



New Mexico State University

Facilities Services

Facilities and Services Triage and Project Initiation

<p>Effective: February 18, 2016</p> <p>Last Updated: February 18, 2016</p> <p>Procedure Owner: Facilities and Services, Project Development & Engineering</p> <p>Procedure Contact/ Subject Matter Expert Executive Director, Project Development & Engineering</p>	<p>Related Policies & Procedures:</p> <p>NMSU Policy Manual 9.10 Capital Projects</p>
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Procedure Statement

This procedure outlines the process for providing estimates and initiating projects for customers via the Project Request Form (PRF).

Reason for Procedure

This procedure defines the triage process for Project Request Forms submitted for estimates or to initiate a project, outlines the roles of the project manager and stakeholders, and define the information required to initiate a project.

Procedures

The Facilities and Services web page allows customers to submit a Project Request Form (PRF) <http://hr.nmsu.edu/ofs/wp-content/uploads/sites/57/2015/12/Project-Request-Form-12-09-15.pdf> to obtain an estimate and/or initiate a project

1. If the customer submits an estimate request through AiM, the work is routed to Facilities Maintenance who meets with the customer to review the request and determine if the work can be completed by the shops. If the scope exceeds the shop's work parameters, the customer is instructed to submit a PRF for additional action.
2. The PRF is routed through the triage process where a group composed of staff from Facility Operations, Space Planning and Project Development

- and Engineering, meets twice weekly to review the PRF's and assign work to the appropriate department.
3. A work order is opened and routed to the project manager to initiate the process, and a follow-up email sent to the customer notifying them of the name and contact information of the project manager working on their request.
 4. The Project Manager schedules an appointment with the customer to review and develop the scope of work.
 5. An estimate phase is opened in the work order by the project manager to prepare an estimate.
 6. Once the estimate is complete, the project manager prepares a budgetary estimate brief <http://hr.nmsu.edu/ofs/wp-content/uploads/sites/57/2015/08/Project-Budgetary-Estimate-Brief.docx> and schedules a meeting with the customer to review the completed estimate and resolve any questions.
 7. If the customer chooses to move forward, they submit a new department-approved PRF with a funding index and budget, and the PRF is routed through the triage process.
 8. The triage committee will assign the work to a project manager and a project will be opened in AiM. A scanned copy of the Project Request Form is attached to the project in related documents.
 9. FS Accounting forwards the PRF to Accounting Financial Reporting (AFR) to transfer the customer funds into a plant fund index assigned to the project.
 10. Once the index is created, account setup is completed by F&S Accounting, and the project can be initiated.

DEFERRED MAINTENANCE SECTION is currently in development and will be added at a later time.