



UNIVERSITY OF HOUSTON SYSTEM  
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FACILITIES PLANNING AND CONSTRUCTION

**Project Delivery**

- I. **Project Initiation (Needs Development) (14 – 21 Days)**
  - a. Work request submitted by client
  - b. DBA approves the work request
  - c. Work request assessed by triage team
  - d. Triage Team evaluates the scope for complexity to determine if it is a project or should be assigned to MIC or the Technical Shops
  - e. Project Assigned to Planning for Programming (depending on scope of project)
  - f. Planning sends the project specifics for Academic Approval as needed
- II. **Scope Approval (20 - 30 Days)**
  - a. Planning & the assigned PM works with client to develop the scope
  - b. The Program is reviewed with the Planning Manager
  - c. Program approved and signed by client
  - d. PFA and PCB signed by the Planning Manager and FP&C Executive Manager
  - e. PFA and PCB signed by client
  - f. The approved documents are submitted to Business Services
  - g. Business Services sets up the project cost center
  - h. A transition meeting is schedule with the assigned PM
  - i. The PM validates the scope, schedule and budget
- III. **Project Design (30 - 90 Days)**
  - a. Proposal is received from design team
    1. Pre-design meeting to discuss contract deliverables
    2. Project design Program agreement (agreement with client and stake hold)
  - b. Contract initiated for design
    1. PM and business services proceed in preparing architectural and or engineering services agreement for full execution
  - c. Design
    1. Design team is released by PM to develop Schematic design and proceed to 90-95% for submittal review PM.
    2. PM and client approves schematic design SD's
    3. Design team is released by PM to develop Design documents (DD's) and proceed to 90-95% for submittal review PM.
    4. PM and client approves Design Documents DD's
    5. PM coordinates furniture plan and room numbering
    6. PM distributes DD's to project team for review, confirm that docs comply with intent, standards and codes.
    7. PM obtains approval for 100% DD's from stake holders and client.
    8. Design team is released by PM to develop Construction documents (CD's) and proceed to 95-100% for submittal review PM.
    9. PM and client approves Construction Documents CD's

10. PM distributes CD's to project team for review, confirm that docs comply with intent, standards and codes.
11. PM obtains approval for 100% CD's from stake holders and client.
- c. Construction Documents Prepared for RFP
  1. PM writes draft RFP with OCA, CD's attached for review by FPC contracts manager and OGC.

**IV. Procurement of Construction Services (48 - 60 Days)**

- a. RFP review
  1. PM submits draft RFP to UH Purchasing, CD's attached for review by Purchasing manager.
  2. PM recruits and selects RFP review committee.
- b. RFP posted
  1. Pre-Submittal Meeting
  2. Last Day for Questions
  3. Qualification Statements received (21 Calendar Day Posting)
  4. Evaluation of Qualification Statements (5+days)
  5. Notify Vendors
  6. Contract Negotiations commence.
- c. RFP selection process
  1. Evaluation of Qualification Statements (5+days)
- d. Award recommendation
- e. Issue award letter
  1. Notify Vendors
  2. Contract Negotiations commence
- f. Contract preparation
  1. PM writes draft contract as an Owner Contract Agreement, RFP with associated documents and CD's attached submits to contract manager to begin execution process
- g. (Does Business Services really review a draft of the contract?)
- h. Contract draft sent to vendor
- i. Vendor review and execution
  1. Vendor returns contract via PO Contracts to PM for execution by approval signature levels of the University
- j. Business Services certifies project funding
- k. Signature process begins in Sharepoint workflow
- l. OCA review (for contracts over \$50K)
- m. Contract continues through Administration signature chain
- n. Fully executed

**V. Construction (90 - 120 Days)**  
*(Varies – days described below are rule-of-thumb, but dependent on site and weather conditions)*

- a. Up to \$250K – 90 days
- b. \$250 to \$500K – 120 days
  - \$550K to \$1 million – 150 days
  - \$1 million to \$4 million – 180 days
- c. Construction Kick Off
  1. Project contacts and roles and responsibilities have been identified
  2. Site safety and security plan has been prepared
  3. Site logistics have been reviewed by appropriate project and University parties

4. Contractors Schedule of Values (SOV) has been reviewed and approved
5. The construction baseline schedule has been reviewed and approved
6. The submittal schedule has been reviewed and approved
- d. Review Deliverables
  1. The construction drawing process has been established and initiated
  2. Notice to Proceed has been issued and all required permits obtained by the contractor
  3. Job safety is being monitored and all unsafe conditions are reviewed with the PM, A/E and/or Contractors
  4. Required inspections identified and complied with the appropriate inspection processes
  5. Monthly schedule updates are reviewed and signed off as required
- e. Manage Deliverables
  1. Attend monthly/weekly Project meetings
  2. Verify that A/E or GC are addressing daily responsibilities in a timely fashion in accordance with contract documents
  3. Participate in project progress and coordination meetings
  4. Coordinate special inspections and outages between applicable university departments
  5. Coordinate owner-provided equipment installation with project and contractors
  6. Review proposal request and availability of funding before issuing change orders to contractors
  7. Document monthly updates of as-built drawings
  8. Review and distribute shop drawings and submittals
  9. Monitor change order process and logs, schedules, RFI logs, ASIs, and shop drawing schedule
  10. Monitor A/E and GC contract requirements and deliverables
  11. Perform site inspections and prepare field reports as appropriate
  12. Initiate and monitor building commissioning process, as applicable
  13. Review contractor, Contractor and A/E monthly pay applications
  14. Ensure that contractors are following user special conditions/construction guidelines
  15. Conduct Customer Transition Meeting
  16. Identify work that does not conform to code or documents and implement corrective measures
  17. Document inspections and special tests as required based upon the nature of the work
  18. Substantial Completion Letter w/Punch list sent to Contractor
  19. Review attic stock with Operations and other stakeholders
  20. Schedule pre-life safety inspections
  21. Monitor completion of punch list work
  22. Verify that work is being performed per contract documents, applicable codes, guideline, and university Building Design Standards
  23. Schedule TAS/ADA inspections

**VI. Transition/Activation/Close-out (30 – 90 Days)**

***Warranty Period is one Year***

- a. Activation/Transition
  1. Turnover plan and schedule finalized (with Customer and FM)
  2. Conduct Customer Transition Meeting

3. Punch list completed
4. Schedule and document O&M training of user group maintenance staff
5. Final inspections completed
6. Final completion letter sent to Contractor
7. Conduct warranty walk-thru (again 11 months later)
8. Project assessment and evaluations issued and completed (By PM)
9. Complete and return project assessment and evaluations (By Customer)
10. Verify all claims have been resolved and paid
11. Verify all construction contracts and purchase orders have been paid in full
12. Verify all professional services amendments have been completed
13. Verify A/E Contract Completion Checklist was completed
14. Verify with Plant Operations Archivist that Record Documents are readable
15. Verify all professional services contracts have been paid in full
16. Verify work has been completed by internal departments (UIT, Key Control, Shops, etc.) and billed in full (In FAMIS)
17. Verify all project records have been filed according to the FM Record Management Guidelines
18. Verify that the project status in has been updated to "Administrative Close Out" in SharePoint and notified the Archivist and Business Services
19. Space Reporting Form has been completed and submitted to Facilities Space Management
20. Verify with Business Services and Plant Accounting that Work Order has been closed

**DURATION RANGE: 232 TO 411 Days**

END