## Capital Facilities Process

### Capital Project Development Phases and Approval

**Date:** January 26, 2018

<table>
<thead>
<tr>
<th>Development Phase</th>
<th>Description</th>
<th>Approval Required</th>
<th>Materials for the Capital Facilities Committee, President, and Board of Trustees Approvals (As Applicable)</th>
</tr>
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</table>
| Programming, Feasibility, Pre-Design | - This phase includes programming, space planning, rough order of magnitude cost estimates, and the development of a preliminary project schedule  
- This phase may also include a feasibility study, conceptual design, or the development of master plans | Approval Path B: Yes  Approval Path C: Yes |  
- Capital Facilities Committee Resolution  
- Program Document  
- Conceptual Budget  
- Milestone Schedule  
- Conceptual Test-Fit (as applicable)  
- Funding Strategy  
- Board of Trustees Presentation  |
| Schematic Design | - Schematic design documents further develop the approved project to a level that the design, scope, budget, and schedule can be approved | Approval Path B: Yes  Approval Path C: Yes |  
- Capital Facilities Committee Resolution  
- Program Document  
- Schematic Design Budget  
- Project Schedule  
- Funding Plan  
- Variance Approval  
- Floor Plans and Renderings  
- Board of Trustees Presentation  |
| Design Development/Construction Documents | - Design development and construction documents take the approved design from schematic design into finalized documents for construction | Approval Path C: Yes |  
- Updated Total Project Budget  
- Funding Agreement  
- Updated Project Schedule  
- Variance Approval |
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| Construction Procurement/Permitting | • The construction procurement includes the following: permit, bid, and award.  
• Phase will take the developed drawings and submit them to: the jurisdictional authorities for plan review to obtain necessary construction permits; contractors for bid and award. | No                |                                                                                                |
| Construction                      | • The implementation of the project in accordance with contract documents, and within budget and schedule.  
• The construction phase may be split into demolition and construction to expedite project delivery. | No                | No                                                                                                  |
| Occupancy                         | • Occupancy is when the project is nearing completion and the temporary certificate of occupancy has been issued allowing occupants to move-in.                                                                 | No                | No                                                                                                  |
| Close-Out                         | • Close-out includes commissioning and the completion of all construction and financial activities.                                                                                                       | No                | No                                                                                                  |

Additional material required for Approval Path C as applicable.