnel on-site, including subcontractors, delivery drivers, and visitors, and to ensure accountability through consistent access control documentation.

Definitions

Sign-In Sheet: Daily log sheet used to record all labor, deliveries, visitors, and trade foremen entering the site.

Access Control Log: System of tracking who entered and exited the jobsite and when, used for audits, emergencies, and incident investigations.

Step-by-Step Procedure

Ensure Sign-In Sheets Are Deployed at Every Access Point

Post laminated instructions next to sheet station

Maintain sheets by day and crew

Backup stored: OneDrive > Projects > [Project Name] > 17. Safety > Sign-In Sheets and Access Logs > [Date]

Monitor and Collect Sheets Daily

At end of day, collect physical sheets

Scan and upload to OneDrive by 4:00 PM

Log summary of entries in Sage CM > Safety > Daily Log

Verify Entries for Incomplete or Missing Data

Check for:

No-shows

Early or unapproved entry

Incorrect trade or crew labeling

Flag in Sage CM > Safety > Observations if recurring

Use Access Logs for Incident or Safety Tracing

In case of safety event:

Pull scanned sign-in log

Cross-check with timecard and witness logs

Coordinate with Site Manager for Gate Guard or Monitoring Support

If persistent issues arise, initiate additional site control (badge checks, QR codes, etc.)

Blocking Logic

? No worker may enter site without logging on sign-in sheet

? Missing logs for any day must be escalated to PM and Safety Lead

? Unauthorized access must be documented and addressed by Site Manager

Outputs/Deliverables

Digitally scanned and archived daily sign-in sheets

Sage CM entries for safety logs

Incident cross-referencing supported with entry logs

Access control audit trail available for compliance

[9.2] DMS PM Oversight of Safety Training, Orientation, and Certification Records (Work Instruction) {#dmssafetytraining}

Tools Used:

OneDrive > 17. Safety > Training Logs and Certifications

Sage CM > Safety > Training Records

Teams > Safety Channel

Microsoft Forms or PDF sign-in templates

Outputs:

Safety orientation logs per crew and subcontractor

Equipment training sign-off forms

Certification records (e.g., forklift, fall protection) stored in OneDrive

Verification logs of completion status in Sage CM

Escalation Path:

DMS PM ? Site Manager ? Safety Lead ? PM ? HR (if internal crew)

Objective

Ensure all field personnel?internal and subcontracted?are trained, oriented, and documented in alignment with Devere?s Safety Management SOP before performing work.

Definitions

Safety Orientation: Project-specific onboarding conducted before any task begins. Includes site rules, evacuation, PPE, and hazard awareness.

Training Record: Documentation showing an individual has completed safety training or holds a valid certification (e.g., aerial lift).

Step-by-Step Procedure

Administer Project-Specific Safety Orientation

Coordinate with Safety Lead to schedule sessions for:

DMS crews

New subcontractors

Use sign-in sheets stored in: OneDrive > Projects > [Project Name] > 17. Safety > Training Logs and Certifications > Orientation Logs

Upload scanned sheets or digital submissions within 24 hours

Verify Trade-Specific Certifications and Equipment Training

Collect copies of:

OSHA 10/30 cards

Lift/forklift/scaffold certifications

Confined space training (if applicable)

Upload to OneDrive > [Project Name] > 17. Safety > Training Logs and Certifications > [Trade or Individual Name]

Log training dates and certs in Sage CM > Safety > Training Records

Track Certification Expirations and Re-Training Needs

Maintain tracker in OneDrive > 17. Safety > Certification Tracker.xlsx

Color-code for expiring within 30 days (YELLOW) and expired (RED)

Notify crew or subcontractor rep via Teams with re-training requirement

Escalate Gaps or Noncompliance

If no certification is on file:

Block work assignment

Escalate to Site Manager and Safety Lead

PM to determine work stoppage or substitution

Blocking Logic

? No personnel may operate equipment without documented training

? No subcontractor labor may start work without orientation attendance

? Expired certifications must be flagged and resolved prior to continued access

Outputs/Deliverables

Full orientation sign-in logs per subcontractor and crew

Validated and filed training/certification records

Centralized safety training history accessible to PM, Safety Lead, and Site Manager

Preventative alerts triggered before certification expirations

[9.3] DMS PM Responsibilities for SDS Binders and Chemical Hazard Compliance (Work Instruction) {#dmssdsbinders}

Tools Used:

OneDrive > 17. Safety > SDS and Chemical Logs

Jobsite SDS Binder (hard copy, job trailer or safety kiosk)

Sage CM > Safety > Observations

Outputs:

Digitally archived and up-to-date SDS files for all materials used onsite

Hard copy SDS binder maintained and accessible at all times

Observations logged in Sage CM for chemical non-compliance

Escalation Path:

DMS PM ? Site Manager ? Safety Lead ? PM ? Subcontractor Rep (if applicable)

Objective

To maintain complete and current chemical hazard documentation for all materials on-site, in compliance with

OSHA standards and Devere?s internal safety protocols.

Definitions

SDS (Safety Data Sheet): A standardized OSHA document that outlines health, handling, and emergency response information for any chemical product brought onsite.

Step-by-Step Procedure

Collect SDS Documents for All Jobsite Materials

Upon procurement or delivery of chemical-containing products (e.g., sealants, coatings, cleaners):

Request SDS from supplier or manufacturer

Verify document has hazard, handling, and first aid sections

Save to OneDrive > Projects > [Project Name] > 17. Safety > SDS and Chemical Logs > [Material Name].pdf

Maintain Hard Copy SDS Binder in Field

Print one copy per SDS

Organize binder by alphabetical order or by trade use

Place binder at:

Job trailer

Safety station (if separate)

Label cover clearly: "SDS ? [Project Name] ? Emergency Chemical Info"

Verify Subcontractor SDS Submissions

Each subcontractor bringing chemicals must submit SDS before using product onsite

Store digital copies under: OneDrive > 17. Safety > SDS and Chemical Logs > Subcontractors > [Company Name]

Confirm binder includes subcontractor products

Weekly Review and Binder Update

DMS PM or Safety Lead checks for:

New materials added

Outdated or missing SDS pages

Replace damaged binder sheets or expired entries

Respond to Incidents or Inspections

If injury or exposure occurs:

Retrieve SDS from binder immediately

Provide to medical responders

Log the event and binder use in Sage CM > Safety > Observations

Blocking Logic

? No chemical may be stored or used onsite without SDS on file (digital + hard copy)

? Missing SDS must trigger stop-work order for that product

? Non-submittal by subcontractor results in PM-level escalation

Outputs/Deliverables

Digitally organized SDS folder in OneDrive, updated in real-time

Field-ready hard copy SDS binder maintained weekly

Sage CM entries documenting compliance and any incidents

Verified SDS records for Devere crews and subcontractors

[9.4] DMS PM Safety Response Protocol for Heat Illness, Injury, and Impairment Observations (Work Instruction) {#dmssafetyresponse}

Tools Used:

Sage CM > Safety > Incidents and Observations

OneDrive > 17. Safety > Incident Logs and Reports

Red Cross First Aid Guide (digital/field copy)

Safety Plan posted at trailer and shared in Toolbox Talks

Outputs:

Logged incidents, near misses, and safety responses in Sage CM

Documented injury/impairment reports in OneDrive

Compliance with OSHA recordkeeping and reporting standards

Escalation Path:

DMS PM ? Site Manager ? Safety Lead ? Project Manager ? HR (for employees) or Sub Rep (for subcontractors)

Objective

Ensure immediate and proper response to field incidents, suspected impairment, heat illness, or injury events. All actions must align with OSHA, Devere?s safety protocols, and Red Cross first aid principles.

Definitions

Heat Illness: Includes dehydration, heat exhaustion, or heat stroke due to prolonged exposure. Signs include confusion, excessive sweating, cramping.

Impairment: Observable physical or cognitive dysfunction, potentially due to drugs, alcohol, or fatigue, that affects safety.

Step-by-Step Procedure

Observe and Secure the Area

If a crew member appears impaired or ill:

Stop work in immediate area

Ensure the individual is seated or supported safely

Remove any dangerous tools or equipment from the area

Initiate Emergency Response

For heat stroke or serious injury:

Call 911 immediately

Apply first aid as trained (see Red Cross Guide in safety trailer)

Notify Site Manager and Safety Lead via Teams or radio

Document the Incident

In Sage CM > Safety > Incidents, create a new report:

Date, time, personnel involved

Nature of incident

First aid administered or emergency services called

Witness names (if applicable)

Upload photo or documentation to OneDrive > 17. Safety > Incident Logs and Reports > [Date ? Incident Type].pdf

Evaluate Impairment (Suspected)

If impairment is suspected:

Do NOT accuse or diagnose

Contact Site Manager and Safety Lead

Remove individual from work area

If subcontractor: notify company supervisor immediately

If Devere employee: HR and PM must be alerted

Close the Incident Log

Follow up within 24 hours to:

Verify completion of observation entry in Sage CM

Ensure corrective actions or safety plan adjustments are issued

Upload any formal reports or safety briefings to OneDrive

Blocking Logic

? No work may resume in affected area until hazard is mitigated or individual cleared

? All suspected impairment must be documented and escalated without delay

? Failure to log incident within 24 hours is a compliance violation

Outputs/Deliverables

Verified incident reports logged in Sage CM

First aid and 911 reports saved to OneDrive

Confirmation of subcontractor notifications and Devere HR coordination

Preventative actions logged and reviewed at next Toolbox Talk

[9.5] DMS PM Safety Walk Participation and Documentation Responsibilities (Work Instruction) {#dmssafetywalks}

Tools Used:

Sage CM > Safety > Observations and Inspections

OneDrive > 17. Safety > Weekly Walk Logs

Safety Checklist Templates (stored digitally and hard copy)

Microsoft Teams > Safety Channel

Outputs:

Weekly safety observation reports per trade and zone

Follow-up tasks documented and tracked via Sage CM and Teams

Lessons learned and improvements distributed at Toolbox Talks

Escalation Path:

DMS PM ? Site Manager ? Safety Lead ? PM ? Trade Foreman ? Subcontractor Rep (if external)

Objective

To proactively identify hazards, verify safety compliance, and support continuous safety improvement through active participation in scheduled safety walks and accurate documentation.

Definitions

Safety Walk: A scheduled field inspection conducted to identify hazards, confirm checklist compliance, and document observations by area, trade, and condition.

Step-by-Step Procedure

Join Weekly Safety Walks

Attend all safety walks led by the Safety Lead or Site Manager

Rotate through:

General areas

DMS zones

Subcontractor staging/laydown areas

Carry latest safety walk checklist (digital or printed)

Perform Visual and Documentation Checks

Confirm presence of:

Fall protection

Guardrails

Housekeeping/cleaning compliance

Fire extinguishers

Open trench barriers

Note condition and location of each item

Take photos where violations or concerns exist

Record and File Findings

Log observations in Sage CM > Safety > Observations

Upload checklist to OneDrive > 17. Safety > Weekly Walk Logs > [Date].pdf

Highlight action items and who is responsible

Assign and Track Corrective Actions

Create follow-up tasks in:

Sage CM > Tasks or

Teams > Safety Channel (tag foreman or sub rep)

Assign due date, responsible party, and resolution deadline

Escalate Repeated or Serious Issues

Report recurring violations directly to Safety Lead and PM

For subcontractors: escalate through Site Manager to sub foreman

For DMS crews: escalate to crew lead and Superintendent

Distribute Lessons Learned

Add key findings to Toolbox Talk topics for next week

Save lessons learned summary to OneDrive > 17. Safety > Lessons Learned Logs

Blocking Logic

? No new scope may begin in a zone flagged during safety walk until resolved

? Safety walks must be completed weekly without exception

? Failure to assign or close action items triggers escalation to PM and CPO

Outputs/Deliverables

Completed weekly safety walk checklists filed in OneDrive

Sage CM entries with observations and follow-ups

Updated Toolbox Talk content reflecting current risks and themes

Record of repeat issues for trend tracking and accountability

[9.6] DMS PM Field Responsibilities for Fall Protection, Ladders, and Elevated Work Monitoring (Work Instruction) {#dmsfallprotection}

Tools Used:

Sage CM > Safety > Observations

OneDrive > 17. Safety > Elevated Work & Fall Protection Logs

Red Cross & OSHA Fall Protection Quick Guides (printed + digital)

Outputs:

Observations logged in Sage CM with photographic documentation

Weekly elevated work log with subcontractor/DMS team notes

Fall protection compliance summaries included in Toolbox Talks

Escalation Path:

DMS PM ? Site Manager ? Safety Lead ? PM ? Sub Rep or Trade Foreman ? CPO (if unresolved)

Objective

Ensure safety compliance in all elevated work, including ladder use, scaffolding, and personal fall arrest systems (PFAS), through active field observation, documentation, and corrective action coordination.

Definitions

Elevated Work: Any work occurring six feet or more above a lower level where a fall hazard exists.

PFAS: Personal Fall Arrest System, including harness, lanyard, anchor point, and connector meeting OSHA criteria.

Step-by-Step Procedure

Pre-Work Visual Walkthroughs

Walk all zones where elevated work will occur that day

Confirm guardrails, toeboards, or PFAS are in place

Note weather or floor conditions that may increase fall risk

Ladder and Scaffold Inspection Checks

Ensure ladders are:

Rated for industrial use (Type I, IA, or IAA)

Positioned at 4:1 ratio (for extension ladders)

Not leaning against unsupported surfaces

Inspect scaffolding for:

Proper planking

Secure baseplates and locking pins

Guardrails and safe access

Observe Active Elevated Work

Confirm use of harnesses and anchor points

Record contractor name and responsible crew lead

Take wide and close-up photos where issues are found

Document All Observations

Log in Sage CM > Safety > Observations with:

Date, time, location

Crew or subcontractor name

Type of equipment

Deficiency (if any) and photo

Save weekly log to OneDrive > 17. Safety > Elevated Work & Fall Protection Logs > [Week of ___].xlsx

Coordinate Corrective Action

For minor issues:

Notify responsible foreman or DMS crew lead

Require immediate fix

For major violations:

Escalate to Site Manager and Safety Lead

Document stop-work and recheck post-correction

Feed into Weekly Safety Planning

Include findings in safety huddles and Toolbox Talks

Review trends weekly with PM, Superintendent, and Safety Lead

Blocking Logic

? No elevated work can begin without fall protection in place and verified

? Broken or non-rated ladders must be removed from site immediately

? Repeat violators trigger stop-work and potential safety citation

Outputs/Deliverables

Daily and weekly elevated work logs with photos and checklists

Sage CM safety observation records for compliance

Risk trend data for weekly reviews and Toolbox Talk integration

Active enforcement of fall safety standards across DMS and subcontractors

[9.7] DMS PM Safety Input for Daily Huddles and Toolbox Talks (Work Instruction) {#dmssafetyhuddles}

Tools Used:

Sage CM > Safety > Toolbox Talk Log

OneDrive > 17. Safety > Toolbox Talk Templates and Records

Microsoft Planner > Safety & QC task board

Teams > Safety Channel (for coordination)

Outputs:

Daily input for field safety topics, including task-specific risks and jobsite conditions

Documented Toolbox Talks with crew signatures

Escalated safety notes or issues filed with PM and Safety Lead

Escalation Path:

DMS PM ? Site Manager ? Safety Lead ? PM ? Superintendent (if repeated issues)

Objective

To ensure safety culture is embedded daily through active DMS PM participation in huddles and Toolbox Talks, promoting relevant and timely risk awareness.

Definitions

Toolbox Talk: A short, focused safety meeting held with crews on-site before work begins.

Huddle: A quick daily team meeting to align on tasks, hazards, and coordination.

Step-by-Step Procedure

Review Site Safety Context

Check:

Current weather

Ongoing elevated work

High-risk scopes scheduled (e.g., trenching, steel)

Open safety items from prior walks

Prepare Topic Inputs

Identify at least one relevant topic from:

Past safety walks

Action Plan risk sections

Near misses or lessons learned

Add notes to the Sage CM > Safety > Toolbox Talk Log as pre-draft

Coordinate with Site Manager or Safety Lead

Suggest focus topics for the day?s Toolbox Talk

For DMS-led scopes, offer to lead or support the talk

Ensure new crew members are present and introduced

Participate in Toolbox Talk Delivery

Help communicate:

Specific jobsite risks that day

What to watch for (e.g., debris, open trench)

Crew assignments and staging areas

Ensure all team members sign the attendance sheet

Upload and Track

Upload signed talk sheet to OneDrive > 17. Safety > Toolbox Talk Templates and Records > [Date ? Topic].pdf

Record attendance in Sage CM > Safety > Toolbox Talk Log

Follow Up on Issues Raised

If any concerns are raised:

Note in Sage CM or Teams Safety Channel

Assign corrective tasks in Planner (if applicable)

Blocking Logic

? No crew begins work before attending daily huddle or Toolbox Talk

? Toolbox Talk attendance must be documented daily

? Unaddressed concerns from talks must be escalated within 24 hours

Outputs/Deliverables

Safety topic input based on field conditions and recent issues

Recorded attendance for daily safety talks

Uploaded talk records and compliance logs

Immediate corrective actions or escalations where needed

[9.8] DMS PM Safety Interface with Third-Party Inspectors and Site Safety Consultants (Work Instruction) {#dmsthirdpartyinspectors}

Tools Used:

OneDrive > 17. Safety > Third Party Inspections

Sage CM > Safety > Inspection Logs and Issues

Microsoft Teams > Safety Channel

Inspection Checklist Templates and Consultant Action Registers

Outputs:

Confirmed third-party inspection results and issue logs

Consultant action items tracked and resolved in Sage CM

Lessons learned and compliance trends shared at Safety Syncs

Escalation Path:

DMS PM ? Site Manager ? PM ? Safety Director ? CPO (if repeated or unresolved)

Objective

To ensure proper coordination and follow-through on all third-party safety inspections, audits, and consultant walkthroughs, driving continuous improvement and regulatory compliance.

Definitions

Third-Party Inspector: An external professional (e.g., OSHA consultant, private safety firm) conducting formal or informal site audits.

Consultant Action Register: A running log of observations, recommended corrections, and dates assigned for resolution.

Step-by-Step Procedure

Verify Inspection Timing and Scope

Confirm schedule of walkthrough with Site Manager or Safety Director

Review prior inspection reports and open items in OneDrive > 17. Safety > Third Party Inspections

Attend and Document Inspection

Accompany inspector and record:

Locations walked

Key findings

Photographic evidence

Crew or subcontractor names involved

Log Findings in Sage CM

Go to Sage CM > Safety > Inspection Logs

Enter:

Inspector name and date

Category of observation

Priority or severity

Responsible party (DMS crew, sub, etc.)

Populate Consultant Action Register

Update Excel log in OneDrive > 17. Safety > Third Party Inspections > Consultant Action Register.xlsx

Assign deadlines and resolution owners

Coordinate Resolutions

Follow up with:

DMS crew leads

Sub foremen

Safety Lead

Use Teams Safety Channel to post urgent items

Confirm and Archive Closeout

Confirm fix with re-inspection or photo evidence

Log resolution in Sage CM and OneDrive

Note ?Resolved? with date in Consultant Action Register

Review and Reflect

Discuss at next safety meeting: trends, delays, improvements

Save insights to OneDrive > 17. Safety > Lessons Learned Logs

Blocking Logic

? Unresolved consultant issues may trigger hold points or stop work

? Re-inspections must confirm issue resolution before area is cleared

Outputs/Deliverables

Full record of inspection findings and resolutions

Updated consultant action register and Sage CM log

Trends discussed in weekly safety syncs

Verified resolution documentation archived in OneDrive

[9.9] DMS PM Protocol for Incident, Near Miss, and Injury Documentation (Work Instruction) {#dmsincidentreporting}

Tools Used:

Sage CM > Safety > Incidents & Observations

OneDrive > 17. Safety > Incident Reports

Microsoft Teams > Safety Channel (for notification)

Red Cross / OSHA guidelines (external reference)

Outputs:

Complete, timely incident logs with supporting documentation

Root cause analysis and preventive actions documented

Escalation communication trail via Teams and Sage CM

Escalation Path:

DMS PM ? Site Manager ? PM ? Safety Director ? CPO (serious or OSHA-reportable cases)

Objective

To ensure that all incidents, injuries, near misses, and observed safety hazards are properly documented, escalated, and investigated to drive continuous improvement and legal compliance.

Definitions

Near Miss: An unplanned event that did not result in injury but had the potential to do so.

Incident: Any unplanned event that results in injury, illness, property damage, or regulatory violation.

Root Cause Analysis: Structured investigation to determine the underlying reason for an incident.

Step-by-Step Procedure

Immediate Response

Secure the scene if necessary (e.g., barricades, halt work)

Provide first aid or emergency services if required

Notify Site Manager and Safety Lead immediately

Initial Reporting in Sage CM

Go to Sage CM > Safety > Incidents & Observations

Complete entry with:

Date, time, location

Names of affected personnel

Summary of event and initial actions

Collect Evidence

Take photos, video, or sketches of the incident site

Interview witnesses

Save files to OneDrive > 17. Safety > Incident Reports > [Date ? Incident Title]

Perform Root Cause Analysis

Use 5-Why or fishbone method

Document on incident analysis template (stored in same OneDrive path)

Escalate and Review

Post notification in Teams > Safety Channel

Tag appropriate parties (Site Manager, Safety Lead, PM)

Schedule safety stand-down if warranted

Log Preventive Actions

Identify corrective/preventive measures

Assign responsibility and due date in Sage CM or Planner

Follow up until closure

Archive and Share

Finalize report in Sage CM > Incidents with attachments

Save signed copy in OneDrive > 17. Safety > Incident Reports

Share findings at next DMS PM meeting or safety sync

Blocking Logic

? Any injury or OSHA-reportable event must be entered in Sage CM the same day

? Failure to follow up on incident findings will trigger management escalation

Outputs/Deliverables

Fully documented incident reports with evidence and RCA

Shared corrective/preventive actions

Incident trends discussed at PM and Safety meetings

Compliance-ready logs for legal/regulatory purposes

[10.0] DMS PM Coordination with Devere Quality Team and Subcontractors (Work Instruction) {#dmsqualitycoordination}

Tools Used:

Sage CM > Quality > Inspections, NCRs, Checklists

OneDrive > 18. Quality > [Trade-Specific Folders]

Microsoft Teams > Quality Sync Channel

Pre-Install Meeting Templates, Deficiency Logs, and Hold Point Checklists

Outputs:

Completed checklists and inspection logs

Non-conformance tracking and resolution documents

Quality observations escalated and logged

Escalation Path:

DMS PM ? Site Manager ? PM ? Quality Lead ? CPO

Objective

Ensure field-level quality compliance through coordinated efforts with the Devere Quality Management Team and trade subcontractors, reinforcing the Zero Defect standard.

Definitions

Hold Point: A designated stage in the work process at which inspection or approval is required before continuing.

Deficiency Log: A formal list of work that does not meet specification, tracked until resolved.

Pre-Install Meeting: A required quality meeting prior to beginning any definable feature of work.

Step-by-Step Procedure

Confirm Quality Plan for Scope

Access project-specific Quality Plan from OneDrive > 18. Quality > [Trade]

Review required checklists, hold points, and pre-install templates

Participate in Pre-Installation Meetings

Coordinate timing with Site Manager and Quality Lead

Ensure all relevant crew members attend

Discuss:

Approved submittals

Quality control expectations

Common failure trends

Save meeting minutes to OneDrive > 18. Quality > Meetings

Perform and Document Field Quality Checks

Complete trade-specific checklist from OneDrive > 18. Quality > Checklists

Log entries in Sage CM > Quality > Inspections

Monitor Subcontractor Quality

Observe ongoing work for spec compliance

Address deficiencies immediately in field or via Teams

If unresolved, log in Sage CM > Quality > Deficiency Log

Support NCR and Rework Tracking

If non-conformance is issued:

Assist Quality Lead in defining corrective actions

Coordinate rework and rescheduling with Site Manager

Upload documentation to OneDrive > 18. Quality > Concrete or [Other Trade] > NCR Logs

Close Quality Items and Share Lessons

Confirm correction and document in Sage CM > Quality

Archive supporting photos, logs, and signoffs in OneDrive

Bring forward key issues at PM Coordination Meetings

Blocking Logic

? No work may proceed past a hold point without Quality signoff

? Subcontractor deficiencies must be resolved before DMS crews begin subsequent work

Outputs/Deliverables

Pre-installation meeting documentation

Completed checklists with inspection logs

Quality trends shared in Devere Lessons Learned library

Resolved NCRs archived for audit trail

[10.1] DMS PM Responsibilities for Pre-Pour, Pre-Bury, and Pre-Cover Coordination (Work Instruction) {#dmsprepourprebury}

Tools Used:

OneDrive > 18. Quality > Concrete, Utilities, Civil > Pre-Checklists

Sage CM > Quality > Checklists & Hold Points

Microsoft Teams > Quality and Coordination Channels

Outputs:

Verified and completed pre-checklists

Pre-task meetings and hold point sign-offs

Documentation of field readiness before pour, burial, or backfill

Escalation Path:

DMS PM ? Site Manager ? PM ? Quality Lead ? CPO (if hold point is bypassed or undocumented)

Objective

Ensure DMS-led scopes (e.g., concrete pours, utility burials, or trench covers) are executed only after verified coordination, inspection, and documentation per Devere quality standards.

Definitions

Pre-Pour Checklist: A task-specific form verifying all field conditions (formwork, rebar, embeds, layout, subgrade) are ready for concrete.

Pre-Bury Checklist: Utility trench verification including bedding, compaction, pipe elevation, and visual testing.

Pre-Cover Checklist: Final condition check prior to backfill, including compaction, safety barriers, and inspections.

Step-by-Step Procedure

Schedule Verification Meeting

Confirm work readiness with Site Manager

Book walkthrough 1 day before event (pour, bury, cover)

Download Correct Checklist

Go to OneDrive > 18. Quality > [Relevant Trade] > Pre-Checklists

Select appropriate version for:

Concrete Pour

Water/Sanitary/Storm Bury

Electrical or Other Systems

Perform Field Walkdown

Verify:

Form alignment

Trench dimensions and pipe clearance

Sleeve locations and embed alignment

Compaction and protection requirements

Check item-by-item using printed or mobile-accessed checklist

Document Checklist in Sage CM

Go to Sage CM > Quality > Checklists

Upload filled checklist with:

Photos

Names of DMS leads and Site Manager

Sign-off timestamps

Escalate Unresolved Issues

If deficiencies are found:

Tag item in checklist as ?Incomplete?

Assign responsible person with due date

Log note in Teams and re-inspect before work proceeds

Final Approval and Hold Point Clearance

Obtain approval via Sage CM > Hold Point Log

Confirm upload to OneDrive with naming convention: [Date]_[Scope]_PreChecklist.pdf

Notify Site Manager and PM via Teams when ready to proceed

Blocking Logic

? No pour, burial, or cover may proceed without checklist completion and hold point approval

? Bypassing the process requires CPO authorization and must be logged in Teams and Sage CM

Outputs/Deliverables

Pre-task checklist completed and filed

Field photos and sign-offs

Checklist archived in OneDrive and logged in Sage CM

Approval status posted in coordination thread on Teams

[10.2] DMS PM Responsibilities for Non-Conformance Reports (NCRs) and Field Rework Documentation (Work Instruction) {#dmsncrrework}

Tools Used:

Sage CM > Quality > NCRs, Rework Log

OneDrive > 18. Quality > [Trade] > NCR Logs

Teams > Quality Channel (for NCR alerts)

Non-Conformance Report template and Corrective Action Forms

Outputs:

NCR form with attached documentation and photos

Assigned corrective actions with due dates and reinspection sign-offs

Lessons learned and cost impacts shared during PM syncs

Escalation Path:

DMS PM ? Site Manager ? PM ? Quality Lead ? CPO (if non-conformance is repeated or unaddressed)

Objective

Ensure all quality deviations are documented, tracked, and resolved through proper NCR and rework processes, preserving compliance and improving future work practices.

Definitions

NCR (Non-Conformance Report): A formal record identifying work that does not meet spec, drawing, or quality plan.

Corrective Action: The steps required to correct and prevent recurrence of the non-conformance.

Rework Log: A running list of items requiring field correction before acceptance.

