



Local Project Process

November 2018

Campus Planning and Design

Facility Management and Project Services

We strive to serve the university in developing and completing campus funded projects in an efficient and effective manner with the highest quality in construction and departmental input.

Request for locally funded campus projects that are less than \$ 100,000 are completed in the following manner:

Project Inception and Concept Phase:

1. You have the option to request a project via email, phone, or conversation with CPD staff, and we can give you preliminary guidance. This includes space renovations, furniture selections, or normal maintenance replacements such as carpet, paint, and signage.
2. Our preference is for you to enter a work order in the [WORQ system](#), and your project will be entered into the project process system and will be directed to the proper individual for action.
3. Work orders come to a central location for distribution to our staff and are assigned to a **PM (Project Manager)** and a designer who will contact you for a meeting or initial phone consultation.
4. Space renovation project requests (non-maintenance items) require the client to complete the [Facilities Improvement Request – Form A](#) for additional information. Once this form is completed, you can return it to the **PM**. If your project request involves a change in space utilization, you will need to submit a [Request for Space Change form](#).
5. Our **PM** and Designer will then work with you to develop initial design concepts, sketches, and order of magnitude estimates during the concept stage.
6. At the conclusion of the concept stage you will be provided the [Project Summary Checklist and Approval to Proceed with Design – Form B](#) for signatures of you (the requester), your departmental financial authority and Dean or Assistant Vice President before we proceed with full design and completion of construction drawings.



Project Design Phase:

7. **PM** will determine if the project will require State Fire Marshall's approval of stamped engineered drawings or if local approval by their field inspector is adequate.
8. Either our staff or one of our contract consultants will prepare plans and specifications, obtain SFM approval, and your signature upon completion of the drawings.
9. Procurement will be conducted by our staff in one of four ways:
 - a. utilizing Direct Order Contractor for quote
 - b. providing duplicate plans and specs to three bidders up to \$ 50,000
 - c. entering plans and specs into Tigerbuy for 15 days if over \$ 50,000
 - d. utilizing master contracts if applicable
10. After the quote is secured, [Project Scope Estimate and Approval to Transfer Funds – Form C](#) will be provided for your approval to transfer funds for the project.
11. **PM** will then make recommendation for award, and procurement will issue purchase order.

Project Construction Phase:

12. **PM** will schedule pre- construction meeting, review project schedule and determine start date.
13. **PM** will review submittals, monitor construction, make monthly payments.
14. **PM** will perform inspection, create punch list with you and the Designer.
15. **PM** will review close out documents / records / update Physical Facilities Inventory.
16. **PM** will approve completed punch list items, make final payment, and return any excess funds.