

PLANNING AND JOB START SOP TEMPLATE

A. Purpose

The Planning and Job Start process defines how planning activities are performed and how projects transition from preconstruction into execution readiness. This process establishes how project planning inputs, execution strategy, procurement considerations, manpower requirements, scheduling activities, and operational readiness are developed, coordinated, and aligned to support a consistent and well-prepared project start. It ensures project teams have the information, direction, and readiness necessary to support mobilization, improve coordination across stakeholders, and transition projects into execution in a controlled and organized manner.

B. Trigger(s):

The Planning and Job Start process is initiated when a project is authorized to proceed and sufficient project information is available to begin defining the execution approach, planning activities, and operational readiness requirements necessary to support mobilization and transition into execution.

1. Planning

The Planning component is initiated when initial project direction and requirements are available to define how the project is intended to be executed.

- a. Project is awarded or approved to proceed (e.g., executed contract or Notice to Proceed)
- b. Initial project information is available, including estimate assumptions, scope, and execution considerations
- c. Project team begins defining the intended approach, sequencing, and key assumptions for execution

2. Job Start

- a. Project is fully established within company systems (Job Setup)
- b. Job Hand-Off meeting has been conducted (Precon)
- c. Estimate is converted into a budget and uploaded into CMiC (Precon)
- d. Key pre-execution conditions are in place or progressing (e.g., permitting, procurement of long lead items) (Precon)

C. End State Objectives / Success Criteria

The Planning and Job Start process is complete when project planning activities, operational readiness requirements, and project coordination efforts have been sufficiently developed and aligned to support mobilization and transition into execution. Success is achieved when project teams have established the necessary planning inputs, execution approach, stakeholder alignment, and readiness conditions required to begin work in a controlled and organized manner.

1. Planning inputs are defined, including:

- a. Scope, sequencing, and execution approach
- b. Key assumptions and constraints
- c. Procurement considerations and major milestones

2. Project team is aligned and prepared for mobilization, including:
 - a. Job Hand-Off and Job Start Up meetings conducted
 - b. Key stakeholders engaged and informed
 - c. Procurement strategy is developed and disseminated to the project team
 - d. Project is ready to transition into mobilization and execution

D. Process Flow

The Process Flow outlines how planning activities and job start preparation progress from initial project authorization through transition into execution. It highlights the key planning, coordination, and readiness activities required to align project information, establish execution strategy, prepare operational resources, and support a consistent and well-organized project mobilization.

1. Project Planning

- a. Project Lead reviews available project information, including
 - i. Estimate
 - ii. Contract documents
 - iii. Drawings and specifications
 - iv. Owner and site-specific requirements
- b. Schedule Development (Planning Phase Input)
 - i. Develop initial project schedule
 - ii. Align schedule with available project information and execution approach
 - iii. Obtain approval from Keeley leadership prior to implementation
- c. Hand-Off Integration
 - i. Complete Estimating/Precon Hand-Off Checklist
 - ii. Attend Hand-Off Meeting
 - iii. Incorporate information received from estimating/preconstruction into planning activities
- d. Safety & Quality Planning
 - i. Identify and develop appropriate safety plan, including:
 1. Job Hazard Analysis (JHA)
 2. Site Specific Safety Plan (SSSP)
 3. Emergency Action Plan
 - ii. Identify and develop appropriate quality plan, including:
 1. Conduct pre-activity meetings
 2. Develop testing plan
 3. Identify owner hold points
- e. Permitting & Compliance Planning
 - i. Acquire necessary permits and licensing requirements
 - ii. Define ownership and responsibility for permitting activities