Step-by-Step Procedure

Identify a Non-Conformance

Via checklist, field walk, inspection, or third-party feedback

Examples: incorrect embed placement, understrength concrete, misaligned framing

Issue NCR in Sage CM

Navigate to Sage CM > Quality > NCRs

Complete all fields:

Work description

Deviation from spec

Photos

Date/time of discovery

Log and Upload Evidence

Save all documentation to OneDrive > 18. Quality > [Trade] > NCR Logs

Include:

Measurement verification

Marked-up drawings

Related checklists

Assign Corrective Action

Define clear action with due date and responsible party

Use Corrective Action Form (template stored in same OneDrive folder)

Log assignment in Sage CM > Quality > Rework Log

Monitor Rework Completion

Re-inspect site or task with Site Manager or Quality Lead

Take follow-up photos and document checklist re-validation

Update Sage CM > NCR with closure notes

Escalate if Not Resolved

Tag overdue or repeated issues in Teams > Quality Channel

Notify PM and Quality Lead for CPO review if pattern develops

Lessons Learned Documentation

Log what caused issue (e.g., unclear detail, bad layout, crew training)

Share during monthly PM coordination meeting

Archive under OneDrive > 23. Logs & Reports > Lessons Learned

Blocking Logic

? Any unresolved NCR must remain open in Sage CM until corrective action is signed off

? Rework completion must be documented before follow-on work proceeds

Outputs/Deliverables

NCR and Corrective Action files

Updated Rework Log in Sage CM

Documented lessons shared with PM team

Cost or schedule impact logged in Project Risk Register

[10.3] DMS PM Support for Third-Party Inspections and Special Testing (Work Instruction) {#dmsthirdpartyinspections}

Tools Used:

OneDrive > 18. Quality > [Trade] > Testing & Reports

Sage CM > Quality > Testing Log, Observations

Teams > Quality > 3rd Party Inspection Channel

Coordination meeting templates and inspection calendars

Outputs:

Inspection scheduling documents and attendance

3rd party reports uploaded and tagged

Documentation of issues and resolutions

Escalation Path:

DMS PM ? Site Manager ? PM ? Quality Lead ? CPO (for failed inspections or vendor issues)

Objective

Ensure all required third-party inspections and testing (e.g., concrete, soils, masonry) are coordinated, supported, and documented by the DMS PM in alignment with Devere quality expectations.

Definitions

3rd Party Inspector: An external agency qualified to verify compliance for materials, structural, or geotechnical criteria.

Special Testing: Specific tests (e.g., slump, cylinder breaks, compaction) required per spec or IBC.

Inspection Calendar: Pre-approved schedule aligning testing windows with project sequence.

Step-by-Step Procedure

Confirm Inspection Requirements

Review specifications and Quality Plan

Cross-check Inspection Matrix in OneDrive > 18. Quality > [Trade] > Testing & Reports

Coordinate Testing Schedule

Identify pour, backfill, or structural work requiring 3rd party presence

Notify Site Manager, PM, and Quality Lead at least 48 hours prior

Post event in Teams > Quality > 3rd Party Calendar thread

Assist with Field Setup and Access

Meet inspector on site

Provide:

Mix tickets

Location maps

Test section references

Document Results and Upload

Collect inspector notes and official reports

Save to OneDrive > 18. Quality > [Trade] > Testing & Reports with proper filename: [Date]_[TestType]_Report.pdf

Log results in Sage CM > Quality > Testing Log

Flag Issues or Failures Immediately

If test fails:

Stop work in area

Log Observation in Sage CM > Observations

Notify Site Manager, PM, and Quality via Teams

Track and Resolve Non-Conformances

Coordinate follow-up testing if needed

Link corrective actions in NCR Log if applicable

Confirm documentation is complete before proceeding

Blocking Logic

? Do not proceed past any structural or buried system milestone without third-party clearance

? Failed tests must be retested and resolved prior to work continuation

Outputs/Deliverables

Uploaded test reports and logs

Scheduled inspections posted in calendar

Issue resolutions tied to NCRs when required

Complete record of special testing for closeout package

[10.4] DMS PM Role in Quality Closeout Package Compilation (Work Instruction) {#dmsqualitycloseout}

Tools Used:

OneDrive > 25. Closeout > Quality Documentation

Sage CM > Punch List > Completed Items

Teams > Quality Coordination Channel

Final Inspection Reports and Subcontractor QC Certifications

Outputs:

Completed Quality Closeout Folder

Linked checklist approvals, tests, and NCR resolutions

Punch list verification and final sign-off

Escalation Path:

DMS PM ? Site Manager ? PM ? Quality Lead ? CPO (for any missing or rejected documentation during closeout)

Objective

Ensure the DMS PM assembles all trade-specific quality documentation and checklists to support Devere?s final closeout package and meet contract compliance.

Definitions

Closeout Package: The assembled set of records submitted to the Owner/Architect verifying completed and accepted work.

Final QC Checklists: Signed-off trade-specific inspections covering structural, finish, and utility scopes.

QC Certification: A document from subcontractor or testing agency certifying compliance with requirements.

Step-by-Step Procedure

Start Folder Preparation at 90% Project Completion

Open OneDrive > 25. Closeout > Quality Documentation

Create subfolders for:

Testing & Reports

NCR Logs

Checklists

Sign-Off Forms

Gather Field Documentation

Pull final inspection reports from:

Sage CM > Inspections

OneDrive > 18. Quality > [Trade]

Confirm all checklists are signed and dated

Verify All NCRs Are Closed

Open Sage CM > Quality > NCR Log

Confirm no open items

Save final NCR export to OneDrive > 25. Closeout > Quality Documentation > NCRs

Complete Final QC Sign-Off Form

Fill out Quality Closeout Checklist (template in OneDrive)

Review with Site Manager and PM

Submit signed version to Quality Lead

Resolve Punch Items

Go to Sage CM > Punch List > Completed Items

Confirm 100% completion for DMS scope

Save export and summary to closeout folder

Confirm Subcontractor Certifications

Ensure each major scope (e.g., concrete, storm, finishes) has a signed QC Certification

Save PDFs to: OneDrive > 25. Closeout > Quality Documentation > Certifications

Blocking Logic

? Closeout may not proceed to Owner without final checklist approvals and QC certifications

? Any incomplete NCR, checklist, or missing cert must be resolved before turnover

Outputs/Deliverables

Assembled closeout package for DMS trades

Final inspection documentation and sign-offs

Complete records for Quality Lead and Project Executive review

[10.5] DMS PM Responsibilities for Lessons Learned Capture and Quality Process Improvement (Work Instruction) {#dmslessonslearned}

Tools Used:

OneDrive > 23. Logs & Reports > Lessons Learned

Teams > Quality Channel > Lessons Thread

Quality Debrief Template (stored in OneDrive)

Outputs:

Completed Lessons Learned Form for each major phase or issue

Shared documentation across PM team and Site Ops

Suggested updates for future SOP or checklist modifications

Escalation Path:

DMS PM ? Site Manager ? PM ? Quality Lead ? CPO (if root causes are systemic or require organizational response)

Objective

Ensure field learnings?both mistakes and successes?are documented and used to continuously improve Devere?s Quality Management SOPs, checklists, and training.

Definitions

Lessons Learned: Key insights identified through project execution to improve future performance.

Debrief: A structured reflection at project milestones or after specific incidents.

Step-by-Step Procedure

Identify Lesson Trigger

Common triggers include:

Failed inspections

Missed hold points

Unexpected field delays or rework

Exceptional solutions or innovations

Open Lessons Learned Template

OneDrive > 23. Logs & Reports > Lessons Learned > [Trade] > [Date]_[Issue].docx

Fill in root cause, corrective/preventive actions, outcome, and recommended changes

Conduct Debrief (Individual or Team)

Invite PM, DMS PM, Site Manager, and Quality Rep

Optional: Subcontractor or vendor if applicable

Use Teams > Quality Channel > Lessons Thread for notes or schedule

Submit Documentation

Save final version of completed template to OneDrive

Include photos, documents, or NCR references if relevant

Notify Quality Lead via Teams or email

Review and Incorporate into SOPs

PM and Quality Lead assess suggestions

Log accepted changes in SOP Review Tracker

Assign updates to CPO or Process Manager

Blocking Logic

? Final closeout cannot proceed unless required Lessons Learned forms are submitted for major issues

? Suggested changes must be formally reviewed before SOP updates are published

Outputs/Deliverables

Trade-specific Lessons Learned documentation

Quality meeting documentation and debrief logs

Future checklist, SOP, or training updates derived from feedback

[11.0] Integration of DMS PM Work with Company-Wide Continuous Improvement Programs (SOP) {#dmscontinuousimprovement}

Tools Used:

OneDrive > 26. Continuous Improvement > Field Feedback Logs

Teams > Continuous Improvement > DMS Feedback Thread

Sage CM > Notes and Tagging > Quality Tags / Issue Categories

Monthly Quality & Safety Review Meeting agendas

Outputs:

Actionable field input entered into company-wide CI system

Feedback loop from field to policy

Metrics reported to the Executive Team

Escalation Path:

DMS PM ? Site Manager ? PM ? Safety/Quality Leads ? CPO ? Executive Team

Objective

Formalize the DMS PM role in Devere?s Continuous Improvement (CI) process by establishing consistent input channels, field-led innovations, and SOP feedback capture.

Definitions

Continuous Improvement (CI): Structured approach to identify, document, and implement field-driven changes that improve safety, quality, or productivity.

CI Loop: Feedback pathway from the field to leadership, leading to review, approval, and procedural change.

Step-by-Step Procedure

Identify Recurring Field Issues or Innovations

Examples: coordination delays, punchlist patterns, material substitutions

Use Sage CM tags or Daily Log notes to capture

Log Observations in Field Feedback Folder

Open OneDrive > 26. Continuous Improvement > Field Feedback Logs

Use template to describe:

The issue or opportunity

Proposed improvement

Affected trades and systems

Raise in Weekly PM Coordination Meeting

Add topic to Teams Planner > Weekly Meeting Agenda

Discuss issue validity and scope with PM, Site Manager, and applicable trade PMs

Submit for Formal Review

If item has project-wide or systemic impact:

Submit to Safety/Quality Lead

If approved, escalate to CPO

CPO initiates SOP change proposal

Track Implementation and Report Metrics

If improvement is adopted:

Add to OneDrive > 26. Continuous Improvement > Implemented Changes

Report in Monthly Safety & Quality Meeting

Flag for training update

Blocking Logic

? No change to SOPs is to be made based on verbal direction alone

? All field-proposed changes must be logged, reviewed, and formally approved

Outputs/Deliverables

Field feedback log entries

Meeting minutes and Planner tasks

Updated SOPs or training content

CI Report slide for Executive Team

[11.1] DMS PM Participation in Monthly CI, Safety, and Quality Committee Meetings (SOP) {#dmsmonthlyci}

Tools Used:

Teams > Calendar > Monthly CI Meeting

OneDrive > 17. Safety > 11. Action Plans

OneDrive > 18. Quality > Checklists and Logs

Sage CM > Quality > Reports

Meeting Agenda/Minutes Tracker (OneDrive)

Outputs:

Updated lessons learned summaries and committee feedback notes

Confirmed review of past safety/QC incidents

Agenda items logged in committee minutes

Escalation Path:

DMS PM ? Site Manager ? PM ? Quality/Safety Leads ? Committee Chair ? CPO (if structural change is recommended)

Objective

Ensure each DMS PM consistently participates in formal monthly CI, Safety, and Quality committee meetings, contributing field insights and addressing recurring project-level trends.

Definitions

CI Committee Meeting: Monthly meeting where safety observations, quality inspections, and lessons learned are reviewed cross-project to identify systemic gaps and improvements.

Meeting Tracker: A shared OneDrive document logging agenda items, attendance, and outcomes from each meeting.

Step-by-Step Procedure

Add Monthly Meeting to Calendar

Use Teams > Calendar to track recurring monthly CI Committee schedule

Block off 60?90 minutes for participation

Prepare Talking Points Before Meeting

Pull recent checklists from OneDrive > 18. Quality

Review Safety Incident Reports from Sage CM > Safety > Observations

Summarize lessons from last month (OneDrive > 23. Logs & Reports > Lessons Learned)

Attend and Engage in Discussion

Raise recurring NCR trends, safety concerns, subcontractor issues

Suggest checklist improvements or action plan modifications

Note feedback or new standards issued by the committee

Document Meeting Outputs

Log notes in OneDrive > 26. Continuous Improvement > Meeting Notes > [Date]_CI_Meeting.docx

Update project-specific action plans if needed (OneDrive > 17. Safety > 11. Action Plans)

Close the Feedback Loop

Confirm changes discussed in meeting are reflected in:

Toolbox Talks

Subcontractor compliance expectations

Quality inspection protocols

Blocking Logic

? Failure to attend and submit monthly CI notes may delay SOP updates or safety procedure revisions

Outputs/Deliverables

Meeting agenda and participation record

Quality/Safety issue logs with resolution steps

Updated checklists, toolbox talks, or SOP revisions (if applicable)

[11.2] DMS PM Responsibility for Field-Initiated SOP or Training Suggestions (SOP) {#dmssopsuggestions}

Tools Used:

OneDrive > 26. Continuous Improvement > SOP Proposals

Sage CM > Notes > SOP Tag

Teams > CI Discussion Thread

Microsoft Word Template > SOP Suggestion Form

Outputs:

New draft SOP sections or training updates from field experience

Feedback summaries logged and reviewed by leadership

Documentation of root cause-based suggestions for system improvement

Escalation Path:

DMS PM ? Site Manager ? PM ? Safety/Quality Leads ? SOP Steering Committee ? CPO

Objective

Empower DMS PMs to actively identify and propose SOP improvements or new training materials, leveraging firsthand experience to enhance Devere's project delivery standards.

Definitions

SOP Suggestion Form: A preformatted Word document used to submit potential improvements to existing SOPs or propose new ones.

SOP Tag in Sage CM: Used to flag logs, punch items, or safety notes as SOP-relevant for later review.

Step-by-Step Procedure

Identify an Improvement Opportunity in the Field

Example triggers: unclear work instruction, repeated safety issue, change in supplier, tool upgrade

Document the Observation in Sage CM

Add entry in Sage CM > Daily Log or Observation with tag: #SOP

Provide context: location, task, issue observed, suggested improvement

Fill Out SOP Suggestion Form

Open OneDrive > 26. Continuous Improvement > SOP Proposals > SOP_Suggestion_Form.docx

Complete fields:

Existing SOP reference (if applicable)

Description of issue or improvement

Root cause and benefit of change

Suggested revision or new step

Submit to Site Manager for Review

Email form and link to Sage CM entry

Site Manager routes to PM and Quality/Safety Lead

Track Feedback and Decision

Discussion logged in Teams > CI Discussion Thread

If approved, added to SOP Steering Committee agenda

If Adopted, Assist with Rollout

Participate in field training

Help update checklists or visual guides

Monitor adoption of change in future reports

Blocking Logic

? SOP changes without documented root cause, impact, or system integration will not be advanced

Outputs/Deliverables

Completed SOP Suggestion Form(s)

Meeting records and disposition log

Revised SOPs or new work instructions (if accepted)

Training attendance sheets (if implemented)

[11.3] DMS PM Coordination of Cross-Project Field Visits for Best Practice Exchange (SOP) {#dmsbestpracticeexchange}

Tools Used:

Teams > Cross-Project Field Visit Calendar

OneDrive > 26. Continuous Improvement > Field Visit Logs

Sage CM > Daily Logs > Cross-Site Notes

Outputs:

Completed site visit summaries and best practice reports

New checklist items or recommendations based on peer review

Actionable improvement items documented in CI logs

Escalation Path:

DMS PM ? Site Manager ? PM ? Peer Project PM ? Quality/Safety Leads ? CI Committee

Objective

Enable structured cross-project learning by requiring DMS PMs to participate in scheduled peer jobsite visits and report best practices observed.

Definitions

Cross-Project Visit: A formalized visit by a DMS PM to another active Devere jobsite, focused on learning alternative workflows or techniques.

Field Visit Log: A standardized OneDrive document for capturing insights from a site walkthrough.

Step-by-Step Procedure

Coordinate Monthly Field Visit Schedule

Review Teams > Calendar > CI Field Visit Schedule

Select relevant peer project based on trade focus

Prepare for Site Visit

Review drawings and scope of receiving site via OneDrive

Bring standard Field Visit Log template (print or tablet)

Conduct Jobsite Walkthrough

Join host PM/Site Manager

Observe key operations (e.g., slab prep, wall framing, utility trenching)

Log Observations and Recommendations

Record checklist or sequencing improvements

Document specific crew tools, staging approaches, layout hacks

Submit Field Visit Log

Save completed form to OneDrive > 26. Continuous Improvement > Field Visit Logs > [Date]_Visit_Report.docx

Notify CI Committee thread in Teams

Apply Learnings to Home Project

Flag changes for review in Lessons Learned Log

If applicable, propose checklist update or new tool spec

Blocking Logic

? Failure to complete at least one visit per quarter may result in CI program noncompliance status

Outputs/Deliverables

Completed Field Visit Log

Shared learnings in CI meeting

Proposed SOP or checklist changes (if warranted)

[11.4] DMS PM Input into Annual Strategic Review and CI Planning Session (SOP) {#dmsstrategicreview}

Tools Used:

OneDrive > 26. Continuous Improvement > Annual Strategy Input

Microsoft Planner > CI Initiatives Tracker

Teams > Annual CI Planning Channel

Word Template > Strategic Contribution Memo

Outputs:

Strategic memos highlighting DMS field challenges and solutions

Recommended system/process improvements submitted for annual CI plan

Integration of top field-validated ideas into following year?s SOP/training updates

Escalation Path:

DMS PM ? Site Manager ? PM ? CPO ? Annual CI Steering Committee

Objective

Involve DMS PMs in Devere?s yearly CI and strategic planning sessions to ensure field-first realities shape executive decisions and SOP direction.

Definitions

Strategic Contribution Memo: A structured memo capturing field conditions, persistent inefficiencies, and suggested CI themes.

CI Steering Committee: Devere leadership group directing company-wide improvement initiatives.

Step-by-Step Procedure

Reflect on Past Year?s Field Execution

Review Lessons Learned Logs

Summarize repeated friction points and crew-level suggestions

Draft Strategic Contribution Memo

Open Word template from OneDrive > 26. Continuous Improvement > Annual Strategy Input

Include:

Top 3 observed inefficiencies

Root cause analysis

Suggested system or SOP revisions

Submit to Site Manager and PM

Include proposed solutions and scalability potential

PM routes to CPO and CI Steering Committee

Present in Annual CI Review

Participate in virtual or in-person CI Planning Session

Discuss memo themes and implementation feasibility

Monitor Strategic Acceptance

Track items adopted into Planner > CI Initiatives Tracker

Follow rollout and training for included initiatives

Blocking Logic

? Strategic input without field data backing or root cause analysis will not be considered

Outputs/Deliverables

Completed Strategic Contribution Memo

Notes and outcomes from Annual CI Planning Session

Tracked implementation status in CI Planner board

[11.5] DMS PM Field Performance Scorecard and Accountability Review (SOP) {#dmsperformanceaccountability}

Tools Used:

OneDrive > 26. Continuous Improvement > Scorecards

Microsoft Planner > CI Performance Tracker

Sage CM > Time & Resource Logs

Teams > Monthly CI Performance Channel

Outputs:

DMS PM Performance Scorecard

Accountability metrics tracked quarterly

Action plans for improvement or peer recognition

Escalation Path:

Site Manager ? PM ? CPO ? CI Committee ? Executive Review (if needed)

Objective

Establish transparent and consistent accountability for DMS PM performance using quantifiable metrics aligned with Devere?s CI values.

Definitions

Field Performance Scorecard: A structured rubric assessing execution, safety, documentation, and improvement contributions.

Accountability Review: A quarterly evaluation of scorecard trends and progress on corrective actions.

Step-by-Step Procedure

Monthly Data Collection

Extract KPIs from:

Sage CM > Daily Logs (entry consistency)

Sage CM > Time Logs (crew productivity)

Safety Observations, Quality NCRs

Collect participation metrics from:

CI Meetings, SOP Submissions, Toolbox Talks

Populate Monthly Scorecard

Use template in OneDrive > 26. Continuous Improvement > Scorecards

Input scores for: Safety, Quality, Reporting, Leadership, Innovation

Conduct Quarterly Review

Review with PM and Site Manager

Identify:

Trends (improvement, decline)

Barriers (resources, training gaps)

High performers (nominate for recognition)

Assign Corrective or Growth Action Plans

For underperforming categories:

Identify corrective task

Assign due date in Planner > CI Performance Tracker

Submit Final Scorecard

Upload signed version to OneDrive > 26. Continuous Improvement > Scorecards > [Quarter]_PM_Performance.pdf

Blocking Logic

? Failure to complete 2 or more metrics for 2 consecutive months requires CI escalation

Outputs/Deliverables

Completed and signed Performance Scorecard

Summary action items (if needed) in Planner

Recognition nominations for internal awards

Quarterly summary file in OneDrive and CI Review folder

[11.6] DMS PM Participation in Quarterly Peer Learning Meetings (SOP) {#dmspeerlearningmeetings}

Tools Used:

OneDrive > 26. Continuous Improvement > Peer Learning

Teams > Peer Learning Meeting Channel

Microsoft Planner > CI Events Tracker

Outputs:

Peer Learning Participation Log

Summary of key lessons exchanged

Follow-up implementation items (if applicable)

Escalation Path:

DMS PM ? Site Manager ? PM ? CI Lead ? CPO

Objective

Promote cross-pollination of practical knowledge and field solutions through structured peer learning among DMS PMs.

Definitions

Peer Learning Meeting: A collaborative, informal yet structured internal event for sharing field-tested practices among DMS PMs.

Learning Summary: A brief write-up highlighting shared solutions, tools, or lessons applicable across projects.

Step-by-Step Procedure

Quarterly Summit Scheduling

CI Lead schedules each summit via Teams (1 hour max)

Use CI Events Tracker to assign facilitators and presenters

Prepare for Summit

DMS PMs prepare 5?10 minute presentation or verbal share

Topics: Lessons learned, tech usage, schedule hacks, quality hold points

Upload slides or talking points to OneDrive > 26. Continuous Improvement > Peer Learning

Participate in Summit

Join via Teams > Peer Learning Summit Channel

Engage, take notes, ask questions

Document Key Learnings

Summarize 2?3 key lessons in Learning Summary template (Word)

Save to OneDrive > 26. Continuous Improvement > Peer Learning > Summaries

Implement and Track Takeaways

Apply learnings to active projects

Add tasks (if applicable) to Planner > CI Events Tracker

Blocking Logic

? Failure to participate in 2 consecutive summits without cause may result in performance review escalation

Outputs/Deliverables

Peer Learning Meeting Participation Log

Completed Learning Summary Template

Planner tasks tracking field application

Uploads in OneDrive Peer Learning folder

[11.7] DMS PM Role in Identifying and Reporting Field-Level Innovations (SOP) {#dmsfieldinnovation}

Tools Used:

OneDrive > 26. Continuous Improvement > Field Innovations

Sage CM > Daily Logs or Observations

Teams > CI Reporting Channel

CI Innovation Submission Form (Word or Forms)

Outputs:

Innovation Log Entry

Innovation Review Outcome Report

Shared field application case studies (if adopted)

Escalation Path:

DMS PM ? Site Manager ? PM ? CI Team ? CPO

Objective

Encourage front-line innovation by providing DMS PMs with a clear and rewarding channel to propose field-tested improvements in methods, materials, tools, or coordination strategies.

Definitions

Field-Level Innovation: A process, idea, or workaround developed in the field that improves safety, quality, cost, or efficiency.

Innovation Log: A structured tracking file that records all submitted innovations, reviewer feedback, and implementation status.

Step-by-Step Procedure

Observe or Develop a Field Innovation

Identify an improvement in layout, formwork reuse, material staging, safety hacks, coordination flow, etc.

Optional: Discuss preliminarily with Site Manager for validation.

Submit Innovation

Fill out CI Innovation Submission Form with:

Problem Statement

Innovation Description

Photos (optional)

Potential Application Scope

Save to OneDrive > 26. Continuous Improvement > Field Innovations > [Project Name]

Notify CI Team via Teams > CI Reporting Channel

CI Review Process

CI Team logs entry and reviews weekly

May request clarification or field demo

Review outcome shared via OneDrive folder and Teams

Adopt or Archive

If accepted:

CI Team assigns Champion for rollout

Schedule training/demo

Log in Innovations Adopted list

If rejected:

Provide feedback to DMS PM for learning

Blocking Logic

? Failing to submit known innovations that materially improve project outcomes may reflect negatively on DMS PM initiative score.

Outputs/Deliverables

Innovation Submission Form

Innovation Log Entry (with status: Under Review / Adopted / Archived)

CI Review Outcome Summary

Implemented Case Study if approved

[11.8] DMS PM Contribution to Equipment, Tool, and Asset Management Process (SOP) {#dmsassetmanagement}

Tools Used:

GoCodes (asset assignment, GPS tracking)

OneDrive > 13. Equipment & Tools > Assignments

Sage CM > Equipment Logs

Teams > Equipment Tracking Channel

Outputs:

Daily/weekly asset location confirmation logs

Equipment condition and usage reports

Lost/stolen incident documentation and resolution notes

Escalation Path:

DMS PM ? Site Manager ? Equipment Manager ? CPO (if unresolved or repeated)

Objective

To ensure accountability, reliability, and proper use of all tools and equipment assigned to DMS crews, supporting project success and financial stewardship.

Definitions

Assigned Asset: Any tool, piece of equipment, or GPS-tagged resource assigned to a crew or foreman.

Asset Condition Report: A visual + written form capturing condition at hand-off and return.

Step-by-Step Procedure

Daily Equipment Check

Foremen or designated leads confirm tool/equipment presence and condition.

Log issues in Sage CM > Equipment Logs > [Project Name]

Update GoCodes location if moved significantly.

Weekly Reporting

DMS PM verifies accuracy of GoCodes asset map.

Update usage summaries (e.g., hours, fuel) and condition observations.

Save to OneDrive > 13. Equipment & Tools > Assignments > [Week#].xlsx

Lost or Damaged Asset Reporting

Immediately document via Sage CM > Equipment Logs.

Attach photos, witness info, and GoCodes tag history.

Notify Site Manager and Equipment Manager via Teams.

Equipment Requests and Transfers

Submit new equipment requests via Equipment Request Form.

Save request to OneDrive > 13. Equipment & Tools > Requests

Equipment Manager logs approval or denial in shared tracker.

Blocking Logic

? Missing weekly asset logs or failing to report damage/loss within 24 hours may trigger financial accountability or retraining.

Outputs/Deliverables

Weekly Equipment Summary Logs

GoCodes Asset Map Updates

Condition Reports

Lost/Stolen Incident Documentation

[11.9] DMS PM Role in Construction Technology Feedback and Field Tool Pilot Testing (SOP) {#dmstechnologyfeedback}

Tools Used:

Sage CM > Project Logs > Technology Feedback

OneDrive > 26. Continuous Improvement > Tech Pilots

Teams > CI or CPO Channel

Feedback Forms and Pilot Evaluation Sheets

Outputs:

Technology Feedback Form (filed by DMS PM)

Field Pilot Testing Report (if assigned)

Tool usage video/photo log

Recommendations for company-wide implementation

Escalation Path:

DMS PM ? Site Manager ? CI or CPO ? Vendor (if applicable)

Objective

Capture boots-on-the-ground insights into emerging construction technologies, apps, or field equipment being tested or used during operations to help Devere maintain its innovation advantage.

Definitions

Field Tool Pilot Test: Temporary evaluation of new tech (e.g., layout laser, AI site cam) by DMS team.

Feedback Form: A short, structured document rating ease of use, reliability, accuracy, and crew adoption.

Step-by-Step Procedure

Submit Technology Feedback

Log perceived tech inefficiencies or feature gaps in Sage CM > Project Logs > Technology Feedback.

Email/screenshot key issue or opportunity to CI/CPO.

Participate in Pilot Test (If Assigned)

Receive orientation or vendor instructions.

Deploy tool on active scope and record:

Setup time

Field reactions

Benefits or failures

Take photos or videos if safe to do so.

Complete Feedback Form

Rate from 1?5 on usability, value, compatibility.

Suggest improvements.

Save to OneDrive > 26. Continuous Improvement > Tech Pilots > Feedback

Wrap-Up Review

CI/CPO compiles summary.

CPO or CI Champion decides rollout.

Blocking Logic

? Failing to report significant tech issues or ignoring pilot test instructions may delay adoption or lead to unsafe practices.

Outputs/Deliverables

Technology Feedback Form

Pilot Evaluation Summary

Photo/Video Demo Folder

Go/No-Go Report on Field Use

[12.0] DMS PM Collaboration with External Vendors and Subcontractors for Continuous Improvement (SOP) {#dmsexternalvendors}

Tools Used:

Sage CM > Vendor Logs > Continuous Improvement

OneDrive > 26. Continuous Improvement > Sub/Vendor Insights

Microsoft Teams (shared CI chat, document channels)

Outputs:

Monthly Sub/Vendor Feedback Log

Collaborative Action Items Register

CI-driven Process Improvement Recommendations

Joint Lessons Learned Reports

Escalation Path:

DMS PM ? Site Manager ? Project Manager ? CI or CPO

Objective

To formalize and elevate collaboration between DMS PMs and external vendors/subcontractors in driving field-level improvements that align with Devere?s CI culture and deliver measurable outcomes.

