

The Paperwork Behind the Workbook

A project coordinator's everyday documents, all from the same sample project as the Project Control Workbook. The numbers match the workbook as of its status date (October 16, 2026).

#	Document	What it shows
1	Project charter	Everyone agrees on goal, scope, dates, budget and who decides, before work starts
2	Meeting minutes	Decisions and action items, each with one owner and a due date
3	Change request	A cost increase written up so the sponsor can decide quickly
4	Follow-up email	Chasing an overdue question without burning the relationship
5	Weekly status email	The Friday update, written from the workbook's numbers
6	Closeout checklist	Finishing properly: paperwork, money, lessons learned

Company, people and figures are fictional. Roles are used instead of names. Weekly OAC meeting = the weekly Owner-Architect-Contractor meeting.

1 • Project Charter

Project: Suite 300 Build-Out & Office Move **Sponsor:** Chief Operating Officer **Prepared by:** Project Coordinator

Goal

Move a 45-person team into a renovated 6,000 sq ft suite in Columbia, MD, working on day one: **Monday, Dec 14.**

In scope

- Design, permits and landlord approval
- Construction: demolition, walls, electrical, HVAC, finishes
- Network, Wi-Fi, firewall and conference-room AV
- Furniture purchase and install
- Move weekend and day-one support desk

Out of scope

- Changing the phone system (decision D-02: keep the current one)
- New laptops for staff
- Selling or moving old furniture from the previous office

Key milestones

Milestone	Date	Owner
Kickoff meeting & charter sign-off	Aug 31	Project Manager
Construction drawings issued	Sep 29	Architect
Building permit submitted & approved	Oct 13	General Contractor
Rough-in inspections passed	Nov 6	General Contractor
Network & AV testing sign-off	Dec 3	IT Lead
Final inspection & certificate of occupancy	Dec 8	General Contractor

Move weekend	Dec 14	Mover
Lessons learned & closeout report	Dec 23	Project Coordinator

Budget

\$515,000 total, including a **\$30,000** contingency for surprises. Contingency can only be used through an approved change order.

Success looks like

- Staff working in the new suite on Dec 14
- Final cost at or under budget
- Network and AV tested before move weekend
- Punch list closed within 5 business days

Who decides what

Decision	Who
Scope, budget, move date, use of contingency	Sponsor
Day-to-day schedule and vendor coordination	Project Manager
Design questions (RFIs) and product approvals (submittals)	Architect
Logs, meeting notes, follow-ups and the weekly status report	Project Coordinator

Communication: weekly OAC meeting on Mondays; written status report every Friday; anything that needs a decision gets one owner and a date.

2 · Meeting Minutes — Weekly OAC Meeting

Date: Monday, Oct 12, 2026

Attendees: Project Manager, Project Coordinator, Architect, General Contractor, IT Lead, Facilities

Notes by: Project Coordinator

1. Last week's action items

- **A1** Send revised furniture layout to cabling vendor (Project Coordinator): Done

2. Schedule

- Building permit approval expected Oct 13. Demolition starts Wednesday, Oct 14, once the permit is posted, and runs through Friday.
- **ISP circuit:** ordered Sep 21, but the carrier still hasn't confirmed an install date. This is our top risk (R-01). The move date depends on internet working.
- **Furniture:** quotes came in about 4% over budget. The PO is waiting on approval, and lead times are 8–10 weeks (R-02).

3. Issues

- **Moving company:** the first quote expired before we signed. We need new quotes (logged as issue I-02).

4. Decisions

- Keep the December move date. Re-check it at the Oct 19 meeting once the ISP date is in writing.

5. New action items

#	Action	Owner	Due
A2	Get a written install date from the ISP carrier	IT Lead	Oct 14
A3	Re-bid moving company (3 quotes)	Project Coordinator	Oct 19

Next meeting: Monday, Oct 19.

3 · Change Request — CO-04

Submitted: Oct 15, 2026 Requested by: General Contractor Decision needed by: Oct 20 (RAID item D-01)

What happened

During demolition, the contractor found that the east-wing floor isn't level enough for the new flooring. It needs leveling compound before framing and flooring can proceed (issue I-01).

Item	Impact
Cost	\$4,750 (Construction budget line)
Schedule	2 working days, absorbed before drywall starts on Nov 9 if approved by Oct 20
Contingency	\$20,800 left after approved change orders → \$16,050 if this is approved. CO-03 (\$3,100) is also still pending.

Options

Option	Pros	Cons
A. Approve now from contingency	Keeps the move date; contingency still covers CO-03	Uses \$4,750 of the cushion
B. Skip the leveling	No cost now	New flooring can fail or void its warranty; not a real option
C. Get a second price first	Might save money	About a week's delay, which pushes drywall and puts the move date at risk

Recommendation: Option A. Approve \$4,750 from contingency by Oct 20.

Sponsor decision: ☐ Approve ☐ Reject ☐ Need more info Signature / date: _____

4 • Follow-up Email — Overdue RFI

To: Architect **Cc:** Project Manager **Date:** Oct 15, 2026

Subject: RFI-003: floor box locations, response needed by Mon Oct 19

Hi,

Following up on RFI-003 (existing floor box locations vs. the new desk layout), sent Oct 8. The response was due Oct 13.

We need it by **Monday, Oct 19**. The cabling vendor starts rough-in on Oct 26, and the floor boxes decide where they run cable. If any of the boxes have to move, we'd rather know now than after drywall.

If a quick call is easier, I'm free tomorrow between 10 and 2. I've attached the current desk layout for reference.

Thanks,

Project Coordinator

Why it's written this way: the subject line has the RFI number and the deadline; the body explains why the date matters; it offers an easier path (a call); and the project manager is copied so nothing is a surprise.

5 • Weekly Status Email

To: Sponsor **Cc:** Project Manager **Date:** Friday, Oct 16, 2026

Subject: Suite 300 status: AMBER, 1 decision needed by Oct 20

Overall: Amber. The project is 44% complete against a plan of 49%. 2 tasks are late and 2 are at risk. Forecast cost is \$502,400 against a revised budget of \$515,000 (\$12,600 under). Move-in day is 59 days away.

Needs your decision: approve CO-04 floor leveling (\$4,750 from contingency) by Oct 20 so drywall can start on time. The one-page change request is attached.

Watching: the ISP install date (still not confirmed; backup LTE router being priced) and the furniture order (quotes about 4% over budget).

Done this week: permit approved; demolition complete.

Full report attached.

Project Coordinator

6 • Closeout Checklist

Used in the last week of the project (Dec 15–Dec 23). The project isn't done until every box is checked.

Item	Owner
☐ Punch list walked, every item fixed and re-checked	Project Coordinator + General Contractor
☐ Certificate of occupancy and final inspection reports filed	General Contractor
☐ As-built drawings, warranties and equipment manuals received and saved to the project folder	Project Coordinator
☐ All change orders closed; final invoices checked against POs and the budget tab	Project Coordinator + Finance
☐ Network, Wi-Fi and AV sign-off filed; support handed to the regular IT team	IT Lead
☐ Keys, badges and access cards issued; old-suite keys returned to the landlord	Facilities
☐ Open RAID items closed or handed to an owner	Project Manager
☐ Lessons-learned meeting held; notes sent to everyone involved	Project Coordinator
☐ Project files archived; final status report sent to the sponsor	Project Coordinator

Sample documents written by Adam Asifo for a fictional project. They go with the Project Control Workbook.