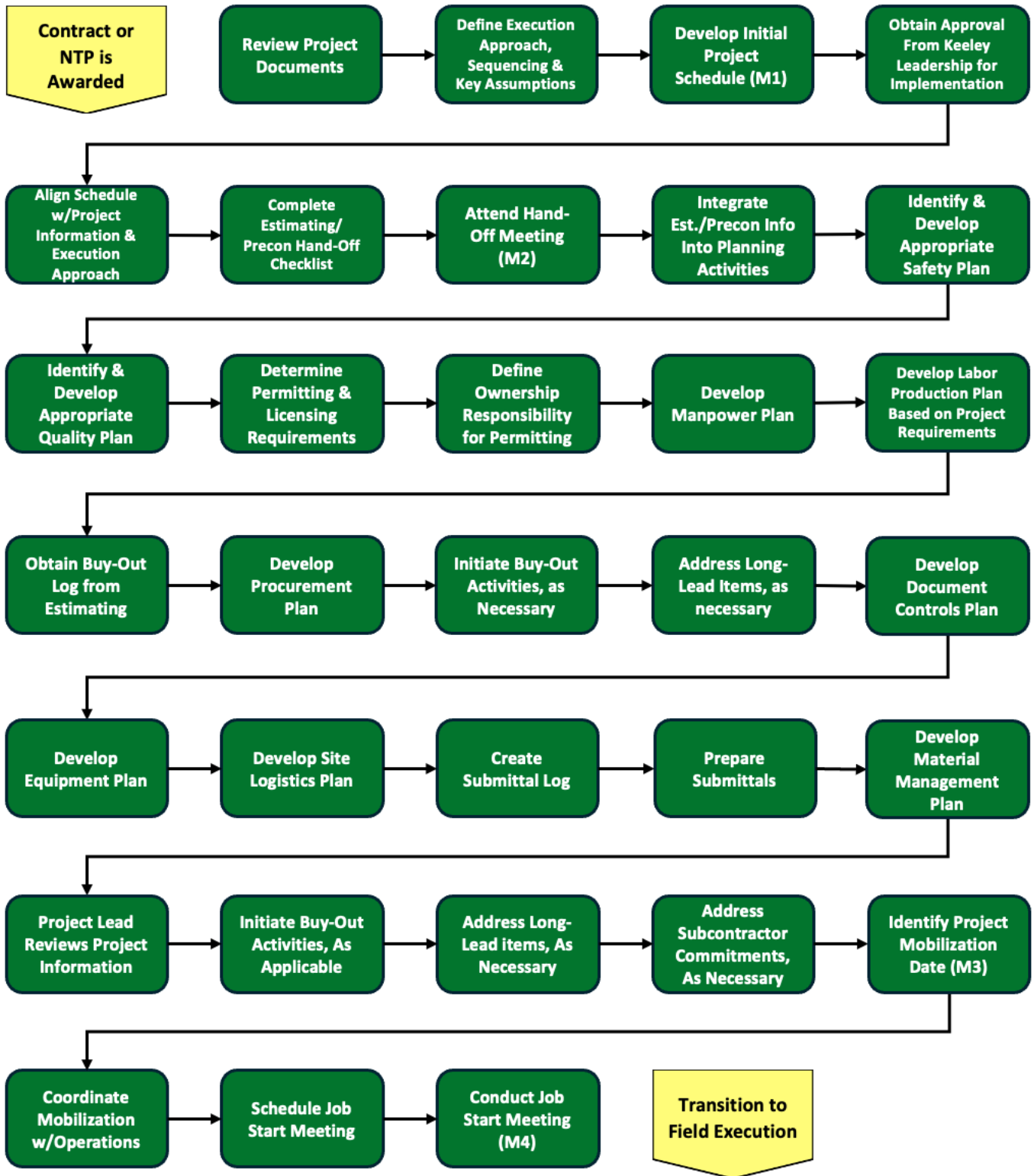
- f. Resource & Workforce Planning
 - i. Develop manpower plan, including:
 - 1. Union vs. non-union requirements
 - 2. Certified payroll requirements
 - 3. IRA / ITCs considerations
 - 4. Required skillsets and certifications
 - 5. Organizational chart / project RACI
 - ii. Develop labor production plan for self-perform work, based on project requirements
 - g. Procurement Planning
 - i. Receive Buy-Out Log from Estimating
 - ii. Develop procurement plan, including: (Project Lead responsible, Procurement assists)
 - 1. Materials
 - 2. Subcontractors
 - h. Project Controls & Documentation Planning
 - i. Develop documentation controls plan
 - ii. Define approach to managing project documentation
 - i. Equipment Planning
 - i. Develop equipment plan, including evaluation of buy vs. rent availability
 - j. Supporting Planning Activities (As Applicable)
 - i. Develop site logistics plan/project signage
 - ii. Create Submittal Log
 - iii. Prepare submittals
 - iv. Develop material management plan
 - k. Planning Coordination & Ongoing Updates
 - i. Update planning inputs throughout the project as information evolves
 - ii. Coordinate planning activities with project team and field input, as applicable
2. Job Start Preparation & Alignment
- a. Procurement
 - i. Buy-out activities are initiated, as applicable
 - ii. Long-lead items and subcontractor commitments are addressed based on project needs
 - b. Project mobilization date is identified, coordinated with operations
 - c. Job Start Up meeting is scheduled



