



DELEGATED PROJECT PROCEDURE

Revised August 2026

TABLE OF CONTENTS

1.0 PURPOSE & SCOPE	4
2.0 AUTHORITY & APPLICABILITY	4
3.0 INTENT & INTERPRETATION	4
3.1 Interpretation	4
3.2 Acronyms	4
3.3 Definitions.....	4
3.4 Roles & Access	6
4.0 DELEGATION REQUIREMENTS & LIMITATIONS.....	6
4.1 Statutory Requirements	6
4.2 DPW Requirements.....	7
5.0 FUNDING	7
5.1 Permanent Building Fund (PBF)	7
5.2 Agency Funds.....	7
5.3 Request to Increase Delegated Amount	8
5.4 Power Incentives & Rebates	8
6.0 PROCUREMENT & CONTRACT REQUIREMENTS	8
6.1 General Procurement Rules	8
6.2 Design-Consultant Professional Services & Limits.....	8
6.3 Service Contractors & Limits.....	9
6.4 Bidding	9
7.0 INSURANCE & BONDING REQUIREMENTS	9
8.0 DELEGATION REQUEST PROCESS	9
8.1 Agency Submission	9
8.2 DPW Administrator Review.....	9
8.3 PBFAC Delegation Approval.....	9
8.4 Project Setup	9
9.0 PROJECT EXECUTION REQUIREMENTS.....	10
9.1 Design Phase	10
9.2 Bidding Procedures	11
9.3 Service Contract Selection.....	11
9.4 Contract Execution	11
9.5 Construction Administration	11
10.0 CLOSEOUT REQUIREMENTS & NONCOMPLIANCE	11
10.1 Closeout Submission	11
10.2 Funding Reconciliation	12
10.3 Noncompliance & Delegation Eligibility	12
APPENDIX	13
EXHIBIT A: IDAHO CODE REFERENCES.....	14
EXHIBIT B: DELEGATION REQUEST LETTER.....	15
EXHIBIT C: DELEGATED PROJECT INFORMATION WORKSHEET	16

EXHIBIT D: PBFAC DELEGATION WRITE-UP TEMPLATE	18
EXHIBIT E: PBFAC DELEGATED REVIEW WRITE-UP TEMPLATE	19
EXHIBIT E.1: PBFAC DELEGATED REVIEW -PRESENTATION TEMPLATE	20
EXHIBIT F: AGENCY CONSTRUCTION APPROVAL	21
EXHIBIT G: NOTICE TO PROCEED	22
EXHIBIT H: PROJECT DOCUMENTATION CHECKLIST.....	23
EXHIBIT I: FINAL ACCOUNTING SUMMARY.....	24
EXHIBIT J.1 SUBSTANTIAL COMPLETION FORM	25
EXHIBIT J.2 CONDITIONS PRECEDENT TO FINAL PAYMENT	26
EXHIBIT J.3: RELEASE OF CLAIMS.....	27
EXHIBIT J.4: CONTRACTORS AFFIDAVIT OF PAYMENT OF DEBTS & CLAIMS.....	28
EXHIBIT J.5: CONSENT OF SURETY TO FINAL PAYMENT.....	29
EXHIBIT J.6: TRAINING.....	30
EXHIBIT J.7: TAX RELEASE.....	31
EXHIBIT J.8: PROJECT FINALIZATION & START UP.....	32
EXHIBIT K: AGENCY CLOSURE REQUEST LETTER.....	33
EXHIBIT L: OMS TUTORIAL – AGENCY	34
EXHIBIT M: DELEGATED PROJECT PROCESS FLOW CHART	35

1.0 PURPOSE & SCOPE

This policy establishes uniform requirements, limitations, and procedures for the delegation of public works projects to State agencies under Idaho Code § 67-5710A(2). It applies to all delegated projects with a total project value of less than \$500,000, regardless of funding source.

2.0 AUTHORITY & APPLICABILITY

Under Idaho Code §67-5710A(2), the Administrator of the Division of Public Works (DPW) may delegate control of project design, construction, and all other aspects of eligible public works projects to a state agency, provided that:

- a. The requesting agency submits a written request for delegation.
- b. The requesting agency maintains compliance with this procedure.
- c. The DPW Administrator and the Permanent Building Fund Advisory Council (PBFAC) grant delegation approval.

Delegation is granted on a project-by-project basis and may be cancelled by the DPW Administrator, with concurrence of the PBFAC.

3.0 INTENT & INTERPRETATION

3.1 Interpretation

This procedure is intended to provide consistent administrative guidance for agencies participating in the delegated project program. It shall be interpreted in a manner that supports compliance with applicable Idaho statutes, administrative rules, and DPW requirements.

Unless otherwise stated:

The Division of Public Works reserves the right to interpret and administer this procedure as necessary to ensure consistent implementation and compliance.

3.2 Acronyms

CD – Construction Documents
DD – Design Development
DOPL – Division of Occupational & Professional Licenses
DP – Design Professional
DPW – Division of Public Works
FF&E – Furniture, fixtures, and equipment.
ITB – Instruction to Bidders
NTP – Notice to Proceed
O&M – Operations and Maintenance
OMS – Owner's web-based Management Software
PAC – Project Authorization/Change
PBF – Permanent Building Fund
PBFAC – Permanent Building Fund Advisory Council
SD – Schematic Design

3.3 Definitions

Authorized Funds – The total amount of funding formally approved for the project through delegation approval, including all approved funding sources. Authorized funds establish the maximum amount available for project execution unless modified through a subsequent approval action.

Closeout – The administrative process required to complete a delegated project, including submission of final documentation, financial reconciliation, and formal project closure by DPW.

Construction Delivery Method – The procurement and contracting approach used to complete the project (The only authorized delivery methods for delegated projects are Design-Bid-Build and Service Contracts).

Delegated Agency – The state agency receiving delegated authority to manage a public works project.

Delegated Project – A public works project for which the Division of Public Works has formally delegated authority for project management and execution to a state agency pursuant to Idaho Code § 67-5710A(2).

Delegation – Formal authorization granted by the DPW Administrator, with concurrence to the Permanent Building Fund Advisory Council, allowing a state agency to manage an eligible public works project.

Design Professional – A licensed architect, engineer, or other qualified design consultant retained to prepare project documents and provide professional services as required by law.

