

ESTIMATING WORK ORDER REQUEST
Operations

Effective date: 02/97
Revision date: 04/10
Review date : 08/12

Policy:

Provide a means by which to estimate non-maintenance and project work order request.

Prevailing Codes and Standards:

Physical Plant Policy

Procedure:

- I. **General:** This procedure outlines the estimating process for non-maintenance and project work order requests from the point of initial contact with the requesting department through the design, production, evaluation, refinement and reporting phases. The procedure would take affect after the work order number is issued and a funding source established.

- II. **Estimating:**
 - A. Customer Request: Upon receipt, the work request will be assigned to an estimator by Physical Plant Administration or to a project manager by the Director of Physical Plant.

 - B. Project Design: The estimator or project manager will meet with the requesting department's contact person to better define the scope of the project.

 - C. Drawings: Drawings will be the responsibility of the estimator or project manager and will consist of architectural, casework, electrical, plumbing, HVAC, reflective ceiling, fire protection and any other detail drawings needed. The Engineering Department may be requested to furnish information or drawings. The drawings will then be sent around for shop review. Each foreman will check to ensure everything is correct.

 - D. Work Order Summary Sheet & Checklist: A Work Order Summary Sheet and checklist showing details of all work will be completed by the estimator or project manager if needed.

 - E. Cost Estimate/Estimating Program: Information from the Work Order Summary Sheet or drawing notes will be entered into the estimating program (WINEST) and estimates entered into the Work Order program.

 - F. Approval: Estimator will provide department with cost estimate and request approval from the initiating department's approving authority. This may be written or verbal approval.

 - G. Schedule Project: Upon final approval the project will be assigned a start construction date.

