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Accounting and Safeguarding of Assets

40.13 Administration of University Construction and Maintenance Projects

Issued: January 16, 2002

1. Definitions

University Construction Project - The construction of new buildings, facilities or other permanent improvements that do not exceed \$1,000,000 in cost, and projects for the repair, renovation or rehabilitation of existing buildings, facilities or other permanent improvements that do not exceed \$2,000,000 in cost. [See System Policy 51.04 - Delegations of Authority on Construction Projects]

Maintenance Project - Generally, repairs and replacements involving a single trade and not requiring an Architect/Engineer (A/E) design.

2. Delegations of Authority and Responsibilities

- 2.1 The Chancellor has delegated in System Regulation 51.04.01 to the President authority to administer minor construction projects. Said delegation includes the authority to initiate the project, appropriate funding (University funds only), select and contract with A/E firms, select and contract with construction vendor, and any other tasks necessary to completion of the project.
- 2.2 The President has assigned responsibility for the administration of minor construction, and maintenance projects to the Physical Plant Department. To carry out this responsibility, the Physical Plant Department has established a Planning and Construction Office.

3. Project Requests

- 3.1 To initiate a project, the requesting department must complete and submit a Physical Plant Job Order/Project Request form ([see Attachment 1](#)).
- 3.2 The Director of Physical Plant will review each Physical Plant Job Order/Project Request and make a determination of whether the project meets the criteria for a Maintenance Project or a University Construction Project and indicate determination on the form.
- 3.3 If the project is determined to be a Maintenance Project, the Director of Physical Plant will notify the requesting department that either Building Maintenance or a private contractor will perform the work.
- 3.4 If the project is determined to be a University Construction Project, the Director of Physical Plant will forward the request to the Planning and Construction Office.

4. Maintenance Project - Building Maintenance

- 4.1 For projects to be handled by Building Maintenance, the project is initiated by the user department submitting a Purchase Requisition through the Interdepartmental Order (IDO) process ([see Administrative Procedure 10.01](#)). The vendor on the Purchase Requisition will be Building Maintenance.
- 4.2 Upon receipt of a properly approved IDO, the Building Maintenance staff will handle all aspects of the project, including the procurement of materials, hiring of labor, scheduling of work, and inspection or work.

5. Maintenance Project - Private Contractor

5.1 Initiation Process

A maintenance project is initiated by the requesting department submitting a Purchase Requisition to the Purchasing Office. If the requesting department has solicited quotes it should attach the quotes received to the Purchase Requisition. To ensure that the desired work is obtained, the requesting department should provide a complete description of work to be performed on the face of the Purchase Requisition or on an attached document.

5.2 Procurement Process

The procurement process is the same as for any other purchase of goods or services at the University. The Purchasing Office will take the necessary steps to ensure that the State and University bidding requirements and documentation are met and then issue a Purchase Order

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to the selected vendor. Upon completion of the project and receipt of an invoice, the Accounts Payable Office will obtain an approval to pay from the department receiving the services and then process it for payment.

Note: Vendors sometimes provide an invoice to the receiving department at the end of the job. When this occurs, it is important that the receiving department approve the invoice for payment, note the Purchase Order number on the face of it, and forward it immediately to the Accounts Payable Office.

6. Minor Construction Project

6.1 General

The University will adhere to The Texas A&M University System Construction Procedures Manual. Exceptions to the procedures and forms contained therein will be approved by the TAMUS Facilities Planning and Construction Office.

6.2 Project Initiation and Approvals

6.2.1 Upon receipt of a Physical Plant Work Order Request for a minor construction project, the Construction and Planning Coordinator will prepare a C-1 form to obtain approval to initiate each requested project. Depending upon the size and nature of the project, a C-1 may be prepared to fund the initial design work and then a second C-1 prepared after the project has been designed and bid to fund the full project. Sometimes circumstances make it is necessary to modify the scope and cost of the project. When this occurs, a C-1 form must be completed to obtain approval of the changes.