Funds – Money made available to the agency for the purpose of completing the delegated project, including transferred Permanent Building Fund (PBF) appropriation and/or agency-provided funds.

Noncompliance – Failure to meet the requirements of this procedure, applicable statutes, required deadlines, or DPW directives.

Owner's web-based Management Software (OMS) – DPW's official web-based project management system used for project setup, document storage, communication, monthly reporting, and closeout. (e.g. Projectmates)

Project Authorization/Change (PAC) – A formal OMS record used by DPW to establish a project and document approved funding or project changes during the project lifecycle.

Revocation of Delegation – Formal cancellation of delegated authority by the DPW Administrator, with concurrence of PBFAC.

Service Contract – A competitively awarded and authorized contract used for specific construction related services in accordance with applicable Idaho procurement requirements.

Substantial Completion – The stage of the project when the work is sufficiently complete for its intended use, even though minor corrective or punch list items may remain.

Team Notes – Monthly project status updates entered into OMS by the agency documenting project progress, schedule updates, issues, and key decisions.

Total Project Cost – The full authorized project budget, including design fees, construction costs, contingencies, permits, testing, and all other project-related expenses.

3.4 Roles & Access

Agency Field Representative – The individual designated by the agency to oversee on-site construction activities, coordinate field communication, and monitor project progress during construction.

Agency Project Coordinator – Granted access to the Documents module in OMS across phases (Planning, Design, Bids & Contracts, Construction). Main point of contact for the agency is per project unless otherwise noted by the Agency Signature Authority.

Agency Project Manager – Responsible for day-to-day management of the delegated project, including coordination with consultants, contractors, ensuring compliance with this procedure.

Agency Signature Authority – Requesting party for delegated approval. Main point of contact for Agency during the delegation request process. Granted access to the Documents module in OMS across phases (Planning, Design, Bids & Contracts, Construction).

Contractor / Service Contractor – The entity contracted to perform construction or specialty work for the project in accordance with the approved contract documents.

Design Professional – The licensed architect, engineer, or consultant retained by the agency to prepare design documents, support code review, and provide construction-phase services as required by contract.

DPW Administrator – Provides executive oversight of the delegated project program, reviews delegation requests for compliance with applicable statutes and DPW procedures, issues delegation approval or denial recommendations, and may recommend corrective action or revocation of delegated authority when warranted.

DPW Management Assistant – Serves as the primary administrative point of contact for delegated project requests; receives and routes agency submissions, coordinates PBFAC agenda materials, prepares delegation correspondence, and supports communication between agencies and DPW staff.

DPW Project Manager (PM) – Serves as DPW's assigned Owner's Representative for the delegated project; provides oversight throughout the project lifecycle to monitor compliance with this procedure, reviews monthly project updates, coordinates with the agency as needed, and oversees final closeout.

DPW Senior Project Coordinator – Supports delegated project setup, administrative processing, and closeout activities; establishes new projects in OMS, processes Project Authorization/Change (PAC) records, manages user permissions, and assists with final project closeout.

Permanent Building Fund Advisory Council (PBFAC) – Provides final approval of delegation requests and delegated design reviews and may audit delegated projects for compliance.

4.0 DELEGATION REQUIREMENTS & LIMITATIONS

4.1 Statutory Requirements

- a. The state agency to whom control is delegated shall assume all responsibility for project budgets and shall receive funds appropriated for the project upon application and approval by the DPW Administrator and the PBFAC.

- b. Delegation of project control does not exempt the state agency from complying with public works statutes, rules, safety and building codes, or other applicable codes, regulations, policies and procedures. The requesting agency also must comply with any procedures for design and construction adopted by the DPW and the PBFAC.
- c. State agencies that receive delegated projects may not have access to permanent building contingency funds. If the agency contributes agency contingency funds to a project, it must be submitted in writing and approved by the DPW Administrator.
- d. Prior written approval from the DPW Administrator must be granted for any public works project utilizing sole source or limited competition. No agency will be delegated the ability to declare an emergency as defined in Idaho Code § 67-5711B.
- e. The PBFAC may elect to audit any project for compliance with applicable codes and policies.
- f. The delegated state agency will use all forms and contracts adopted by DPW. (see appendix)
- g. Delegation is subject to cancellation by the DPW Administrator with the concurrence of the PBFAC.

4.2 DPW Requirements

- a. Requesting agencies must use the OMS for all required documentation, monthly project updates using team notes, and closeout materials throughout the lifecycle of each delegated project.
- b. Delegated agencies must meet all reporting, schedule, procurement, and accounting requirements outlined in this policy.
- c. DPW will review monthly team notes to monitor compliance, ensure timely oversight, and evaluate each agency's performance under delegated authority. Failure to provide complete and timely monthly notes may affect an agency's eligibility for future delegated projects and may result in additional oversight or corrective action.
- d. Delegated agencies must begin construction within 12 months of receiving delegated funding or delegation may be revoked.

5.0 FUNDING

One of the following funding sources must be clearly identified in the delegation request:

5.1 Permanent Building Fund (PBF)

- a. Funds that originate from the Permanent Building Fund.
- b. Funds are transferred to the agency upon PBFAC approval.
- c. Any unused PBF funds must be returned to DPW at project closeout.

5.2 Agency Funds

- a. Funds that originate from the agency's internal budget or other designated sources.

- b. Unused funds are not returned to PBF and remain under agency control.
- c. DPW will not authorize delegation for agency funded projects under \$200,000 as per Idaho Code § 67-5711.

5.3 Request to Increase Delegated Amount

- a. When seeking to add agency funds to a project, the delegated agency must submit a letter to the DPW Administrator requesting an increase in delegated authority.
- b. If added funds exceed 10% of original authorization, the Delegated Agency must provide a project update to PBFAC at the next available regularly scheduled meeting.
- c. If project funding meets or exceeds \$500,000, delegation will be revoked and a DPW project manager will be assigned to oversee the new project.

5.4 Power Incentives & Rebates

For projects eligible for utility incentives or rebates, the agency's contracted Design Professional is responsible for identifying, applying for, and tracking all available rebates associated with the project.