Definitions

External Vendor/Subcontractor Feedback Loop: A formalized exchange of insights, improvement ideas, and efficiency opportunities based on actual jobsite experience.

Collaborative Action Register: A log of agreed-upon changes, pilot ideas, or recurring process challenges.

Step-by-Step Procedure

Initiate Monthly Feedback Loop

Schedule 30-minute virtual or on-site meeting with key subcontractor reps.

Use standard CI meeting agenda: Wins, Challenges, Improvement Ideas, Action Items.

Log meeting in OneDrive > 26. Continuous Improvement > Sub/Vendor Insights > [Month-Year].docx

Capture Improvement Opportunities

During pre-install or weekly planning meetings, ask vendors:

"What slows us down that we can fix together?"

"Any tool, sequence, or process you?d adjust next time?"

Record in Sage CM > Vendor Logs > Continuous Improvement > [Company Name]

Log and Assign Action Items

Add to Collaborative Action Register with responsible party (Sub, PM, DMS PM).

Share register via Teams > CI Channel.

Monitor and Escalate

Unresolved barriers flagged in register.

If recurring or systemic, escalate to CI or CPO for deeper analysis or procedural change.

Joint Reporting and Recognition

Capture success stories (e.g., saved time, better finish, reduced rework).

Highlight in monthly meeting notes and PM reports.

Blocking Logic

? Failure to engage vendors in meaningful CI conversations may be flagged in PM performance reviews and delay process refinements.

Outputs/Deliverables

Sub/Vendor CI Meeting Log

Action Register

Process Improvement Notes

Success Story Summary

Lessons Learned Log Entries

[12.1] DMS PM Responsibilities for Supporting External Subcontractor Innovation Proposals and Pilot Programs (SOP) {#dmsexternalpilotprograms}

Tools Used:

Sage CM > Vendor Logs > Innovation Initiatives

OneDrive > 26. Continuous Improvement > Pilot Programs

Microsoft Teams > CI Channel (Vendor-Pilot Thread)

Outputs:

Subcontractor Pilot Proposal Tracker

Evaluation Memos and Field Test Notes

Subcontractor Feedback Summary

Devere CI Review Memos and Outcomes

Escalation Path:

DMS PM ? Site Manager ? CI or CPO

Objective

To formalize DMS PM involvement in evaluating, piloting, and reporting on field-level innovations or procedural improvements proposed by external subcontractors.

Definitions

Subcontractor Pilot Proposal: A field idea initiated by a subcontractor aimed at improving safety, quality, speed, or cost.

Pilot Program Tracker: A running log of active and proposed field innovations initiated by external subs.

Step-by-Step Procedure

Capture Innovation Proposals

During weekly meetings or site walk-throughs, document subcontractor ideas that:

Change process (e.g., forming method, bracing technique).

Use new tools or temporary equipment.

Propose sequencing shifts or layout strategies.

Record in Sage CM > Vendor Logs > Innovation Initiatives.

Evaluate Feasibility

Discuss with Site Manager, DMS PM, and CI/CPO as needed.

Consider safety, cost, speed, repeatability, and impact on other trades.

Schedule test or mockup (if needed).

Pilot and Observe

Conduct pilot in real-world conditions on isolated area.

Use standardized test forms: Pilot Observation Log, Quality Snapshot, Crew Feedback.

Log results in OneDrive > 26. Continuous Improvement > Pilot Programs > [Sub Name].

Review and Decide

Log meeting with CI or CPO to assess outcomes.

Decide whether to adopt, adapt, or reject the approach.

Log and Close

Update Tracker with outcome and rationale.

If adopted, note where it will be implemented.

Save final notes to Lessons Learned Log.

Blocking Logic

? Field changes may not proceed unless reviewed and logged through this workflow. Unapproved pilots may be flagged as safety or quality deviations.

Outputs/Deliverables

Subcontractor Innovation Proposal Tracker

Field Evaluation and Feedback Forms

CI Review Outcome Memo

Lessons Learned Log Entry

[12.2] DMS PM Responsibility for Documenting Lessons Learned from External Innovation Programs (SOP)

{#dmslessonsfromexternal}

Tools Used:

OneDrive > 23. Logs & Reports > Lessons Learned > External Subcontractor Pilots

Sage CM > Project Logs > Innovation Notes

Microsoft Teams > CI Channel > External Lessons Thread

Outputs:

Innovation Debrief Summary

Actionable Lessons Form

Folder-ready .docx or .pdf for CI archive

Escalation Path:

DMS PM ? Site Manager ? CI or CPO

Objective

To ensure that every field pilot or vendor-driven innovation (successful or not) concludes with a structured lessons learned entry that contributes to Devere?s long-term knowledge base.

Definitions

Lessons Learned: Reflections from a completed pilot detailing what worked, what failed, and what should be adapted for future execution.

CI Archive: Company-wide folder structure organized by trade, subcontractor, and improvement area, storing all pilot program results and feedback.

Step-by-Step Procedure

Schedule Debrief Within 5 Days of Pilot Completion

Invite Site Manager, CI/CPO, and relevant field leads.

Use the ?Innovation Debrief Agenda Template? stored in OneDrive > 26. Continuous Improvement > Templates.

Complete Lessons Learned Form

Document:

Key learning points.

Crew feedback (from post-task talks or tool debrief).

Metrics compared to baseline (e.g., time savings, QC results).

Use Actionable Lessons Form template.

File Documentation

Save PDF and editable form to: OneDrive > 23. Logs & Reports > Lessons Learned > External Subcontractor Pilots > [Sub Name] > [Pilot Name]

Link form in Sage CM > Project Logs > Innovation Notes.

Tag for CI Review

Post a summary and upload link in Teams > CI Channel > External Lessons Thread.

CI or CPO to mark the log reviewed, and archive.

Feedback to Subcontractor (Optional)

Where useful, the DMS PM may send a courtesy summary to the subcontractor.

This may encourage deeper collaboration in future pilots.

Blocking Logic

? No external pilot may be considered ?closed? until this lessons learned process is complete. This protects Devere from repeating field inefficiencies and missed documentation.

Outputs/Deliverables

Completed Innovation Debrief Summary (.docx or .pdf)

Actionable Lessons Form stored in CI Archive

Updated CI Channel Log

[12.3] DMS PM Escalation of Innovation Impacts to Sitewide GC Operations (SOP) {#dmsinnovationescalation}

Tools Used:

Microsoft Teams > CI Channel > Escalation Thread

OneDrive > 26. Continuous Improvement > Field Escalations > [Project Name]

Sage CM > Daily Logs > DMS PM Field Entry > Notes Category: "Innovation Impact"

Outputs:

Field Impact Memo (PDF or Word)

Updated meeting minutes and coordination action items

Archive entry in CI folder

Escalation Path:

DMS PM ? Site Manager ? PM ? CI or CPO ? Owner/GC-wide if needed

Objective

To ensure that any innovation trial, technique, or tool introduced by a subcontractor or internal crew?and found to have GC-wide implications?is escalated quickly and constructively to improve operations across projects.

Definitions

GC-Wide Impact: Any effect?positive or negative?that changes how Devere, as General Contractor, might execute similar scopes on other jobs.

Field Impact Memo: A standardized one-page brief that describes the issue, effect, recommendation, and potential benefit/risk.

Step-by-Step Procedure

Identify Innovation with GC-Wide Relevance

Triggered by:

Improved productivity

Lowered QC failure rate

New safety risk

Cost savings or scope compression

Draft Field Impact Memo

Use template stored in: OneDrive > 26. Continuous Improvement > Templates > Field Impact Memo.docx

Include:

Pilot summary

Lessons learned

Recommended next action (e.g., replicate, revise, reject)

Escalate to Site Manager + PM

Deliver memo via Teams or email

Discuss during next coordination meeting

Log in Sage CM + OneDrive

Sage CM > Daily Logs > DMS PM Field Entry > Notes: Innovation Impact

OneDrive > 26. Continuous Improvement > Field Escalations > [Project Name]

CI Review

PM or CPO flags for review in Teams > CI Channel > Escalation Thread

CI Committee determines broader rollout, pilot restart, or kill

Blocking Logic

? Failure to escalate a potential GC-wide issue or benefit may result in:

Project inefficiencies

Safety citations or repeat defects

Missed strategic advantage

Outputs/Deliverables

Completed Field Impact Memo

Logged Daily Entry in Sage CM

Coordination Meeting Update

CI Escalation Log Updated

[12.4] Continuous Improvement Communication ? Field to Office to Ownership (Work Instruction) {#ci-communication-chain}

Tools Used:

Microsoft Teams > CI Channel > CI Log

OneDrive > 26. Continuous Improvement > Communications Archive > [Project Name]

Sage CM > Project Logs > Notes Category: "CI Field Feedback"

Outputs:

CI Summary Notes

CI Log Entry

Communication Chain Status Memo

Escalation Path:

DMS PM ? Site Manager ? PM ? CI or CPO ? Ownership (if systemic issue)

Objective

To establish a structured method for field-to-office knowledge transfer that ensures Devere?s project teams actively inform internal strategy through transparent and traceable communication.

Definitions

CI Log Entry: A timestamped message or document noting observations, improvements, issues, or opportunities submitted from the field.

Communication Chain Status Memo: A brief overview that confirms the chain of review, decision, and action on key CI topics raised by the field.

Step-by-Step Procedure

Field Observation Captured by DMS PM

Enter summary into:

Sage CM > Project Logs > Notes > Category: "CI Field Feedback"

Teams > CI Channel > Log Entry Thread

Label clearly with:

Project name

Issue title (e.g., "Formwork Crew Redesign Proposal")

Documentation Filed in OneDrive

Store supplemental documents, photos, or plans in: OneDrive > 26. Continuous Improvement > Communications Archive > [Project Name] > [Date]_[Topic].pdf

Initial Review by PM or Site Manager

PM reviews within 48 hours of CI entry.

If issue is validated and has broader implication or value:

Prepare Communication Chain Status Memo using template.

CI Review and Executive Escalation

CI or CPO to receive memo, comment, and classify:

Action Now

Flag for Rollout Later

No Action (Archive Only)

Owner-level escalation only when risk, legal, or major opportunity exists.

Record of Action

Status updates documented in Teams > CI Channel

Final action summary added to: OneDrive > 26. Continuous Improvement > Communications Archive > [Project Name] > Final_Action_Summary.docx

Blocking Logic

? CI entries without resolution or status memo after 10 business days must be escalated to the CPO for closure.

Outputs/Deliverables

Filed CI Observation Log Entry

Completed Communication Chain Status Memo

Final Action Summary (when applicable)

Fully archived documentation in OneDrive

[12.5] Field-Level Innovation Indexing and Cross-Project Referencing (SOP) {#ci-crossprojectindex}

Tools Used:

OneDrive > 26. Continuous Improvement > Innovation Index > [Trade or System]

Sage CM > Project Logs > Lessons Learned or CI category

Microsoft Teams > CI Channel > Index Tracker Sheet

Outputs:

Innovation Index Entry

CI Tracker Spreadsheet Entry

Cross-project sharing summary memo

Escalation Path:

CI Lead ? PMs and DMS PMs across active jobs ? CPO (monthly report-up)

Objective

To enable Devere to rapidly capture and reuse field-tested innovations across all current and future projects, organized by system (e.g., formwork, layout, slab prep) and discipline (e.g., concrete, excavation, carpentry).

Definitions

Innovation Index: A categorized digital log of vetted innovations with links to supporting documentation, performance notes, and implementation results.

Cross-Project Sharing Summary: A simple memo highlighting a tested method and its benefit, circulated to current jobs with instructions for voluntary pilot or feedback.

Step-by-Step Procedure

Index Entry Trigger

Initiated when:

Field-tested improvement passes lessons learned review

CI or CPO classifies it as worth replicating

Implementation was successful (e.g., improved speed, quality, or safety)

Create Innovation Index Folder

OneDrive > 26. Continuous Improvement > Innovation Index > [Trade or System] > [Innovation Title]

Upload:

Debrief form

Photos, checklists

Metrics from implementation

Log to Sage CM

Create new log entry in Sage CM > Project Logs > CI Category

Include project name, trade, date, and direct link to OneDrive index folder

Update CI Tracker Sheet

CI or admin updates Teams > CI Channel > Index Tracker Sheet

Log includes:

Innovation name

Date indexed

Result summary

Deployment notes

Cross-Project Sharing Summary

CI creates and distributes PDF memo to all current projects

Memo includes:

1-page benefit highlight

File path to supporting materials

Contact info of DMS PM or field lead

Voluntary Pilots & Feedback Loop

Projects may opt in to trial

Feedback logged via:

CI Channel thread

Lessons Learned folders

Blocking Logic

? No innovation may be deployed GC-wide without:

Documented OneDrive index folder

CI approval entry

Pilot performance metrics

Outputs/Deliverables

Indexed CI entry with metrics and media

Sage CM log entry linked to archive

Shared rollout memo for other projects

Participation feedback for tracking future improvements

[12.6] Continuous Improvement Templates, Forms, and Field-Facing Aids (Work Instruction) {#ci-templates-and-aids}

Tools Used:

OneDrive > 26. Continuous Improvement > Templates & Forms

Sage CM > Documents > CI Templates

MS Word / Excel Templates for mobile fill-in

Outputs:

CI Template Pack (PDF or Excel)

Field-Ready Mobile Forms

SOP-linked Visual Aids

Escalation Path:

CI Lead ? PM/DMS PMs ? Site Manager ? Field Use Feedback to CI or CPO

Objective

To equip the DMS PM and field teams with standardized forms, instructions, and visual aids that support rapid documentation, consistent improvement tracking, and seamless handoff between field and office.

Definitions

CI Template Pack: A folder of curated, Devere-approved forms used across all projects to document CI inputs, observations, metrics, and summaries.

Field-Facing Aids: Laminated one-pagers, flowcharts, and cheat sheets provided to foremen and crew to support proper execution of CI-related workflows.

Step-by-Step Procedure

CI Template Creation and Approval

CI drafts templates (e.g., Field Innovation Log, Metrics Tracker, CI Feedback Card)

Templates reviewed by CPO and PM group for consistency and usability

Final templates stored in: OneDrive > 26. Continuous Improvement > Templates & Forms

Field Tool Distribution

Distribute digital fillable PDFs to:

Site Manager tablets/laptops

DMS PMs for foreman use

Optional: Print laminated copies for trailer binders

Embed in SOPs and Workflows

Link templates from all applicable SOPs (e.g., concrete pour improvement forms in Quality SOP)

Embed template filenames in Sage CM log instructions

Training and Use

Brief crew leaders on form use during weekly huddles

Offer 5-minute refresher at monthly PM meetings

Feedback and Version Control

Site Managers log feedback in:

Teams > CI Channel > Template Feedback

Sage CM > Notes > CI Form Feedback

CI Lead reviews and publishes updated versions with date stamps

Blocking Logic

? CI templates must not be used if:

The file is out of date (older than 90 days)

Version control is missing or unapproved

Field feedback has flagged usability flaws without CI resolution

Outputs/Deliverables

CI Template Pack in OneDrive

Field-ready forms for use on mobile or printed

SOP-embedded templates and visual aids

Version-controlled archive with update log

[12.7] CI Metrics Dashboard and Performance Reporting (SOP) {#ci-metrics-dashboard}

Tools Used:

OneDrive > 26. Continuous Improvement > CI Metrics Dashboard.xlsx

Sage CM > Project Logs > CI Tracking

Microsoft Teams > CI Channel > Monthly Report Archive

Outputs:

Updated CI Dashboard (Excel or Power BI)

Monthly CI Report PDF

Trends and Performance Summary by Trade and Project

Escalation Path:

CI Lead ? PM Group ? DMS PMs ? CPO (quarterly strategic analysis)

Objective

To monitor the success of continuous improvement efforts through data visualization, performance tracking, and trend analysis across all Devere projects.

Definitions

CI Dashboard: A dynamic reporting tool used to visualize performance indicators like resolved issues, innovation adoption rate, feedback volume, and cross-project impacts.

Performance Reporting: The structured delivery of CI insights through monthly updates and summary charts to guide management strategy.

Step-by-Step Procedure

Dashboard Setup

CI Lead or Data Coordinator maintains the file in:

OneDrive > 26. Continuous Improvement > CI Metrics Dashboard.xlsx

Dashboard fields include:

of Lessons Learned logged

of Innovations indexed

Participation by crew

Adoption by other projects

Weekly Data Entry

DMS PMs and Site Managers submit:

CI activity logs (from Sage CM)

Feedback counts (Teams threads or Forms)

Entries consolidated into CI Dashboard

Monthly Report Generation

Export charts and graphs from Excel dashboard

Write 1-page summary (key wins, misses, recommendations)

Save to:

OneDrive > 26. Continuous Improvement > Reports > [Month-Year].pdf

Teams > CI Channel > Monthly Report Archive

Trend Analysis & Strategic Use

CI Lead and CPO meet quarterly to review:

Emerging trends (e.g., repeated issues by trade)

Adoption blockages

Recommended SOP adjustments

Communication of Results

Key findings presented at PM Meetings

Posters for high-performing crews issued for motivation

New CI insights linked into SOPs and shared via CI memos

Blocking Logic

? CI Metrics Dashboard should not be used for forecasting or policy setting unless:

All data sources are up to date

At least 3 months of trend history exist

CI and CPO validate conclusions

Outputs/Deliverables

Up-to-date CI Dashboard file

Monthly Reports in PDF with graphs and summary

Quarterly trend memos with SOP implications

Archived insights accessible for future project use

[12.8] Formal CI Review Cycles and Integration into Annual Strategic Planning (SOP) {#ci-review-and-planning}

Tools Used:

OneDrive > 26. Continuous Improvement > Annual Review Archive

Sage CM > CI > Performance Summaries

Microsoft Teams > CI Strategic Planning Thread

Outputs:

Annual CI Strategic Planning Memo

SOP Update Log & CI Tracking Matrix

Cross-functional priorities list for next year

Escalation Path:

CI Lead ? CPO ? Executive Review Committee (if policy/practice change required)

Objective

To institutionalize continuous improvement by integrating field-driven innovations and lessons learned into Devere?s annual strategic planning process.

Definitions

CI Review Cycle: A structured, year-end review of field insights, dashboard metrics, and SOP performance to guide forward planning.

Strategic Integration: The act of converting lessons learned into formal policy, workflow updates, SOP revisions, or budgeted initiatives.

Step-by-Step Procedure

Schedule CI Annual Review

CI Lead coordinates annual review meeting (November)

Invite stakeholders: PMs, Site Managers, DMS PMs, Safety, Quality, CPO

Data Preparation

Compile:

CI Dashboard trend summaries (12 months)

List of SOP changes logged via CI feedback

Field highlights and barriers noted by DMS PMs

Save all to: OneDrive > 26. Continuous Improvement > Annual Review Archive > [Year]

Meeting Execution

Facilitate roundtable format:

What worked well?

What needs refinement?

Which improvements should scale across projects?

Use Teams > CI Strategic Planning Thread to record input live

Action Prioritization and Memo

CI Lead drafts strategic CI memo:

Top 5 cross-project CI priorities

Policy/SOP changes proposed

Resource requests or initiatives

Save to: OneDrive > 26. Continuous Improvement > Annual Review Archive > [Year] > Strategic Memo.pdf

Implementation & SOP Update Log

CI and CPO review outcomes for inclusion in:

Budgeting and resourcing

SOP/Work Instruction update plan

Maintain update log in: OneDrive > 26. Continuous Improvement > SOP Update Logs > [Year]_Changes.xlsx

Blocking Logic

? Strategic CI integration is blocked if:

Less than 9 months of performance data exists

CI memo lacks field input

SOP revision approval process isn?t complete

Outputs/Deliverables

Annual CI Planning Memo

SOP Update Log

Updated priorities for Quality, Safety, and PM SOPs

Archived meeting input and dashboard summaries

[12.9] Field-Tested Innovation Vetting and Final Implementation Approval (SOP) {#ci-innovation-approval}

Tools Used:

Sage CM > CI > Lessons Learned Log

OneDrive > 26. Continuous Improvement > Innovations Under Review

Teams > CI Channel > Field Trials Thread

Outputs:

CI Field Trial Summary Report

Final Implementation Approval Form

SOP/Work Instruction Change Log Update

Escalation Path:

DMS PM ? CI Lead ? Site Manager ? CPO ? Final Review Committee

Objective

Ensure all proposed innovations undergo rigorous field testing and vetting before being officially adopted and included in Devere?s operational procedures.

Definitions

Field-Tested Innovation: A new practice, tool, or method that has been trialed in real project conditions and shows demonstrable value.

Implementation Approval: The formal process for deciding whether an innovation becomes a permanent part of Devere SOPs or Work Instructions.

Step-by-Step Procedure

Field Trial Nomination

Any DMS PM, Site Manager, or foreman can nominate an innovation for trial

Submit basic description and justification to: Teams > CI Channel > Field Trials Thread

Trial Setup

CI Lead assigns trial project and defines:

Duration

Measurable success criteria (e.g., labor hours saved)

Required documentation (photos, logs)

Entry added to: OneDrive > 26. Continuous Improvement > Innovations Under Review > [Innovation_Name]

Monitoring & Logging

DMS PM logs daily/weekly results in Sage CM > CI > Lessons Learned Log

Include:

Before vs. After performance metrics

Crew feedback and resistance/support

Trial Review & Summary Report

CI Lead consolidates feedback into:

CI Field Trial Summary Report (PDF template)

Stored in OneDrive > 26. Continuous Improvement > Innovations Under Review

Final Approval Vote

Convene review panel:

CI Lead, CPO, 1 PM, 1 Site Manager, 1 DMS PM

Review report and vote:

Approve

Reject

Re-test with changes

Final Implementation Approval Form signed

SOP/Work Instruction Update

If approved:

Update relevant SOPs/Work Instructions

Log changes in: OneDrive > 26. Continuous Improvement > SOP Update Logs > [Year]_Changes.xlsx

Communicate update via CI Channel + Toolbox Talks

Blocking Logic

? No innovation may be fully implemented until:

Measurable trial results are logged

CI Field Trial Summary Report is completed

Final Implementation Approval Form is signed

Outputs/Deliverables

Innovation Field Trial Report

Signed Implementation Approval Form

SOP/Work Instruction update and version archive

[13.0] PM Role in Driving Innovation Culture and Recognizing Field Contributions (SOP) {#pm-ci-leadership}

Tools Used:

Teams > CI Channel > Recognition Board

OneDrive > 26. Continuous Improvement > Contributions > PM Endorsements

Sage CM > Project Logs > CI Highlights

Outputs:

Monthly PM Recognition Posts

End-of-Project CI Summary from PM

Logged CI Contributions by Field Crews

Escalation Path:

PM ? Site Manager ? CI Lead ? CPO (for formal award consideration)

Objective

Empower PMs to actively champion Devere?s Continuous Improvement culture by recognizing, logging, and elevating valuable contributions from the field.

Definitions

CI Champion (PM): A Project Manager who reinforces innovation behavior by highlighting wins, recognizing contributors, and modeling follow-through.

Recognition Post: A short note by the PM summarizing a crew member?s innovation, shared publicly with the team and CI Lead.

Step-by-Step Procedure

Daily Observation of Innovation Moments

PMs observe the field for smart ideas, safety hacks, improved workflows

Use Sage CM > Daily Logs > CI Highlights section to capture a brief entry

Log Crew Contributions Weekly

By Friday each week, add top contributions to: OneDrive > 26. Continuous Improvement > Contributions > PM Endorsements > [Project][Week][Crew].docx

Monthly Recognition Share-Out

PM posts short public message in Teams > CI Channel > Recognition Board

Include:

Crew member or DMS PM name

Description of innovation or improvement

Impact to project

End-of-Project CI Summary

Draft 1-page summary:

Top 3 innovations

Most improved process

Suggestions for other projects

Save to: OneDrive > 26. Continuous Improvement > Contributions > [Project]_CI Summary.pdf

Nominate for Award (if applicable)

If contribution is field-changing, PM forwards to CPO:

Subject: "CI Contribution Nomination ? [Name] ? [Project]"

Attach field log, photos, and endorsement

CPO evaluates for company-level recognition or bonus program

Blocking Logic

? CI culture enforcement is compromised if:

PM fails to observe or log contributions weekly

No monthly recognition posted

End-of-project CI Summary is not submitted

Outputs/Deliverables

Weekly crew endorsement logs

Teams recognition posts

End-of-project CI Summary PDF

CI Contribution award nominations (if applicable)

[13.1] Linking Innovation Recognition to Career Development and Advancement Opportunities (SOP) {#ci-career-path}

Tools Used:

OneDrive > 26. Continuous Improvement > PM Endorsements > Recognition Logs

Teams > CI Channel > Leadership Nominations

Devere HR Portal (Career Development Dashboard)

Outputs:

Talent Development Notes per Contributor

Advancement Opportunity Tracker

Leadership Pipeline Recommendations

Escalation Path:

PM ? CI Lead ? CPO ? HR for career review

Objective

Ensure that team members who consistently contribute innovative ideas are considered for leadership development, field promotions, or special project assignments.

Definitions

Advancement Opportunity Tracker: A log of high-performing field staff showing CI contributions aligned with promotion or leadership potential.

Leadership Pipeline: A set of internal candidates ready for higher responsibility based on performance and innovation.

Step-by-Step Procedure

Monthly Review of Recognized Innovations

CI Lead and PM review Recognition Logs: OneDrive > 26. Continuous Improvement > PM Endorsements > [Project]Week[X]

Identify individuals with multiple logged contributions or impactful ideas.

Talent Development Notes

For standout contributors, PM submits development note:

Format: Name, Date, CI Examples, Observed Behaviors, Field Impact

Store in: OneDrive > 26. Continuous Improvement > PM Endorsements > Talent_Notes

Nomination to Leadership Pipeline

Nominate staff with repeated innovation behavior:

Submit to Teams > CI Channel > Leadership Nominations

Add to internal Advancement Opportunity Tracker (Excel): OneDrive > 26. Continuous Improvement > Tracker.xlsx

Quarterly HR Review

CI Lead and CPO present advancement cases to HR

HR logs entries in Career Development Dashboard

Recommendations may trigger:

Mentorship assignment

Pay grade review

Field management shadowing opportunities

Blocking Logic

? Recognition loses long-term value if not linked to tangible growth opportunities.

Talent Development Notes must follow recurring recognition

Tracker must be updated quarterly

Outputs/Deliverables

Talent Development Notes (OneDrive archive)

Advancement Tracker spreadsheet

Quarterly leadership nominations in Teams

[13.3] PM Accountability and CI Leadership (SOP) {#pm-accountability-ci}

Tools Used:

Sage CM > Daily Log, Budget, Schedule, Safety Reports

OneDrive > 23. Logs & Reports > Weekly_Reports

OneDrive > Personnel > [PM Name] > Performance_Reviews

Teams > CI Channel > CPO Feedback Thread

Outputs:

PM Scorecard and CI Leadership Log

Documented performance reviews

SOP Improvement Feedback Submissions

Escalation Path:

CPO ? HR ? PM ? Site Manager ? DMS Crew (for project-level feedback)

Objective

Reinforce PM accountability for delivering safety, quality, and innovation while acting as Continuous Improvement (CI) leaders across all Devere projects.

Responsibilities

Own Project Outcomes: PMs are accountable for safety stats, schedule adherence, budget variance, and inspection results.

CI Role Modeling: PMs must submit at least one SOP feedback or innovation idea monthly.

Performance Transparency: PMs support weekly reporting and participate in quarterly reviews.

Step-by-Step Procedure

Weekly Review of Leading Indicators

PM reviews project safety, schedule, and budget trends using Sage CM.

Submits admin summary to OneDrive > 23. Logs & Reports > Weekly_Reports.

Monthly CI Log Entry

PM submits a CI observation, SOP gap, or process improvement idea to OneDrive > 26. Continuous Improvement > PM_CI_Log.docx.

Optionally posts a reflection in Teams > CI Channel > CPO Feedback Thread.

Quarterly Scorecard Review

CPO evaluates PM using KPIs (profitability, safety, quality, schedule).

Documented in OneDrive > Personnel > [PM Name] > Performance_Reviews > Q[XX]_PM_Scorecard.pdf.

Feedback and Improvement Goals

PM and CPO discuss root causes and set action items.

Revisit during next quarterly review or earlier if escalations arise.

Blocking Logic

? Deviation from CI leadership expectations (no monthly entries, poor review scores, safety violations) will trigger direct coaching and possible escalation to HR.

Outputs/Deliverables

Monthly CI Leadership Log Entries

Weekly Admin Reports

Quarterly PM Scorecard Review Files

[13.4] PM-Led CI Spotlight Presentations (SOP) {#ci-spotlight}

Tools Used:

Teams > CI Channel > Monthly Spotlights

OneDrive > 26. Continuous Improvement > CI Spotlights > [Project]_[Month].pptx

Sage CM > Daily Logs and Photos

Outputs:

CI Spotlight Presentation Deck

Shared Lessons Log

Upload to PM Training Library

Escalation Path:

CPO ? CI Lead ? PM ? All PMs

Objective

Ensure PMs curate and share impactful examples of jobsite continuous improvement monthly. These become training tools for new PMs and reinforce a culture of excellence.

