

Louisiana State University

Office of Facility Services

Operating Instruction 1107

Revision: 3
Effective Date: December 1, 2010
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SUBJECT: Estimating/Planning/Executing Construction Projects

I. Origination of Requests

- A. The Office of Facility Services receives a request via internet, phone, memo or email by a department (requestor) describing the scope of work to be performed. All requests for constructions and renovations are to be routed through the Estimating department.
- B. The Customer Service Center prepares a Request for Estimate (RFE) in the work order tracking system. The RFE is assigned to the Manager of the Estimating Department and changes the status of the work order to WCAPPR (work control approved). The Manager of the Estimating Department and the Assistant Director of Construction Services reviews the RFE for content and design. If design is required, the RFE is sent to Planning, Design & Construction for design. The RFE is then forwarded to the Planning/Estimating (P/E) department for estimating.

II. Preparation of Detailed Estimate

- A. The Planner/Estimators will provide a detailed estimate to include labor and materials, tasks, shop drawings, specifications, materials, lists, and special instructions needed to satisfactorily complete the project. When they begin to work on the estimate, the work order status is changed to EST-PROG (Estimate in Progress). The P/E utilizes a computerized Labor and Material Summary Sheet to itemize the task description and associated labor and material cost breakdown.
- B. When all Estimators have completed their portion of the estimate, the work order is changed to EST-COMP (Estimate Complete) and it is returned to the Manager of Estimators. They will attach the following correspondence for final approval and submittal:

1. Letter of Transmittal
 2. The RFE and Labor Material Summary Sheets
 3. Associated drawings and vendor quotes, if applicable.
- C. The Estimate is then sent to the Assistant Director of Construction Services for review. The estimate will note if approval for PM 60, Board of Regents, Fire Marshal or Facilities Design and Development Committee is needed. The Assistant Director of Construction Services reviews the estimate and makes any necessary changes to the scope of work and then forwards the estimate to the Director of Planning, Design & Construction for final approval.
- D. The Customer Service Center then enters the cost data into the work order database, verifies work order status is EST-COMP in the database system, scans a copy of the document and saves it in the DATA-HUB. The estimate is then sent by email and/or a hard copy is sent to the Requestor.
- E. If the department making the request decides not to approve the estimate, the Customer Service Center, upon notification, will change the status of the estimate in the Work Control database from Estimate Complete (EST-COMP) to Cancelled (CAN).
- F. If the department making the request approves the estimate, the Customer Service Center will change the status of the estimate in the Work Control database from Estimate Complete (EST-COMP) to Estimate Approved (EST-APPR).

III. Estimates Approved by Requestor

- A. All approved estimates must have approval of the appropriate Departmental identity of funding authority with a budgetary account number.
- B. The Assistant Director of Construction Services will now assign a job cost number (JCN) to the project and assign PE charges to the project. They will acquire approvals for PM 60, Board of Regents, Fire Marshall or Facilities Design and Development Committee as needed.
- C. The Customer Service Center will set up packages and/or work orders for each craft according to the list below:
1. Crafts (one for each)
 2. Work Control (one)
 3. Material Control (one)
 4. Project Manager (one)

At this time, the packets contain a copy of the Work Order, a copy of the RFE Labor and Material Summary and drawings and/or specs.

- D. The Customer Service Center routes the packet to the Assistant Director of Construction Services, and the work orders are assigned to the craft supervisors. The MCO packet is sent to the Warehouse Manager and storage location of materials will be assigned.
- E. The Assistant Director of Construction Services will file the Work Control and Project Manager packets in the "Project Awaiting Materials" file and forward the craft packets to the appropriate P/E for material take-off.
 - 1. Routine projects will be handled in the normal scheduling sequence.
 - 2. Emergency projects and/or those requiring special handling due to grants or funding considerations, or to accommodate new faculty or staff will be handled as an emergency request and expedited. A letter of justification may be requested to bypass the normal project process.
- F. After completing the material take-off, material requisitions are filled out and placed in the craft packets. The craft packets are forwarded to University Stores for purchasing of materials.

IV. Ordering Materials

- A. When University Stores received their packets for purchase of materials, the purchases fall into two (2) categories:
 - 1. Materials stocked at University Stores
 - 2. Materials purchased from outside vendors
- B. When all the materials have been ordered for a job, the Material Order Form, if applicable, is distributed by:
 - 1. White copy-Material Control file
 - 2. Yellow copy-Craft packet
- C. A copy of the order with the appropriate purchase order number and delivery date of materials is to be included in each craft package. Once the order is placed, University Stores will return the package to the Estimating department.