- d. Project Lead conducts Job Start meeting
 - i. Key stakeholders participate, including:
 1. Safety
 2. Project Controls
 3. Quality
 4. Operations
 5. General Superintendent / Superintendent
 6. Project Accounting
 7. Scheduling
 8. Procurement

10. Transition to Execution

- a. Project team is aligned on scope, budget, risks, and execution approach
- b. Project is prepared to transition into mobilization and field execution



E. RACI Overlay (Responsibility Model)

The RACI Overlay defines how roles are structured across each activity, clarifying who is driving the work, who is ultimately answerable for its completion, and who needs to be engaged along the way. It reduces ambiguity in decision-making and ownership, which helps teams operate more efficiently and avoid delays or duplication of effort.

Responsible (1) – Performs the work to complete the activity or deliverable

Accountable (1) – The individual is ultimately answerable for the outcome of the activity

Consulted (>/= 1) – Roles who provide input, expertise, or guidance

Informed (>/=1) – Roles who are kept aware of progress or outcomes

N/A – Not applicable

Empty – No role assigned

TBD – To be determined

Process Step	Responsible	Accountable	Consulted	Informed
Review Project Documents and Owner Requirements	Project Lead	Project Director	BGL Legal	
Define execution approach, sequencing, and key assumptions	Project Lead	Project Lead's Supervisor		
Develop Initial Project Schedule (M1)	Scheduler Project Lead	Project Lead's Supervisor		
Obtain approval for initial project schedule from Keeley leadership prior to implementation	Project Lead	Project Lead's Supervisor		
Align schedule with available project information and execution approach	Project Lead	Project Lead's Supervisor		
Complete Estimating/Precon Hand-Off Checklist	Project Lead	Project Lead's Supervisor		
Attend Hand-Off Meeting (M2)	Project Lead	Project Lead's Supervisor		
Integrate estimating/preconstruction feedback into planning activities	Project Lead	Project Lead's Supervisor		
Identify and develop project appropriate Safety Plan	Project Lead	Project Lead's Supervisor	Safety SME	
Identify project appropriate Quality Plan	Project Lead	Project Lead's Supervisor	Quality SME	
Determine permit and licensing requirements	Project Lead	Project Lead's Supervisor		
Define ownership and responsibility for permitting activities	Project Lead	Project Lead's Supervisor		

Process Step	Responsible	Accountable	Consulted	Informed
Create Manpower Plan	Project Lead	Project Lead's Supervisor		
Develop Labor Production Plan for self-perform work, based on project requirements	Project Lead	Project Lead's Supervisor		
Create Submittals	Project Lead	Project Lead's Supervisor		
Develop Procurement Plan	Project Lead	Project Lead's Supervisor	Procurement	
Create Document Controls Plan	Project Lead	Project Lead's Supervisor		
Create Equipment Plan	Project Lead	Project Lead's Supervisor	SME	
Identify Project Mobilization Date (M3)				
Coordinate Mobilization with Operations				
Schedule Job Start Meeting	Project Lead	Ops Director	N/A	(Add List)
Conduct Job Start Meeting (M4)	Project Lead	Ops Director	N/A	(Add List)
Transition to execution	Project Lead	Ops Director	Project Team Field Team	BGL

F. Key Milestones

The Key Milestones define the critical control points within the Planning and Job Start process. These milestones represent measurable transition points where work is complete, information is aligned, and the project is ready to progress to the next phase.

#	Milestone	Description
M1	Develop Initial Project Schedule	An initial project schedule is developed to establish the planned sequencing, major durations, and execution approach required to support project planning and coordination activities.
M2	Attend Hand-Off Meeting	The project team participates in the Hand-Off Meeting to review and align on project scope, estimate assumptions, risks, execution strategy, and key information transferred from estimating and preconstruction.
M3	Identify Project Mobilization Date	The project mobilization date is identified so the team has a clear target for when the project needs to be prepared for field start up.
M4	Conduct Job Start Meeting	The Job Start Meeting is conducted to align project stakeholders on project readiness, operational requirements, responsibilities, risks, and mobilization activities prior to transition into execution.