Definitions

CI Spotlight: A curated 5?7 minute presentation that showcases one improvement in safety, schedule, cost, or quality from a real project.

Shared Lessons Log: A summary of takeaways from each CI Spotlight used to update SOPs or future toolbox talks.

Step-by-Step Procedure

Select Improvement Story (Monthly)

PM chooses a significant CI outcome from their jobsite (e.g., layout efficiency gain, submittal tracking fix).

Create Spotlight Presentation

Download CI Spotlight Template from OneDrive > 26. Continuous Improvement > Templates

Fill in:

Project Name

Problem / Solution / Result

Before/After photos (from Sage CM > Daily Logs)

Stakeholders involved

Save as [Project]_[Month].pptx

Upload and Notify

Upload to OneDrive > 26. Continuous Improvement > CI Spotlights

Post a link in Teams > CI Channel > Monthly Spotlights

Tag CPO and PM group

Log Shared Lessons

Summarize key learning in Shared_Lessons_Log.xlsx

Add new row for each Spotlight with: Date, Project, PM, Topic, SOP Link (if applicable)

Save to OneDrive > 26. Continuous Improvement

Blocking Logic

? Failure to submit a monthly spotlight presentation may result in a compliance reminder from the CPO.

Three missed months = escalation.

Outputs/Deliverables

CI Spotlight Deck (.pptx)

Shared Lessons Log entry

Teams Spotlight Post

[13.5] PM-Led Lessons Learned and SOP Feedback Loop (Work Instruction) {#lessons-feedback}

Tools Used:

OneDrive > 26. Continuous Improvement > Lessons Learned

Teams > CI Channel > Feedback Threads

Microsoft Forms or Excel

Sage CM > Project Notes

Objective:

To ensure Project Managers contribute structured feedback from project execution to improve SOPs, tools, and training resources. This feedback loop institutionalizes real-world lessons and drives continuous organizational learning.

When to Perform:

At Final Completion

During CI Spotlights (Section 13.4)

After major project challenges or innovations

Who Performs This Task:

Project Manager (primary author of feedback)

CPO (review and integration into SOPs)

CI Lead (log management and trend analysis)

Step-by-Step Procedure

Download Lessons Learned Template

Path: OneDrive > Templates > Lessons_Learned_Form.docx

Log Key Lessons

For each major phase (e.g., submittals, scheduling, buyout, DMS coordination), identify:

What went well

What could improve

Specific SOP sections impacted

Submit Completed Form

Save file to:

OneDrive > 26. Continuous Improvement > Lessons Learned > [Project]_[Date].docx

Notify CPO via Teams > CI Channel

Add Summary to CI Log

Update Shared_Lessons_Log.xlsx with:

Project Name

Topic

SOP section (if relevant)

Summary recommendation

Link to form

CPO to Review and Escalate

CPO flags items for SOP update, discussion at PM Roundtable, or immediate rollout.

Optional: Submit MS Form Feedback

Use internal survey (Microsoft Forms) to capture anonymous or thematic insights.

Blocking Logic

? Do not archive project folders until the PM has submitted their Lessons Learned form and logged at least one SOP-related improvement or validation.

Outputs/Deliverables

Lessons_Learned_Form.docx (project-specific)

Shared_Lessons_Log.xlsx (updated)

CI Thread Post in Teams

SOP Update Flag (if applicable)

Optional: MS Forms feedback export

[13.6] PM Participation in SOP Development and Updates (Work Instruction) {#sop-feedback}

Tools Used:

OneDrive > 26. Continuous Improvement > SOP Feedback

Teams > PM Roundtable Channel

Microsoft Word, Teams, Planner

Objective:

Ensure Project Managers directly contribute to the refinement of Devere?s SOPs based on field experience, enabling agile updates and maintaining relevance as systems, vendors, and project types evolve.

When to Perform:

After project closeout

When major process gaps or inefficiencies are observed

During quarterly PM Roundtable sessions

Who Performs This Task:

Project Manager (initiator)

Chief Process Officer (review and update)

CI Lead (logs and trends feedback)

Step-by-Step Procedure

Identify SOP Improvement Need

While executing project tasks, if a gap, inefficiency, or inconsistency arises in the SOPs, document the issue.

Draft Feedback or Suggestion

Use SOP_Feedback_Form.docx from:

OneDrive > Templates > SOP_Feedback

Provide:

Section number

Problem or outdated instruction

Suggested fix or clarification

Example or impact from real project

Submit to CPO for Review

Upload completed form to:

OneDrive > 26. Continuous Improvement > SOP Feedback > [Date]_[Project].docx

Tag CPO in Teams > PM Roundtable Channel

Track in Planner Board

CPO or Admin adds item to:

Microsoft Planner > SOP Review Board

with label: ?Submitted by PM?

Roundtable Discussion (Quarterly)

Discuss submissions during PM Roundtable

Flag SOP sections for formal revision or pilot changes

Assign owners for rewrite/testing

Integrate into Next SOP Version

CPO revises document and updates footer version

Save to OneDrive > SOP Library

Notify PMs via Teams when updated

Blocking Logic

? Do not issue new SOP revisions until feedback is reviewed and logged in Planner, and CPO has approved the revision draft.

Outputs/Deliverables

SOP_Feedback_Form.docx

SOP Feedback Folder Entry

Microsoft Planner SOP Card

SOP Revision Log Entry

Updated SOP Version in OneDrive

[13.7] PM Accountability Review and Disciplinary Path (Work Instruction) {#pm-accountability}

Tools Used:

OneDrive > 26. Continuous Improvement > Accountability Reviews

Sage CM > Logs & Reports > Budget / Schedule / Safety

Microsoft Teams, Outlook, Word

Objective:

To formalize the review and escalation process for Project Managers who repeatedly fail to meet Devere performance expectations related to schedule, budget, documentation, compliance, or field coordination.

When to Perform:

After missed SOP compliance items (3+ times per quarter)

Following safety violations or unreported field incidents

When PM underperformance affects profitability, schedule, or client satisfaction

Who Performs This Task:

Chief Process Officer (CPO)

PM?s direct Project Executive (PE)

PM under review

Contract Compliance Officer (if safety/compliance-related)

Step-by-Step Procedure

Trigger Review Criteria

Identify repeated violations (e.g., missed cost updates, overdue SOV, incomplete safety logs).

Pull evidence from Sage CM > Logs & Reports and OneDrive > [Project] > 23. Logs & Reports.

Schedule Review Meeting

CPO schedules 1-on-1 Teams call with PM.

Invite PE and Contract Compliance Officer if applicable.

Prepare Documentation Packet

Create an Accountability Packet:

Summary of violations/missed items

Corresponding SOP section references

Project impacts (delays, rework, financial loss)

Team feedback (if relevant)

Save to:

OneDrive > 26. Continuous Improvement > Accountability Reviews > [PM Name]_[Date].docx

Conduct Meeting and Assign Action Plan

Walk through deficiencies and align on expectations.

Issue 30-day Action Plan: include training, deadlines, assigned mentors if needed.

PM signs acknowledgment of the plan.

Track Progress

Schedule weekly check-ins via Teams.

Document progress and upload to PM?s Accountability Folder.

Escalate to HR if plan is ignored or performance does not improve.

Document Final Outcome

CPO writes outcome summary:

?Improved,? ?Needs Ongoing Support,? or ?Escalation to HR.?

Upload to same folder and log in PM Performance Ledger.xlsx.

Blocking Logic

? Do not reassign PM to new projects until accountability items are resolved or Action Plan is complete.

Outputs/Deliverables

Accountability Review Packet (Word Doc)

Signed Action Plan

Weekly Progress Notes

PM Performance Ledger Update

Outcome Summary (Docx)

[13.8] PM Feedback Loop and SOP Evolution Submission (Work Instruction) {#pm-feedback-loop}

Tools Used:

OneDrive > 26. Continuous Improvement > SOP Feedback

Teams > CI Channel > Feedback Thread

Microsoft Forms or Word Template

Objective:

To capture PM field feedback on SOP usability, identify opportunities for clarification or improvement, and submit formal suggestions for SOP updates?ensuring the manual remains a living, practical document aligned with real-world use.

When to Perform:

After completing major project phases (e.g., closeout, buyout, kickoff)

During post-mortem meetings or lessons learned reviews

Anytime a PM finds a gap, confusion, or improvement area in the SOP

Who Performs This Task:

Project Manager (initiates feedback)

CPO (reviews, accepts/rejects, and updates SOP)

Contract Compliance Officer (if compliance-related)

PM Trainer or Executive (optional reviewer)

Step-by-Step Procedure

Access Feedback Form

Navigate to OneDrive > 26. Continuous Improvement > SOP Feedback

Use Microsoft Word template SOP_Feedback_Form.docx or the Microsoft Forms link posted in Teams.

Complete the Form

Include:

SOP section number (e.g., 5.2 or 13.3)

Description of the issue or improvement

Suggested fix or clarification

Any supporting documents or screenshots

Save completed form to:

Projects > [Project Name] > 26. Continuous Improvement > Submitted_Feedback

Submit and Notify

Post in Teams > CI Channel > Feedback Thread with:

?New SOP Feedback ? [PM Name] ? [Project] ? [Section #]?

Link to the OneDrive file

Tag CPO and Contract Compliance (if applicable)

CPO Review and Routing

CPO evaluates:

Urgency (e.g., critical clarification vs. future update)

Cross-project relevance

Training impacts

If accepted, assigns revision task and version logs the change.

Track and Archive

Feedback is entered in SOP_Revision_Log.xlsx

Accepted suggestions are folded into the SOP in the next quarterly release.

PM is notified of resolution status via Teams.

Blocking Logic

? Do not distribute revised SOP versions until all accepted feedback is formally logged and cross-checked for conflicts with existing instructions.

Outputs/Deliverables

Completed SOP_Feedback_Form.docx

Teams post with submission thread

Entry in SOP_Revision_Log.xlsx

Updated SOP section (if accepted)

Notification of resolution to PM

[13.9] Lessons Learned Integration into Training and SOPs (Work Instruction) {#lessons-learned}

Tools Used:

OneDrive > 26. Continuous Improvement > Lessons_Learned

Teams > CI Channel > Lessons Learned Thread

SOP Revision Log (SOP_Revision_Log.xlsx)

Microsoft Word, Excel, and Forms

Sage CM > Daily Logs and Issue Logs (for reference)

Objective:

To systematically integrate field-validated lessons learned into future training sessions, SOP revisions, and PM onboarding?ensuring Devere captures institutional knowledge and prevents repeat errors across projects.

When to Perform:

After each project milestone (Buyout, Mobilization, Closeout)

Following critical issues, change orders, or nonconformance events

At the end of each project (Final Lessons Learned Meeting)

Who Performs This Task:

Project Manager (submits summary)

CPO (reviews and directs action)

CI Lead or PM Trainer (implements into training or SOPs)

Step-by-Step Procedure

Prepare Lessons Summary

Download Lessons_Learned_Template.docx from:

OneDrive > Templates > Lessons Learned

Include:

Project name, date, and PM

Key problem/event

Root cause

Corrective action taken

Recommended SOP or training change

Impact (schedule, cost, safety, quality)

Submit to CI Folder

Save completed form to:

OneDrive > 26. Continuous Improvement > Lessons_Learned > [Project]_[Date].docx

Log and Notify

Post in Teams > CI Channel > Lessons Learned Thread

Include:

?New Entry ? Lessons Learned ? [Project Name] ? [Category]?

Summary bullet points

Link to the OneDrive file

Tag CPO, Trainer, and relevant PMs

CPO and Training Review

CPO reviews and determines if the lesson:

Triggers an SOP update

Becomes a future CI Spotlight

Requires immediate retraining or staff notification

CI Lead updates Lessons_Learned_Log.xlsx and SOP_Revision_Log.xlsx if applicable.

Integration

If SOP revision is required:

Update draft section

Review with PM group during next SOP review cycle

If Training Update:

Add example to onboarding deck or CI Workshop curriculum

Archive final version to Training Library

Blocking Logic

? Do not mark project as ?Complete? in CI System unless a Lessons Learned Summary has been submitted and reviewed by the CPO.

Outputs/Deliverables

Lessons_Learned_Template.docx (project-specific submission)

Teams post with summary and file link

Logged entry in Lessons_Learned_Log.xlsx

SOP update (if triggered)

Training slide or deck revision (if triggered)

[14.0] Lessons Learned and Continuous Improvement (SOP) {#lessons-learned-ci}

Tools Used:

OneDrive > 26. Continuous Improvement > Lessons_Learned

Teams > CI Channel > Lessons Learned Thread

Sage CM > Daily Logs, Issue Logs

Microsoft Forms, Word, Excel

SOP_Revision_Log.xlsx

Training Slide Decks, PM Roundtable Agenda

Escalation Path:

Project Manager ? CI Lead ? CPO ? Training Coordinator

Objective

To ensure every project at Devere Construction yields organizational growth by converting field-tested experiences into actionable SOP updates, training improvements, and cross-project communication?thereby strengthening safety, quality, schedule, and cost outcomes across all teams.

Definitions

Lessons Learned Summary: A structured documentation of a project?s key takeaways, challenges, and successes used for internal improvement.

CI Loop: The process of capturing, analyzing, and integrating lessons and innovation into Devere SOPs and training.

SOP Revision Log: A master tracker of all requested and approved changes to Devere's SOP manual, ensuring proper documentation and version control.

Step-by-Step Procedure

Trigger Lesson Capture Events

Occurs at the end of major project phases (e.g., Buyout, Mobilization, Closeout)

Also initiated following major incidents, change orders, or performance deviations

Download Lessons Learned Template

From OneDrive > Templates > Lessons_Learned_Template.docx

Save locally or to:

Projects > [Project Name] > 26. Continuous Improvement > Lessons_Learned > [Project]_[Date].docx

Complete the Summary

Include:

Project Name and Date

Event or Issue Summary

Root Cause

Corrective Action Taken

Suggested SOP or Training Updates

Impact Area (Safety, Cost, Schedule, Quality)

Upload and Notify

Save to project folder in OneDrive

Post in Teams > CI Channel > Lessons Learned Thread

Tag CI Lead, CPO, and any relevant PMs or Trainers

CI Review and SOP Escalation

CPO and CI Lead review for:

Cross-project relevance

Urgency of SOP update or training change

Value for future onboarding or PM roundtables

Updates flagged in SOP_Revision_Log.xlsx

Training and SOP Integration

If applicable:

CPO drafts SOP revisions

Trainer updates slide decks or onboarding materials

Changes are reviewed in next PM Roundtable before release

Final documents archived in:

OneDrive > SOP Library > PM SOP Version History

Blocking Logic

? Do not mark a project as Closed in OneDrive or Sage CM unless:

Lessons Learned Summary has been submitted

CI Review has occurred

Any relevant SOP or training changes have been entered into the Revision Log

Outputs/Deliverables

Completed Lessons_Learned_Template.docx

Teams Thread post with summary and file link

Logged entry in Lessons_Learned_Log.xlsx

SOP revision entry in SOP_Revision_Log.xlsx (if applicable)

Updated training slide or onboarding materials

Integration discussion minutes from next PM Roundtable

[14.1] Capturing Project Milestone Reflections (Work Instruction) {#milestone-reflections}

Tools Used:

OneDrive > 26. Continuous Improvement > Lessons_Learned

Templates > Milestone_Reflection_Form.docx

Teams > CI Channel > Milestone Reflections

Sage CM > Project Logs

Objective:

To ensure Project Managers document lessons learned and observations at critical project milestones?creating a proactive feedback loop that improves safety, schedule, cost, and quality management before final project closeout.

When to Perform:

Immediately following each key milestone:

? Buyout complete

? Substantial Completion achieved

? Final Completion / Closeout

? Major schedule or budget deviation

Optional after any critical issue or innovation

Who Performs This Task:

Project Manager (author)

Project Executive or CPO (review)

CI Lead (logs and monitors patterns)

Step-by-Step Procedure

Download the Milestone Reflection Form

Navigate to: OneDrive > Templates > Milestone_Reflection_Form.docx

Save a copy to the project folder:

Projects > [Project Name] > 26. Continuous Improvement > Lessons_Learned > [Milestone]_[Date].docx

Document the Reflection

Complete the form for the milestone in question, including:

Event description

Positive takeaways

Challenges encountered

Deviations from SOPs or standard workflows

Root cause and resolution

Recommendations for future projects

Upload and Notify

Upload completed file to project?s CI folder

Post summary bullets in Teams > CI Channel > Milestone Reflections

Tag CPO and CI Lead

Log in Lessons_Learned_Log.xlsx

CI Lead records entry and tags as ?Milestone Reflection?

Categorize by milestone type (e.g., Substantial Completion, Buyout)

Review and Integrate

CPO reviews reflections quarterly to identify patterns or recurring issues

High-value items may be flagged for SOP revision, CI Spotlights, or PM Roundtable discussion

Blocking Logic

? Do not proceed to closeout or move forward with next milestone deliverables until:

Milestone Reflection is submitted and logged for Buyout and Substantial Completion

Project team has reviewed and signed off on key takeaways

Outputs/Deliverables

Completed Milestone_Reflection_Form.docx

Teams summary post with highlights

Logged entry in Lessons_Learned_Log.xlsx

Potential flag for SOP/Training/Spotlight update

Input to PM Roundtable agenda

[14.2] PM-Led Lessons Learned Meetings (Work Instruction) {#lessons-learned-meeting}

Tools Used:

Microsoft Teams or In-Person Meeting

OneDrive > 26. Continuous Improvement > Lessons_Learned

Templates > Lessons_Learned_Meeting_Agenda.docx

Sage CM > Daily Logs, Budget, Schedule, Submittals, and RFI Modules

Objective:

To facilitate structured, PM-led discussions at the end of each project?capturing lessons from all departments, subcontractors, and field staff. These meetings are key to continuous improvement and must be treated as a formal closure phase.

When to Perform:

Within 15 business days after Final Completion

Mandatory before project is archived in Sage CM

Who Performs This Task:

Project Manager (organizer and lead facilitator)

Project Executive (attendee and reviewer)

Site Manager, Admin, PE, CPO (invited participants)

Key subcontractor reps (optional guests)

Step-by-Step Procedure

Schedule the Meeting

Send Teams invite with agenda to project team and PE

Optional: Invite CPO, Contract Compliance, CI Lead

Location: On Teams or in Project Office

Date: Within 15 business days of Final Completion

Prepare the Agenda

Download: Templates > Lessons_Learned_Meeting_Agenda.docx

Customize to project and attach to meeting invite

Sections should include:

Safety lessons

Budget performance

Schedule adherence

Submittal/RFI efficiency

DMS performance

Subcontractor coordination

Owner/Architect coordination

CI contributions

SOP recommendations

Lead the Discussion

PM facilitates structured walkthrough using the agenda

Designate notetaker (typically Admin or PE)

Focus on facts, root causes, and actionable improvements

Document the Output

Use form: Lessons_Learned_Meeting_Notes.docx

Save to:

Projects > [Project Name] > 26. Continuous Improvement > Lessons_Learned > Final_Meeting_[Date].docx

Summarize bullets into: Shared_Lessons_Log.xlsx

Distribute and Submit

Email meeting notes to attendees and CPO

Post summary in Teams > CI Channel > Lessons Learned Thread

Confirm SOP suggestions submitted via [13.8] Feedback Loop Form

Blocking Logic

? Do not mark project as ?CI Complete? until:

Lessons Learned Meeting is held

Meeting notes are archived in the correct OneDrive folder

SOP suggestions are submitted (if applicable)

Outputs/Deliverables

Completed Lessons_Learned_Meeting_Notes.docx

Meeting agenda (customized)

Logged entry in Shared_Lessons_Log.xlsx

Teams post in CI Channel

SOP Feedback submissions (if applicable)

[14.3] Shared Lessons Log Management (Work Instruction) {#shared-lessons-log}

Tools Used:

OneDrive > 26. Continuous Improvement > Shared_Lessons_Log.xlsx

Microsoft Excel, Teams

SOP_Revision_Log.xlsx

Sage CM > Daily Logs and Project Notes

Objective:

To ensure that all lessons learned from PMs, Site Managers, and field staff are recorded in a central log for organization-wide visibility, SOP updates, and training refinement. The Shared Lessons Log is the backbone of Devere?s continuous improvement culture.

When to Perform:

Immediately after a Lessons Learned meeting

After any approved feedback via the SOP Feedback Loop

During monthly CI reviews by the CPO or CI Lead

Who Performs This Task:

Project Manager (entry of project-specific lessons)

CI Lead (monthly review and categorization)

CPO (review for SOP and training integration)

Step-by-Step Procedure

Access the Log

Open: OneDrive > 26. Continuous Improvement > Shared_Lessons_Log.xlsx

Confirm you are using the latest version (check timestamp in header)

Enter New Lessons

Add one row per lesson learned

Required fields:

Date

Project Name

Lesson Category (Safety, Budget, Schedule, Quality, CI, Coordination)

Description (1?3 sentences)

SOP Section Affected (if applicable)

Link to Full Document (e.g., Lessons_Learned_Form.docx or Meeting Notes)

Validate and Format Entries

Ensure consistent category naming using dropdowns

Use hyperlinks for document links (stored in OneDrive > 26. Continuous Improvement > Lessons_Learned)

Spell check and summarize clearly for searchability

Tag for SOP Update or Training Use

If lesson applies to current SOP, add "YES" to ?SOP Revision Needed?? column

If it supports training examples, add "YES" to ?Training Update?? column

CI Lead reviews these fields weekly

Notify CPO and CI Lead

Post in Teams > CI Channel > Lessons Learned Thread

Format:

pgsql

CopyEdit

New Shared Lesson Logged ? [Project Name] ? [Category]

SOP Impact: [Yes/No]

Training Use: [Yes/No]

Link: [OneDrive path]

Quarterly Audit and Review

CI Lead exports and audits log for trends (repeat failures, frequent SOP edits)

Submit report to CPO for discussion at PM Roundtable

Used for planning SOP updates and future CI Spotlights

Blocking Logic

? Do not close out any Lessons Learned Meeting unless the Shared_Lessons_Log entry is complete and includes all required fields.

Outputs/Deliverables

Updated Shared_Lessons_Log.xlsx

Teams post to CI Channel

Tags for SOP or training update

Quarterly CI trend report for CPO

[14.4] CI Spotlight Curation and Library Management (Work Instruction) {#ci-spotlight-library}

Tools Used:

OneDrive > 26. Continuous Improvement > CI Spotlights

Teams > CI Channel > Monthly Spotlights

Microsoft PowerPoint, Word

Sage CM > Daily Logs (for photo sourcing)

Objective:

To organize and maintain Devere?s library of PM-submitted Continuous Improvement (CI) Spotlights, ensuring consistent formatting, searchable access, and integration into training materials for new hires and ongoing development.

When to Perform:

Upon submission of each monthly CI Spotlight by a PM

Quarterly review by the CI Lead

During PM onboarding material refresh

Who Performs This Task:

PM (initial submission and formatting)

CI Lead (review, tagging, library curation)

PM Trainer (training module linkage)

Step-by-Step Procedure

Download Template and Create CI Spotlight

Path: OneDrive > 26. Continuous Improvement > Templates > CI_Spotlight_Template.pptx

PM fills out the following fields:

Project Name

Date

CI Topic / Problem / Solution / Result

Before/After photos (from Sage CM > Daily Logs)

Stakeholders involved

Save file as: [Project]_[Month].pptx

Upload to: OneDrive > 26. Continuous Improvement > CI Spotlights

Post to Teams Channel

Navigate to Teams > CI Channel > Monthly Spotlights

Post the new CI Spotlight deck with a short summary and tag @CPO and @CI Lead

Format:

less

CopyEdit

New CI Spotlight ? [Project] ? [Topic]

? Link: [OneDrive URL]

Key Takeaway: [1?2 line summary]

Curate and Organize Library

CI Lead reviews submission for clarity, completeness, and impact

Move file into appropriate subfolder by year:

OneDrive > 26. Continuous Improvement > CI Spotlights > 2025 > [Project]_[Month].pptx

Update index file: CI_Spotlight_Library_Index.xlsx with metadata:

Project, Month, Topic, Category (Safety, Cost, Schedule, Quality), PM Name, Link

Tag for Training Use

If spotlight is strong training content, mark "YES" in ?Training Material?? column

PM Trainer reviews quarterly for integration into onboarding decks or workshops

Backup and Archive

Quarterly, CI Lead creates ZIP archive of prior quarter's spotlights

Save to: OneDrive > 26. Continuous Improvement > CI Spotlights > Archives > [Quarter].zip

Blocking Logic

? Do not mark CI Spotlight as ?complete? until:

PowerPoint is saved and uploaded using correct naming convention

Post is made to Teams

Metadata is added to Library Index

CI Lead review is complete

Outputs/Deliverables

CI Spotlight Deck (.pptx)

Teams CI Spotlight Post

Updated CI_Spotlight_Library_Index.xlsx

Quarterly Archive ZIP

?Training Material? tag for onboarding content

[14.5] Monthly CI Roundup and Dashboard Reporting (Work Instruction) {#ci-roundup-dashboard}

Tools Used:

OneDrive > 26. Continuous Improvement > CI Spotlights, Shared_Lessons_Log.xlsx

Teams > CI Channel > Monthly CI Roundup Thread

Microsoft Excel, Power BI or Dashboard Tool

Sage CM > Daily Logs (as source reference)

Objective:

To compile and summarize monthly CI activity?including PM Spotlights, SOP suggestions, and field contributions?into a visual dashboard and structured roundup for organizational visibility, compliance monitoring, and recognition.

When to Perform:

On the first Friday of each month (reporting on the previous month?s activity)

During monthly PM meetings and CI review sessions

Who Performs This Task:

CI Lead (primary compilation and reporting)

Project Managers (ensure submissions are complete)

CPO (review and circulate dashboard)

Step-by-Step Procedure

Compile Monthly Submissions

Navigate to: OneDrive > 26. Continuous Improvement > CI Spotlights

Gather all decks submitted in the prior month

Log each in Shared_Lessons_Log.xlsx with:

Project Name, PM, CI Topic, Submission Date, SOP Section Linked (if any), Summary

Track Compliance

Compare PM submissions against expected list

Highlight missing submissions in CI_Compliance_Tracker.xlsx

Notify delinquent PMs and tag in Teams > CI Channel > CI Roundup Thread

Update Visual Dashboard

Use Power BI (or Excel if unavailable) to generate a visual dashboard with:

Total CI Spotlights submitted

Top 3 Themes (e.g., Safety, Scheduling, Cost)

Field Crew Recognition Count

PM Submission Rate (%)

SOP Update Triggers

Save to: OneDrive > 26. Continuous Improvement > CI Dashboards >

CI_Monthly_Dashboard_[MonthYear].pdf

Post Roundup Summary

In Teams > CI Channel > CI Roundup Thread, post a formatted summary:

? CI Roundup ? [Month]

- ? Spotlights Submitted: [#]

- ?? Top Field Innovations: [List or Quote]

- ? SOP Feedbacks: [#]

- ? Lessons Logged: [#]

- ? Delinquent PMs: [Names or None]

? Dashboard: [OneDrive Link] Review with CPO

Send the roundup report and dashboard PDF to the CPO for review before the PM Roundtable

Make edits or clarifications if requested

CPO to present or delegate PM presentation at Roundtable

Blocking Logic

? Do not mark CI Month as ?Closed? in reporting systems until:

All PM submissions are logged

Roundup is posted

Dashboard is generated and approved

Delinquency report is issued (if needed)

Outputs/Deliverables

Updated Shared_Lessons_Log.xlsx

CI_Compliance_Tracker.xlsx (updated)

CI_Monthly_Dashboard_[MonthYear].pdf

Teams CI Roundup Summary Post

PM Meeting Agenda Item with CI Metrics

[14.6] Integration of Lessons Learned into SOP and Training (Work Instruction) {#lessons-to-sop-training}

Tools Used:

OneDrive > 26. Continuous Improvement > Lessons_Learned

SOP_Revision_Log.xlsx

Microsoft Word, PowerPoint (for SOPs and Training Decks)

Teams > PM Roundtable Channel

Microsoft Planner > SOP Review Board

Objective:

To ensure validated lessons learned from project execution are formally reviewed, prioritized, and integrated into Devere?s SOP library and PM/field training curriculum?closing the feedback loop and institutionalizing continuous improvement.

