UCLA Procedure 815.1: Requesting Facilities Management Services

Issuing Officer: Assistant Vice Chancellor, Facilities Management
Responsible Dept: Facilities Management
Effective Date: January 25, 2016

I. GENERAL POLICY
II. RECHARGEABLE SERVICES
III. PROCEDURES

I. GENERAL POLICY

Facilities Management (FM) is a service unit assigned the responsibility to support the instructional, research and public service programs of the campus. Upon request, FM will provide, at cost, rechargeable services (i.e., special maintenance, repair, construction support, etc.) to departments, administrative units, and self-sustaining activities of the campus.

All construction involving alterations to buildings or parts thereof, regardless of the source of funds, is to be accomplished only by members of Facilities Management or by contractors employed by the University and working under the supervision of Facilities Management staff.

II. RECHARGEABLE SERVICES

Rechargeable services fall into two categories:

A. **Blanket Work Orders** are submitted on a Facilities Service Request (FSR) form located at [http://www.fsr.ucla.edu](http://www.fsr.ucla.edu). A blanket is established by the department by initiating an FSR. The department is then notified of the blanket number assigned and when requesting any services to be performed on the blanket, inserts this number in the appropriate space provided on the FSR.

Blanket projects should be restricted to low dollar volume work (i.e., cutting keys, making signs, moving furniture, hanging bulletin boards, etc.) for which NO ESTIMATE IS REQUIRED. Moreover, using a blanket number is an authorization for FM to proceed with the work and NO ESTIMATE WILL BE PROVIDED.

All blanket numbers must be followed by a four-digit tag number (e.g., A4343-0011) predetermined by the department. As work is requested, the initiating department should identify each FSR to be charged to a blanket account with a tag number. This will enable the department to identify the time and material costs for specific blanket work orders on the monthly billings that are summarized by tag number.

If FM determines that the scope of work requested is too complex to be accommodated on a blanket work order, FM will:

- Assign a work order number to the project;
- Notify the department;
- Process the work request as a non-blanket work order (see Section II. B, below).

All blanket numbers will remain open indefinitely unless canceled in writing by the department or by FM.

A minimum of five working days is required from receipt of the FSR for FM to contact the department in order to define needs and schedule work.
B. **Non-Blanket Work Orders** are submitted on an FSR ([http://www.fsr.ucla.edu](http://www.fsr.ucla.edu)). FM assigns a specific work order number for each request, acknowledges receipt of the request, and notifies the department of the number assigned. The department utilizes the number for identification purposes in order to obtain billing or project status information.

A Project Manager assigned to coordinate the work, estimates the cost of the project. Estimate requests submitted to FM’s Maintenance & Alterations (M&A) Department, also known as the FM “Shops” is free of charge, however may take up to 90 calendar days to complete. There are as many as 5-8 estimate requests received every workday and M&A does not employ any full time estimators.

Once the estimate is complete and returned to the requestor, the department reviews and signs Work Scope Definition and Project Estimate Summary Sheet forms, approving the cost and authorizing FM to proceed with the project. The estimated cost then becomes a contract price for the project.

The department will be billed the authorized amount unless a change in work scope is required which will either increase or decrease the amount to be billed. Since the department is aware of the total project cost before the work is started, no detailed billings will be provided. A lien will appear on the department’s ledger and will be expended monthly until the work is completed. The total billings will equal the contracted amount.

### III. PROCEDURES

#### A. Blanket Work Orders

<table>
<thead>
<tr>
<th>RESPONSIBILITY</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department/Customer</td>
<td>Prepares FSR (<a href="http://www.fsr.ucla.edu">http://www.fsr.ucla.edu</a>) using appropriate blanket order and tag numbers and forwards to: Facilities Management, Customer Service, 731 Charles E. Young Drive South.</td>
</tr>
<tr>
<td>Facilities Management</td>
<td>Forwards FSR to appropriate Facilities Management department for action.</td>
</tr>
<tr>
<td>(Customer Service)</td>
<td></td>
</tr>
<tr>
<td>(Project Manager)</td>
<td>Contacts customer within 5 working days:</td>
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<tr>
<td></td>
<td>• If minor item, may complete work within 5 days.</td>
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<tr>
<td></td>
<td>• If job is complex, requires definitions of scope of work and discussion of implementation schedule.</td>
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<tr>
<td>(Accounting)</td>
<td>Forwards statement of charges to department.</td>
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</tbody>
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#### B. Non-Blanket Work Orders

<table>
<thead>
<tr>
<th>RESPONSIBILITY</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities Management</td>
<td>Assigns work order number and acknowledges receipt of order indicating Facilities Management department responsible for action.</td>
</tr>
<tr>
<td>(Customer Service)</td>
<td>Forwards FSR to appropriate Facilities Management department where it is screened for required Environment Health &amp; Safety, Office of Academic Planning and Budget, and Corporate Financial Services approvals.</td>
</tr>
<tr>
<td>(Department Manager)</td>
<td>Receives approval and assigns to Project Manager to coordinate the work.</td>
</tr>
<tr>
<td>(Project Manager)</td>
<td>Contacts customer to define scope of work.</td>
</tr>
<tr>
<td></td>
<td>Prepares cost estimate.</td>
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</tbody>
</table>
RESPONSIBILITY | ACTION
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(Project Manager, cont’d) | Contacts customer to review estimate. 
Department/Customer | Approves or rejects estimate. 
Facilities Management (Project Manager) | Obtains customer’s signature authorizing work to proceed if estimate is approved. 
 | OR 
 | Cancels FSR if estimate is rejected. Department may be billed for cost of design required to develop cost estimate. 
 | If estimate is approved: 
 | - Places lien on customer’s ledger for the authorized amount, and 
 | - Reviews implementation details with customer and schedules work. 
 | Advises customer of project’s status, as necessary. 
 | Obtains Department authorization for any changes in scope of work via a change order form. 
 | Supervises work through completion of project. 
 | Meets with customer to obtain comments on quality of service. 
Department/Customer | Signs Project Acceptance Sign-Off form verifying completion of project. 
Facilities Management (Project Manager) | Closes job. 
(Accounting) | Bills Department monthly during course of project for costs accrued during previous month. 

Issuing Officer

/s/ Kelly J. Schmader

Assistant Vice Chancellor, Facilities Management

Questions concerning this policy or procedure should be referred to the Responsible Department listed at the top of this document.