- a. Agencies must notify DPW of any anticipated utility incentive or rebate during project execution.
- b. All rebates or incentives associated with projects funded wholly or partially by PBF must be returned to DPW for deposit back into the Fund.
- c. Documentation of rebate applications, approvals, and payments received must be uploaded to OMS as part of the project record.
- d. Rebate amounts must be identified in the Final Accounting Summary submitted at project closeout.

6.0 PROCUREMENT & CONTRACT REQUIREMENTS

6.1 General Procurement Rules

Delegated agencies must follow Idaho Public Works procurement laws and DPW requirements, including:

- a. Public advertising and competitive bidding as required. Idaho Code § 67-5711C.
- b. Use of DPW standard forms for all contracts and agreements Idaho Code § 67-5710A.
- c. DPW Administrator approval for sole-source or limited-competition procurement.
- d. Furniture, fixtures, and equipment (FF&E) are not to be included as part of delegated projects. The agency is responsible for FF&E and must follow applicable procurement rules.
- e. Permanent building funds may not purchase FF&E, which includes head end equipment such as network archiver, switches, software maintenance agreements.

6.2 Design-Consultant Professional Services & Limits

Delegated projects may be executed using one or more regional design professional services contracts, provided that:

- a. No single contract exceeds \$50,000 Idaho Code § 67-2320.

6.3 Service Contractors & Limits

Delegated projects may be executed using one or more service contractors, provided that:

- a. No single service contract exceeds \$200,000, and
- b. The aggregate total of all service contracts used to complete the project does not exceed \$300,000.

6.4 Bidding

All bidding must comply with requirements listed in Idaho Code § 67-5711.

7.0 INSURANCE & BONDING REQUIREMENTS

All delegated projects, regardless of funding source, require:

- a. Certificate of General Liability.
- b. Payment and Performance Bonds for projects with construction costs over \$50,000.
- c. Builder's Risk Insurance as required by risk management.

Evidence of required insurance and bonds must be obtained before the Notice to Proceed (NTP) is issued.

8.0 DELEGATION REQUEST PROCESS

8.1 Agency Submission

Using Exhibit B, the agency's designated signature authority must submit a written delegation request to the DPW Administrator. This request must include a project address, description, justification, estimated cost, funding source, construction delivery method and anticipated construction schedule. Exhibit C – Delegated Project Information Worksheet must be attached and enclosed with the agency request letter.

8.2 DPW Administrator Review

The DPW Administrator reviews the request for statutory, technical, and procedural compliance. Review may consider past delegated performance of the agency. The Administrator will issue an initial written determination. Final approval is required in the next regularly scheduled PBFAC meeting.

8.3 PBFAC Delegation Approval

The requesting agency must submit a delegation write-up to be reviewed by PBFAC. The Agency shall use the write-up template (Exhibit D) provided by DPW. Write-up to be sent to DPW Management Assistant as outlined in call for items distributed by DPW.

8.4 Project Setup

Upon PBFAC approval, the following steps are taken for project set up:

DPW Management Assistant:

- a. Draft the Delegation Approval Confirmation Letter and send it to the designated agency contact.

- b. Compile the delegation confirmation packet, containing delegation approval confirmation letter, approved delegation request letter with project worksheet, and approved PBFAC write-up.
- c. Route the delegation confirmation packet to Senior Project Coordinator.

DPW Senior Project Coordinator:

- a. Create a new delegated project in OMS.
- b. Upload the delegation approval confirmation packet to OMS.
- c. Confirm that all project users are added to the OMS with appropriate rights to upload project documents.
- d. Submit the Project Authorization/Change (PAC) to open project attaching delegation confirmation packet.
- e. Route the project to DPW Project Manager.

DPW Project Manager:

- a. When project is funded by PBF, create a contract with the delegated agency in OMS.
- b. Create an invoice in OMS to transfer PBF funds to delegated agency.
- c. Coordinate with the delegated agency throughout the project.

9.0 PROJECT EXECUTION REQUIREMENTS

Once delegation is granted, the delegated agency manages all phases of the project. Documentation for each phase is required to be uploaded into the OMS. See Exhibit H for required documentation.

9.1 Design Phase

- a. Update the OMS team notes monthly.
- b. Hire a Design Professional (DP) using DPW Regional Design Professional list.
- c. Follow standard design phase milestones: Schematic Design (SD) → Design Documents (DD) → Construction Documents (CD). Per I.C. 67-5710A, all delegated projects **must** include plans and specifications, and all plans and specifications must be reviewed and approved by PBFAC.
- d. Using Exhibit E, submit a delegated review write-up and presentation to DPW management assistant to be placed on PBFAC meeting agenda.
- e. The delegated agency or contracted design professional presents the project to PBFAC for delegated review, seeking approval of preliminary/final plans and specifications and authorization to proceed with bidding or award of contract.
- f. The Agency Construction Approval (Exhibit F) is added to final specifications and drawings.

- g. Submit the specifications and drawings to DOPL for code review as required.
- h. Projects cannot proceed to bidding until DOPL review is complete or the agency provides confirmation from DOPL that a review is not required.

9.2 Bidding Procedures

For bidding procedures, refer to Idaho Code § 67-5711C which includes, but is not limited to the following:

- a. Advertise for bids.
- b. Conduct public bid openings.
- c. Perform Public Works License review to determine lowest responsive bidders.

9.3 Service Contract Selection

When the work of the project can be performed by a service contractor, the following requirements apply:

- a. Contact DPW for list of approved service contracts
- b. DPW Service Contract use must be authorized by DPW in writing.
- c. Service Contractor fee proposal is received and uploaded to OMS.

9.4 Contract Execution

Contractor provides the following documentation prior to contract execution:

- a. Idaho State Tax Commission WH-5 Form.
- b. Certificate of General Liability.
- c. Payment and Performance Bonds for projects with construction costs over \$50,000.
- d. Builder's Risk Insurance as required by risk management.

Once required contract documentation is received, the delegated agency must issue a Notice to Proceed (NTP) to the contractor using Exhibit G.

9.5 Construction Administration

- a. Delegated agency to update project team notes in OMS monthly.
- b. When construction is complete, utilize the DPW Substantial Completion form, Exhibit J.1.
- c. DOPL final acceptance is uploaded to OMS.