6.2.2 The completed C-1 form is routed for the following approvals:

Approval	Purpose
Requesting Budget Head	Approval of project scope and funding source.
Office of Sponsored Programs or Research Foundation	Approval of compliance with grant or contract requirements.
Construction and Planning Coordinator	Certification that C-1 form is correct and complete.
Director of Physical Plant	Certification that all Physical Plant requirements have been met.
Vice President for University Operations	Certification that all Physical Plant requirements have been met; Recommendation that project proceed.
Controller	Certification that sufficient funding is available in source account and that source of funds can legally be used for construction.
Vice President for Finance and Administration	Certification that all financial and legal requirements have been met; Recommendation that project proceed.
President	Approval of Project.

6.3 A/E Contracting Process

6.3.1 Specific minor construction projects will be assigned to an eligible A/E firm based upon project requirements, availability and interest of firm in the project, ability of firm to meet project time lines, etc. An A/E contract amendment will be executed for each project assigned. *[See Section 11 for contract approval process.]*

6.3.2 Upon execution of the contract amendment, the Construction and Planning Coordinator will submit a Purchase Requisition (with copy of contract amendment attached) for the full amount of the amendment to the Purchasing Office for processing of a Purchase Order.

6.4 Construction Bidding and Contracting Process

6.4.1 Upon approval of the project design, the Construction and Planning Coordinator will put together a bid package containing the scope of work, construction contract form, design and work specifications, and all required standard forms relative to the project.

6.4.2 A Request for Bid (RFB) will be issued and advertised by the Purchasing Office in compliance with System Policy 51.01 - Advertising Policy for Construction Projects, including posting on the Texas Market Place. The Construction and Planning Coordinator will initiate newspaper advertisements with Purchase Requisitions. The RFB will require bids to be submitted directly to the Purchasing Office.

6.4.3 Bids will be secured by the Purchasing Office until the scheduled bid opening. The bid opening will be jointly administered and witnessed by representatives from the Purchasing Office and the Physical Plant Department. The Purchasing Office will document attendance and tabulate bids received using its standard forms.

6.4.4 The Construction and Planning Coordinator, with consultation of the assigned A/E firm, will review the bids and make the selection based upon conformance to bid requirements and the bid amount. Generally, the lowest qualified bid will be awarded the contract. Justifications for selections other than the lowest bidder will be documented.

6.4.5 The selected contractor will be asked to execute the standard construction contract form. *[See Section 10 (below) for required contract approvals.]* Upon execution of the contract and upon receipt of required bonding and insurance documentation by the

University, the contractor is authorized to begin construction.

- 6.4.6 If during the construction project a change to the project specifications is required to address an issue identified and the issue is within the original project scope, the standard Change Order form will be processed by the Construction and Planning Coordinator and approved by all parties who approved the original contract. Except in the case of an emergency, work associated with the Change Order will not be authorized until all approvals are obtained.
- 6.4.7 Upon execution of the construction contract, the Construction and Planning Coordinator will submit a Purchase Requisition to the Purchasing Office for issuance of a Purchase Order. Upon execution of a contract amendment, the Construction and Planning Coordinator will submit a Purchase Requisition to the Purchasing Office to increase the amount of the Purchase Order for the original contract. Copies of the contract and/or contract amendment must be attached to the Purchase Requisition.
- 6.5 Payment Process
- 6.5.1 The University will adhere to the payment processes contained in the standard A/E and construction contract forms.
- 6.5.2 Upon receipt of a billing from an A/E or construction contractor, the Construction and Planning Coordinator will review and verify that the billing amount is correct and conforms to the contract and that the work has been completed. The Construction and Planning Coordinator will prepare and approve a Construction Voucher and submit it to the Accounts Payable Office for processing. The applicable Purchase Order and Project Account numbers must be referenced on the voucher.
- 6.6 Project Design and Management Fees
- 6.6.1 The project design and management fees for Physical Plant Construction Projects will be handled as follows:
- | | |
|--------------------|--|
| Project Design | The A/E fee will be negotiated for each project. An A/E fee in excess of 10% of the construction cost must be approved by the Vice President for Finance and Administration. |
| Project Management | Each project will be assessed a 5% management fee to help defray the cost of administering projects. |
- 6.6.2 The project design fees will be paid to the A/E using the prorated payment schedule provided for in the A/E contract. The project management fees will be billed by the Planning and Construction Office on a monthly basis by IDO, based upon project expenditures for the month.
- 6.7 Project Accounting and Close-outs
- 6.7.1 Upon completion of the construction project and payment of all billings, the Planning and Construction Office will prepare the standard C-30 form to close out the project and revert any unspent funds to the source accounts. As part of the close out, the Planning and Construction Office will determine the proper breakdown of project costs between capital and non-capital. Within the capital category, a breakdown by asset class to meet the State Comptroller's componentization requirements will be provided. The C-30 form should be completed and processed within 90 days of the project completion.
- 6.7.2 Upon receipt of the C-30 form, the General Accounting Office will prepare the necessary journal entries to record the reversion of funds and close out of construction costs from Construction in Progress to the appropriate asset accounts and/or expense codes.
7. Telecommunications and Campus Net
- 7.1 Telecommunications Projects must be submitted to the University's Telephone Office. The Director of Telecommunications is responsible for administering the project and providing proper coordination with the Physical Plant Department. A copy of all As-Built Drawings for each project will be submitted to the Construction and Planning Office for record.
- 7.2 Campus Net Projects must be submitted to the Information Technology Services Department. The Associate Vice President for University Operations is responsible for administering the project and providing proper coordination with the Physical Plant Department. A copy of all As-Built Drawings for each project will be submitted to the Construction and Planning Office for record.
8. A/E Selection Process
- 8.1 Projects \$600,000 or less
- 8.1.1 To expedite individual construction projects, the University will select Architectural/Engineering (A/E) firms to be on its approved A/E list.
- 8.1.2 Interested A/E firms will be invited through a Request for Qualifications (RFQ) to submit information on their credentials, experience, prior projects, and references. The RFQ will be advertised in accordance with System Policy 51.01 - Advertising

Policy for Construction Projects, including posting on the Texas Market Place.

8.1.3 The selection of A/E firms will be based upon a review of the interested firms' qualifications. The selections will be made by the Construction and Planning and Coordinator and the Director of Physical Plant.

8.1.4 The selected A/E firms will be asked to execute the University's standard A/E contract. *[See Section 10 (below) for required contract approvals.]* All firms that have a fully executed contract on file will be eligible for University construction projects.

8.2 Projects over \$600,000

For projects over \$600,000, the procedures promulgated by TAMUS Facilities Planning and Construction will be used.

9. Physical Plant Review and Inspection Process

All University construction and maintenance projects will be inspected by appropriate Physical Plant Department personnel. The purpose of the reviews and inspections is to ensure University facility standards are maintained. The requesting department or construction project will be billed for inspection services.

10. Contract Approvals

All construction related contracts will be subject to the following approval process:

Approval	Purpose
Construction and Planning Coordinator	Certification that all requirements of the bid and/or selection process have been met and that vendor is qualified.
Director of Physical Plant	Verification that all Physical Plant requirements have been met.
Vice President for University Operations	Verification that all Physical Plant requirements have been met; Recommendation that contract be executed.
Purchasing Agent	Certification that all State, System, and University bid requirements have been met.
Training & Compliance Officer	Review and approval for legal sufficiency.
Controller	Verification that adequate funding exists in project.
Vice President for Finance and Administration	Certification that all financial and legal requirements have been met; Recommendation that contract be executed.
President	Approval of contract.

**Contacts: Director of Physical Plant
Controller**

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