

Capital Facilities Process
Capital Project Development Phases and Approval

Date: January 26, 2018

Development Phase	Description	Approval Required			Materials for the Capital Facilities Committee, President, and Board of Trustees Approvals <i>(As Applicable)</i>
		Approval Path A	Approval Path B	Approval Path C	
Programming, Feasibility, Pre-Design <i>(When Required)</i>	<ul style="list-style-type: none"> 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 	-	Yes	Yes	<ul style="list-style-type: none"> Capital Facilities Committee Resolution Program Document Conceptual Budget Milestone Schedule Conceptual Test-Fit (as applicable) Funding Strategy Board of Trustees Presentation¹
Schematic Design	<ul style="list-style-type: none"> Schematic design documents further develop the approved project to a level that the design, scope, budget, and schedule can be approved 	Yes – As Applicable	Yes	Yes	<ul style="list-style-type: none"> Capital Facilities Committee Resolution Program Document Schematic Design Budget Project Schedule Funding Plan Variance Approval Floor Plans and Renderings¹ Board of Trustees Presentation¹
Design Development/ Construction Documents	<ul style="list-style-type: none"> Design development and construction documents take the approved design from schematic design into finalized documents for construction 	Yes	Yes	Yes	<ul style="list-style-type: none"> Updated Total Project Budget Funding Agreement Updated Project Schedule Variance Approval

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Construction Procurement/ Permitting	<ul style="list-style-type: none"> 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	No	No	
Construction	<ul style="list-style-type: none"> 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	No	
Occupancy	<ul style="list-style-type: none"> Occupancy is when the project is nearing completion and the temporary certificate of occupancy has been issued allowing occupants to move-in. 	No	No	No	
Close-Out	<ul style="list-style-type: none"> Close-out includes commissioning and the completion of all construction and financial activities. 	No	No	No	

Additional material required for Approval Path C as applicable.