10.0 CLOSEOUT REQUIREMENTS & NONCOMPLIANCE

10.1 Closeout Submission

Within 60 days of project substantial completion, the delegated agency must confirm that all required project documentation has been uploaded to OMS, including all forms and documentation identified in the DPW Documentation Checklist (Exhibit H). Once documentation is confirmed complete in OMS, the agency must submit the following items to the DPW Project Manager for final closeout review:

- a. Exhibit K – Agency Closure Request Letter

- b. Exhibit I – Final Accounting Summary
 - i. Backup documentation for service contract work, as applicable.

10.2 Funding Reconciliation

- a. DPW staff will review submitted closeout materials for accuracy and completeness. Upon review approval, DPW staff will process final closeout actions in the OMS.
- b. Agencies shall return any unused funds to DPW for deposit back into the Permanent Building Fund.

10.3 Noncompliance & Delegation Eligibility

- a. Failure to comply with project execution and closeout requirements, including failure to meet the 60-day closeout deadline, may result in denial of future delegation requests, at the discretion of the DPW Administrator and PBFAC.
- b. DPW staff will perform audits for each participating agency to confirm compliance with statutory, licensing, and division requirements.
- c. DPW may issue written notice to agencies with a history of non-compliance, placing agency on notice, or terminating participation in future delegation approvals.
- d. If the delegated agency has not reached the “active construction” phase on a delegated project within 12 months of delegation, DPW will recommend revocation of delegation to PBFAC.

APPENDIX

EXHIBIT A: IDAHO CODE REFERENCES

Code Reference	Title
67-5710A (2)	Title 67- State Government and State Affairs Chapter 57-Department of Administration <i>67-5710A- Requirement of Plans and Specification Approval by Permanent Building Fund Advisory Council and Delegation of Project Oversight by the Administrator for the Division of Public Works.</i>
67-5711B	Title 67- State Government and State Affairs Chapter 57-Department of Administration <i>67-5711B. Emergency Contracting Authorized Division of Public Works.</i>
67-5711C	Title 67- State Government and State Affairs Chapter 57-Department of Administration <i>67-5711C. Construction of Public Projects — Competitive Sealed Bidding.</i>
67-2320	Title 67- State Government and State Affairs Chapter 23-Miscellaneous Provisions <i>67-2320. Professional Service Contracts with Design Professionals, Construction Managers, and Professional Land Surveyors.</i>
67-5711	Title 67- State Government and State Affairs Chapter 57-Department of Administration <i>67-5711. Construction, Alteration, Equipping, Furnishing and Repair of Public Buildings and Works.</i>
54-1902	Title 54 – Professions, Vocations, and Businesses Chapter 19- Public Works Contractors <i>54-1902. Unlawful to Engage in Public Works Contracting Without License – Investigations.</i>
Title 44	Title 44 - Labor

EXHIBIT B: DELEGATION REQUEST LETTER

INSERT AGENCY LETTERHEAD

MMMM, DD, YYYY

Administrator Berard
Division of Public Works
PO Box 83720
Boise, Idaho 83720-0072

Subject: Request for Delegation for (Type of Work and Location)

Dear Administrator:

Insert Agency Name from List would like to request that a DPW project be delegated to (Type of Work and Location).

(Describe the project, scope, and proposed delivery method)

Sincerely,

(Agency Signature Authority)
(Title)

Enclosures

- Exhibit C - Delegated Project Worksheet

c: Agency Contacts
DPW Management Assistant
Project File

EXHIBIT C: DELEGATED PROJECT INFORMATION WORKSHEET

PROJECT INFORMATION

Project #: _____ D Agency: _____

Project Name: _____

Address: _____ Square Feet: _____

SCOPE/DESCRIPTION

Agency Request:

Primary Objectives/Goals:

Special Considerations:

PROJECT CONTACTS

Role	Name	Phone	Email
Agency Signature Authority:	_____	_____	_____
Agency Project Manager:	_____	_____	_____
Agency Field Rep:	_____	_____	_____
Design Professional:	_____	_____	_____
Contractor:	_____	_____	_____
Other:	_____	_____	_____
Other:	_____	_____	_____

CONTINUE TO NEXT PAGE

BUDGET

Funding Type: ☐ PBF ☐ Agency Total Project Budget: \$ _____

Section	Amount	Percent
1.0 Design Professional Services:	\$ _____	_____ %
2.0 Professional Services:	\$ _____	_____ %
3.0 Construction:	\$ _____	_____ %
4.0 Miscellaneous:	\$ _____	_____ %
5.0 Authorized Funding:	\$ _____	_____ %

CONTRACT DETAILS

Design Professional: _____ Type: ☐ DPW Regional ☐ Other

Construction Delivery Method: ☐ Design-Bid-Build
☐ DPW Service Contract
☐ Agency Service Contract

PRELIMINARY PROJECT SCHEDULE

Milestone	Date
PBFAC Delegation	_____
Design Professional Selection	_____
PBFAC Delegated Review	_____
Receive Bids	_____
Construction Begin	_____
Construction Substantial Completion	_____

DELEGATION AGREEMENT

By signing below, the agency acknowledges that it has read, understands, and agrees to comply with the requirements, responsibilities, and procedures outlined in the Delegated Projects Procedure Manual. The agency further acknowledges that acceptance of delegated authority does not relieve it of responsibility for complying with all applicable Idaho statutes, administrative rules, building and life safety codes, procurement requirements, and Division of Public Works (DPW) policies and procedures. The agency accepts full responsibility for administering the delegated project in accordance with these requirements and understands that failure to comply may result in corrective action, revocation of delegated authority, or denial of future delegation requests.

Agency Signature Authority:

Printed Name Signature Date

DPW USE ONLY

Management Assistant Initials _____ Administrator Initials _____ PBFAC Approval _____
Senior Project Coordinator Initials _____ OMS Set-Up _____ PM Initials _____

EXHIBIT D: PBFAC DELEGATION WRITE-UP TEMPLATE

DELEGATED PROJECT REQUEST

DPW Project No. 00000D

Funding Source(s) Agency \$ 000,000.00

Project Title

Specific Building/Site if named

Agency (Agency Abbreviation)

City, Idaho

(Insert Agency Name) requests delegation of a project to ACTION VERB (replace/remodel/remove/build/provide) DESCRIPTION/SCOPE OF WORK at the BUILDING/SITE (AGENCY) in CITY. (Insert Agency Abbreviation) will utilize (insert design professional) as the design professional. This project is anticipated to start _____ and be complete by _____. It is anticipated that (insert construction delivery method) will be performing the construction.

