Funding Approval

Programming & Estimate

Request for Estimate

**Steps 1 and 2 –** New Project Request andProject Review Phases

1. Once a New Project Request has been submitted online by the requesting department contact person, the Assistant Director of Construction Services (AD) will review the project request and contact the department contact if further clarification is needed. When approved, the AD will notify the Project Coordinator (PC) to create the **Request for Estimate form** which will be sent via DocuSign to the department contact and department approvers for verification of initial funding source(s) and approval to move forward with requested project. Once approvals and funding confirmation have been received, the AD will then notify the Project Coordinator which Project Manager (PM) to assign to the project.
2. The PM will reach out to the department contact to follow up on the specific request/requirements identified in the submitted Project Request. The PM will also assist with the coordination of the following activities:

* Verify scope and other project related requirements
* Create an in-house conceptual drawing for review and approval
* Develop a cost estimate
* Develop a project schedule

**Steps 3, 4, and 5 –** Programming/Estimating and Submitted for Funding Phases

1. Once the scope and in-house conceptual drawings have been approved, the **Funding Approval Request Form** will be created and sent for approval and department fund information (via DocuSign) from the department contact and other department approvers ie:

* Chairman/Department Head
* Dean
* Vice President

This document is then routed to the AD of Construction Services, VP of Facilities Services, and the Accounting Manager (Controller) to create the Construction Project Account.

1. Once the Funding Request approval and department fund info is received project is assigned project fund/account.

**Step 6 -** Active Construction Phase

1. PM will release the awarded vendor/contractors per the scope requirements/in-house drawings approved in the program/estimate phase.
2. PM will monitor project progress and coordinate the various activities until project completion.
3. If the project scope changes, a Funding “Change Order” might be required to add additional funds to the project account. (**Funding Request Change Order** approval will be sent via DocuSign for additional funds/approval).
4. PM will update project status in the FM Systems and the department contact will receive email notifications throughout the process.
5. Department contacts can log into FM Systems to view project info and status updates.

**Step 8 –** Substantial Completion Phase

1. When project activities are completed, PM will create a project punchlist.
2. The punchlist will be shared with the project team members for review and will be monitored until all items have been completed and signed off.
3. Department Contact will receive a **Certificate of Completion** to sign acknowledging project has been completed per scope/satisfaction of department.

**Final Step -** Project Closeout/Archive Phase

1. A project survey will be sent to the department contact requesting feedback on the project.
2. After punchlist items have been completed and final invoices processed, PM will notify AD of Construction Services that the project can be closed.
3. Funds remaining in the project fund/account will be returned to the original funding source identified on the Funding Request Approval.
4. Project is now closed and archived.

*\*Forms in bold will be sent to department contact and project team via DocuSign for approval and/or information.*