Purpose

This guide is to standardize the procedure in developing and submitting estimates prepared by Facilities Management shops. An estimate is designed to provide the University of Houston Faculty and Staff with an initial scope, budget, and schedule in support of the real property maintenance and capital renewal mission.

Procedure

1. **Execution**

   A. Plant Operations Initial Project (Billable) work request (Shop Supervisor/Manager)

      (1) Customer submits request for maintenance, construction, or facility modification estimate by completing a “Plant Ops. – Service Request Form” and submitting it through the Plant Ops. – Facility Service Center.

      (2) Plant Operations will then perform the following actions once the Service Request Form 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. Plant Operations (Deliverables)

      (1) Plant Operations Shop Supervisor/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 Shop supervisor/Manager completes the estimate letter and all required attachments and submits the estimate letter to the Manager/Director 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 shop/trade 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 rolled into 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 reviewing and approving the estimate the customer will identify the funding source (cost center).