ACTION REQUESTED: APPROVE DELEGATION OF DPW PROJECT NO. xxxxxD.

EXHIBIT E: PBFAC DELEGATED REVIEW WRITE-UP TEMPLATE

DELEGATED PROJECT REVIEWS

DPW Project No. 00000D

Funding Source(s) Agency \$ 000,000.00

Project Title

Specific Building/Site if named

Agency (Agency Abbreviation)

City, Idaho

Previous Minutes: MM-DD-YY, MM-DD-YY (oldest to newest)

Presentation by: First Last Name, Firm, City, State (Indicate if Presenter is Virtual)

DPW Project Manager: First Last Name

Describe the problem that is being addressed:

The work of this project will ACTION VERB (replace/remodel/remove/build/provide) DESCRIPTION at the BUILDING/SITE (AGENCY) in CITY.

Who is doing the design/work, how does the cost estimate compare with the budget (include structure/building sf costs, site costs separately), are there additive alternates, and when will work be done:

ABC Architects, City has designed the project. The estimated construction cost is \$\$\$ (\$\$/sf), which is within the \$\$\$ construction budget. Additive Alternate(s) will be included in the project to ensure maximum use of the budget. The work is anticipated to commence DATE/TIME-FRAME and be completed prior to DATE/TIME-FRAME.

ACTION REQUESTED: APPROVE DPW PROJECT NO. 00000D AND AUTHORIZE BIDDING AND AWARD OF CONTRACT.

EXHIBIT E.1: PBFAC DELEGATED REVIEW -PRESENTATION TEMPLATE

Please limit Presentations to five (5) PowerPoint slides or less if possible and encourage presenters to be succinct.

Agency Name
Enter Project Full Name
DPW (ENTER PROJECT #)

Presenters: Enter Presenters Full Names & Titles
DPW Project Manager: Enter Project Manager Name
Enter PBFAC Meeting Date

Insert Agency Log | Insert DP Logo

Slide 2:
Image & Description of Project Scope

Slide 3:
Images of current site conditions

Slide 4:
Image & Description of Future Design

Slide 5:
Budget Breakdown & Project Schedule

Thank you!

Questions
Presenter's Name

1

EXHIBIT F: AGENCY CONSTRUCTION APPROVAL

CONSTRUCTION APPROVAL BY RESPONSIBLE
CHIEF OFFICER OF INSTITUTION OR AGENCY
(IDAHO CODE 67-5710)

Final Plans & Specs have been reviewed for:

Insert Project Name

Insert DPW Project No.

This project incorporates the required program elements within the funding limitations authorized and authorizes the Division of Public Works to proceed with bidding on the project. If acceptable bids are received, I will approve awarding a contract and construction of the facilities in accordance with the plans and specifications.

Insert Agency Name

Insert Agency Signature Authority

APPROVALS

Role	Action	Signature	Date
1. Agency Signature Authority (insert name)			
2. Agency Project Manager (insert name)			

EXHIBIT G: NOTICE TO PROCEED

NOTICE TO PROCEED

TO CONTRACTOR:

DPW NUMBER:

CONTRACT DATE:

ARCHITECT:

CONTRACT AMOUNT: \$

DATE OF ISSUANCE:

OWNER: State of Idaho

You are hereby notified to commence work on the above referenced contract on/or before **Date** and are to substantially complete the work within **Number of Days** consecutive calendar days thereafter; therefore, your contract completion date is **Date** .

The contract provides for the sum of \$ **Dollar Value** as liquidated damages for each consecutive calendar day after the above established substantial completion date that the work remains incomplete. Completion date will be established by "Certificate of Substantial Completion."

You are reminded that any changes to the original contract document regarding either cost or completion date must be affected by a change order approved by this department.

Your payment estimates must be submitted on Division of Public Works forms included herein. We will be most happy to assist you in preparing the payment-estimate forms.

 Name has been appointed as Field Representative for this project. Please contact him at **332-** prior to beginning work. A pre-construction meeting will be held **Date** , at **Time** , at **Location** .

Sincerely,

KELLY A. BERARD
ADMINISTRATOR

KB:pb

DISTRIBUTION: Tax Commission
 Division of Building Safety
 Risk Management (w/ Builder's Risk Application, if applicable)
 (Project Manager)
 Fiscal Office TAX ID xx-xxxx

EXHIBIT H: PROJECT DOCUMENTATION CHECKLIST

PLANNING

Background Information

- ☐ Agency Project Worksheet (Exhibit C)

Funding

- ☐ Agency Delegation Request Letter

DESIGN

PBFAC

Presentations

- ☐ PowerPoint Slides presented to PBFAC for Delegated Review

Write Ups

- ☐ Exhibit D – PBFAC Delegation Write-Up
- ☐ Exhibit E – PBFAC Delegated Review Write-Up

Regulatory Agency

DOPL Application

- ☐ DOPL Application for Plan Review
- ☐ DOPL Confirmation Plan Review Not Required

Construction Documents

- ☐ Cost Estimate
- ☐ 95% CDs
- ☐ Schedule

BIDS & CONTRACTS

Bidding

- ☐ Advertisement for Bid
- ☐ Bid Addendums
- ☐ Bid Tabulation Sheet
- ☐ Non-Successful Bidder Docs

Construction Contracts

- ☐ Affidavit Concerning Taxes
- ☐ Builders Risk Insurance
- ☐ Certificates of Insurance
- ☐ Contract Docs
- ☐ Notice to Proceed
- ☐ Payment & Performance Bonds
- ☐ Public Works Contractors Report

CONSTRUCTION

DOPL Documents

- ☐ Approved Bid Plans & Specifications
- ☐ Final Acceptance & Inspections
- ☐ Permits

Construction Correspondence

Other

- ☐ All Project Invoices/Receipts
- ☐ Final Accounting Summary
- ☐ Contractor As-Builts
- ☐ Record Drawings
- ☐ Warranties

