

GUIDELINES:

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PURPOSE:

This guide is to standardize the procedure in developing and submitting estimates prepared by the Facilities Management Department (FMD). An estimate is designed to provide the Washington University School of Medicine (WUSM) with an initial scope, budget and schedule in support of the real property maintenance and capital renewal mission.

Procedure

1. Execution

A. FMD Initial Project (Billable) work request

- (1) Customer submits request for maintenance, construction, or facility modification estimate by completing a Service Now Work Order and submitting it through the FMD – Facilities Integrated Service Center (FISC).
- (2) FMD will then perform the following actions once the Service Now Request is received:
 - a. Request is assessed for validity and duplication.
 - b. Review associated drawings and other information, example Asbestos reports.
 - c. Priority is established and scope is generated after completing the site visit (if applicable).

B. FMD (Deliverables)

- (1) An FMD Supervisor/Planner/Project Manager will respond within seven (7) calendar days by meeting with the customer to conduct a scope validation, site visit and conference. During this meeting, the following issues will be discussed and established:
 - a. Site investigation
 - b. Methods and options/alternatives for accomplishing work
 - c. Definition and refinement of requirements
 - d. Detailed scope of work
 - e. Time requirements for completion, site access / availability.

2. Review and Approvals

- A. Once the milestones are established, the Supervisor/Planner/ Project Manager completes the estimate letter and all required attachments and submits the estimate letter to the Director, Capital Projects for review.
- B. The following items should be attached to the Estimate Letter when submitted for approval:

- Signed Estimate Letter including all options along with Work Request
 - Budget Breakdown
 - Project Schedule
 - Estimate preparation fee should be included with all estimates.
These fees are calculated based on number of hours necessary to prepare an estimate times the In House Construction/Planning Fee rate. A minimum of one hour and maximum of three will be charged to prepare an estimate. The customer has to pre-authorize up to three hours for estimate preparation. This estimation fee will be included in the Project Management-Flat Fee for the project if the estimate and project is approved to proceed. This estimation fee will be non-refundable if the customer chooses to not proceed with the work. In special situations where detailed investigation is necessary prior to completion of the estimate additional approvals from the customers need to be sought and the necessary hours included in the estimate fees.
- C. After the Director reviews and approves the estimate and the documents listed above, the Supervisor/Planner/Project Manager delivers the documents to the customer for review and approval. If approved the customer will need to identify the funding source.
- D. Once the customer approves the estimate and provides the funding source and if the project budget exceeds \$15,000, Capital Projects and the Business Office should be notified that the project needs to go through the formal Capital Project approval process.