When to Perform:

Within 30 days of a Lessons Learned submission

During SOP quarterly review cycles

Prior to onboarding new PMs or major project mobilizations

Who Performs This Task:

Chief Process Officer (CPO) ? SOP revision, prioritization

CI Lead ? log maintenance and workflow tracking

PM Trainer ? training module updates

Project Managers ? initial lesson submission

Step-by-Step Procedure

Review Submitted Lessons

Open: OneDrive > 26. Continuous Improvement > Lessons_Learned

Review each new document for:

Relevance to SOP content

Clarity of root cause and corrective action

Cross-project applicability

Mark reviewed entries in Lessons_Learned_Log.xlsx

Flag Lessons for SOP Update

For valid suggestions, open SOP_Revision_Log.xlsx and log:

Section # affected

Summary of lesson

PM/Project Name

Proposed change

Priority (Low/Medium/High)

Tag item in Microsoft Planner > SOP Review Board

Label: ?Lesson Learned Input?

Draft SOP Revision

CPO opens the relevant SOP document (e.g., PM SOP, Safety SOP)

Updates the section in Microsoft Word, including:

Revised step-by-step instructions

Clarified roles or definitions

Example from the field (if relevant)

Highlight tracked changes until approved

Review at PM Roundtable

Present proposed revisions to PMs in: Teams > PM Roundtable Channel

Use ?SOP Redline Review Deck.pptx? if needed for visual walkthrough

Collect feedback and finalize edits

Finalize and Publish

Save updated SOP with version update to:

OneDrive > SOP Library > [SOP Name]_v[Year].[Rev].docx

Update SOP_Revision_Log.xlsx with publish date

Notify all PMs via Teams with summary of changes and links

Update Training Materials

PM Trainer revises training decks or onboarding resources

Add revised content to:

OneDrive > Training Materials > SOP-Based Curriculum

Schedule training or distribute update notification as needed

Blocking Logic

? Do not close the SOP quarterly review cycle until:

All lessons flagged in Lessons_Learned_Log.xlsx are reviewed

Applicable SOP sections are updated or deferred with reason

CPO and PM group have acknowledged final versions

Outputs/Deliverables

Updated SOP_Revision_Log.xlsx

SOP files with tracked and final changes

Microsoft Planner entries (SOP Review Board)

Redline Review Deck (if used)

Revised training decks and onboarding content

Teams announcement with summary and links

[14.7] Continuous Improvement Metrics Dashboard and Reporting (Work Instruction) {#ci-metrics-dashboard}

Tools Used:

Microsoft Excel > CI_Metrics_Dashboard.xlsx

Sage CM > Daily Logs, Safety, Schedule, Budget modules

OneDrive > 26. Continuous Improvement > Metrics

Microsoft Teams > CI Channel

Power BI (optional for advanced reporting)

Objective:

To maintain a centralized dashboard of Continuous Improvement (CI) metrics that track PM engagement, field innovation activity, and impact across projects?enabling leadership to assess progress, identify trends, and recognize high performers.

When to Perform:

Metrics updated monthly

Reports generated quarterly and shared at PM Roundtable

Who Performs This Task:

CI Lead (dashboard maintenance and reporting)

CPO (review, trend analysis, escalation if underperformance is detected)

PMs (data entry for own CI activities)

Step-by-Step Procedure

Collect PM CI Participation Data

Each PM submits their monthly CI activities to:

OneDrive > 26. Continuous Improvement > PM_CI_Log.docx

CI Lead reviews for completeness and standardizes for tracking

Update CI_Metrics_Dashboard.xlsx

Open CI_Metrics_Dashboard.xlsx in:

OneDrive > 26. Continuous Improvement > Metrics

Enter/update for each PM:

of CI Log entries this month

of field recognitions posted

of SOP feedback submissions

of lessons learned submitted

of contributions nominated for recognition

Validate with date-stamped folder contents

Pull Quantitative Project Data from Sage CM

Log into Sage CM and extract for each active project:

Open safety issues

Punch list count and aging

RFI and submittal resolution times

Budget and schedule variances

Input into dashboard for trend correlation

Highlight Trends and Flags

Use conditional formatting or Power BI (if applicable) to identify:

PMs with 3+ months inactivity in CI Log

Projects with repeated late RFI/Submittals

Safety issues correlated with lack of field CI activity

Flag these for review at Roundtable

Prepare CI Metrics Report

Generate summary report quarterly:

Top contributing PMs

Field teams with most innovation logs

Common SOP suggestions

At-risk projects based on low CI engagement

Save report to:

OneDrive > 26. Continuous Improvement > Metrics > Reports > [Quarter]_CI_Summary.pdf

Present at PM Roundtable

CI Lead presents metrics via Teams or projector

Include recommendations for training or recognition

PMs may be asked to present successful examples

Blocking Logic

? Do not finalize quarterly CI summary or PM recognition nominations until the CI_Metrics_Dashboard is updated and reviewed with CPO.

Outputs/Deliverables

CI_Metrics_Dashboard.xlsx (updated monthly)

Sage CM data exports (safety, RFIs, budget)

Quarterly CI Summary Report PDF

Teams presentation or Roundtable discussion log

Recognition/discipline flags documented for follow-up

[14.8] Continuous Improvement (CI) Metrics Dashboard Maintenance (Work Instruction) {#ci-dashboard}

Tools Used:

Microsoft Excel > CI_Metrics_Dashboard.xlsx

OneDrive > 26. Continuous Improvement > Metrics > CI_Metrics_Dashboard.xlsx

Teams > CI Channel > Monthly Summary Thread

Sage CM > Daily Logs, Safety, Quality, Budget Reports

Objective:

To maintain a live dashboard tracking the health and participation level of Devere's Continuous Improvement program, including PM engagement, field recognition activity, and implementation of SOP changes.

When to Perform:

Monthly (by the 5th of each month)

Quarterly (rollup and trend analysis)

Who Performs This Task:

CI Lead (primary dashboard owner)

Project Managers (data contributors)

CPO (review and oversight)

Step-by-Step Procedure

Open the Dashboard File

Navigate to OneDrive > 26. Continuous Improvement > Metrics

Open CI_Metrics_Dashboard.xlsx

Collect Monthly CI Metrics from PMs

Send reminder to PMs via Teams by the 1st of each month

PMs enter data in their tab or submit to CI Lead for entry

Update Metrics Fields

For each PM/project, enter:

of CI Log entries this month

of field recognitions posted

of SOP feedback submissions

of lessons learned submitted

of contributions nominated for recognition

Compile Roll-Up Totals

Update summary totals and auto-generated graphs

Check for missing PM data or obvious anomalies

Post Summary in Teams

Post chart or table in Teams > CI Channel > Monthly Summary Thread

Include:

Participation highlights

Trends or drops in engagement

Recognition of high-performing PMs or projects

Quarterly Review and Archive

Save quarterly version as:

CI_Metrics_Q[XX]_[Year].xlsx

in the same OneDrive folder

Notify CPO and PMs of quarterly performance outcomes

Blocking Logic

? Do not mark a month as "complete" in CI records unless:

All PMs have submitted/update metrics

Roll-up and trends are accurate

Teams summary is posted

Quarterly files are saved on time (Q1, Q2, etc.)

Outputs/Deliverables

CI_Metrics_Dashboard.xlsx (updated)

PM-specific data entries

Teams post with summary chart or table

CI_Metrics_Q[XX]_[Year].xlsx archives

Quarterly trend notes (optional)

[14.9] PM Roundtable: Continuous Improvement Review and SOP Update Session (Work Instruction) {#pm-roundtable}

Tools Used:

Microsoft Teams > PM Roundtable Channel

OneDrive > 26. Continuous Improvement > PM Roundtable Agendas

OneDrive > 26. Continuous Improvement > SOP Feedback

SOP_Revision_Log.xlsx, CI_Metrics_Dashboard.xlsx

Objective:

To conduct a structured monthly PM Roundtable focused on reviewing Continuous Improvement submissions, SOP feedback, and operational trends, ensuring Devere?s processes evolve in sync with field realities and project challenges.

When to Perform:

Monthly (Last Thursday of each month)

Ad hoc (for urgent revisions or trend escalations)

Who Performs This Task:

Chief Process Officer (facilitator)

Project Managers (contributors and reviewers)

CI Lead (log and trend analyst)

Contract Compliance and Executive Team (optional reviewers)

Step-by-Step Procedure

Schedule and Share Agenda

Schedule monthly Teams meeting: ?PM Roundtable ? CI & SOP Review?

Prepare agenda in Word and upload to OneDrive > 26. Continuous Improvement > PM Roundtable Agendas > [Month]_[Year]_Agenda.docx

Include sections for:

Top CI Contributions

SOP Feedback Summary

Metrics Review (from CI Dashboard)

PM Performance Observations

Collect Pre-Meeting Submissions

PMs must submit:

Any SOP feedback using SOP_Feedback_Form.docx

Monthly CI Log entries

Lessons learned or field highlights worth review

Facilitate Roundtable Discussion

Open Teams meeting and follow agenda

Walk through:

High-impact innovations or lessons

SOP feedback and conflicts

Engagement issues (missing spotlights or weak submissions)

System usage trends (e.g., Sage CM inconsistencies)

Assign Action Items and SOP Tasks

Flag SOPs requiring update and assign a revision owner

Add tasks to Microsoft Planner > SOP Review Board

CPO assigns reviewers or pilot leads for trial improvements

Log and Archive

Save meeting minutes and action items to:

OneDrive > 26. Continuous Improvement > PM Roundtable Agendas > [Month]_[Year]_Minutes.docx

Update SOP_Revision_Log.xlsx with accepted updates and target release version

Follow-Up

Notify PM team of action deadlines

Update SOP files and CI dashboard with current month changes

Blocking Logic

? Do not mark SOP version as ?current? or implement policy updates unless:

Roundtable has reviewed the proposed change

SOP feedback has been logged

Revision entry exists in SOP_Revision_Log.xlsx

Assigned revision owner confirms accuracy of change

Outputs/Deliverables

PM Roundtable Agenda and Minutes

Microsoft Planner Tasks for SOP revisions

Updated SOP_Revision_Log.xlsx

Teams Post with Action Summary

Updated CI_Metrics_Dashboard.xlsx (if reviewed)

[15.0] Project Closeout and Warranty Management (SOP) {#closeout}

Tools Used:

Sage CM > Closeout Module, Punch Lists, RFIs, Submittals

OneDrive > 27. Closeout > All Tabs (Documents, Warranties, O&M Manuals, Photos)

Microsoft Word, Excel, Teams, Bluebeam

Escalation Path:

PM ? Project Executive ? CPO ? Owner/Architect

Objective

Ensure every Devere project is completed to contractual standards, documentation is submitted and verified, and all final turnover and warranty obligations are met. Closeout is not just a paperwork milestone?it is the final proof of delivery and professionalism.

Definitions

Turnover Package: Full archive of closeout deliverables provided to the Owner, typically including warranties, as-builts, O&M manuals, tests, and contact info.

Warranty Log: Centralized and structured log of warranty-covered materials and systems, including terms and responsible vendors.

Substantial Completion: Stage when the work is usable for its intended purpose, pending minor punch list items.

Final Completion: All contractual requirements, punch list corrections, and documents are complete, verified, and accepted.

Step-by-Step Procedure

Begin the Closeout Plan 90 days prior to Substantial Completion by downloading the Closeout Checklist Template.

Establish closeout tracking folders in OneDrive under: Projects > [Project Name] > 27. Closeout.

Collect all closeout requirements from Division 01 Specifications and create document tracking assignments.

Notify subcontractors and vendors 60 days in advance of required closeout deliverables.

Collect, verify, and upload:

Warranties

O&M Manuals

Test Reports

Final Submittals

As-Built Drawings

Schedule final punch walk with Owner and Architect and log all punch items in Sage CM.

Assemble Owner Turnover Package with digital files and binder/USB as required.

Host the final turnover meeting and obtain sign-off.

Submit the final pay application and retainage release once all documents and sign-offs are confirmed.

Move project folders to archive and confirm Sage CM is closed out.

Monitor and manage warranty requests during the 12?24 month post-project period, conducting scheduled check-ins.

Blocking Logic

? Do not submit Final Pay Application or request Retainage Release until:

Final Punch List is cleared and signed

Turnover Package is delivered and confirmed

Warranty Log is complete and Owner-acknowledged

Archive folder is complete and Sage CM tasks are closed

Outputs/Deliverables

Closeout_Checklist.xlsx

Warranty_Log.xlsx

Final Punch List PDF

Turnover Package (Digital + USB/Hard Copy if required)

Turnover_Signoff_Form.docx

Final Pay App Submission in Sage CM

Archived Project Folders in OneDrive

Warranty Support Records (post-substantial completion)

Supporting Resources

Closeout Templates: OneDrive > Templates > Closeout

Warranty Tracker Template: OneDrive > Templates > Warranty_Tracker.xlsx

Submittal Logs: OneDrive > [Project Name] > 03. Submittals

Sage CM Help:

[15.1] Closeout Plan Launch and Checklist Setup

Tools Used:

Microsoft Excel, OneDrive, Teams, Sage CM

When to Perform:

90 days prior to anticipated Substantial Completion

Who Performs This Task:

Project Manager (lead)

Project Administrator (support)

CPO (review)

Step-by-Step Procedure:

Download the Closeout Checklist Template from: OneDrive > Templates > Closeout_Checklist.xlsx

Save project-specific copy to: Projects > [Project Name] > 27. Closeout > Closeout_Checklist.xlsx

Open Division 01 specifications (typically 01 77 00 ? Closeout Procedures).

Review each item and enter into the checklist under ?Required Documents.?

Assign document responsibility by name (e.g., PM, Admin, Site Manager, Subcontractor).

Set target dates and status tracking for each row.

Add weekly reminder to Teams calendar for PM/Admin to review status.

Submit first draft to CPO for verification and compliance.

Update checklist weekly and archive final version with sign-off.

Blocking Logic: ? Do not begin Owner communication on closeout readiness unless:

Closeout Checklist is populated with Div 01 items

Responsibilities are assigned

Dates and status tracking are activated

Outputs/Deliverables:

Project-specific Closeout_Checklist.xlsx

Checklist population of all Div 01 closeout requirements

Assignment of responsibilities and status dates

Weekly review schedule with Admin and PM

[15.2] Subcontractor and Vendor Closeout Coordination

Tools Used:

Microsoft Outlook, OneDrive, Sage CM, Teams

When to Perform:

Begin 60 days prior to Substantial Completion

Continue weekly until all subcontractor requirements are submitted

Who Performs This Task:

Project Manager (lead coordinator)

Project Administrator (tracking and reminders)

Site Manager (field verification)

Step-by-Step Procedure:

Generate a list of all subcontractors and vendors with open commitments in Sage CM > Commitments.

Email subcontractors their required closeout items using the template from OneDrive > Templates > Subcontractor_Closeout_Request.docx

For each subcontractor, identify:

Required documents (warranties, O&M manuals, as-builts, tests)

Due dates (per spec and Substantial Completion target)

Responsibility and field verification process

Track submissions in the Closeout_Checklist.xlsx under the responsible vendor?s name.

Conduct weekly follow-up calls or emails for outstanding items.

Store all submitted documents in OneDrive > Projects > [Project Name] > 27. Closeout > Vendors > [Company Name]

Cross-verify submittals and test results with the Submittal Log and RFIs.

Notify CPO weekly of delinquent subs via summary log.

Do not finalize closeout punch list or turnover package until all vendor documents are received and verified.

Blocking Logic:

? Do not accept final pay applications from any subcontractor or vendor unless:

All required closeout documentation has been submitted and verified

Items are logged in the Closeout Checklist and folder

Test and inspection requirements (e.g., fire alarm, elevator) are certified

Outputs/Deliverables:

Vendor-specific folders with documentation in OneDrive

Subcontractor closeout email logs

Updated Closeout_Checklist.xlsx with document status

Weekly delinquency report to CPO

Verified records cross-linked with Submittal Log and RFI Register

[15.3] Punch List Management and Final Walk Coordination

Tools Used:

Sage CM > Punch List Module

OneDrive > 27. Closeout > Punch List

Bluebeam, Teams

When to Perform:

30 days prior to Substantial Completion (pre-walk)

Day of Substantial Completion Walk

Weekly until Final Completion

Who Performs This Task:

Project Manager (lead coordinator)

Site Manager (field lead)

Project Administrator (tracking)

Architect/Owner (participant and signatory)

Step-by-Step Procedure:

Schedule a preliminary punch walk internally with Site Manager and DMS PMs 30 days prior to Substantial Completion.

Create draft punch list using Bluebeam or on-site inspection notes and save to:

Projects > [Project Name] > 27. Closeout > Punch List > Pre-Walk.pdf

Review and resolve as many punch items as possible prior to formal Owner/Architect walkthrough.

Schedule Substantial Completion Walkthrough via Teams invite, including Owner, Architect, PM, Site Manager.

Conduct walkthrough and enter formal punch items in Sage CM > Punch List Module.

Assign responsibility and due dates to each punch item in Sage CM.

Export PDF summary and upload to OneDrive.

Update status weekly and verify completion with field photos and subcontractor sign-offs.

Finalize punch list by having all items signed off by Architect/Owner.

Save signed punch list to:

Projects > [Project Name] > 27. Closeout > Punch List > Final_Punch_Signed.pdf

Blocking Logic:

? Do not declare Final Completion or request retainage release until:

All punch list items in Sage CM are marked complete and verified

Architect/Owner signs final punch list

Supporting documentation (photos, sign-offs) is uploaded to OneDrive

Outputs/Deliverables:

Pre-Walk.pdf punch draft

Sage CM Punch Log (complete and verified)

Final_Punch_Signed.pdf

Field photos and subcontractor acknowledgments

Weekly punch list update email to CPO and Owner?s rep

[15.4] Owner Turnover Meeting and Document Delivery (Work Instruction) {#turnover-meeting}

Tools Used:

OneDrive, Sage CM, USB drives or physical binders, Teams, Microsoft Word

Objective:

To formally deliver the completed closeout package to the Owner, walk through key documents, and record Owner acknowledgment of all turnover materials. This ensures contractual fulfillment and sets the foundation for warranty support.

When to Perform:

After punch list is cleared

Once all documents in the Closeout Checklist are uploaded and verified

Who Performs This Task:

Project Manager (lead presenter)

Project Administrator (prepares documents and signs)

Project Executive (attends and confirms acceptance)

Step-by-Step Procedure

Schedule the Owner Turnover Meeting via Outlook/Teams.

Attach meeting invite with link to Projects > [Project Name] > 27. Closeout.

Prepare digital and physical turnover package:

Ensure Closeout Checklist shows 100% completion.

Copy digital files to USB drive (or cloud link).

Print hard copy binder if contractually required.

Prepare the Turnover_Signoff_Form.docx with date, project name, Owner rep name, and deliverables checklist.

Conduct the meeting:

Walk through Warranties, O&M Manuals, As-Builts, Training Logs.

Demonstrate location of files in OneDrive.

Discuss warranty coverage periods and points of contact.

Obtain Owner signature on Turnover Signoff Form.

Upload signed form to: Projects > [Project Name] > 27. Closeout > Turnover_Signoff_Form.docx.

Confirm delivery of USB or binder.

Update Master File Register to show delivery confirmation.

Blocking Logic

? Do not submit Final Pay App or release retainage until the Turnover Meeting is held and the Owner has signed the Turnover Signoff Form.

Outputs/Deliverables

Signed Turnover_Signoff_Form.docx

Digital Turnover Package uploaded to OneDrive

USB or Hard Copy Binder (if required)

Master File Register update showing turnover confirmation

[15.5] Final Pay Application and Retainage Release (Work Instruction) {#retainage-release}

Tools Used:

Sage CM, OneDrive, Microsoft Excel, Microsoft Word, Teams

Objective:

To verify that all contractual obligations are fulfilled and initiate the Final Pay Application and Retainage Release process in compliance with Devere's standards and Owner agreement.

When to Perform:

After Owner Turnover Meeting is completed

Once final punch list and all closeout deliverables are signed off

Who Performs This Task:

Project Manager (submission and verification)

Project Administrator (supporting documentation)

Finance (payment processing)

Step-by-Step Procedure

Confirm all blocking tasks in Sections 15.0 through 15.4 are complete.

Open latest Pay Application file from: Projects > [Project Name] > 07. Billing > PayApp_[Month].xlsx

Copy PayApp_[Month].xlsx and rename as Final_PayApp_[ProjectName].xlsx

Review:

All line items marked complete (100%)

Stored materials confirmed

Retainage field is populated correctly

Attach:

Signed Turnover_Signoff_Form.docx

Final Punch List Signoff PDF

Closeout Checklist.xlsx

Submit Final PayApp packet to Finance via Teams + upload to OneDrive: 07. Billing

Tag Finance and CPO to review and approve within 3 business days

Upon Finance approval, initiate retainage release payment request per contract terms

Log final payment entry in: Projects > [Project Name] > 23. Logs & Reports > Financials

Update Master File Register: add entry "Final PayApp Approved + Retainage Released"

Blocking Logic

? Do not initiate final payment unless:

Turnover Signoff and Final Punch List are signed

All required closeout deliverables are logged and uploaded

Finance and CPO have confirmed approval

Outputs/Deliverables

Final_PayApp_[ProjectName].xlsx

Final Pay Application Packet (OneDrive)

Finance Approval Log (Teams message or email)

Final Payment Logged in Financials Folder

Master File Register updated with Final Payment status

[15.6] Warranty Service and Post-Completion Support (Work Instruction) {#warranty-support}

Tools Used:

OneDrive, Sage CM > Warranty Module, Microsoft Outlook, Teams, Warranty_Log.xlsx

Objective:

To establish a clear and proactive process for responding to Owner warranty claims, conducting scheduled warranty check-ins, and ensuring all service issues are resolved and documented within the warranty period.

When to Perform:

As-needed during the 12?24 month warranty period

At scheduled 6-month, 12-month, and 18-month check-in intervals

Who Performs This Task:

Project Manager (primary contact)

Project Administrator (tracking and recordkeeping)

Site Manager or Field Technician (site visits and verification)

Warranty Vendor (if applicable)

Step-by-Step Procedure

Monitor Warranty Requests

Set up email alias or folder in Outlook: WarrantyRequests@[projectname].com

Review weekly for any new Owner communications or requests

Log each issue in Warranty_Log.xlsx with:

Date received

Description of issue

Affected system/vendor

Response actions and due date

Assign and Dispatch

PM or Admin notifies responsible vendor/subcontractor within 24 hours

For DMS scope (e.g., concrete, carpentry), assign internal field staff via Teams

Add ?Warranty Task? in Teams with assignee and deadline

Verify Completion

Field verify correction was made (photo if applicable)

Collect service report or vendor confirmation

Update Warranty_Log.xlsx and upload evidence to:

Projects > [Project Name] > 27. Closeout > Warranty > [Issue Name]

Scheduled Warranty Check-Ins

Create Outlook calendar reminders for:

6-month site review

12-month warranty audit

18-month final follow-up

PM or Site Manager visits project site

Review known issues, building systems, Owner feedback

Document each visit in:

Projects > [Project Name] > 27. Closeout > Warranty_Checkin_[Month].docx

Issue Final Warranty Closeout Summary

At 24 months or end of contractual warranty period:

Summarize all warranty claims and resolutions

Provide Owner with a digital PDF summary and closeout letter

Upload to:

27. Closeout > Warranty > Final_Warranty_Resolution.pdf

Blocking Logic

? Do not consider warranty period closed or mark project as archived until:

All open issues in Warranty Log are resolved and confirmed

Owner has received Final Warranty Closeout Summary

All 6-, 12-, and 18-month check-ins are documented

Outputs/Deliverables

Updated Warranty_Log.xlsx with resolution records

Issue-specific service reports and photos

Warranty_Checkin_[Month].docx files

Final_Warranty_Resolution.pdf delivered to Owner and saved to OneDrive

[15.7] Final Pay Application and Retainage Release (Work Instruction) {#final-payapp}

Tools Used:

Sage CM > Pay Applications Module, OneDrive > 27. Closeout > Pay Applications, Microsoft Word, Excel, Teams

Objective:

To submit and track the final pay application, including retainage release, once all closeout documentation and deliverables are complete and verified. This step confirms the Owner's financial closeout and allows final reconciliation with vendors and internal cost codes.

When to Perform:

After Owner Turnover Meeting is completed

Once punch list is fully signed and all required closeout documents are submitted

Who Performs This Task:

Project Manager (submission and communication)

Project Administrator (document prep and upload)

Finance (review and final invoice processing)

Step-by-Step Procedure

Verify Closeout Completion

Confirm the following are 100% complete:

Closeout Checklist

Turnover Signoff Form

Punch List (final signed version)

Warranty Log entry for Owner acknowledgment

All project files are archived in OneDrive

Prepare Final Pay Application Package

In Sage CM > Pay Applications, create new pay app entry

Include final stored materials, work completed, and total retainage due

Generate PDF and save to:

Projects > [Project Name] > 27. Closeout > Pay Applications > Final_PayApp.pdf

Prepare Final Invoice Letter

Open template Final_Invoice_Letter.docx from OneDrive > Templates

Populate with project name, Owner contact, amount due, and certification language

Save to:

Projects > [Project Name] > 27. Closeout > Pay Applications > Final_Invoice_Letter.docx

Submit to Owner

Send email to Owner with:

Final_PayApp.pdf

Final_Invoice_Letter.docx

Link to Turnover Package and Warranty Summary

CC: Project Executive, CPO, and Finance

Track Payment and Confirm Retainage Release

Monitor payment status with Finance

Upon payment, upload proof of payment to OneDrive and log final entry in Budget Control Action Plan

Blocking Logic

? Do not submit the Final Pay App unless:

Owner has signed the Turnover Signoff Form

Final Punch List is cleared and uploaded

All required documents are in OneDrive

Warranty Log is acknowledged by Owner

Outputs/Deliverables

Final_PayApp.pdf from Sage CM

Final_Invoice_Letter.docx

Email log of Owner submission

Proof of retainage payment

Updated Budget Action Plan

[15.8] Archiving Project Records and Final Documentation (Work Instruction) {#closeout-archive}

Tools Used:

OneDrive > 27. Closeout, Sage CM > Final Logs, Microsoft Excel, Word, Teams

Objective:

To formally close out and archive all project records in both Sage CM and OneDrive, ensuring complete traceability of documents for future warranty support, audits, and legal requirements.

When to Perform:

After final pay app and turnover are complete

Before Sage CM project deactivation

Who Performs This Task:

Project Administrator (lead archival)

Project Manager (final review and sign-off)

CPO (compliance check)

Step-by-Step Procedure

Review Closeout Checklist for Completion

Confirm that all tabs (Punch, Warranty, Submittals, Final Logs) are 100% complete.

Organize OneDrive Folders

Consolidate all documents into:

Projects > [Project Name] > 27. Closeout

Ensure folder structure matches: Documents, O&M, Warranties, Photos, Final Logs

Remove duplicates and rename all files to include date and document type

Finalize and Lock Sage CM Entries

Navigate to Sage CM > Closeout Module

Lock all punch items, final pay apps, and submittal logs

Confirm status is "Archived" in each relevant module

Prepare Final Archive Summary Log

Use Archive_Log_Template.xlsx from OneDrive > Templates

Fill out log with:

Document name, location, uploaded by, date, verification initials

Save to Projects > [Project Name] > 27. Closeout > Archive_Log.xlsx

Submit for Final Review and Signoff

Route archive log to PM and CPO for digital signature

Save signed log in same folder

Close Out Teams Channels and Planner Tasks

Move Teams project channels to "Archived" section

Mark all Planner tasks as complete

Blocking Logic

? Do not deactivate Sage CM project or remove project folders from OneDrive until:

Archive_Log.xlsx is completed and signed

All required documentation is in its correct final location

CPO has reviewed and approved archive log

Outputs/Deliverables

Archive_Log.xlsx (signed and verified)

Final folder structure in OneDrive > 27. Closeout

Sage CM project marked "Archived"

Teams/Planner project status changed to Archived/Complete

[15.9] Warranty Walks and Post-Completion Follow-Up (Work Instruction) {#warranty-walks}

Tools Used:

Sage CM > Warranty Log, OneDrive > 27. Closeout > Warranty, Teams, Microsoft Word

Objective:

To proactively manage warranty obligations through scheduled check-ins and final walkthroughs, ensuring all post-completion issues are documented, tracked, and resolved in compliance with contract terms.

When to Perform:

At 6-month, 12-month, and 18/24-month intervals following Substantial Completion

Any time a warranty claim or Owner issue is received

Who Performs This Task:

Project Manager (warranty coordination and resolution tracking)

Site Manager or CPO (final walkthroughs if Owner requests)

Step-by-Step Procedure

Create Warranty Walk Schedule

Upon Substantial Completion, establish reminder dates for 6-, 12-, and 24-month walkthroughs.

Schedule Teams calendar invites with Owner and internal staff.

Track Warranty Issues

Log all warranty items in Sage CM > Warranty Log with description, location, and responsible party.

Attach supporting documents (photos, submittals, correspondence).

Conduct Warranty Walks

Use Walk Log Template: OneDrive > Templates > Warranty_Walk_Form.docx

Walk site with Owner and note observations, deficiencies, and needed repairs.

Assign follow-ups to subcontractors and vendors with completion deadlines.

