FACILITIES REQUEST PROCESS

SMARSTHEET FORMS AND AUTOMATION
Use Smartsheet to submit a Project Initiation Request, view status of projects and access portals.

Log In: https://app.smartsheet.com/b/home?lx=buLZxDANowO_u8GVqrGvv7qkEttxVlvPyLvOLn8tbAA&mt=16

If you don’t have a log in click here to sign up.

Note: Users will be able to access Smartsheet without an account # set up to review and approve documents.
Once you have logged in you will have access to all sheets and dashboards that have been shared with you. You can click on them at any time to submit forms and look up projects.
Design & Construction

The Administrative Operations department oversees and manages all Facilities Projects for all TAMUCC campuses. Projects are defined as any alteration, new construction, addition to the physical structure, or renovations that involve multiple trades regardless of funding source and have a cost that exceeds $5,000.

EXAMPLES OF DESIGN AND CONSTRUCTION PROJECTS:
- Additions to buildings
- New construction
- Major building/system repairs
- Renovations (classroom, office, lecture halls, laboratories, public use areas)
- If your renovation will change the size or function of a space.
- If the project affects the civic structure or public realm of the university.

If you are ready to move forward with your project initiation request after reading the examples above, please click on the Project Initiation Request box below.

INITIATING A PROJECT REQUEST

CONSTRUCTION PROCESS
CONSTRUCTION & FACILITIES PROJECT PROCESS

CONSTRUCTION PROCESS

1. Project Initiation Request: A Project Initiation Request is submitted by requestor. AdminOps assigns to a Project Contact Person (PCP).
2. Project Work Plan Form: PCP contacts requester and schedules initial meeting with all stakeholders. PCP enters preliminary information into a Project Work Plan form and submits it to keep on file. No approvals are required, this is for information purposes only.
3. Facilities Request Form: PCP enters and submits a Facilities Request form for review and approval. This form serves to approve or deny projects ONLY. No costs are incurred at this stage and contractors are not selected yet.
4. Statement of Work: Upon Facilities Request approval, PCP prepares and submits a Statement of Work to procure goods and services. Once SOW is approved, PCP will begin scheduling construction activities to begin. A purchase order will be submitted to encumber funds.
5. Notice to Proceed: A notice to proceed form will be submitted by PCP. The form will include project start date and estimated completion. The PCP will keep requestor informed of the status of their project during construction.
6. Change Request Form (If applicable): Submitted by PCP when requesting time extensions or additional funds not captured in original Statement of Work.
7. Substantial Completion Form: Submitted by PCP when project is 90% complete and user is able to occupy space.
8. Punch List Items: Submitted by PCP if there are pending items that need to be corrected but do not prevent requestor to occupy and/or use space.
9. Certification of Final Completion: Submitted by PCP, when project is 100% complete and no punch list items to resolve.

For Project Initiation Request and Facilities Request status questions please refer to your Project Dashboard or contact your assigned PCP.
STEP 1: INITIATING A PROJECT REQUEST

From the AdminOps Design and Construction Page https://adminops.tamucc.edu/

INITIATING A PROJECT REQUEST

1. Fill out the Project Initiation Request form, failure to provide complete responses may cause a delay in getting a project assessed for assignment.
2. The form will provide an option to request a confirmation receipt of the PIR for the requestor’s records.
3. Once the completed Project Initiation Request is received, AdminOps will review it and assign to a Project Contact Person (PCP).
4. The PCP will initiate a meeting with the Requestor and IT to collect project requirements.
5. The database portal is available if a requestor would like to inquire about the project schedule, scope and cost.

For any initial questions please contact AdminOps Business Administrator at (361) 825-2019 or Administrative.Operations@tamucc.edu.
**Project Initiation Request**

A Project Initiation Request is a project request form submitted for any of the following reasons: additions to buildings, new construction, major building/system repairs, renovations (classroom, office, lecture halls, laboratories, public use areas).

- Fill out the Project Initiation Request form, failure to provide complete responses may cause a delay in getting a project assessed for assignment.
- Once the completed PIR is received, AdminOps will review it and assign to a Project Contact Person (PCP).
- The PCP will initiate a meeting with the Requestor and IT to collect project requirements.
- A database portal is available on the AdminOps website if a requestor would like to inquire about the project schedule, scope and cost.
- For any questions prior to your request being assigned to a PCP, please contact AdminOps Business Administrator at (361) 825-2019 or Administrative.Operations@tamucc.edu.
CONFIRMATION NOTICE UPON SUBMISSION OF PROJECT INITIATION REQUEST

Thank you. Your Project Initiation Request has been received.

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EMAIL NOTIFICATION

Thank you for submitting your Project Initiation Request. A copy is included below for your records. A Project Contact Person will contact you shortly to discuss your proposed project.

**Project Initiation Request (PIR)**

<table>
<thead>
<tr>
<th>Request Type</th>
<th>Request for Additional Space, Request to Change Room type and Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requestor</td>
<td>Minerva Alaffa</td>
</tr>
<tr>
<td>Phone #</td>
<td>361-825-2019</td>
</tr>
<tr>
<td>College/Department</td>
<td>Academic Affairs</td>
</tr>
<tr>
<td>Building</td>
<td>101 CLASSROOM WEST</td>
</tr>
<tr>
<td>Project Description</td>
<td>fddfsfaw</td>
</tr>
<tr>
<td>Add/Change/Replace Request</td>
<td>Electrical/Lighting, Furniture</td>
</tr>
<tr>
<td>Start Date</td>
<td>08/18/2020</td>
</tr>
<tr>
<td>End Date</td>
<td>08/31/2020</td>
</tr>
<tr>
<td>Comments</td>
<td>please [rpvode esto,ate]</td>
</tr>
</tbody>
</table>

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- When a project is assigned to a Project Contact Person, they will receive an email notification with the details submitted in Project Initiation Request.
- PCP will schedule initial meeting with requestor and based on information provided submit a Project Work Plan.
STEP 2: PROJECT WORK PLAN

From the AdminOps Projects Dashboard for PCPs

**Project Work Plan**

Instructions:
- Complete this form for design/construction projects prior to completing a Facilities Request Form (FRF), bid or start of construction.
- Indicate N/A when not applicable.
- Complete the Project Work Plan in its entirety as delays may occur if items are not addressed correctly.