G. Documents (Suggested by Process Team or Industry Best Practice)

This section defines the key documents, templates, and tools that support execution of the Planning and Job Start process. These documents are intended to reinforce consistency, improve coordination, and mitigate identified risks related to unclear roles, inconsistent handoffs, system setup variability, and lack of standardized tracking across business units.

1. Estimating/Preconstruction Hand-Off Checklist – **to be created and utilized across all business units**
 - a. Defines the minimum information required to be transferred from estimating and preconstruction to operations
 - b. Aligns project teams on scope, assumptions, risks, budget structure, schedule expectations, and execution considerations
 - c. Mitigates risk of incomplete project information transfer, inconsistent hand-offs, and loss of critical project knowledge during transition into execution
2. Buy-Out Log – **to be created and utilized across all business units**
 - a. Tracks procurement and subcontractor buy-out activities required to support project execution
 - b. Provides visibility into procurement status, long-lead items, and outstanding buy-out requirements
 - c. Mitigates risk of delayed procurement activities, missed commitments, and lack of alignment between procurement planning and project readiness

3. **Planning Kickoff / Alignment Meeting Agenda – to be created and utilized across all business units**
 - a. Establishes alignment on execution approach, sequencing, and planning expectations at the start of planning
 - b. Defines roles, responsibilities, and initial planning priorities
 - c. Ensures consistent communication across estimating, operations, and field teams
 - d. Mitigates risk of misalignment, inconsistent planning approaches, and unclear expectations

4. **Safety & Quality Planning Templates**
 - a. Provides standardized formats for developing safety and quality plans (e.g., JHA, SSSP, testing plans, hold points)
 - b. Ensures required safety and quality considerations are consistently addressed
 - c. Supports alignment with project requirements and internal standards
 - d. Mitigates risk of incomplete planning, inconsistent safety/quality approaches, and missed requirements

5. **Manpower & Labor Production Planning Template**
 - a. Standardizes how manpower plans and labor production plans are developed
 - b. Provides a consistent structure for defining workforce requirements, skillsets, and production expectations
 - c. Improves visibility into resource needs and supports coordination with scheduling
 - d. Mitigates risk of inaccurate manpower planning, resource misalignment, and schedule inefficiencies

6. **Procurement Planning Template**
 - a. Defines a consistent structure for identifying and tracking material and subcontractor procurement needs
 - b. Aligns procurement activities with project sequencing and planning inputs
 - c. Improves coordination between planning, scheduling, and procurement teams
 - d. Mitigates risk of missed procurement requirements, delays, and misalignment with the schedule

7. **Job Start Meeting Agenda – to be created and utilized across all business units**
 - a. Standardizes discussion topics for hand-off meetings (scope, budget, risks, procurement, schedule, etc.)
 - b. Ensures consistency in meeting execution across teams
 - c. Mitigates variability in hand-off quality and timing

8. **Job Start Meeting Minutes & Action Item Log – to be created and utilized across all business units**
 - a. Documents key discussion points, decisions, and action items from hand-off meetings
 - b. Tracks ownership, due dates, and status of action items
 - c. Mitigates risk of missed follow-ups and lack of accountability

9. Budget Upload Checklist (CMiC) – **to be created and utilized across all business units**
 - a. Confirms budget has been reviewed, validated, and correctly uploaded into CMiC
 - b. Ensures alignment between estimate, budget, and system data
 - c. Mitigates risk of errors in financial reporting

10. Procurement & Buy-Out Initiation Checklist (Procurement) - – **to be created and utilized across all business units**
 - a. Identifies when procurement activities should begin and what inputs are required
 - b. Aligns procurement timing with project readiness
 - c. Mitigates risk of delayed subcontractor engagement and material procurement

11. Job Start Meeting Agenda – **to be created and utilized across all business units**
 - a. Standardizes topics for Job Start meetings across all business units
 - b. Ensures alignment across operations, safety, quality, accounting, scheduling, and procurement
 - c. Mitigates risk of misalignment prior to execution

12. Project Readiness / Mobilization Checklist – **to be created and utilized across all business units**
 - a. Defines minimum conditions required prior to mobilization
 - b. Aligns project team on readiness for execution
 - c. Mitigates risk of starting work without complete information or alignment