Upload and Review

Save each walk form to: Projects > [Project Name] > 27. Closeout > Warranty > [Date]_Walk.docx

PM to review all open issues weekly until resolved.

Confirm Resolution

Require completion photos and subcontractor closeout verification.

Update Sage CM > Warranty Log to show resolved/closed.

Submit Warranty Summary Report to Owner

After each walk, prepare and submit summary of issues and actions.

Archive in OneDrive and log delivery in Master File Register.

Blocking Logic

? Do not close out project or archive warranty folder until:

All scheduled warranty walks are documented

All issues are resolved or addressed with Owner

Summary reports are submitted and signed

Outputs/Deliverables

Warranty_Walk_Form.docx

Warranty_Log.xlsx (updated)

Resolution Photos and Sub Sign-Offs

Summary Report to Owner

Final archive entry in Master File Register

[16.0] Mentorship and Leadership Development (SOP) {#mentorship-development}

Tools Used:

OneDrive > 26. Continuous Improvement > Mentorship Logs

Microsoft Teams > Mentorship Channel

Microsoft Planner > Leadership Development Tracker

Sage CM > Daily Logs, Submittals, Issue Logs

Word, Excel

Escalation Path:

PM ? Project Executive ? CPO ? HR/Training Lead

Objective

To formally embed mentorship into Devere?s operational culture?developing next-generation leaders by pairing experienced PMs with high-potential field staff, reinforcing best practices, improving SOP literacy, and strengthening succession planning.

Definitions

Mentor PM: A Project Manager assigned to provide ongoing coaching, skill development, and leadership modeling to a mentee.

Mentee: A field employee (DMS Lead, Assistant PM, Site Manager) identified for leadership growth.

Mentorship Cycle: A defined 90-day structured development period between mentor and mentee.

Leadership Development Tracker: The Planner board used to log goals, touchpoints, and milestones for each mentee.

Step-by-Step Procedure

Identify Mentee Candidates

Quarterly, the CPO and Project Executives review:

Site Manager evaluations

CI contributions

Leadership behavior in field

Selected mentees logged to:

OneDrive > 26. Continuous Improvement > Mentorship Logs > Mentee_Candidates.xlsx

Assign Mentor PM

CPO matches PMs with mentees based on:

Project type experience

Personality fit

Proximity to site

Mentorship assignment email sent and logged in:

Planner > Leadership Development Tracker

Define Mentorship Goals

Mentor meets with mentee in first week:

Define 2?3 SMART goals (e.g., ?Run weekly subcontractor meetings by Week 6?)

Record in:

Mentorship_Goals_Template.docx > OneDrive > Mentorship Logs > [Mentee_Name].docx

Weekly Check-Ins

Mentor and mentee meet 30 minutes each week (Teams or in person)

Discuss:

What went well

Challenges faced

Review field logs or real-world examples

Notes documented and saved in mentee?s log folder

Monthly Touchpoint Summary

Mentor uploads:

Summary of progress

Evidence of development (e.g., site photos, meeting notes, SOV drafts)

Roadblocks or training needs

Stored in:

OneDrive > Mentorship Logs > [Mentee_Name] > Month_[X]_Summary.docx

Final Review at 90 Days

Mentor and CPO conduct closeout review:

Revisit goals

Assess growth, attitude, and readiness

Complete Mentorship_Completion_Form.docx and upload to:

Mentorship Logs > [Mentee_Name]

Blocking Logic

? Do not close out the mentorship cycle unless:

All 90-day goals are documented

Monthly summaries are submitted

Final review is held and signed off by mentor and CPO

Outputs/Deliverables

Mentee_Candidates.xlsx

Mentorship_Goals_Template.docx

Weekly Check-In Notes

Monthly Progress Summaries

Mentorship_Completion_Form.docx

Updated entry in Leadership Development Tracker (Planner)

Supporting Resources

Templates:

OneDrive > Templates > Mentorship

Mentorship_Goals_Template.docx

Mentorship_Completion_Form.docx

CI Thread:

Teams > CI Channel > Mentorship Highlights

[16.1] Mentor Assignment and Goal Planning (Work Instruction) {#mentor-assignment}

Tools Used:

OneDrive > 26. Continuous Improvement > Mentorship Logs

Microsoft Word > Mentorship_Goals_Template.docx

Microsoft Planner > Leadership Development Tracker

Microsoft Teams (Kickoff Meeting)

Objective:

To formally assign mentor-mentee pairs and define development goals that guide the 90-day mentorship cycle, ensuring alignment with Devere?s leadership standards and project demands.

When to Perform:

Within 7 days of mentee selection by the CPO and Project Executives

Who Performs This Task:

CPO (assigns mentors and reviews goals)

Assigned Mentor PM (primary planning and coaching role)

Mentee (participant)

Step-by-Step Procedure

Confirm Mentee Selection

CPO confirms eligible mentees using:

OneDrive > 26. Continuous Improvement > Mentorship Logs > Mentee_Candidates.xlsx

Assign Mentor PM

Match mentor based on:

Technical experience

Project compatibility

Leadership readiness

Update Microsoft Planner > Leadership Development Tracker:

Add task card: ?[Mentee Name] ? Mentorship Cycle Start?

Assign PM and CPO

Due date = 90 days from start

Schedule Kickoff Meeting

Mentor PM schedules Teams or in-person meeting

Agenda:

Discuss mentorship purpose and expectations

Align on availability for weekly check-ins

Begin SMART goal discussion

Download and Complete Goal Template

File path:

OneDrive > Templates > Mentorship_Goals_Template.docx

Capture the following:

2?3 SMART goals for growth

Strengths and development areas

Success indicators (e.g., "lead safety talk," "submit updated SOV")

Save and Log the Goals

Save to:

OneDrive > 26. Continuous Improvement > Mentorship Logs > [Mentee Name] > Goals.docx

Post summary note to Teams > Mentorship Channel:

?Mentorship kickoff completed for [Mentee Name]. Goals uploaded. Cycle start date: [XX/XX/2025].?

CPO Review

CPO reviews file and leaves feedback or approval in footer.

If goals are misaligned or weak, schedule 15-min sync to adjust.

Blocking Logic

? Do not proceed with weekly check-ins unless:

Kickoff meeting is completed

SMART goals are finalized and logged

CPO has approved or commented on the goals file

Outputs/Deliverables

Completed Mentorship_Goals_Template.docx

Updated card in Microsoft Planner

Kickoff summary in Teams > Mentorship Channel

CPO-reviewed goal file saved in mentee folder

[16.2] Weekly Mentor Check-Ins and Development Tracking (Work Instruction) {#mentor-checkins}

Tools Used:

Teams (Video or In-Person Check-In)

OneDrive > 26. Continuous Improvement > Mentorship Logs > [Mentee Name]

Word > Mentor_Checkin_Notes.docx

Planner > Leadership Development Tracker

Objective:

To conduct structured weekly check-ins between mentor and mentee, reinforcing development goals, accountability, and skill-building over the 90-day mentorship cycle.

When to Perform:

Once per week throughout the mentorship period (12?13 total sessions)

Who Performs This Task:

Assigned Mentor (leads session, tracks progress)

Mentee (participates, takes initiative)

CPO (mid-cycle and end-cycle review)

Step-by-Step Procedure

Schedule Recurring Meeting

Set weekly time in Teams calendar for 30-minute check-ins

Adjust around field conditions or deadlines as needed

Open Check-In Notes Template

Path:

OneDrive > Templates > Mentor_Checkin_Notes.docx

Save new file per session as:

OneDrive > 26. Continuous Improvement > Mentorship Logs > [Mentee Name] > Checkin_[Week #].docx

Conduct Weekly Session

Review current project responsibilities and any obstacles

Discuss SMART goal progress:

Milestones achieved

Support needed

Feedback from others (e.g., Site Manager, DMS leads)

Provide soft skills coaching (communication, proactivity, escalation)

Update Notes and Action Items

Complete check-in form with:

Weekly summary

Key accomplishments

Next steps or areas to work on

Upload finalized version to mentee?s mentorship folder

Mentor Feedback to CPO

Every 4th week (Weeks 4, 8, and 12), mentor sends short status note via Teams or email to CPO:

?Quick mentor update for [Mentee Name] ? Week [X]: [Progress Summary]?

Log Completion in Planner

Mark weekly check-in task as complete under:

Microsoft Planner > Leadership Development Tracker > [Mentee Name]

Blocking Logic

? Do not proceed to next cycle phase or graduate mentee unless:

Minimum 10 of 12 weekly check-ins are completed

Notes are uploaded for each session

CPO has received three milestone updates (Week 4, 8, 12)

Outputs/Deliverables

Checkin_[Week #].docx files stored in mentorship folder

Summary notes submitted to CPO (Weeks 4/8/12)

Weekly Planner updates marked complete

[16.3] 30/60/90 Day Goal Planning and Progress Reviews (Work Instruction) {#goal-planning}

Tools Used:

OneDrive > 26. Continuous Improvement > Mentorship Logs

30_60_90_Goals_Template.docx

Microsoft Teams > Mentor/Mentee Channel

Sage CM (for project-based performance indicators)

Planner > Leadership Development Tracker

Objective:

To establish and review SMART goals for each mentorship mentee at 30-, 60-, and 90-day milestones, aligning personal growth with Devere?s operational needs and tracking tangible outcomes.

When to Perform:

Day 1 (initial goal planning)

Day 30, 60, and 90 (review milestones and adjust)

Who Performs This Task:

Mentee (drafts and owns goals)

Mentor (reviews, refines, evaluates)

CPO (reviews at Day 60 and Day 90)

Step-by-Step Procedure

Download and Customize the Template

Path:

OneDrive > Templates > 30_60_90_Goals_Template.docx

Mentee fills in SMART goals across the three intervals:

30 Days: Immediate learning, SOP review, tools usage

60 Days: Intermediate skills, communication improvements

90 Days: Leadership behaviors, initiative, system mastery

Review with Mentor

Upload draft to:

OneDrive > 26. Continuous Improvement > Mentorship Logs > [Mentee Name] > Goals.docx

Review during Week 1 check-in and finalize

Track Goal Progress Weekly

During check-ins (see 16.2), reference goals and update current status

Formal 30/60/90 Day Reviews

At each milestone, mentor and mentee meet for a focused review

Update the Goals document with:

Status (Not Started, In Progress, Complete)

Notes on accomplishments or blockers

Signature line for both mentor and mentee

Submit to CPO

At Day 60 and Day 90, mentor uploads updated Goals doc and notifies CPO via Teams

Reflect and Close

At 90-day mark, mentor and mentee write closing summary in the Goals doc

Document is archived as part of the mentee?s Personnel folder

Blocking Logic

? Do not mark mentorship cycle ?Complete? unless:

All three milestone reviews are conducted and documented

Goals.docx shows progress with supporting commentary

CPO has reviewed Day 60 and 90 check-ins

Outputs/Deliverables

30_60_90_Goals_Template.docx (customized and signed)

Milestone summaries at 30, 60, and 90 days

Day 60 and 90 notifications to CPO

Archived final version in Personnel folder

[16.4] Peer Shadowing and Field Exposure Planning (Work Instruction) {#shadowing-exposure}

Tools Used:

OneDrive > 26. Continuous Improvement > Mentorship Logs

Shadowing_Schedule_Template.xlsx

Microsoft Teams > Mentor/Mentee Channel

Sage CM > Daily Log

Field Sign-In Sheets

Objective:

To provide mentees with structured field exposure and peer shadowing opportunities across multiple roles, ensuring well-rounded understanding of Devere?s operations, safety standards, and leadership expectations.

When to Perform:

Start planning in Week 1 of mentorship

Execute during Weeks 2?8 (shadowing sessions)

Wrap-up by Week 10

Who Performs This Task:

Mentor (plans and coordinates)

Mentee (participates and logs learnings)

Site Manager / DMS PM (hosts shadows)

CPO (approves schedule and verifies completion)

Step-by-Step Procedure

Create Shadowing Plan

Download template:

OneDrive > Templates > Shadowing_Schedule_Template.xlsx

Identify 3?5 key exposure opportunities based on mentee?s goals:

DMS PM (field crew leadership)

Site Manager (safety, scheduling)

Project Coordinator (documentation)

Superintendent (quality assurance)

Contract Compliance (sub engagement)

Fill out dates, hosts, topics to observe, and learning objectives

Coordinate with Hosts

Mentor contacts each host and confirms date/time availability

Add each shadowing session to:

Shadowing_Schedule_Template.xlsx

Teams calendar (invite mentee + host)

Conduct Shadowing Sessions

Mentee attends each session and brings printed Shadowing Notes sheet

Observe tasks, workflows, tools used, and role behavior

Ask questions at the end of the session

Take notes on key learnings and impressions

Document Learnings

After each session, mentee types notes and saves to:

OneDrive > 26. Continuous Improvement > Mentorship Logs > [Mentee Name] > Shadowing_Notes.docx

Include:

Date, Role, Host Name

What was observed

Key takeaways

How it relates to mentee goals

Review with Mentor

At weekly check-ins (see 16.2), discuss field learnings and how they influence growth goals

Adjust upcoming sessions as needed

Submit Completion Packet

Once all sessions are completed, upload:

Final Shadowing_Schedule_Template.xlsx

Shadowing_Notes.docx

Notify CPO via Teams > Mentorship Channel

Blocking Logic

? Do not consider mentorship field-ready unless:

At least 3 different shadowing roles are completed

Shadowing Notes are uploaded and reviewed

Schedule is signed off by the Mentor and acknowledged by the CPO

Outputs/Deliverables

Completed Shadowing_Schedule_Template.xlsx

Individual Shadowing Notes entries

Field exposure summary in weekly check-ins

Final upload to Mentorship Logs

Verification post to Teams by Mentor

[16.5] Structured Feedback and Evaluation Process (Work Instruction) {#mentorship-evaluation}

Tools Used:

OneDrive > 26. Continuous Improvement > Mentorship Logs

Mentorship_Evaluation_Form.docx

Microsoft Teams > Mentor/Mentee Channel

PM Scorecard (if applicable)

Objective:

Establish a structured, honest, and growth-oriented feedback loop between mentor and mentee to reinforce strengths, identify development areas, and align performance with Devere?s expectations.

When to Perform:

Midpoint Check-In: Week 5

Final Evaluation: Week 10

Optional follow-ups during ongoing project milestones

Who Performs This Task:

Mentor (completes and discusses feedback)

Mentee (self-reflection and action planning)

CPO (final review and confirmation)

Project Executive or CI Lead (optional observer)

Step-by-Step Procedure

Prepare Evaluation Form

Download template from:

OneDrive > Templates > Mentorship_Evaluation_Form.docx

Create a project-specific copy and save to:

OneDrive > 26. Continuous Improvement > Mentorship Logs > [Mentee Name] > Evaluation > Midpoint_Eval.docx and Final_Eval.docx

Midpoint Feedback Meeting (Week 5)

Mentor and mentee meet in person or via Teams

Complete Section A of Evaluation Form:

Communication

Initiative

Accountability

Field Awareness

CI Participation

Mentee completes self-assessment portion (Section B)

Mentor provides feedback and refines mentorship plan for second half

Save signed Midpoint Evaluation form to Evaluation folder

Final Evaluation (Week 10)

Repeat same process using Final_Eval.docx

Include:

Specific examples of growth

Areas needing continued coaching

Recommendation for next development step (e.g., stretch assignment, SOP writing, leadership opportunity)

Mentor and mentee sign and submit to CPO

Submit to CPO and Archive

Upload completed forms to:

OneDrive > 26. Continuous Improvement > Mentorship Logs > [Mentee Name] > Evaluation

Tag CPO in Teams > Mentor/Mentee Channel with summary

CPO logs feedback into mentee?s PM Scorecard or Performance File

Optional Team Feedback

Mentor may gather anonymous input from team members or Site Manager using:

Mentorship_360_Feedback_Form.xlsx (OneDrive > Templates)

Include in final evaluation if major themes emerge

Blocking Logic

? Do not mark mentorship complete unless:

Both Midpoint and Final Evaluations are submitted

Mentee self-reflection is included

CPO has reviewed and signed off

Actionable feedback and next steps are documented

Outputs/Deliverables

Midpoint_Eval.docx and Final_Eval.docx

Mentor and mentee self-assessments

Optional 360 Feedback form

Teams post to CPO

Scorecard update or performance log entry

[16.6] Mentorship Integration into SOP and CI Programs (Work Instruction) {#mentorship-ci-sop}

Tools Used:

OneDrive > 26. Continuous Improvement > SOP Feedback, Lessons Learned, Mentorship Logs

Teams > CI Channel > Feedback Threads

Microsoft Forms or Word Templates

Sage CM > Daily Logs > CI Highlights

Objective:

Ensure mentorship experiences contribute to institutional knowledge by integrating feedback, improvement ideas, and practical innovations into Devere?s SOPs, CI Spotlights, and training materials.

When to Perform:

After final mentorship evaluation

During quarterly CI or SOP review cycles

As relevant insights arise during the mentorship period

Who Performs This Task:

Mentor (primary contributor of observations)

Mentee (co-author of lessons or SOP feedback)

CPO (integration and approval)

CI Lead or PM Trainer (implementation into SOP or training)

Step-by-Step Procedure

Review Mentorship Outcomes

Open Final_Eval.docx from:

OneDrive > 26. Continuous Improvement > Mentorship Logs > [Mentee Name] > Evaluation

Identify any:

Practical improvements

Process gaps

Suggestions from mentee/mentor pair

Draft SOP Feedback or Lesson

Use SOP_Feedback_Form.docx or Lessons_Learned_Template.docx from Templates folder

Provide:

Section of SOP affected (if applicable)

Problem, recommendation, and field example

Supporting files or screenshots

Save to:

OneDrive > 26. Continuous Improvement > SOP Feedback > [Date]_[MenteeName].docx

or

... > Lessons_Learned > [Project]_Mentorship_Entry.docx

Submit and Notify

Post in Teams > CI Channel > Feedback Thread or Lessons Learned Thread

?Mentorship-Based SOP Feedback ? [Mentee Name] ? [Topic]?

Link to OneDrive file

Tag CPO and CI Lead

Optional: highlight in CI Roundtable or PM Meeting

CPO/CI Lead Review

CPO determines whether:

SOP update is required

Training material needs revision

Feedback becomes a CI Spotlight

CI Lead logs into SOP_Revision_Log.xlsx or Lessons_Learned_Log.xlsx

Implementation and Tracking

Revised SOPs saved to SOP Library

Training examples added to onboarding decks or workshops

Mentorship contributions recognized during CI Award nominations (if applicable)

Blocking Logic

? Do not archive mentorship files unless at least one SOP, lesson learned, or CI feedback entry is submitted for review.

Outputs/Deliverables

Completed SOP_Feedback_Form.docx or Lessons_Learned_Template.docx

Teams thread post and OneDrive link

Logged entry in SOP_Revision_Log.xlsx or Lessons_Learned_Log.xlsx

Updates to SOP Library or training decks

Optional: CI Spotlight nomination

[16.7] Mentorship Success Stories and Recognition (Work Instruction) {#mentorship-success}

Tools Used:

OneDrive > 26. Continuous Improvement > Mentorship Logs

Teams > CI Channel > Recognition Board

Microsoft Word, Forms, and Teams

OneDrive > 01. Administration > Company Announcements

Objective:

To celebrate impactful mentorship pairings and share success stories that reinforce Devere?s values of growth, excellence, and leadership development. This formal recognition promotes a culture of teaching, learning, and advancement.

When to Perform:

At the end of each formal mentorship cycle

During quarterly PM roundtables

As part of CI awards or end-of-project ceremonies

Who Performs This Task:

Mentor (submits summary)

Mentee (participates in reflection and quote)

CPO (review and endorsement)

CI Lead or PM Trainer (publication and archiving)

Step-by-Step Procedure

Prepare Success Summary

Download Mentorship_Success_Template.docx from:

OneDrive > Templates > Mentorship

Document the following:

Mentor/Mentee names and roles

Duration and focus of mentorship

Specific outcomes (skills gained, challenges overcome, promotions, innovations)

Quotes from both parties

Optional photo or team reference

Submit and Store

Save completed summary to:

OneDrive > 26. Continuous Improvement > Mentorship Logs > Success Stories > [MenteeName]_[Date].docx

Notify CI Lead and CPO via Teams message with file link

Post Recognition

CI Lead posts a summary excerpt and photo to:

Teams > CI Channel > Recognition Board

Title format: ?? Mentorship Spotlight ? [Mentee Name] & [Mentor Name]?

Optional: Feature in Company Announcement

CPO selects top mentorship stories quarterly for company-wide shareout

Upload summary PDF to:

OneDrive > 01. Administration > Company Announcements > Mentorship_Stories_[Q#].pdf

Include in All-Hands or CI Presentation

Blocking Logic

? Mentorship logs are considered incomplete unless a final Success Summary is submitted for at least one pairing per quarter.

Outputs/Deliverables

Mentorship_Success_Template.docx (filled)

Recognition post in Teams > CI Channel

Entry in Mentorship Logs > Success Stories

Optional: PDF in Company Announcements folder

Archive with CI Awards materials if nominated

[16.8] SOP Integration of Mentorship Feedback (Work Instruction) {#mentorship-sop-feedback}

Tools Used:

OneDrive > 26. Continuous Improvement > Mentorship Feedback

Teams > PM Roundtable Channel

Microsoft Word, Excel, and Forms

SOP_Revision_Log.xlsx

Objective:

To formally capture feedback from mentorship participants that identifies unclear, outdated, or missing SOP guidance?ensuring Devere?s operating procedures evolve with real-world learning from the field.

When to Perform:

After each mentorship cycle or project milestone

When mentees identify knowledge gaps during SOP training

As part of Lessons Learned or CI Spotlights

Who Performs This Task:

Mentee (initiates submission)

Mentor (reviews/validates submission)

CPO (reviews, accepts/rejects feedback)

CI Lead (tracks and logs updates)

Step-by-Step Procedure

Access Feedback Form

Navigate to:

OneDrive > 26. Continuous Improvement > SOP Feedback

Use: Mentorship_SOP_Feedback_Form.docx or internal Microsoft Form

Document Mentorship-Sourced Feedback

Complete form with:

SOP Section affected (e.g., 2.3 or 10.4)

Problem observed (unclear wording, missing step, outdated instruction)

Real-world example from mentorship context

Proposed correction or improvement

Comments from both mentee and mentor

Submit and Notify

Save to:

OneDrive > 26. Continuous Improvement > Mentorship Feedback > [MenteeName]_SOPFeedback_[Date].docx

Tag CPO and CI Lead in Teams > PM Roundtable Channel with summary and link

Review and Track

CPO determines if feedback is:

Critical (immediate update needed)

Informational (scheduled SOP review)

Invalid (no action needed)

Accepted feedback is logged in SOP_Revision_Log.xlsx under:

OneDrive > 26. Continuous Improvement > SOP Revision Log

Integrate into SOP

Assigned PM revises SOP draft if accepted

Version updated and posted to SOP Library

Notification sent in Teams > PM Roundtable Channel

Blocking Logic

? Do not close out mentorship pairings without verifying if any SOP feedback arose during the cycle.

Outputs/Deliverables

Completed Mentorship_SOP_Feedback_Form.docx

Teams post with link and summary

Log entry in SOP_Revision_Log.xlsx

Updated SOP version in SOP Library (if accepted)

[16.9] Mentorship Legacy and Retention of Institutional Knowledge (Work Instruction) {#mentorship-legacy}

Tools Used:

OneDrive > 26. Continuous Improvement > Mentorship Archives

Teams > PM Roundtable Channel > Mentorship Reflections

Microsoft Word, PowerPoint, Excel

Training Library > Legacy Playbooks

Objective:

To preserve valuable insights, lessons, and best practices gained through Devere?s mentorship program, transforming them into lasting institutional knowledge accessible to future project teams and new hires.

When to Perform:

At the conclusion of each formal mentorship cycle

During Lessons Learned reviews or post-project reflections

When notable field lessons, cultural stories, or project strategies emerge

Who Performs This Task:

Mentee (writes initial reflection)

Mentor (adds legacy notes and technical references)

CI Lead (curates and archives)

CPO (approves for training use or SOP addition)

Step-by-Step Procedure

Submit Mentorship Reflection

Mentee writes a 1-page summary covering:

Most valuable lesson learned

Key mistakes and corrections

?What I wish I knew? moments

Career or leadership development moments

Use:

Mentorship_Legacy_Template.docx from OneDrive > Templates

Add Mentor Notes

Mentor appends:

Context from the field

References to SOPs, safety lessons, technical standards

Leadership takeaways or long-term strategies

Final file saved as:

OneDrive > 26. Continuous Improvement > Mentorship Archives > [Mentor-Mentee]_[Date]_Legacy.docx

Review and Approval

CI Lead reviews and summarizes in tracker:

Mentorship_Legacy_Log.xlsx

CPO reviews for:

Internal publication in PM Roundtable

Integration into training decks or SOP footnotes

Annual ?Mentorship Spotlight? recognition

Upload to Training Library

Approved submissions archived to:

OneDrive > Training Library > Legacy Playbooks

Categorized by:

Division (Earthwork, Concrete, GC)

Theme (Safety, Budgeting, Field Ops)

Mentor/Mentee pairing

Notify and Share

Post Teams message in PM Roundtable Channel with:

Title: ?New Mentorship Legacy Entry ? [Mentor/Mentee]?

Lessons in bullet form

Link to file or Playbook entry

Blocking Logic

? Do not delete any mentorship documentation until it has been reviewed for legacy value by the CI Lead or CPO.

Outputs/Deliverables

Completed Mentorship_Legacy_Template.docx

Mentor-authored additions

Archived entry in Mentorship Archives

Mentorship_Legacy_Log.xlsx updated

Optional: Playbook slide or SOP excerpt created

[17.0] Project Manager Mentorship and Knowledge Transfer (SOP) {#pm-mentorship}

Tools Used:

OneDrive > 01. Administration > Mentorship

Teams > PM Mentorship Channel

Sage CM > Project Logs, Lessons Learned

Microsoft Word/Excel, Forms

Escalation Path:

CPO ? Trainer ? Senior PM ? Junior PM

Objective

To establish a structured mentorship and knowledge transfer program for Project Managers (PMs) at Devere Construction, ensuring new or junior PMs receive the experience, guidance, and tools needed to deliver high-performance projects.

Definitions

Mentorship Pairing: A formal assignment of a senior PM to a new or junior PM for a defined period of project overlap or onboarding.

Knowledge Transfer Session (KTS): A planned 30?60 minute session where senior PMs walk through actual project strategies, lessons learned, or tools in use.

Mentorship Log: A documented record of meetings, topics, and milestones reached in the PM mentorship program.

Step-by-Step Procedure

Identify Mentorship Need

Upon PM hire, promotion, or reassignment, CPO triggers mentorship pairing.

Add entry to: OneDrive > 01. Administration > Mentorship > PM_Mentorship_Log.xlsx

Assign Mentor

Match based on discipline, region, or recent project experience.

Send pairing notice in Teams > PM Mentorship Channel.

Establish Schedule

Kickoff meeting within 5 business days.

Set weekly or bi-weekly mentorship meetings (Teams or in-person).

Use Mentorship Template

Download PM_Mentorship_Template.docx from: OneDrive > Templates > Mentorship

Topics: Scheduling, Subcontractor Coordination, Cost Reports, Closeout, CI Spotlights

Conduct Sessions

Senior PM shares real-world project examples.

Junior PM prepares questions, brings reports for feedback.

Each session logged in PM_Mentorship_Log.xlsx

Midpoint Check-In

CPO schedules midpoint check-in to evaluate engagement and value.

Update PM_Mentorship_Evaluation_Form.docx

Final Review and Knowledge Transfer Summary

Senior PM completes Mentorship_Completion_Report.docx

Junior PM submits Key_Takeaways_Form.docx

Both archived to: OneDrive > 01. Administration > Mentorship > Completed

Blocking Logic

? Do not assign Junior PM to lead a project solo until:

Minimum of 3 Mentorship Sessions logged

Completion Report submitted and reviewed by CPO

Key Takeaways Form submitted

Outputs/Deliverables

PM_Mentorship_Log.xlsx

Mentorship_Completion_Report.docx

Key_Takeaways_Form.docx

Midpoint Evaluation Summary

Archived session notes and forms

[17.1] Mentorship Kickoff and Goal Setting (Work Instruction) {#mentorship-kickoff}

Tools Used:

OneDrive > Templates > PM_Mentorship_Template.docx

Teams > PM Mentorship Channel

OneDrive > 01. Administration > Mentorship > PM_Mentorship_Log.xlsx

Objective:

To formally launch each PM mentorship pairing with clear expectations, personalized learning goals, and scheduled sessions that support professional growth and successful project delivery.