**REMINDER:**
- Make sure to check off each box to ensure that you have discussed all items with the requestor.

A PCP will complete a Project Work Plan to:
- A. determine project needs
- B. develop accurate estimates and timelines
- C. fill out the Facilities Request Form
STEP 3. FACILITIES REQUEST FORM

From the AdminOps Projects Dashboard for PCPs
STEP 3. FACILITIES REQUEST FORM

Project Number:
This is the number that was assigned at the Project Initiation Request Phase. (ex: 19XXFG21)

Project Description:
Please include if project needs to be completed by a certain time.

Current Room Type/Use

Proposed Room Type and Use:
Request for approval to rezoned space use and function, i.e. storage room to office, class lab to research lab, etc., with no structural modifications.

IP NOT APPLICABLE, N/A

Describe any critical time constraints that affect timing.

Describe the impact:
Describe the impact on the unit’s operations if request is not approved.

Enter Additional Space/Change of Type & Use
If you are requesting additional space and/or are changing type of use, please complete the information below if applicable.

# of Full-Time Faculty

# of FTE Part-Time

# of Full-Time Staff

# of FTE Part-Time Staff

# of Faculty Offices

# of Staff offices/offices

Conference/meeting rooms

Describe how much space is being requested:
In the space allowed, briefly describe how much space is being requested, why additional space is needed, and how it will be used. (Additional explanatory information, drawing, floor plans, diagrams, etc., may be attached at the bottom of this form).

Existing Space Identification:
What steps have been made to identify and reconfigure or share underutilized space within the unit's existing space allocation?

Rough Order Magnitude (ROM):
The Rough Order Magnitude (ROM) cost will be automatically created based on the amounts included below. This is not the final cost and actual costs will be provided once costs are gathered at the Statement of Work (SOW) stage. If services is not applicable, enter 0.

Contraction Estimate(s):
Please be sure to include a Project Management fee, if applicable.

IT Estimate(s):

Additional Services Estimate(s):
These services can include: Furniture, Custodial, Maintenance, Locksmith, Grounds, Signage, Moving, etc.

Funding Request

If you are requesting funds for this project select "Yes" and respond to questions below. Your request will route to the Budget department for review and approval. No fiscal request to be submitted is necessary. 

In funding being requested for the project:
Select

Dean/Director Approval Email Address:
Enter the email address for the department Dean/Director.

@tamucc.edu

Division VP Approval Email Address:
Enter the email address for the Division Vice President.

@tamucc.edu

Submit

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STEP 4: STATEMENT OF WORK

From the AdminOps Projects Dashboard for PCPs
STEP 4: STATEMENT OF WORK
STEP 5: NOTICE TO PROCEED

From the AdminOps Projects Dashboard for PCPs
STEP 6: CHANGE REQUEST FORM (IF APPLICABLE)

From the AdminOps Projects Dashboard for PCPs

Change Order Request Form

This form is submitted when modifications to original approved request are needed (Ex: Requesting additional funds, Deductive Change Order, Request for additional time, etc.). Failure to attach or provide all information, may cause delays in approval.
### Step 6: Change Request Form (if applicable)

**PROJECT DETAIL**
- Project Name
- Work Order Number
  - Enter if applicable, otherwise enter N/A
- Change Order Request Number
  - Select
- Requesting Additional Days
  - Select or enter value

**PROJECT SCOPE OF WORK**
- General Scope of Work
  - Enter description of work to be performed (e.g., Requesting additional funds for additional construction work; Project will be completed on time.)
- Additional Funds Request
  - Are additional funds being requested?
  - Select

**PROJECT MANAGEMENT OR CONTINGENCY FEE APPLICABLE?**
- Is Project Management Fee applicable?
  - Yes
  - No
  - Enter value
- Is Contingency Fee applicable?
  - Yes
  - No
  - Enter value
- SDC Contracted Cost Credit
  - Enter contract credit applicable for the current contract year
  - Select

**PROJECT PROCUREMENT**
- Procurement Type
  - Select

**PROJECT ATTACHMENTS**
- Please attach schedules, proposals, procurement methods or any additional documents related to the change request.
- Drag and drop files here or browse files.
STEP 7: SUBSTANTIAL COMPLETION FORM

From the AdminOps Projects Dashboard for PCPs
STEP 8: PUNCH LIST ITEMS

From the AdminOps Projects Dashboard for PCPs
STEP 9: CERTIFICATION OF FINAL COMPLETION

From the AdminOps Projects Dashboard for PCPs

Certificate of Financial Acceptance

Final Project Acceptance
1. All contractual requirements and work related to this project as outlined in the contract including punch list (attached). Items have been completed and accepted by TAMU-CC.

2. All Training, M&O, documentation, as-buils drawings and warranty documents have been provided to and accepted by TAMU-CC.

Project Number *

Project Completion Date *
Effective warranty date.

File Upload
Drag and drop files here or browse files

Submit