Substantial Completion

- ☐ 1 Year Warranty
- ☐ Punch List
- ☐ Exhibit J.1 – Substantial Completion

Closeout

- ☐ Exhibit J.2 – Conditions Precedent to Final Payment
- ☐ Exhibit J.3 – Release of Claims
- ☐ Exhibit J.4 – Contractors Affidavit – Debts & Claims
- ☐ Exhibit J.5 – Consent of Surety to Final Payment
- ☐ O&M Manuals
- ☐ Exhibit J.6 – Training
- ☐ Exhibit J.7 – Tax Release
- ☐ Exhibit J.8 – Project Finalization & Start-Up

EXHIBIT I: FINAL ACCOUNTING SUMMARY

DPW Project #	Project Title	PBF \$	Agency \$	Total \$ Authorized	\$ Expended	Variance

The project was funded at \$ xxx,xxx.xx by (PBF/Agency), as approved by PBFAC on MM/DD/YYYY. Design services for the project were provided by (firm) using a (agency/DPW) contract, as approved by PBFAC on MM/DD/YYYY. Construction was provided by (vendor) using a (DPW/Agency) Service Contract. -OR- Project was publicly bid on MM/DD/YYYY awarding (company) as the lowest responsive bidder. Construction was completed on MM/DD/YYYY.

Contract No. :

Vendor Name:

[illegible]

Contract No. :

Vendor Name:

[illegible]

Contract No. :

Vendor Name:

[illegible]

EXHIBIT I: FINAL ACCOUNTING SUMMARY

DPW Delegated Project Procedure | Revised August 2026

EXHIBIT J.1 SUBSTANTIAL COMPLETION FORM

SUBSTANTIAL COMPLETION CERTIFICATION

Project: _____

DPW Project No. _____
Design Professional _____
Contractor _____

Date Required by Agreement and Change Orders _____

Contract Amount Paid to Date

Actual Date of Substantial Completion _____

\$ _____

A list of items to be completed or corrected, prepared by the Design Professional, is attached hereto. Failure by the Design Professional to include any items on this list does not alter the responsibility of the Contractor to complete all Work in accordance with the Contract Documents.

The work performed under this contract and any approved change orders have been reviewed and found to be substantially complete. The Date of Substantial Completion is also the date for commencement of applicable warranties required by the contract unless exempted in an attached list.

A final report of Special Inspections is attached. If no Special Inspections are required, Design Professional to cross out and initial this section. _____

Design Professional

By: Authorized Representative

Date

I will complete or correct the Work on the attached list within _____ days from the Date of Substantial Completion.

Contractor

By: Authorized Representative

Date

The Owner accepts the Work or designated portion thereof as substantially complete and will assume full possession thereof at 8:00 a.m. the day following the Date of Substantial Completion.

Agency Representative

Date

EXHIBIT J.2 CONDITIONS PRECEDENT TO FINAL PAYMENT

Conditions Precedent to Final Payment with Construction Contracts over \$50,000

Date: _____

DPW Project No. _____

Project Title: _____

Location: _____

Send to:
State of Idaho
Division of Public Works
502 N. Fourth Street
Boise, Idaho 83702

Contractor's Responsibilities: *This section to be Completed by Contractor*

Per Paragraph 7:13 of the Fixed Price Construction Contract: As a condition precedent to final payment, the Contractor must furnish the owner, in the form and manner required by Owner, to be submitted to the Owner for approval, the following:

- ☐ Contractor's Final Request for Payment Form has been uploaded to the Owners Management System (OMS);
- ☐ Release of Claims form has been uploaded to OMS;
- ☐ Contractor's Affidavit of Payment of Debts and Claims Form has been uploaded to OMS (AIA G706);
- ☐ Consent of Surety to Final Payment has been uploaded to OMS (AIA G707);
- ☐ Confirmation of all required training, product warranties, operating manuals, instruction manuals and other record documents, drawings and items customarily required of the Contractor have been uploaded to OMS.
- ☐ Public Works Contract Tax Release from the Idaho Tax Commission has been uploaded to OMS;
- ☐ Division of Occupational & Professional Licenses Letter of Completion/Final Inspection has been uploaded to OMS;
- ☐ Project Finalization and Start Up has been uploaded to OMS;

Contractor's Signature

Date

Owner's Responsibilities: *This section to be completed by Owner*

- ☐ All Documents Required per Paragraph 7.13 of the Contract have been uploaded to OMS.
- ☐ All Warranties, Guarantees, etc. have been received, approved and have been uploaded to OMS.
- ☐ Contractor's As-Built Drawings have been received, reviewed, approved and uploaded to OMS in PDF format.
- ☐ Final punch list with Owner/Owner's Representative verification that all items have been completed, has been uploaded to OMS.

To the best of my knowledge, information, and belief, and on the basis of my observations and inspections, I certify the Work has been completed in accordance with the terms and conditions of the Contract Documents and that the required documentation required by Paragraph 7.13 of the contract has been received. The entire balance, as shown on the attached Final Request for Payment, is due and payable.

Owner/Owner's Representative Signature

Date

EXHIBIT J.3: RELEASE OF CLAIMS

RELEASE OF CLAIMS

(TO BE COMPLETED FOR FINAL PAYMENT)

I, _____, do hereby release the State of Idaho from any and all claims of any character whatsoever arising under and by virtue of contract number _____

Dated _____ as amended, except as herein stated.

Company Name:

Signature

Date



EXHIBIT J.4: CONTRACTORS AFFIDAVIT OF PAYMENT OF DEBTS & CLAIMS

AIA Document G706™ – 1994

Contractor's Affidavit of Payment of Debts and Claims

PROJECT: *(Name and address)* **ARCHITECT'S PROJECT NUMBER:** ☐ OWNER ☐
CONTRACT FOR: ☐ ARCHITECT ☐
☐ CONTRACTOR ☐
TO OWNER: *(Name and address)* **CONTRACT DATED:** ☐ SURETY ☐
☐ OTHER ☐

STATE OF:

COUNTY OF:

The undersigned hereby certifies that, except as listed below, payment has been made in full and all obligations have otherwise been satisfied for all materials and equipment furnished, for all work, labor, and services performed, and for all known indebtedness and claims against the Contractor for damages arising in any manner in connection with the performance of the Contract referenced above for which the Owner or Owner's property might in any way be held responsible or encumbered.