When to Perform:

Within 5 business days of assignment of a new PM or reassignment to a new market/project type

Who Performs This Task:

Senior Project Manager (mentor)

Junior Project Manager (mentee)

CPO (oversight and kickoff monitoring)

Step-by-Step Procedure:

Schedule Kickoff Meeting

Mentor and mentee set a Teams or in-person meeting.

Notify CPO of scheduled time in Teams > PM Mentorship Channel.

Download Kickoff Template

From OneDrive > Templates > PM_Mentorship_Template.docx

Rename and save to: OneDrive > 01. Administration > Mentorship > Active_Pairings > [Mentor]_[Mentee]_Kickoff.docx

Define Goals and Expectations

Identify key project types the mentee will manage in the next 6?12 months.

Select 3?5 high-impact learning goals (e.g., advanced scheduling, subcontract buyout, closeout readiness).

Log in kickoff template.

Assign Homework

Mentee to review specific SOP sections (e.g., Scheduling, Safety, Closeout) and bring questions to next session.

Assign first CI Spotlight or Daily Report for peer review.

Log Pairing

Add entry to PM_Mentorship_Log.xlsx with mentor, mentee, date, goals, and scheduled check-in.

Submit Kickoff Packet

Upload completed kickoff file to:

OneDrive > 01. Administration > Mentorship > Active_Pairings

Notify CPO and Trainer in Teams thread.

Blocking Logic

? Do not proceed with formal mentorship sessions unless:

Kickoff file is completed and uploaded

Learning goals are documented

First deliverables (e.g., CI Spotlight draft) are assigned

Outputs/Deliverables:

Completed PM_Mentorship_Template.docx (Kickoff version)

Logged entry in PM_Mentorship_Log.xlsx

CI Spotlight or SOP Review assignment

CPO notification post in Teams

[17.2] Ongoing PM Mentorship Sessions and Progress Tracking (Work Instruction) {#mentorship-sessions}

Tools Used:

OneDrive > 01. Administration > Mentorship > Active_Pairings

Microsoft Teams > PM Mentorship Channel

Sage CM > User Activity Logs (optional review support)

OneDrive > PM_Mentorship_Log.xlsx

Objective:

To maintain structured, recurring mentorship between senior and junior PMs, ensuring steady development in technical, administrative, and leadership skills through targeted check-ins and milestone reviews.

When to Perform:

Biweekly (minimum) mentorship sessions for first 90 days

Monthly check-ins afterward (minimum 6-month mentorship duration)

Who Performs This Task:

Senior Project Manager (mentor)

Junior Project Manager (mentee)

CPO or Trainer (review progress every 60 days)

Step-by-Step Procedure:

Schedule Recurring Mentorship Meetings

Create Teams recurring invite for 1-hour biweekly sessions (Weeks 1?12).

Adjust frequency to monthly after 90-day milestone.

Set Session Topics

Use topics from Kickoff Goals or PM_Mentorship_Template.docx.

Rotate through focus areas such as:

Submittal workflows

Budget forecasting

Owner communication

Sage CM best practices

Lessons learned log entries

Change order processing

Document Progress

Mentor completes a quick recap after each session in:

OneDrive > 01. Administration > Mentorship > Active_Pairings > [Mentor]_[Mentee]_Progress.docx

Update summary status in PM_Mentorship_Log.xlsx.

Assign Stretch Tasks

Assign real-world deliverables tied to project needs, such as:

Drafting a subcontract

Scheduling an Owner meeting

Uploading O&M closeout documentation

Log completion in Progress Doc.

Submit 60-Day Progress Snapshot

Mentor submits 1-paragraph narrative to CPO/Trainer at 60-day mark.

Upload to same pairing folder.

Blocking Logic

? Mentorship cannot be marked "Active" unless:

Progress doc is updated at least monthly

Biweekly sessions have occurred for first 90 days

Stretch tasks are logged

Outputs/Deliverables:

[Mentor]_[Mentee]_Progress.docx

Updated PM_Mentorship_Log.xlsx

Stretch task records

60-Day narrative snapshot

[17.3] PM Mentor Feedback and Escalation Protocol (Work Instruction) {#mentor-feedback}

Tools Used:

OneDrive > 01. Administration > Mentorship > Feedback

Teams > PM Mentorship Channel

Microsoft Forms or Word Feedback Template

OneDrive > PM_Mentorship_Log.xlsx

Objective:

To ensure that both mentors and mentees can confidentially share feedback on the mentorship relationship, flag issues, and request adjustments or intervention if the pairing is ineffective.

When to Perform:

After 30 days (initial feedback checkpoint)

After 90 days (midpoint review)

At mentorship conclusion

Anytime significant concerns arise

Who Performs This Task:

Project Manager (mentor or mentee)

CPO or PM Trainer (review, escalation, reassignment)

Step-by-Step Procedure:

Complete Feedback Form

Use the PM Mentorship Feedback Form:

OneDrive > Templates > PM_Mentorship_Feedback.docx

Capture:

Communication effectiveness

Relevance and value of sessions

Suggestions for improvement

Any issues (scheduling, lack of engagement, etc.)

Submit and Archive

Upload completed form to:

OneDrive > 01. Administration > Mentorship > Feedback > [Mentor]_[Mentee]_Feedback.docx

If using Microsoft Forms, results auto-log to tracker.

Notify Oversight Team

Tag CPO and Trainer in Teams > PM Mentorship Channel

Include summary:

?Feedback submitted for [Mentor] & [Mentee] ? [Date]?

Escalation (if necessary)

If issues include lack of participation, mismatch of skills, or failed outcomes:

Schedule private follow-up between CPO and both parties

Determine if reassignment or additional support is needed

Document decision in PM_Mentorship_Log.xlsx

Blocking Logic

? Mentorship cannot be marked ?Complete? unless:

Feedback has been received from both mentor and mentee

Issues (if raised) are resolved or reassignment has occurred

Outputs/Deliverables:

Completed PM_Mentorship_Feedback.docx

Teams notification

PM_Mentorship_Log.xlsx updated with resolution or closure

Optional: Reassignment memo or support action plan

[17.4] PM Mentor Recognition and Continuous Improvement (Work Instruction) {#mentor-recognition}

Tools Used:

OneDrive > 01. Administration > Mentorship > Recognition

Teams > PM Mentorship Channel

OneDrive > 26. Continuous Improvement > PM Endorsements

Microsoft Word and Excel

Objective:

To formally recognize high-performing mentors who contribute to PM development and embed mentorship lessons into Devere?s Continuous Improvement (CI) system to raise organizational standards.

When to Perform:

At the conclusion of a mentorship cycle

During quarterly PM Roundtable sessions

When a mentor is nominated for a CI Spotlight or award

Who Performs This Task:

Mentee (nominator)

CPO or PM Trainer (review and recognition issuance)

CI Lead (logs and tracks integration into CI)

Step-by-Step Procedure:

Nominate Mentor for Recognition

Mentee completes recognition template:

OneDrive > Templates > Mentor_Recognition_Nomination.docx

Include:

Specific lessons or support given

Impact on mentee?s development or project performance

Suggested recognition (Spotlight, bonus, certificate, etc.)

Submit Nomination

Save file to:

OneDrive > 01. Administration > Mentorship > Recognition > [MentorName]_Nomination.docx

Tag CPO and CI Lead in Teams > PM Mentorship Channel

Evaluate and Recognize

CPO reviews nomination and determines:

Approval of recognition level

Public or private acknowledgment

CI Spotlight presentation (if applicable)

Log in CI System

CI Lead updates:

OneDrive > 26. Continuous Improvement > PM Endorsements

Adds row in Endorsement Log: Mentor Name, Date, Impact Summary, Linked Document

If integrated into CI Spotlight, save presentation file in:

CI Spotlights > [Mentor]_CI_Impact.pptx

Issue Recognition

Prepare:

Recognition Certificate (Word Template)

CI Spotlight invite or presentation

Optional bonus memo (subject to approval)

Present during PM Roundtable or CI Monthly Spotlight

Blocking Logic

? Do not archive mentorship folder until:

Mentor recognition has been reviewed

Endorsement is logged in CI system

CI materials are uploaded (if applicable)

Outputs/Deliverables:

Mentor_Recognition_Nomination.docx

CI Endorsement Log Entry

CI Spotlight File (if triggered)

Recognition Certificate or Memo

Teams post to PM Mentorship Channel

[17.5] Capturing Mentorship Lessons into SOPs and Training (Work Instruction) {#mentor-to-sop}

Tools Used:

OneDrive > 26. Continuous Improvement > Lessons_Learned

OneDrive > 01. Administration > Mentorship > Session_Notes

Teams > PM Mentorship Channel

SOP_Revision_Log.xlsx

Microsoft Word and Forms

Objective

To ensure practical lessons, field solutions, and role-based improvements surfaced during mentorship are institutionalized into Devere?s SOPs and training content for long-term value.

When to Perform:

After completion of each mentorship cycle

During quarterly PM Roundtable or CI Review

Upon discovery of repeatable best practices or SOP gaps

Who Performs This Task:

Mentor (primary content source)

Mentee (co-author or documenter)

CI Lead and CPO (SOP integration and review)

Step-by-Step Procedure:

Review Mentorship Session Notes

Go to:

OneDrive > 01. Administration > Mentorship > Session_Notes > [PM Name]

Identify:

Workarounds or improvements shared

Communication or workflow fixes

Leadership and planning strategies that are not yet in SOPs

Draft Lessons Learned Entry

Use template from:

OneDrive > Templates > Lessons_Learned_Template.docx

Include:

Context of issue

Solution or process adopted

Impacts on cost, safety, quality, or scheduling

Suggested SOP section to revise

Save to:

OneDrive > 26. Continuous Improvement > Lessons_Learned > [MentorName]_[Topic].docx

Notify CPO and CI Lead

Post in Teams > PM Mentorship Channel:

?Mentorship SOP Entry ? [Topic] ? [MentorName] ? [Project Name]?

Link file location and tag CPO

CPO Review and SOP Routing

CPO determines:

Immediate SOP update

Future roundtable discussion

Pilot testing before rollout

If approved:

Add to SOP_Revision_Log.xlsx

Assign SOP owner for update

Integrate into SOP or Training Deck

Final version is saved in:

OneDrive > SOP Library > Updated_SOPs

If relevant to onboarding:

Add to PM Onboarding Deck or CI Workshop Deck

Log update in:

OneDrive > 01. Administration > Training > PM_Training_Log.xlsx

Blocking Logic

? Do not close mentorship records or log cycle as ?complete? until:

At least one validated lesson has been submitted for SOP/training integration

CPO has reviewed and responded to all SOP-impacting insights

Outputs/Deliverables:

Lessons_Learned_Template.docx (filled out)

Teams post with notification and file link

Entry in SOP_Revision_Log.xlsx

Updated SOP document (if triggered)

Training Deck revision (if applicable)

[17.6] Cross-Training PMs on Mentorship Lessons (Work Instruction) {#pm-cross-training}

Tools Used:

OneDrive > 01. Administration > Training > PM_Training_Log.xlsx

OneDrive > 26. Continuous Improvement > Lessons_Learned

Teams > PM Roundtable Channel

Microsoft Word, PowerPoint, Forms

Sage CM (for real project examples)

Objective

To ensure mentorship-derived insights are shared across the broader PM group to elevate collective knowledge, standardize improvements, and reinforce field-tested practices.

When to Perform:

After each mentorship cycle concludes

During quarterly PM Roundtable meetings

When SOPs or training decks are updated with mentorship content

Who Performs This Task:

Mentor (facilitator or presenter)

CI Lead (training coordinator)

CPO (approver and moderator)

Step-by-Step Procedure:

Identify Mentorship Lessons for Broader Use

CI Lead and CPO review completed mentorship cycle notes and Lessons Learned.

Select 1?3 key insights that have broad application or process improvement impact.

Develop Training Materials

Use the CI Spotlight Template or Training Slide Template:

OneDrive > Templates > Training_Slide_Template.pptx

Include:

Scenario from project

Mentor/Mentee story

Before vs. After results

Lesson and SOP reference

Recommendations for others

Schedule Cross-Training Session

Add session to next PM Roundtable agenda

Create Teams invite: PM Roundtable Channel ? Add ?Mentorship Training Spotlight?

Optionally record the session for onboarding use

Deliver and Facilitate Discussion

Mentor or CI Lead presents materials

CPO facilitates Q&A, asks how others might apply the insight

Gather feedback in MS Forms or by poll

Update Training Logs and Materials

Save training slide or video recording to:

OneDrive > 01. Administration > Training > Mentorship_Spotlights

Log event in:

PM_Training_Log.xlsx

If content triggers SOP revision, ensure entry is made in SOP_Revision_Log.xlsx

Blocking Logic

? Do not finalize mentorship documentation cycle until:

At least one cross-training session has been held

Related content has been shared in Teams or archived

PM group feedback has been documented

Outputs/Deliverables:

PM mentorship training slides or video

Event logged in PM_Training_Log.xlsx

Teams Roundtable post with feedback summary

Updates to SOPs or training decks (if applicable)

[17.7] PM Mentorship Impact Evaluation and Feedback Loop (Work Instruction) {#pm-mentorship-impact}

Tools Used:

OneDrive > 01. Administration > Training > Mentorship_Impact_Tracker.xlsx

Teams > PM Roundtable Channel

Microsoft Forms (Mentorship Feedback Survey)

Sage CM > Project Logs (to review before/after performance)

OneDrive > Personnel > [PM Name] > Mentorship Feedback

Objective

To formally evaluate the outcomes of PM mentorship relationships and continuously improve the program by analyzing feedback, project performance, and skill development metrics.

When to Perform:

At the conclusion of each 90-day mentorship cycle

After major milestones (e.g., first estimate, closeout, buyout)

During quarterly performance reviews or training audits

Who Performs This Task:

Mentor (provides performance observations)

Mentee (completes self-assessment)

CPO (reviews impact and adjusts program)

CI Lead (tracks results and trends)

Step-by-Step Procedure:

Distribute Mentorship Feedback Surveys

Send Microsoft Forms survey links to both Mentor and Mentee

Link saved at: OneDrive > Templates > Mentorship_Feedback_Survey_Forms.docx

Collect qualitative and quantitative feedback on:

Communication quality

Skills improved

Key lessons

Suggestions for program improvement

Analyze Project and SOP Contributions

Review mentee?s projects for quality or procedural improvements during mentorship

Look for:

New SOP feedback submissions

Enhanced documentation quality

Timely reporting

Fewer compliance reminders

Log Feedback and Scores

Enter mentor/mentee reflections and survey scores into:

Mentorship_Impact_Tracker.xlsx

Categorize results by improvement area (e.g., Scheduling, Safety, Budgeting)

Hold Impact Review Meeting (Optional)

If major issues or breakthrough growth is reported, hold 15-minute impact debrief

Invite CPO, Mentor, and Mentee

Discuss how to apply learnings to future pairings or SOPs

Update Personnel and Program Records

Save survey PDF exports and summaries in:

OneDrive > Personnel > [PM Name] > Mentorship Feedback

Review during PM?s next quarterly scorecard or training check-in

Add anonymized insights to PM Roundtable slide if broadly useful

Blocking Logic

? Do not close mentorship cycle until:

Both surveys are submitted

Impact data is logged

Any flagged issues are addressed or debriefed

Outputs/Deliverables

Completed mentor and mentee surveys (MS Forms export or Word version)

Mentorship_Impact_Tracker.xlsx updated

Archived feedback folder entry

Optional slide for PM Roundtable if impact was significant

[17.8] PM Mentorship Recognition and Advancement Pathways (Work Instruction) {#pm-mentorship-recognition}

Tools Used:

OneDrive > Personnel > [PM Name] > Mentorship Records

OneDrive > 01. Administration > Training > Advancement_Tracker.xlsx

Teams > CI Channel > Recognition Board

Microsoft Word > Promotion_Nomination_Form.docx

Devere HR Portal

Objective

To formally recognize impactful PM mentorship efforts and translate outstanding mentorship contributions into leadership advancement opportunities, bonuses, or awards?reinforcing Devere?s culture of peer development.

When to Perform:

At the end of each mentorship cycle

During PM Quarterly Performance Reviews

Upon observed impact worthy of advancement or recognition

Who Performs This Task:

Chief Process Officer (CPO)

PM?s Direct Supervisor or Project Executive

Contract Compliance or CI Lead (optional contributor)

HR Department (if promotion/pay grade involved)

Step-by-Step Procedure

Evaluate Mentor Impact

Review mentor?s:

Mentee growth indicators (feedback, project quality, SOP usage)

Number of mentorship cycles completed

Contributions to SOP feedback or onboarding tools

Feedback from mentees in Mentorship_Impact_Tracker.xlsx

Prepare Recognition Summary

Use Promotion_Nomination_Form.docx located at:

OneDrive > Templates > Promotion_Nomination_Form.docx

Include:

Mentor Name and Role

Summary of impact across projects

Notable training contributions

Feedback excerpts from mentees or PM Roundtable

Submit for Recognition or Advancement Review

Upload completed form to:

OneDrive > Personnel > [PM Name] > Mentorship Records

Add candidate to:

Advancement_Tracker.xlsx under Mentorship Impact category

Notify CPO and HR for review cycle inclusion

Post in CI Recognition Board

Post appreciation in Teams > CI Channel > Recognition Board

Tag mentor, CPO, and mentees involved

Use this format:

"Mentorship Recognition ? [PM Name] ? [Highlight]"

"[Short description of impact and projects supported.]"

Advance Review and Outcome

CPO and HR evaluate eligibility for:

Bonus or raise

Promotion or tier advancement

Future leadership training eligibility

Decisions logged in:

OneDrive > Personnel > [PM Name] > Performance_Reviews > Mentorship_Outcome.docx

Blocking Logic

? Do not nominate a mentor for advancement without:

Documented mentee impact

Completed feedback records

Alignment with Devere values (Excellence, Discipline, Truth, Safety)

Outputs/Deliverables

Completed Promotion_Nomination_Form.docx

Recognition post in Teams > CI Channel

Updated Advancement_Tracker.xlsx

Logged decision in Mentorship Outcome File

Optional bonus or advancement recommendation

[17.9] PM Mentorship Legacy Documentation and Knowledge Transfer (Work Instruction) {#pm-mentorship-legacy}

Tools Used:

OneDrive > 26. Continuous Improvement > Mentorship_Legacy

OneDrive > Personnel > [PM Name] > Mentorship Records

Teams > CI Channel > Legacy Shares

Microsoft Word > Mentor_Legacy_Log_Template.docx

Sage CM > Linked SOP Notes or Daily Logs (optional)

Objective

Ensure Devere PM mentors leave behind a documented legacy of practices, innovations, and teachings that can be passed on to future PMs, improving continuity, training, and leadership development.

When to Perform:

At the end of each mentorship cycle

Upon reassignment, promotion, or project closeout

Annually as part of PM performance development

Who Performs This Task:

Project Manager (mentor)

CPO (review and archival)

CI Lead (trend review and curriculum integration)

Step-by-Step Procedure

Download Mentor Legacy Log Template

Location:

OneDrive > Templates > Mentor_Legacy_Log_Template.docx

Complete the Log

Include:

Mentor Name, Mentee(s), and Dates

Key coaching topics (e.g., buyout, budget setup, RFI workflow)

Field strategies or innovations shared

Lessons, quotes, or SOP recommendations made

Links to supporting documents or photos in OneDrive

Summary reflection: "If I could pass on one thing to the next PM..."

Submit for Legacy Archive

Save completed log to:

OneDrive > 26. Continuous Improvement > Mentorship_Legacy > [PM Name]_Legacy_Log.docx

Link to mentee training logs (if applicable)

Tag CI Lead and CPO in Teams > CI Channel > Legacy Shares

Integrate into Training and CI

CI Lead reviews content for:

Inclusion in future PM onboarding

SOP revisions (flag via SOP_Revision_Log.xlsx)

CI Spotlights or toolbox talks

Legacy quotes or highlights may be shared in new PM welcome decks

Blocking Logic

? Do not close out mentorship records or mark mentee ?graduated? until:

Mentor Legacy Log is submitted

All OneDrive documentation links are valid

Log is acknowledged by CI Lead

Outputs/Deliverables

Completed Mentor_Legacy_Log_Template.docx

Linked OneDrive documentation

Teams CI Legacy Share Post

Flagged SOP or Training updates (if applicable)

Entry in Mentorship_Legacy Archive Folder

[18.0] PM Training and Development (SOP) {#pm-training-development}

Tools Used:

OneDrive > 01. Administration > Training > PM Training Decks

Teams > Training Channel

Microsoft Word, Excel, PowerPoint

Sage CM > Role-Based Training Modules

Microsoft Planner > Training Calendar

GoCodes (if asset-related training applies)

Escalation Path:

Trainer ? PM ? Project Executive ? CPO

Objective

Establish a structured and continuously evolving training program for Devere Project Managers that ensures mastery of SOPs, systems, compliance, and leadership expectations through onboarding, ongoing learning, and role-based development.

Definitions

PM Onboarding ? Structured training plan completed before a PM runs solo projects.

Training Deck ? Slide deck or file that includes SOP walkthroughs, tools training, test cases, and jobsite expectations.

CI Feedback Loop ? Systematic process for gathering real-time process feedback from PMs and applying it to future SOP versions.

Training Tracker ? Centralized log of all PM trainings and certifications (by topic/date/status).

Live Project Shadowing ? Mentored field experience for new PMs or cross-trained staff.

When to Perform

During new hire or internal promotion

Annually for role refreshers or compliance updates

Post-performance review if additional training is required

Upon any major SOP revision or system upgrade

Who Performs This Task

Trainer (primary facilitator)

CPO (content owner and reviewer)

Project Executive (mentor/checkpoint lead)

Project Manager (trainee)

Step-by-Step Procedure

Initiate PM Onboarding Packet

Download template from OneDrive > Templates > PM_Onboarding_Tracker.xlsx

Customize to role, project type, and PM experience

Add trainee to Microsoft Planner > Training Calendar

Deliver Training Decks and Materials

Assign modules by topic (Safety, Submittals, Budgeting, Scheduling, Sage CM, OneDrive, GoCodes)

Deliver in Teams Channel or via scheduled video calls

Log assignments in Tracker

Assign Shadow Project and Mentor

Select ongoing Devere project with experienced PM

Assign shadow tasks: Meeting minutes, submittal uploads, schedule updates

Mentor PM logs weekly feedback

Issue Practice Tests and Field Simulations

Use past job issues (schedule delays, closeout failures) as roleplay cases

Score performance and provide feedback

Store tests in OneDrive > 01. Administration > Training > Completed_Assessments

Review Training Completion and Sign-Off

Confirm all training topics are complete in Tracker

Conduct final review meeting with CPO and Project Executive

Archive sign-off sheet and training artifacts

Ongoing Training and CI Loop

Monthly CI Roundtable participation

Submit SOP feedback forms as required in 13.8

Refresh training every 12 months or upon system change

Blocking Logic

? Do not assign PM to independently run a project unless:

Training Tracker is complete and verified

Shadow project performance was successful

Training assessments are passed

Final review is logged and archived

Outputs/Deliverables

PM_Onboarding_Tracker.xlsx

Completed Training Decks and Videos

Shadow Project Logs and Mentor Feedback

Practice Test Results

Final Sign-Off Form

Archived Training Records in OneDrive

Supporting Resources

PM Training Templates: OneDrive > Templates > PM Training

CI Feedback Forms: OneDrive > 26. Continuous Improvement > SOP Feedback

Planner Calendar: Microsoft Planner > Training Calendar

Sage CM Help Site:

Devere CI Spotlights: OneDrive > 26. Continuous Improvement > CI Spotlights

Microsoft Learn for Teams, Excel, Word:

[18.1] PM Onboarding Tracker and Role Assignment (Work Instruction) {#pm-onboarding-tracker}

Tools Used:

OneDrive > Templates > PM_Onboarding_Tracker.xlsx

Microsoft Planner > Training Calendar

Teams > Training Channel

OneDrive > 01. Administration > Training > Completed Trackers

Word or Excel (for tracker entries)

Objective:

To initiate and track the full onboarding experience for each new or promoted Project Manager at Devere, assigning training content, shadowing mentors, and certification steps using a standardized onboarding tracker.

When to Perform

Upon hiring or internal promotion of a new Project Manager

When reassigning a PM to a new role (e.g., GC to DMS, Institutional to Commercial)

Who Performs This Task

Trainer (issues and maintains tracker)

Project Executive (confirms shadow and assignments)

CPO (approves sign-off and release)

Project Manager (completes training milestones)

Step-by-Step Procedure

Download Tracker Template

Navigate to: OneDrive > Templates > PM_Onboarding_Tracker.xlsx

Save a new copy to: OneDrive > 01. Administration > Training > PM_Onboarding > [PM Name]_Tracker.xlsx

Populate PM Role and Project Scope

Indicate PM?s initial assignment (e.g., GC Project, DMS Concrete Oversight)

Note mentor, shadow project, and location

Assign Training Modules

Customize tracker tabs by project type:

Safety, Schedule, Budget, Submittals, Sage CM, GoCodes, CI

Set due dates and owners for each module

Add PM to Microsoft Planner > Training Calendar

Log Weekly Progress

PM and mentor update tracker weekly

Log notes on test scores, field simulations, and SOP comprehension

Include signatures from trainer and executive at key milestones

Conduct Final Review and Sign-Off

CPO, Executive, and PM review tracker

Approve completion and release to project ownership

Save signed file to: OneDrive > 01. Administration > Training > Completed Trackers > [PM Name]_Signed.xlsx

Blocking Logic

? Do not issue a project assignment or enter PM into Sage CM until:

All training tabs in tracker are marked ?Complete?

Signatures from mentor, executive, and CPO are present

Tracker is filed in Completed Trackers folder

Outputs/Deliverables

PM_Onboarding_Tracker.xlsx (project-specific)

Weekly tracker updates with mentor feedback

Microsoft Planner entries for due dates

Final signed tracker saved in Completed Trackers folder

Sign-off confirmation email to CPO

[18.3] PM-Led Microtraining for Field and Office Staff (Work Instruction) {#pm-microtraining}

Tools Used:

Microsoft Teams

OneDrive > 01. Administration > Training > PM_Microtraining

Sage CM (for live walk-throughs or demonstrations)

Microsoft Word and PowerPoint

Objective:

Empower Project Managers to reinforce key processes, tools, and procedures by leading brief (10?15 minute) microtraining sessions for Site Managers, Coordinators, Admins, and DMS PMs. These sessions build internal capacity, drive accountability, and support consistent execution across project teams.

When to Perform:

During weekly site or coordination meetings

Following updates to SOPs or recurring errors in execution

As requested by the CPO, Trainer, or peer

Who Performs This Task:

Project Manager (trainer)

Attending Field Staff and Office Support Roles (audience)

Project Executive or CPO (optional observer or evaluator)

Step-by-Step Procedure

Identify Training Topic

Select from: recent SOP update, recurring issue (e.g., missed cost tracking), or known gap (e.g., punch list entry in Sage CM).

Confirm alignment with CPO priorities or field feedback.

Prepare Brief Agenda

3-point agenda:

What?s the process or tool?

What goes wrong if skipped or misused?

How to do it correctly?

Create quick demo file or screenshots if needed.

Schedule Session

Coordinate with attendees via Teams or Outlook.

Include link to relevant folder in:

OneDrive > 01. Administration > Training > PM_Microtraining > [Topic]

Lead the Microtraining

Keep under 15 minutes.

Demonstrate step-by-step if applicable (e.g., Sage CM workflow).

Answer immediate questions; note broader topics for CPO escalation.

Log Completion

Upload the agenda, materials, and attendance sheet to:

OneDrive > 01. Administration > Training > PM_Microtraining > [Date]_[Topic]

Tag CPO or Trainer in Teams for visibility.

Blocking Logic

? Do not claim microtraining credit unless:

The training was scheduled and logged in OneDrive

Attendees were present and recorded

A topic relevant to field or admin execution was delivered

Outputs/Deliverables

PM Microtraining Agenda (.docx or .pptx)

Attendance Record (.xlsx or sign-in screenshot)

Uploaded materials in Training Folder

Teams post or CPO acknowledgment

[18.4] PM Role in Onboarding New Project Staff and Subcontractors (Work Instruction) {#pm-onboarding}

Tools Used:

OneDrive > 01. Administration > Training > Onboarding Packages

Microsoft Teams

Sage CM > User Setup and Permissions

Devere Welcome Kit (PDF or physical binder)

Objective:

Ensure every new team member (internal or external) joining a Devere project receives a structured, consistent, and informative onboarding experience led by the Project Manager. This promotes culture alignment, reduces startup confusion, and improves first-week productivity.

When to Perform:

On the first day any new Site Manager, Coordinator, Admin, or DMS PM is assigned to the project

At project kickoff for key subcontractors

Anytime a staff or subcontractor replacement occurs mid-project

Who Performs This Task:

Project Manager (onboarding leader)

Project Administrator or HR (support staff)

CPO or Project Executive (escalation)

Step-by-Step Procedure

Prepare Welcome Packet

Go to: OneDrive > 01. Administration > Training > Onboarding Packages

Download the latest ?Devere PM Project Welcome Packet? and customize with project-specific info (folder links, contacts, project goals, safety plans).

