

TITLE: Project with Estimation Initiation Standard Operating Procedure			
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Location: Phoenix Biomedical Campus (PBC), College of Medicine Phoenix (COM-P)			
Population (Define): Requests for projects			
Approved by: Janet Sabuco, Dave Heineking, COM-Phx Leadership			

Overview

This process is designed to detail a workflow and ensure that requestors account for the full scope and impact of requested construction and remodel projects. Due diligence is required to account for various factors that can impact the project scope and implementation.

Definitions

Project: work orders that are above and beyond maintenance orders that could involve estimates and vendors. Often these can involve capital funding.

Purpose

To define an administrative workflow for all construction work, whether new or remodel, requested by various COM-P units. This is meant to confirm that all appropriate affected administrative units are engaged, and that appropriate authorization is obtained to facilitate construction projects.

Terms & Links:

POP – Planning & Operations Phoenix

[Maintenance Connection](#) – Ticket system for POP

[Additional Info for using Maintenance Connection \(https://phxops.arizona.edu/work-orders\)](https://phxops.arizona.edu/work-orders)

[Information Technology Services](#)

Procedure

1. The requestor begins a project by sending in a request to Planning & Operations Phoenix (POP) via Maintenance Connection.
2. Maintenance Connection tickets are reviewed by POP Phoenix staff to determine if request is Routine Maintenance. Requests requiring resources and labor that are currently unavailable on

campus are flagged and reviewed by the Assistant VP of Campus Operations – Phoenix and Executive Director POP Phoenix for COM-P.

3. Maintenance Connection tickets that can be completed via Routine Maintenance are assigned and completed by staff, at this point the process ends. Any tickets that require additional assessment or quotes would follow the workflow.
4. Tickets that cannot be completed internally are reviewed to determine if input by the Research Office is required. If yes, then the POP staff will reach out to include the Dean of Research in step 5.
5. POP Leadership and the Dean of Research (when appropriate) review for impact and feasibility before contacting requestor. Projects deemed not feasible either END or are completed by staff.
6. If project is still considered feasible, POP Leadership forwards the Phoenix Project with Estimation Form to the requestor. The form includes information on project timelines and expectations for the process. This form gathers pertinent details relating to the project, including description, justification, funding, project type, equipment, and space rights. If the project includes changes to Research space, the Research office will be asked to review the Project Proposal Form to include feasibility and space approvals and determine whether other potential research stakeholders might be impacted by the requested change.
7. As part of their review, a member of the POP Leadership conducts a feasibility analysis to ascertain the possibility of downstream effects and project parameters. This step is meant to ensure that there is an understanding of the impact to infrastructure, space rights, safety, costs and regulations.
8. POP Leadership reviews the Phoenix Project with Estimation Form and Feasibility Review, notes any discrepancies, and follows-up with the requestor. There is a possibility that after review, the project can be completed internally, or may present significant changes to campus infrastructure to warrant further review. (Follows the diamond shaped step in workflow, “Can project be completed by POP without External Estimation?”)
9. If the project should be completed by UAHS or UA entity in Tucson, the request will be forwarded to the appropriate staff. This will typically go to the UAHS Assistant Director of Planning and Facilities (Andrew Pickering) in order to coordinate UAHS activities.
10. POP and/or external vendors will now be able to provide preliminary estimates. If POP determines that an external quote is required, vendors will be invited to develop the estimate. Once generated, these quotes and any documentation will be given to the requestor to review. PLEASE NOTE: POP does not control the cost of an estimate, or the workload and timelines

required by external vendors. Timelines for generating quotes cannot be estimated unless provided by the vendor.

11. The requestor will review the estimate for their project and determine whether they wish to move forward. This quote should then be reviewed with Finance, the departments Director of Operations, and college leadership. Sources of funding for the request will be identified at this time.
12. The project is then approved or denied by Campus Leadership (Dean of College and/or Associate Dean for Research). Once approved, POP can move forward to schedule the project with the appropriate vendor after securing necessary funds. If denied, the requestor should receive any notes or changes that would be required to eventually obtain approval.

Workflow on page below:

