

# Designated Local Facilities Manager (DLFM) Project **WORKFLOWS**

*For use when a Facilities Project Initiation Form (FPIF) has been Approved*

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## Relevant Policies, Documents, and Acronyms

### POLICIES

#### Facilities Project Initiation Form

<https://fanda.uga.edu/FPIF/>

#### Performing Work in UGA Facilities located outside of Clarke County and / or are “B” Unit Facilities

<https://policies.uga.edu/Facilities/Performing-Work-Outside-University-of-Georgia-Facilities/>

### DOCUMENTS

- Instructions for Routing Requisitions by DLFM College/Department
- UGA Design& Construction Special Conditions for DBB
- UGA Design & Construction Special Conditions CM or DB
- ESD Fire Safety 354 Transmittal Form  
<https://www.architects.uga.edu/standards>
  - Division 01
  - General Requirements 01 41 26.03
  - Fire Safety Transmittal Form
- OUA Closeout Checklist
- OUA Closeout Checklist for Contractors

### ACRONYMNS

BOR=Board of Regents of the University System of Georgia  
CM=Construction Manager  
CCO=Component Change Order  
DLFM=Designated Local Facilities Manager  
DP=Design Professional  
DB=Design-Build  
DBB=Design-Bid-Build  
ESD=Environmental Safety Division  
FMD=Facilities Management Division  
FPIF=Facilities Project Initiation Form  
GEPA=Georgia Environmental Policy Act  
GMP=Guaranteed Maximum Price  
OUA=Office of University Architects for Facilities Planning  
PM POC=Project Manager Point of Contact

# Is a Facilities Project Initiation Form Required?

## Facility Project Initiation Form Review / Approval Matrix

Project Type (includes design and/or work) <sup>1</sup>	Facilities Project Initiation Form Request	Facilities Management Division (FMD) and Office of University Architects (OUA) Approval or Recommendation <sup>2</sup>	Finance & Administration Review/ Approval	Provost Review / Approval <sup>3</sup>
<b>MAINTENANCE</b>				
Scope doesn't require any third-party consultants, engineers, or design professional fees greater than or equal to \$2500	N	N	N	N
Scope estimate is less than \$50k and requires third-party consultants, engineers, or design professional fees greater than or equal to \$2500	Y	Y	N	N
Scope estimate is greater than or equal to \$50k and requires third-party consultants, engineers, or design professional fees greater than or equal to \$2500	Y	Y	Y	N
Utilizes a FMD or OUA Task Order Contract	Y	Y	Y	N
<b>PROJECT (New Construction/Addition/Renovation)</b>				
Specific project approved via MRR Program (will utilize full or partial MRR funds)	N	N	N	N
Scope estimate is less than \$25k without any third-party consultants, engineers, or design professional	No. FPIF is not required though work must be performed per UGA Policies. <sup>1</sup> Submit a Work Order if the scope is in a Resident Instruction facility in Clarke County.	N	N	N
Scope estimate is less than \$50k with third-party consultants, engineers, or design professional fees greater than or equal to \$2500	Y	Y	N	N
Scope estimate is greater than or equal to \$50k regardless of third-party consultants, engineers or design professional fees	Y	Y	Y	Y
Scope estimate is greater than or equal to \$50k regardless of third-party consultants, engineers or design professional fees and utilizes full or partial MRR funds that were not approved through MRR process for this specific project	Y	Y	Y	Y
Change in Use of Space (i.e. restroom to IT closet, etc.)	Y	Y	Y	Y
Requires new space lease or modification to an existing space lease	Y	Y	Y	Varies

<sup>1</sup> Refer to Engaging Design Professionals and Contractors, Performing Work in UGA Facilities, and Performing Work Outside of Clarke County policies.

<sup>2</sup> Approval if less than \$25k; recommendation if more than \$25k

<sup>3</sup> Provost Approval not applicable for University Housing or Finance & Administration projects (President approval may be required on case by case basis).

# Designated Local Facilities Manager (DLFM) Project WORKFLOW TYPES

## PRE-REQUISITE

**0** GEORGIA ENVIRONMENTAL POLICY ACT (GEPA) Workflow

## DESIGN

**1A** Project Without DESIGN PROFESSIONAL and / or any CONSULTANTS Workflow

**1B** Project With DESIGN PROFESSIONAL and / or CONSULTANTS Workflow

## CONSTRUCTION PROCUREMENT

**2A** BIDDING for DESIGN-BID-BUILD Without a Design Professional of Record Workflow

**2B** BIDDING for DESIGN-BID-BUILD With a Design Professional of Record Workflow

**2C** LUMP SUM TASK ORDER Workflow

**2D** CONSTRUCTION MANAGER or DESIGN-BUILD TASK ORDER Workflow

## CONSTRUCTION ADMINISTRATION

**3A** CONSTRUCTION ADMINISTRATION for DESIGN-BID-BUILD Workflow

**3B** CONSTRUCTION ADMINISTRATION for TASK ORDER Workflow

# DLFM Project PURCHASE ORDER / CONTRACT SUMMARY / APPLICABLE WORKFLOWS

*For use when a FPIF has been approved*

## Design Professional or Consultant

	Purchase Order Required	Contract Required	Contract Prepared By	Change Orders Prepared By	Invoices Sent to
Less than \$2,499 (not for DP)	N	N	N/A	N/A	Accounts Payable
Equal to or more than \$2500	Y	Y	FMD or OUA Contract Specialist	FMD or OUA Contract Specialist	FMD or OUA PM POC