Schedule Kickoff Meeting

Set up Teams or in-person meeting with new staff/subcontractors.

Attach welcome materials and folder paths.

Present Orientation Topics

Introduce Devere culture and values (discipline, integrity, safety).

Review relevant SOP highlights (e.g., daily reporting, Sage CM usage, closeout obligations).

Walk through project-specific folder structure:

Projects > [Project Name] > 01. Administration, 02. Meetings, 04. Safety, etc.

Assign First Week Tasks

Field staff: complete daily reports, log safety items in Sage CM, sync with Site Manager.

Office staff: update cost tracking, attend schedule meeting, review past meeting minutes.

Subcontractors: submit preinstall meeting form, confirm insurance, log into Sage CM (if enabled).

Log Onboarding Completion

Upload attendance or sign-off to:

OneDrive > 01. Administration > Training > Onboarding Records > [Name]_[Date].pdf

Tag HR or CPO in Teams.

Blocking Logic

? Do not consider onboarding complete until:

The individual has received and reviewed the Welcome Packet

Orientation meeting was held

Attendance or sign-off is uploaded to the correct OneDrive folder

Outputs/Deliverables

Customized Welcome Packet

Orientation Meeting Agenda/Notes

Onboarding Attendance Record (PDF or Sign-in Sheet)

Teams post or email acknowledgment to CPO/HR

Task checklist for first week execution

[18.5] PM Oversight of Project Training Compliance and Records (Work Instruction) {#pm-training-compliance}

Tools Used:

OneDrive > 01. Administration > Training > Records

Microsoft Teams

Sage CM > Contacts and Users

MS Excel > Training_Tracker.xlsx

Devere Orientation Materials and SOPs

Objective:

Ensure all required project-level training is completed, recorded, and accessible for all internal staff and subcontractor teams throughout the duration of the project. The PM is responsible for verifying training compliance and resolving any gaps before work begins.

When to Perform:

At project startup and before any subcontractor or DMS work begins

Anytime a new person is added to the project roster

Monthly compliance check-ins

Immediately following a safety incident, SOP change, or inspection failure

Who Performs This Task:

Project Manager (training verification lead)

Project Administrator (support recordkeeping)

Site Manager (daily field verification)

CPO or Safety Director (escalation or audits)

Step-by-Step Procedure

Set Up Project Training Folder

Navigate to:

OneDrive > Projects > [Project Name] > 01. Administration > Training

Create subfolders: Records, Orientation Sign-Ins, Toolbox Talks, Subcontractor Training Docs

Review Required Trainings Per Role

Use master training matrix in:

OneDrive > 01. Administration > Training > Training_Tracker.xlsx

Filter by role (e.g., Site Manager, DMS PM, Subcontractor Foreman)

Confirm required certifications: OSHA 10/30, SOP Acknowledgment, First Aid/CPR, Equipment Certs, Project Orientation

Collect and Upload Proof of Training

Verify all parties have submitted proof before mobilization

Acceptable formats: PDF certs, sign-in sheets, digital forms

Save to:

Projects > [Project Name] > 01. Administration > Training > Records

Track Compliance Monthly

Update training status in the project copy of Training_Tracker.xlsx

Highlight missing items in red and notify responsible parties via Teams

Tag HR or Safety if gaps remain unresolved for more than 1 week

Trigger Corrective Actions if Needed

If an individual is noncompliant:

Remove from project roster in Sage CM

Escalate to CPO for HR review

Schedule make-up training or issue warning letter

Upload follow-up action to:

Training > Records > Corrective_Actions

Blocking Logic

? Do not allow any worker (staff or subcontractor) on-site or into project systems until:

All required training documentation is received and verified

Individual appears as compliant in the Training Tracker

Orientation and safety acknowledgment is logged

Outputs/Deliverables

Project-specific Training_Tracker.xlsx

Onboarding/Orientation Sign-In Sheets

Digital Copies of Certifications

Compliance Audit Reports (if required)

Corrective Action Logs (if gaps identified)

[18.6] PM Leadership in Training Culture and Mentorship Integration (Work Instruction) {#pm-mentorship-training}

Tools Used:

OneDrive > 01. Administration > Training > Mentorship_Tracker.xlsx

Teams > PM Roundtable Channel > Mentorship Threads

Microsoft Word > Training Reflection Templates

Devere SOP Library and PM Curriculum

Sage CM > Project Notes (mentorship and training observations)

Objective:

Reinforce the Project Manager?s leadership role in establishing a strong learning culture by mentoring staff, endorsing team training, and promoting continuous development throughout the life of the project.

When to Perform:

At project startup (assign mentors)

During onboarding and milestone events

Monthly check-ins with mentees

After significant wins or lessons learned

Who Performs This Task:

Project Manager (mentor and trainer)

Site Manager (peer support role)

Mentee or new hire (recipient)

CPO or PM Trainer (oversight)

Step-by-Step Procedure

Assign Mentors at Project Launch

For all new field staff, PMs, or rotating support staff:

Assign a mentor from experienced staff or self-perform leads

Record assignment in:

OneDrive > 01. Administration > Training > Mentorship_Tracker.xlsx

Establish Learning Objectives

Schedule 15-minute intro session between mentor and mentee

Use Word template: Mentorship_Intro.docx to log:

Key goals

Role understanding

Known skill gaps

Safety/quality emphasis areas

Save to:

Training > Mentorship_Logs > [Project]_[Mentee].docx

Monthly Mentorship Check-ins

Mentor or PM schedules monthly Teams check-in or on-site review

Document discussion topics, growth observations, or new concerns

Update Mentorship Tracker (status and progress column)

Promote Peer Learning Moments

Capture "teachable moments" or peer-led training in field:

SOP clarification

Equipment demo

Safety procedure correction

Log in:

Sage CM > Project Notes > Mentorship Observations

Optional: submit as CI Spotlight entry

End-of-Project Reflection and Feedback

Mentee completes Training Reflection Template:

Training > Templates > Training_Reflection.docx

PM submits summary email of mentorship effectiveness and lessons to CPO

Archive final reflection in:

Training > Mentorship_Logs > Final_Reflections

Blocking Logic

? Do not consider onboarding complete unless:

A mentor is assigned and documented

Intro session is conducted and logged

Monthly check-ins are happening

Mentee completes end-of-project reflection

Outputs/Deliverables

Completed Mentorship_Tracker.xlsx (project-specific tab)

Mentorship_Intro and Reflection Docs

Project Notes with training/mentorship logs

CI Spotlights derived from mentorship

Email summary to CPO on mentorship outcomes

[18.7] Leveraging Lessons Learned for Field Coaching and Jobsite Improvement (Work Instruction) {#field-coaching}

Tools Used:

OneDrive > 26. Continuous Improvement > Lessons_Learned

Sage CM > Daily Logs, Issue Logs, Safety Reports

Teams > CI Channel > Lessons Learned Thread

Microsoft Word > Field_Coaching_Form.docx

OneDrive > 17. Safety > Toolbox Talks

Objective:

Translate project-specific lessons into actionable field coaching moments that improve safety, quality, and crew performance across future jobsites.

When to Perform:

After closeout or major lessons learned submission

Prior to kickoff of similar scopes or self-perform work

When repeated field issues occur

As part of DMS daily or weekly safety talks

Who Performs This Task:

Project Manager (identifies and initiates lesson)

Site Manager (leads field coaching session)

Safety Lead or DMS PM (delivers relevant toolbox talk)

CI Lead (logs the integration of lessons)

Step-by-Step Procedure

Review Lessons Learned Archive

Navigate to:

OneDrive > 26. Continuous Improvement > Lessons_Learned > [Relevant_Project].docx

Filter by category: safety, logistics, quality, schedule, communication

Flag any item that has potential read-across to current or upcoming project

Convert Lesson to Field Coaching Topic

Summarize lesson into 3 key points:

What happened

Why it matters

How we prevent/repeat it

Use Field_Coaching_Form.docx template and save in:

OneDrive > [Project Name] > 17. Safety > Coaching > [Lesson_Topic].docx

Coordinate Site-Level Talk

Schedule 10?15 min coaching session with Site Manager and crews

Incorporate into Daily Huddle or Safety Toolbox Talk

Distribute the one-page summary or project photos if applicable

Document Participation

Collect attendance (sign-in sheet or Teams photo if digital)

Store in:

OneDrive > [Project Name] > 17. Safety > Coaching > Signoffs

Submit to CI Thread

Post quick recap in Teams > CI Channel:

?Field Coaching ? [Topic] ? [Project] ? Applied from [Original Project]?

Link to OneDrive folder with coaching material

Blocking Logic

? Do not archive lessons learned if they are not evaluated for read-across opportunities and at least one coaching use has not been logged if applicable.

Outputs/Deliverables

Field_Coaching_Form.docx (lesson summary)

Attendance log or toolbox talk sign-in sheet

Teams post with link to coaching recap

Archived coaching session in project folder

CI entry noting reuse of lesson for training

[18.8] Annual CI Report and SOP Revision Summary (Work Instruction) {#ci-annual-summary}

Tools Used:

OneDrive > 26. Continuous Improvement > SOP_Revision_Log.xlsx

OneDrive > 26. Continuous Improvement > Lessons_Learned_Log.xlsx

Microsoft Word > CI_Annual_Summary_Template.docx

Teams > CI Channel > Annual Review Thread

Sage CM > Issue Logs, Daily Logs, Safety Logs (for source references)

Objective:

To compile and present an annual summary of all Continuous Improvement (CI) contributions, lessons learned, and SOP revisions across Devere projects?supporting strategic planning and reinforcing a culture of reflection and excellence.

When to Perform:

Annually in December or before Q1 strategy kickoff

Following the completion of a fiscal year or major project cycle

Prior to SOP manual version updates

Who Performs This Task:

Chief Process Officer (CPO) (report author and presenter)

CI Lead (log consolidation and data visualization)

PM Trainer (provides feedback on adoption and training impact)

Step-by-Step Procedure

Aggregate CI Metrics from Logs

Open:

OneDrive > 26. Continuous Improvement > SOP_Revision_Log.xlsx

and

Lessons_Learned_Log.xlsx

Summarize metrics for the year:

Total lessons submitted

Number of SOP sections revised

CI Spotlight presentations completed

Field coaching sessions conducted

PM feedback loops triggered

Draft CI Annual Summary

Use CI_Annual_Summary_Template.docx from OneDrive

Include:

Executive Summary

Key stats (use bar or pie charts from Excel)

Highlights from impactful projects

SOP sections updated and why

Lessons reused for coaching or training

PM participation metrics

Save to:

OneDrive > 26. Continuous Improvement > Annual Summary > CI_Annual_Summary_2025.docx

Schedule Review Meeting

Create Teams invite: ?CI Annual Report + SOP Review ? [Date]?

Invite PM group, Site Managers, Safety Lead, Trainer, Contract Compliance, Executives

Attach CI Summary and charts as pre-read

Allocate time for discussion, feedback, and proposed SOP roadmap

Present Findings and Roadmap

Deliver 15?20 minute walkthrough using highlights from the summary

Field live feedback and discuss SOP evolution priorities for next release

Record attendance and notes for archival

Publish Final Report

Archive final PDF in:

OneDrive > 26. Continuous Improvement > Annual Summary > Archive

Post summary to Teams > CI Channel > Annual Review Thread

Include link to PDF and PowerPoint deck (if used)

Blocking Logic

? Do not publish SOP Manual Version [Year + 1] until the CI Annual Summary and Lessons Learned Logs have been reviewed and reported.

Outputs/Deliverables

CI_Annual_Summary_2025.docx and PDF

Metrics charts from SOP_Revision_Log.xlsx and Lessons_Learned_Log.xlsx

Teams post in Annual Review Thread with attachments

Archived attendance and meeting notes

SOP revision roadmap (proposed updates for upcoming year)

[18.9] Continuous Improvement Roadmap Planning and Resource Allocation (Work Instruction) {#ci-roadmap}

Tools Used:

OneDrive > 26. Continuous Improvement > CI_Roadmap_Tracker.xlsx

Teams > CI Channel > Roadmap Planning Thread

Microsoft Planner > CI Roadmap Board

Sage CM > Lessons Learned, Safety, and Issue Logs

Microsoft Word > CI_Roadmap_Meeting_Notes.docx

Objective:

To develop a forward-looking CI Roadmap that identifies targeted improvements, SOP revision priorities, system/tool enhancements, and allocates internal resources accordingly?based on real project experience and organizational performance gaps.

When to Perform:

Immediately after submission of the CI Annual Summary (see Section 18.8)

During annual strategy planning (December?January)

Anytime major procedural or system changes are proposed

Who Performs This Task:

Chief Process Officer (CPO) (facilitates and approves roadmap)

CI Lead (compiles and prioritizes initiatives)

PM Trainer (identifies training impact and needs)

Safety, Quality, and Contract Compliance (input on risk-related items)

Step-by-Step Procedure

Review CI Annual Summary and Logs

Open and review:

OneDrive > 26. Continuous Improvement > CI_Annual_Summary_2025.docx

Lessons_Learned_Log.xlsx

SOP_Revision_Log.xlsx

Safety_Incident_Log.xlsx

Extract recurring patterns, themes, and open issues needing process or system updates.

Compile Improvement Opportunities

Group opportunities into buckets:

SOP Revision Needs

Training or Onboarding Gaps

Technology/Tool Enhancements

Policy Clarifications

Field Execution Challenges

Document in:

CI_Roadmap_Tracker.xlsx > Tab: Raw_Opportunities

Score and Prioritize

Use scoring rubric (Impact × Urgency × Feasibility) to assign weighted values to each idea

Sort and promote top-scoring initiatives to ?Priority List? tab

Mark urgent changes for Q1 SOP Patch Release; others roll into Q2?Q4 timeline

Create Microsoft Planner Tasks

Add each priority item to Planner Board:

Planner > CI Roadmap > Buckets by Category

Assign lead (CPO, CI Lead, Trainer, System Admin, etc.)

Add due dates, milestones, and links to related resources

Host CI Roadmap Planning Meeting

Schedule via Teams: ?CI Roadmap 2025 Planning Session?

Attach CI Summary and Tracker

Walk through top priorities and assign ownership

Capture meeting minutes in:

CI_Roadmap_Meeting_Notes.docx

Save notes to:

OneDrive > 26. Continuous Improvement > Roadmap

Finalize and Communicate

Post summary of roadmap priorities and timeline in Teams > CI Channel

Update SOP Calendar in OneDrive > 01. Administration > Calendars > SOP_Calendar.xlsx

Schedule mini-reviews or checkpoints quarterly to reassess progress

Blocking Logic

? Do not initiate SOP manual version updates without a documented and approved CI Roadmap with assigned owners and milestones.

Outputs/Deliverables

CI_Roadmap_Tracker.xlsx (updated with raw list + priority scoring)

Microsoft Planner CI Roadmap Board (active tasks)

CI_Roadmap_Meeting_Notes.docx

Teams post outlining roadmap priorities

SOP_Calendar.xlsx updated with revision and training targets

Assigned CI Owners and Q1?Q4 initiative breakdowns

[19.0] Project Manager KPIs (Key Performance Indicators) ? SOP

Role: Project Manager (GC ? Commercial, Institutional, and Self-Perform Projects)

Tools Used: Sage CM | OneDrive | MS Teams | Microsoft Planner | GoCodes | Sage 100 | PM Scorecard Template

Outputs/Deliverables: Monthly KPI Report | Red-Yellow-Green (RYG) Summary | Performance Review Inputs

Escalation Path: PM ? CPO ? Executive PM ? HR (if tied to disciplinary or bonus outcomes)

? Objective

To establish a measurable, transparent framework for evaluating Project Manager (PM) performance on active projects. KPIs align project execution with Devere?s values of Excellence, Discipline, Truth, Integrity, and Safety, and ensure performance tracking supports both individual accountability and organizational scalability.

? Definitions

? Categories of PM KPIs

Each KPI is categorized as either Compliance (measurable process execution) or Impact (outcome/result). PMs are expected to stay green in all Compliance KPIs and demonstrate acceptable variance in Impact KPIs. Yellow/Red status triggers review.

? KPI Data Sources

? KPI Review & Reporting Cycle

? Blocking Logic

? No bonus payout triggers unless PM KPIs are in Green/Yellow range and properly documented.

? Red KPI status for 2+ consecutive months requires formal escalation and recovery plan.

? No project closeout approval if KPI documentation is incomplete or manipulated.

? Outputs/Deliverables

? PM KPI Scorecard (Excel, live project-based)

? Monthly KPI Review Notes

? Escalation Summaries (if applicable)

? KPI Inputs for Performance Review & Bonus Eligibility

[19.1] KPI Categories & Definitions (Work Instruction)

Role: Project Manager

Tools Used: Sage CM | OneDrive | Teams | Excel KPI Scorecard Template

Outputs/Deliverables: Categorized KPI Summary, PM Scorecard Inputs, Definition Reference Sheet

Escalation Path: PM ? CPO ? Executive PM ? HR (if tied to bonus or disciplinary action)

? Objective

To define and standardize the core KPI categories used to measure Project Manager performance at Devere Construction. Each category contains a set of measurable indicators tied to real tools and workflows. These definitions ensure objective, transparent, and aligned evaluation across all projects.

? KPI Categories

1. Scope Management KPIs

Charter Completion Rate: Was the project charter drafted, routed, and approved within 5 days of award?

Change Log Accuracy: Are all field or owner-driven changes recorded in Sage CM with a clear description and supporting documentation?

Scope Drift Rate: Count of unapproved scope deviations discovered in the field or during billing.

2. Budget Management KPIs

Budget Setup Compliance: Is the project budget and SOV uploaded within 5 business days of award?

Variance Accuracy: % deviation between Forecast-to-Complete and Actuals at month-end.

Cost Code Mapping Completion: Are all cost codes aligned with actual commitments and buyouts?

3. Schedule Management KPIs

Baseline Upload Compliance: Has the schedule baseline been built and submitted within 15 business days of NTP?

Milestone Hit Rate: % of contractual milestone dates met or within acceptable float.

Lookahead Update Frequency: Are 3-week lookaheads updated weekly without gaps?

4. Procurement & Submittal KPIs

Submittal Log Setup: Are all submittals entered in Sage CM within 10 days of award?

Overdue Submittals Count: Total submittals aged past contractual review window (e.g., 10 business days).

Procurement Tracker Completeness: % of materials with linked submittals, PO, and delivery logs.

5. RFI & Design Coordination KPIs

RFI Timeliness: Are RFIs issued within 24 hours of field obstruction or question?

Aging RFIs: Number of unresolved RFIs open more than 10 business days.

Design Delay Escalations: Have delays been properly escalated and documented?

6. Subcontractor Compliance KPIs

Cleaning Compliance: % of days with clean site log entry and no violations issued.

Sub Onboarding Completion: % of active subs with completed onboarding packet before mobilization.

Compliance Packet Completeness: All required COIs, W-9s, and safety docs filed before first task.

7. Safety Management KPIs

Safety Observations Logged: Weekly documentation of site safety walk-throughs or toolbox talks.

Violation Resolution Time: Average days to close documented subcontractor safety violations.

Third-Party Report Turnaround: Days from external safety inspection to CM log entry and issue closure.

8. Quality Control KPIs

Daily QC Entries: % of workdays with quality checklist completed in Sage CM.

Punch List Count: Total number of unresolved items at Substantial Completion.

Rework Events: Number of tasks requiring redo due to workmanship issues.

9. Change Management KPIs

PCO Logging Timeliness: Are all changes documented in Sage CM before work proceeds?

CO Turnaround Time: Average number of days from PCO to executed Change Order.

Change Order Audit Score: % of COs with complete backup, scope tie-in, and budget link.

10. Closeout KPIs

Final Clean Compliance: Was the subcontractor?s final clean verified within 5 days of Substantial Completion?

Document Closeout Rate: % of required documents uploaded to OneDrive within 30 days of completion.

Lessons Learned Submission: Was a closeout debrief submitted and filed?

? KPI Types Summary

? Outputs/Deliverables

Categorized KPI Glossary (OneDrive > Templates > KPI_Definitions.xlsx)

Monthly PM KPI Scorecard with color-coded flags

RYG Summary Sheets for review sessions

[19.2] KPI Tracking and Data Sources (Work Instruction)

Role: Project Manager

Tools Used: Sage CM | OneDrive | Excel KPI Scorecard Template | Teams | Planner | Daily Logs

Outputs/Deliverables: PM KPI Scorecard, Monthly KPI Package, Escalation Log

Escalation Path: PM ? Executive PM ? CPO ? HR (if tied to bonus/discipline)

? Objective

To establish the method and sources for tracking, updating, and submitting Project Manager KPIs. This ensures that KPI data is consistent, live-linked to actual project systems, and defensible during reviews or performance evaluations.

? KPI Source Matrix

? KPI Tracking Sheet (Live Excel Format)

Template Location:

OneDrive > Templates > KPI Scorecard > PM_KPI_Scorecard_Template.xlsx

Project Version:

Save as ?

OneDrive > Projects > [Project Name] > 23. Logs & Reports > PM KPI Scorecard > PM_KPI_[Month].xlsx

Key Tabs:

KPI Summary ? RYG status by category

Data Pull Log ? Sources, date pulled, person pulling

Escalations ? Notes on red/yellow status triggers

Notes ? Assumptions, exceptions, risk commentary

? Workflow ? Monthly KPI Update Process

? Blocking Logic

? Do not proceed with monthly billing or buyout recap unless KPI Scorecard is current.

? Do not mark project ?Ready for Closeout? unless KPI sections are green or justified.

? KPI omissions are not acceptable?each Red/Yellow must have a note or path to green.

? Outputs/Deliverables

? PM_KPI_[Month].xlsx (Scored and reviewed)

? Data Pull Log (Sources and dates verified)

? Escalation Notes (Red or at-risk items documented)

? Scorecard Archive (Tracked in project folder)

[19.3] KPI Review and Monthly Evaluation Process (Work Instruction)

Role: Project Manager

Tools Used: Sage CM | OneDrive | Teams | Excel KPI Scorecard | Outlook | PM Performance Summary Template

Outputs/Deliverables: Reviewed KPI Scorecard, Evaluation Notes, Escalation Summary

Escalation Path: PM ? Executive PM ? CPO ? HR (if performance triggers formal review)

? Objective

To establish a standardized monthly evaluation process for reviewing Project Manager KPIs. This ensures that PM performance is tracked objectively, discussed with leadership, and corrected proactively when issues emerge?before they impact project outcomes or team morale.

?? Monthly KPI Review Schedule

? Step-by-Step Monthly KPI Review Process

1. Scorecard Finalization

PM opens working KPI Scorecard from:

OneDrive > Projects > [Project Name] > 23. Logs & Reports > PM KPI Scorecard > PM_KPI_[Month].xlsx

Verifies all RYG status fields are current

Fills out:

Escalations tab (for any Red/Yellow)

Notes tab (explaining trends or unusual activity)

2. Submission for Review

PM uploads finalized Excel file to same folder path

Tags Executive PM on Teams in #PMPerformance channel or via direct message

Subject line: PM KPI ? [Project Name] ? [Month]

3. Pre-Review Analysis by Executive PM

Reviews:

Scorecard trends (3-month history if available)

Repeating red/yellow flags

High-performing areas worth reinforcing

Completes "PM Performance Summary" template:

OneDrive > Templates > PM_Performance_Summary.docx

Notes strength areas, concern areas, and required follow-up

4. PM Review Meeting

Held virtually or in person

Agenda:

KPI Summary + trendline discussion

Red/Yellow flags: causes and recovery plans

Alignment to Devere values: Excellence, Discipline, Truth, Integrity, Safety

Discussion of support/resources needed

Duration: 30 minutes

5. Documentation and Archiving

Final KPI Scorecard and PM Performance Summary saved to:

OneDrive > Projects > [Project Name] > 23. Logs & Reports > PM KPI Scorecard > Archive

Summary may be rolled into quarterly performance evaluation or bonus discussion

6. Escalation (If Applicable)

Repeated or critical failures (2+ red KPIs in same category for 2+ months) trigger:

Corrective Action Plan

Coaching or mentorship assignment

Optional HR escalation for Performance Improvement Plan (PIP)

? Sample Evaluation Scoring

? Blocking Logic

? Bonus and performance incentives shall not be calculated unless KPI scorecard and monthly review are completed.

? Project milestone reviews cannot be marked "on track" without matching KPI trendline.

? Projects with unresolved KPI Reds for >2 months must be flagged to CPO for Executive Review Board.

? Outputs/Deliverables

? PM_KPI_[Month].xlsx (Finalized, with Escalation tab filled)

? PM_Performance_Summary.docx

? Meeting notes and action items

? Escalation log (if required)

? Archival in KPI folder with date and initials

[19.4] KPI Corrective Actions and Escalation (Work Instruction)

Role: Project Manager

Tools Used: Sage CM | OneDrive | Teams | Excel KPI Scorecard | Outlook | PM Recovery Plan Template

Outputs/Deliverables: Corrective Action Plan, Escalation Summary, KPI Recovery Tracking Sheet

Escalation Path: PM ? Executive PM ? CPO ? HR (if elevated to Performance Improvement Plan)

? Objective

To formalize the response protocol for underperforming KPIs. This ensures that repeat issues are identified, corrected, and tracked through documented recovery steps, not ignored or misrepresented. It protects project outcomes and provides PMs with fair, structured support to return to green status.

? KPI Escalation Triggers

? Step-by-Step Escalation and Correction Process

1. Red KPI Identification

KPI Scorecard flags item(s) red

PM completes "Escalation" tab and "Notes" tab with reasoning and known causes

2. Internal CPO Escalation (if ? Level 2)

Executive PM tags CPO via Teams or email

Attach:

Finalized PM_KPI_[Month].xlsx

PM Performance Summary.docx

3. Corrective Action Plan (CAP) Creation

Use template:

OneDrive > Templates > PM_Corrective_Action_Plan.xlsx

CAP Must Include:

Specific KPI(s) failing

Root cause(s)

Required actions to return to green

Responsible party

Timeline and checkpoints

Save as:

Projects > [Project Name] > 23. Logs & Reports > PM KPI Scorecard > CAP_[Month].xlsx

4. Recovery Tracking

Weekly updates logged in CAP tracker

PM and Executive PM meet for 15-minute check-in

Update shared in Teams channel #PMPerformance

5. Escalation to HR (if needed)

If PM remains in red status after two full recovery cycles (2 months):

Executive PM and CPO escalate to HR

PIP initiated per Devere?s formal HR process

?? Examples of Corrective Actions by Category

? Outputs/Deliverables

? CAP_[Month].xlsx (Corrective Action Plan ? Excel)

? Escalation Summary (Notes in KPI Scorecard)

? Recovery Tracking Updates (Weekly)

? HR Notification (if applicable)

? Blocking Logic

? Project milestone claims (e.g., "substantially complete", "budget on track") cannot be marked true if relevant KPI(s) are red without a CAP in place.

? No bonuses, raises, or promotions may be considered for PMs in unresolved Level 3 or 4 KPI status.

? If a red KPI is caused by lack of documentation, the system default is to assume non-performance until proven otherwise.

[19.5] Integration with Performance Reviews and Bonus Program (Work Instruction)

Role: Project Manager

Tools Used: KPI Scorecard | Performance Summary Template | Teams | OneDrive | HRIS (if applicable)

Outputs/Deliverables: Quarterly Review Packet, Bonus Eligibility Summary, PM Performance Archive

Escalation Path: PM ? Executive PM ? CPO ? HR

? Objective

To define how Project Manager KPI performance directly influences quarterly reviews, bonus eligibility, and long-term career development at Devere Construction. This ensures fair compensation tied to measurable output and reinforces Devere?s core values: Excellence, Discipline, Truth, Integrity, Safety.

? Quarterly Review Process ? PM Integration

? Bonus Eligibility Framework

Note: Bonus amount is also tied to project profitability, client satisfaction, and timely closeout?KPI status is the gateway but not the only input.

? PM Performance Summary Template

Location:

? OneDrive > Templates > PM_Performance_Summary.docx

Sections Include:

KPI Summary Table (3-month trend)

Top Performing Areas

Red/Yellow Flags + Recovery Status

Field Leadership Feedback

Client/Architect Feedback (if applicable)

Bonus Recommendation

Promotion/Development Track Notes

? Outputs/Deliverables

? PM_Performance_Summary.docx (per quarter)

? Finalized KPI Scorecard Roll-Up

? Bonus Eligibility Statement

? Archived Review Packet in Project Folder

? Blocking Logic

? No bonus recommendation may be submitted without a completed, archived Quarterly PM Review Packet.

? Promotion decisions (e.g., Sr. PM, Area PM) must include three consecutive quarters of KPI trendline + field/owner feedback.

? Any attempt to alter scorecard data without approval is considered grounds for HR review under ?Truth & Integrity? clause.