

## EPA Pacific Southwest (Region 9) DWTSA Project Management Checklist

EPA Region 9's Tribal Set-Aside Grant Program developed this checklist for applicants to demonstrate they have the ability (either in-house or with the assistance of the IHS or other appropriate agency) to meet EPA's project management requirements and properly oversee an SDWA funded construction project.

**SAVE THIS DOCUMENT TO YOUR DEVICE BEFORE YOU BEGIN**

**IMPORTANT:** Attach a resumé for each person identified below.

### 1. Overall Project Management

- A. Who will manage the project to ensure its timely and economical completion?  
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- B. Who will keep project reviewers informed of progress and upcoming decisions?  
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- C. Who will bring together the correct people to select appropriate technology?  
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- D. Who will manage the cash flow of all funds?  
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- E. Does this person(s) have experience overseeing construction projects? If yes, specify.  
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- F. Does this person(s) have experience overseeing grant projects? If yes, specify.  
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### 2. Planning and Design Phases

- A. Who will complete the planning and design phases of the project?  
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- B. Who will provide engineering and design consultation services as needed during construction?  
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- C. Who will prepare the construction drawings?  
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- D. Who will prepare specifications and contract documents and ensure that they have the correct technical and general provisions and meet CFR requirements?  
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- E. Who will supervise startup/initial operation of the treatment works?  
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### **3. Construction Management**

- A. Who will oversee the construction contractor, control project costs and the completion time, and ensure quality construction?  
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- B. Who will monitor and update the project budget and schedule?  
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- C. Who will review construction contractor staffing plans to ensure that adequate manpower will be used to enable the project to stay on schedule?  
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- D. Who will provide advice to the engineer on construction phasing, trade practices, and the suitability and availability of various construction materials?  
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- E. Who will make recommendations concerning bid packaging to increase competitions?  
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- F. Who will inspect the construction to ensure conformance with the specifications?  
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### **4. Accounting**

- A. Who will provide accounting services for the project, including separate ledgers for the EPA funded project, identification of allowable and unallowable costs, and maintenance of vouchers for all costs incurred?  
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### **5. Financial Advice**

- A. Who will determine how O&M and other costs incurred by the Tribe will affect the community and water rate structure?  
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### **6. Legal Services**

- A. Who will provide legal counsel (e.g., right of way, interagency service agreements)?  
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### **7. Environmental Review**

- A. Who will complete documents and other activities for the environmental review process (i.e., NEPA)?  
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