V. Receipt of Material

- A. The Estimating department will notify University Stores of a location to deliver the materials (job site, Facility Services warehouse or at University Stores for will call). University Stores will bundle materials by orders and deliver per the directions on the order.
- B. The Warehouse Manager will notify the Estimating department once the materials have been received. The Estimators will verify materials delivered against the purchase request.
- C. When all materials have been received for the crafts, the package will be sent to the Assistant Director of Construction Services for scheduling. When the job is ready to begin, the crafts will pick up materials for the job and sign that they have received materials.

VI. Assistant Director of Construction Services

- A. Contractors
 - 1. When the packets are set up, one will be set up for each contractor on a job. A Title 38 requisition or solicitation for bid will be set up in the LSU Procurement system, according to the guidelines established by the State of Louisiana and Louisiana State University.
 - 2. A pre-construction meeting with the vendor will be set up.
- B. Package Jobs
 - 1. When all materials have been received, the Assistant Director of Construction Services is notified. They check each packet for content to ensure that each packet contains all the information necessary to complete the project. They will also secure the documentation for PM 60, Board of Regents, Fire Marshal and/or the Facilities Design and Development Committee.
 - 2. The project is then ready to be scheduled. Each Thursday at 10:30 a.m. in the Facility Services conference room, the Assistant Director of Construction Services meets with craft supervisors to schedule new projects and assigns a Project Manager.

VII. Scheduling/Performing Job Tasks

- A. The Assistant Director of Construction Services will review the scope of work and the project manager checklist.
- B. Each craft will receive their packets for review. Any questions or issues that are brought up at the schedule meeting will be addressed by the Assistant Director of Construction Services. If necessary, the project manager can call all crafts together for a pre-construction meeting.
- C. When the start date of a project is determined, the Project Manager will notify the requestor and answer any concerns and/or questions from the requestor. If the project is postponed, it will be the responsibility of the project manager to notify the Assistant Director of Construction Services as soon as possible.

VIII. Project Action Form (Change Orders)

- A. The project manager will be responsible for any changes in the scope of work, requestor or change orders, dictated by the nature of the project, and they must be approved by the Assistant Director of Construction Services.
- B. The Assistant Director of Construction Services will initiate the Project Action Form and forward it to the requestor for approval for the Facility Services department head if a change was not requested by the customer.
- C. Upon receipt of the approved Project Action Form, the Assistant Director of Construction Services sends one (1) copy to the project manager-their authorization to proceed, one (1) copy to the estimators for materials, one (1) copy to the Administrative Coordinator of Planning, Design & Construction for updating labor and material summary and one (1) copy to Finance & Accounting to document final billing to the customer.
- D. The Project Manager will be prepared to give a project status report at the weekly scheduling meeting.

IX. Accounting

- A. During the project, the Facility Services Accounting & Finance department will update actual labor and materials cost for each job. This information will be updated weekly.

- B. Upon completion of the job, Finance & Accounting will send a monthly report to the Assistant Director of Construction Services to verify the jobs completed and which jobs are ready to be billed to the customer.
- C. Accounting will receive all copied of the Project Action Form generated during the project and will print a copy of the final work order. This will serve as a reference for comparison to the computer generated document and for asking routine customer billing questions.

X. Project Completion

- A. Forward craft packet to Planning, Design & Construction and complete work order in the computer system.
- B. Upon completion of the project, when all punch list items are complete, the project manager will turn in all packets and the project manager's check list to the Assistant Director of Construction Services.
- C. The Assistant Director of Construction Services will forward the work control packet to Planning, Design & Construction and notes on the package the project completion date.
- D. Planning, Design & Construction will send a customer service survey to the requestor and completes the work order in the computer system. The requestor completes the survey and returns it to the Assistant Director of Construction Services.
- E. After reviewing the survey, the Assistant Director of Construction Services reviews any issues with the Project Manager, crafts and the requestor. The survey is then filed after results are reviewed with the customer.
- F. A final meeting will be held with the Assistant Director of Construction Services and the Estimating department to review the Labor and Material Summary for the purpose of determining the reasons for variances between actual costs and estimated costs. Notification of reasons for variances (if any) will be sent to Accounting & Finance.