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## UCLA Procedure 815.1: Requesting Facilities Management Services

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Issuing Officer: Assistant Vice Chancellor, Facilities Management

Responsible Dept: Facilities Management

Effective Date: January 25, 2016

Supersedes: UCLA Procedure 815.1, dated 7/1/1998

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### 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 <https://facilities.ucla.edu/submit-request>. A blanket is established by the department's requestor by initiating an FSR that includes the department's 4-digit code and Full Accounting Unit (FAU). The requestor is then notified of the blanket number created and will provide this number when requesting any services to be performed via and 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 to five-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 job number to the project;
- Notify the department to submit an estimate request instead at <https://facilities.ucla.edu/submit-request>;
- Process the work request as a non-blanket estimate request (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. Estimate Requests and Non-Blanket Work Orders** are submitted on an FSR (<https://facilities.ucla.edu/submit-request>). FM assigns a specific job 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 is assigned to coordinate the work and 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 30-60 calendar days to complete. There are as many as 5-8 estimate requests received every workday and M&A only employs one full time estimator.

Once the estimate is complete and emailed to the requestor, the department reviews and signs Work Scope Definition and Project Estimate Summary Sheet forms online, approving the cost and authorizing FM to proceed with the project. The estimated cost then becomes a contract price for the project. Once the requestor approves the job, 75% of the cost is charged upon approval. The remaining 25% cost of the job is charged once FM places the job status as complete in the FM Maintenance Management System.

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**

RESPONSIBILITY	ACTION
Department/Customer	Prepares FSR ( <a href="https://facilities.ucla.edu/submit-request">https://facilities.ucla.edu/submit-request</a> ) using appropriate blanket order and tag numbers and forwards to: Facilities Management, Customer Service, 731 Charles E. Young Drive South.
Facilities Management (Customer Service)	Forwards FSR to appropriate Facilities Management department for action.
FM Project Manager	Contacts customer within 5 working days: <ul style="list-style-type: none"> <li>• If minor item, may complete work within 5 days.</li> <li>• If job is complex, requires definitions of scope of work and discussion of implementation schedule.</li> </ul>
FM Accounting	Forwards statement of charges to department.

**B. Estimate Request and Non-Blanket Work Orders**

RESPONSIBILITY	ACTION
Department/Customer	Prepares FSR ( <a href="https://facilities.ucla.edu/submit-request">https://facilities.ucla.edu/submit-request</a> ) and forwards to: Facilities Management, Customer Service, 731 Charles E. Young Drive South.

RESPONSIBILITY	ACTION
Facilities Management (Customer Service)	Assigns work order number and acknowledges receipt of order indicating Facilities Management department responsible for action.
	Forwards FSR to appropriate Facilities Management department where it is screened for required Environment Health & Safety, Office of Academic Planning and Budget, and Business & Finance Solutions approvals.
FM Department Manager	Receives approval and assigns to Project Manager to coordinate the work.
FM Project Manager	Contacts customer to define scope of work.
	Prepares cost estimate.
	Contacts customer to review estimate.
Department/Customer	Approves or rejects estimate.
FM 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: <ul style="list-style-type: none"> <li>• Places lien on customer's ledger for the authorized amount, and</li> <li>• Reviews implementation details with customer and schedules work.</li> </ul>
	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.
FM Project Manager	Closes job.
FM Accounting	Bills Department monthly during course of project for costs accrued during previous month.

**Issuing Officer**

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**Kelly J. Schmader**  
**Assistant Vice Chancellor, Facilities**  
**Management**

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

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