EXCEPTIONS:

SUPPORTING DOCUMENTS ATTACHED HERETO:

1. Consent of Surety to Final Payment. Whenever Surety is involved, Consent of Surety is required. AIA Document G707™, Consent of Surety to Final Payment, may be used for this purpose.

Indicate attachment: ☐ Yes ☐ No

The following supporting documents should be attached hereto if required by the Owner:

1. Contractor's Release or Waiver of Liens, conditional upon receipt of final payment
2. Separate Releases or Waivers of Liens from Subcontractors and material and equipment suppliers, to the extent required by the Owner, accompanied by a list thereof
3. Contractor's Affidavit of Release of Liens (AIA Document G706A™)

CONTRACTOR: *(Name and address)*

BY:

(Signature of authorized representative)

(Printed name and title)

Subscribed and sworn to before me on this date:

Notary Public:

My Commission Expires:

CAUTION: You should sign an original AIA Contract Document, on which this text appears in RED. An original assures that changes will not be obscured.

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EXHIBIT J.5: CONSENT OF SURETY TO FINAL PAYMENT

AIA Document G707™ – 1994

Consent of Surety to Final Payment

PROJECT: *(Name and address)*

ARCHITECT'S PROJECT NUMBER:

OWNER ☐

CONTRACT FOR:

ARCHITECT ☐

CONTRACTOR ☐

TO OWNER: *(Name and address)*

CONTRACT DATED:

SURETY ☐

OTHER ☐

In accordance with the provisions of the Contract between the Owner and the Contractor as indicated above, the
(Insert name and address of Surety)

on bond of
(Insert name and address of Contractor)

, SURETY,

hereby approves of the final payment to the Contractor, and agrees that final payment to the Contractor shall not
relieve the Surety of any of its obligations to
(Insert name and address of Owner)

, CONTRACTOR,

as set forth in said Surety's bond.

, OWNER,

IN WITNESS WHEREOF, the Surety has hereunto set its hand on this date:
(Insert in writing the month followed by the numeric date and year.)

(Surety)

(Signature of authorized representative)

(Printed name and title)

Attest:
(Seal):

CAUTION: You should sign an original AIA Contract Document, on which this text appears in RED. An original assures that changes will not be obscured.

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EXHIBIT J.6: TRAINING

STATE OF IDAHO
DIVISION OF PUBLIC WORKS
Training Confirmation Sign-In Sheet

DPW Project: _____

Agency: _____

Project Name: _____

Project Location: _____

Field Representative: _____

Date & Time: _____

Name	Company	Telephone	Signature

EXHIBIT J.7: TAX RELEASE
Idaho State Tax Commission
REQUEST FOR TAX RELEASE

Date: _____

PART I -- AWARDING AGENCY INFORMATION:

Name of agency	Mailing address	City, state, and ZIP Code
Contact name	Phone number	Email address

PART II -- CONTRACTOR INFORMATION:

Name of contractor	Mailing address	City, state, and ZIP Code
Federal EIN	Contact name	Phone number
		Email address

PART III -- CONSTRUCTION/CONTRACT MANAGER INFORMATION (if applicable):

Name of business	Mailing address	City, state, and ZIP Code
Federal EIN	Contact name	Phone number
		Email address

Send a copy of the approved Tax Release to: Awarding Agency ☐ Contractor ☐ Construction Manager ☐

NOTE: We will email all copies unless otherwise requested

PART IV -- PROJECT INFORMATION:

Name of project	Location of project
Description of project	

Project number assigned by awarding agency	Project start date	Project completion date	Final/closing contract amount (includes all change orders)
			\$

Did any government entities supply materials which were installed by this contractor or its subs?: Yes ☐ No ☐

If YES, list these materials and their dollar values. (Attach additional information if needed)

List Materials Dollar Values of Materials	List
	\$
	\$
	\$

Send to: Contract Desk/Sales Tax Audit
Idaho State Tax
Commission PO Box 36
Boise ID 83722-0410

Phone: (208) 334-7618 • Fax: (208) 332-6619 • Email: contractdesk@tax.idaho.gov

NOTE: Please allow 30 days to process a Tax Release Request. You must send a complete, signed Form WH-5 Public Works Contract Report to the Idaho State Tax Commission to complete this request.

EXHIBIT J.8: PROJECT FINALIZATION & START UP

PROJECT FINALIZATION AND START-UP

Upon completion of the equipment and systems installation and connections, the contractor shall assemble all equipment factory representative and subcontractors together for system start-up.

These people shall assist in start-up and check out their system(s) and remain at the site until the total system operation is acceptable and understood by the agency's representative(s). The factory representative and system subcontractor shall also give instructions on operation and maintenance of their equipment to the agency's maintenance and/or operation personnel. To prove acceptance of operation and instruction by the agency's representative(s), this written statement of acceptance shall be signed below.

By signing this document, I, the Contractor, associated factory representative and subcontractors, have started each system and the total system; and have proven their normal operation to the agency's representative(s) and maintenance/operation personnel and have instructed him/them in the operation and maintenance thereof.

Contractor Representative Name

Signature

Date

Agency Representative Name

Signature

Date

EXHIBIT K: AGENCY CLOSURE REQUEST LETTER

AGENCY LETTERHEAD

DATE

Administrator
Division of Public Works
PO Box 83720
Boise, Idaho 83720-0072

Subject: Request to Close Delegated Project (DPW project # & Name)

Dear Administrator:

(Name of Agency) would like to request that project (*DPW Project #*) be closed.

The project was funded at \$ xxx.xxx.xx by (PBF/Agency), as approved by PBFAC on MM/DD/YYYY. Design services for the project were provided by (firm) using a (agency/DPW) contract, as approved by PBFAC on MM/DD/YYYY. Construction was provided by (vendor) using a (DPW/Agency) Service Contract. -OR- Project was publicly bid on MM/DD/YYYY awarding (company) as the lowest responsive bidder. Construction was completed on MM/DD/YYYY.

All required closeout documentation has been uploaded into the Owner's web-based Management Software . Enclosed is a completed final accounting summary for your review.

Please contact (agency rep) at (phone number & email) with any questions.

Sincerely,

(Agency Signature Authority)
(Title)

Enclosed

Final Accounting Summary

c: Agency Contacts
 DPW Project Manager
 Project File

EXHIBIT L: OMS TUTORIAL – AGENCY

TEAM NOTES

Team Notes are to be updated before the 10th of every month. The note should include the current project status and a written narrative of current project progress. Start date of team note should be the day it is entered into Projectmates, and the end date should be minimum 30 days out, allowing for the team note to remain active for that span of time. DPW uses these team notes to run a monthly report, tracking progress of all delegated projects.

Team note should be formatted as outlined below:

Project Status: *(see table below for status criteria)*

Agency Abbreviation – Agency Rep Initials – MM/DD/YY:

A few sentences describing the current project status and progress.

Start Date: MM/DD/YY

End Date: + 30 days to start date

STATUS	CRITERIA
Active Construction	Agency confirmed construction is ongoing.
Active Design	PBFAC delegation received. In design phases.
Close When Funds Received	PBF/DMP funded projects that have unused funds needed returned to DPW prior to closing.
Close When PAC Approved	Projects that have complete closeout documents and are queued to close.
Closed	Project documents reviewed. Close out PAC approved.
Closeout In Process	agency closeout letter received, have outstanding closeout documents to be submitted.
In Review/DOPL	Final Plan Review ongoing. DOPL plan review pending.
Inactive Hold	Need status update from Agency; no recent action taken; Needs funding clarification
Out for Bid	Delegated Review approved by PBFAC; Pending formal bid opening; pending contract execution with service contractor.
Preliminary	New delegated project; pending PBFAC approval
Substantially Complete (95%)	construction complete. Agency gathering closeout documents.

EXAMPLE:

The screenshot shows a web form titled "Type/Edit Team Note". It features a rich text editor with a toolbar containing icons for bold, italic, underline, link, bulleted list, numbered list, decrease indent, increase indent, link, unlink, and undo. The text area contains the following content:

Project Status: **Active Design**

DPW-MV-06/10/26: Project received delegation approval in May 2026 PBFAC meeting. Agency authorized to contract with design professional and proceed with design phase of project.

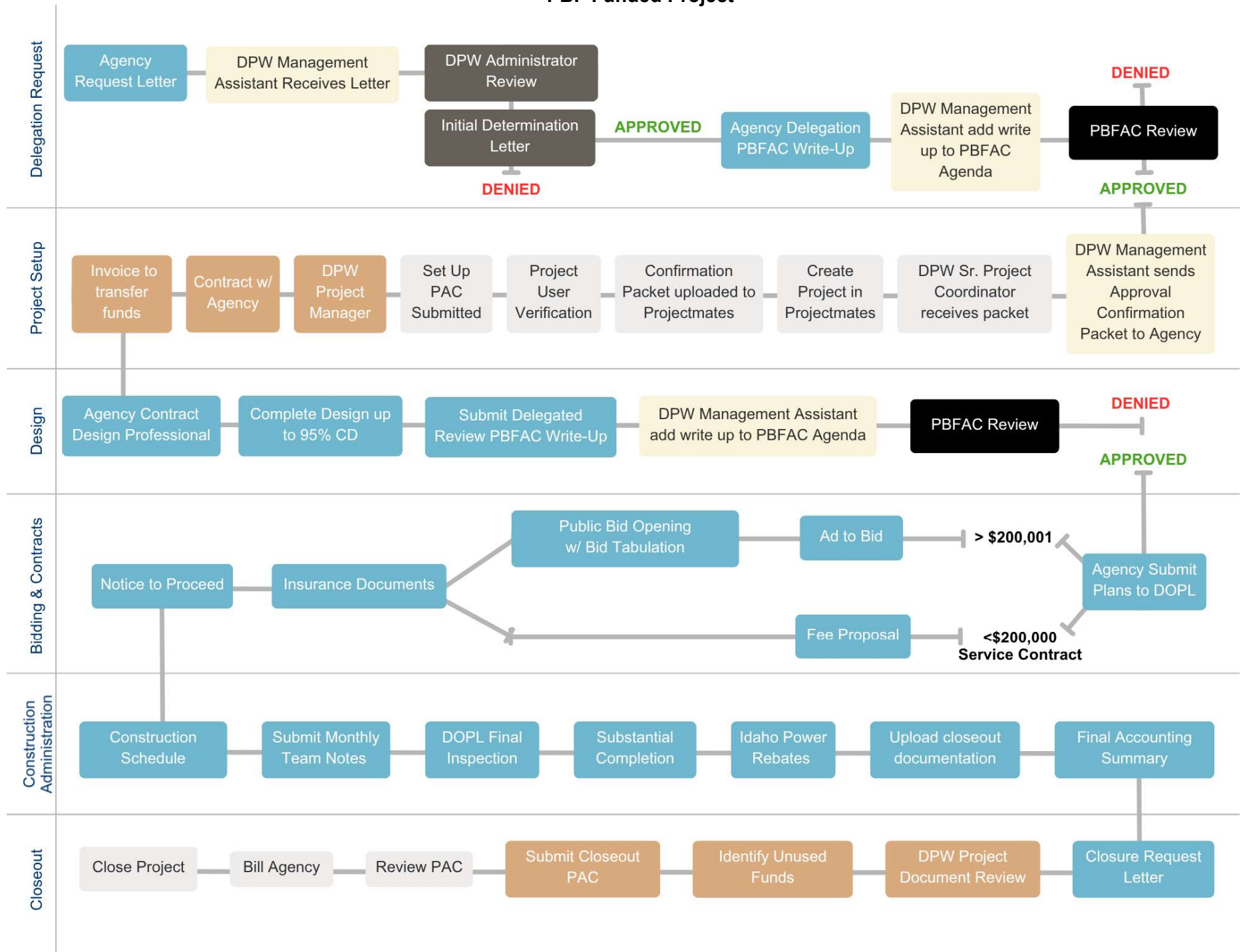
Below the text area is a "Start Date and End Date" field with a calendar icon, showing the range "Jun 10, 2026 - Jul 10, 2026". At the bottom left is a checkbox labeled "Send Emails to Team Members". At the bottom right are "Close" and "Save" buttons.

EXHIBIT L: OMS TUTORIAL-AGENCY

DPW Delegated Project Procedure | Revised August 2026

EXHIBIT M: DELEGATED PROJECT PROCESS FLOW CHART

PBF Funded Project



Agency Funded Project