## Maintenance or Construction

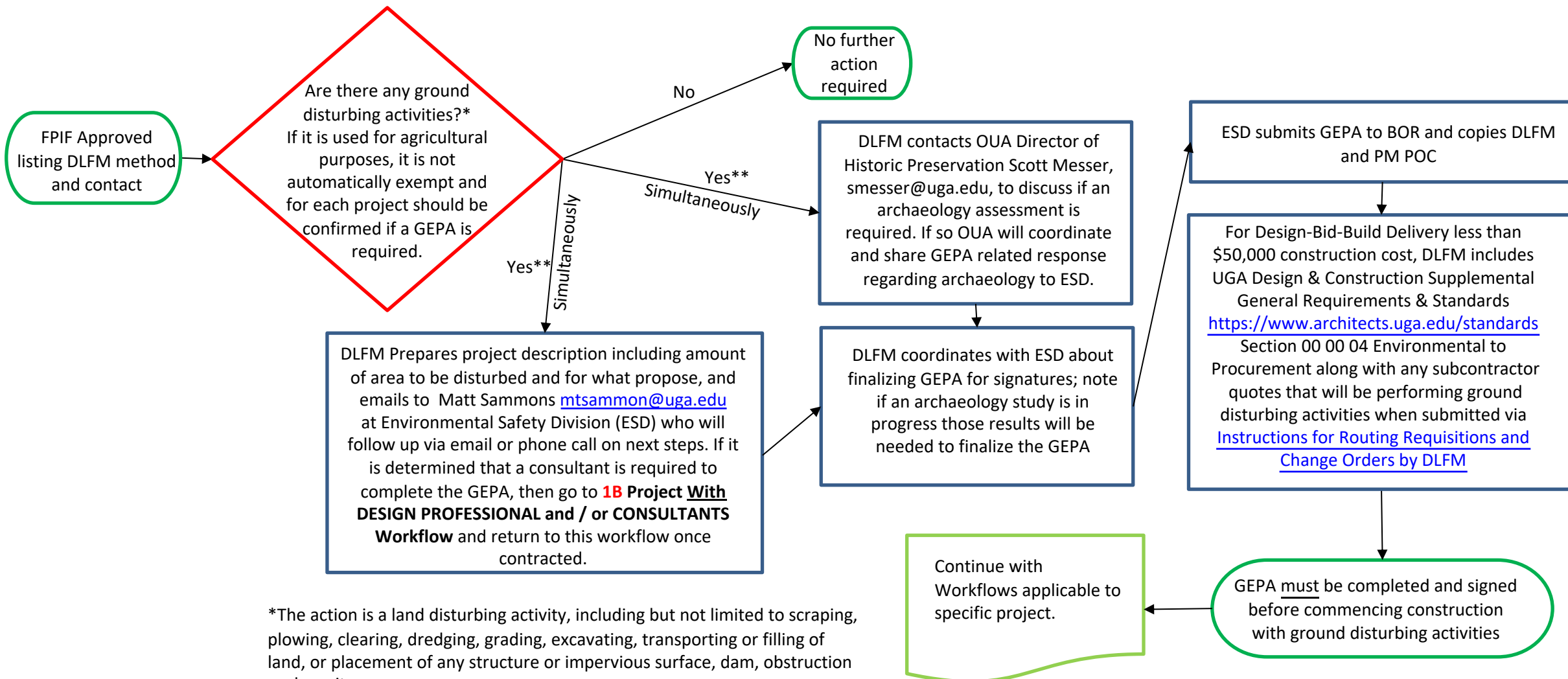
	Purchase Order Required	Contract Required	Contract Prepared By	Change Orders Prepared By	Invoices Sent to	Applicable Workflows
Design-Bid-Build less than \$50k <u>without</u> Design Professional	Y	N	N/A	Procurement	Procurement	0, 1A, 2A, 3A
Design-Bid-Build less than \$50k <u>with</u> Design Professional	Y	N	N/A	Procurement	Procurement	0, 1B, 2B, 3A
Design-Bid Build more than \$50k <u>without</u> Design Professional	Y	Y	Procurement	Procurement	Procurement	0, 1A, 2A, 3A
Design-Bid Build more than \$50k <u>with</u> Design Professional	Y	Y	Procurement	Procurement	Procurement	0, 1B, 2B, 3A
Lump Sum Task Order	Y	Y	FMD or OUA Contract Specialist	FMD or OUA Contract Specialist	FMD or OUA PM POC	0, 1A or 1B, 2C, 3B
Construction Manager Task Order	Y	Y	FMD or OUA Contract Specialist	FMD or OUA Contract Specialist	FMD or OUA PM POC	0, 1A or 1B, 2D, 3B
Design-Build Task Order	Y	Y	FMD or OUA Contract Specialist	FMD or OUA Contract Specialist	FMD or OUA PM POC	0, 1A or 1B, 2D, 3B

# Designated Local Facilities Manager (DLFM) Project

## 0 GEORGIA ENVIRONMENTAL POLICY ACT (GEPA) Workflow

*This workflow is a Pre-requisite and applies for ALL projects with Ground Disturbing Activities*

*It should be completed simultaneously with other applicable workflows but must be completed prior to Ground Disturbing Construction*

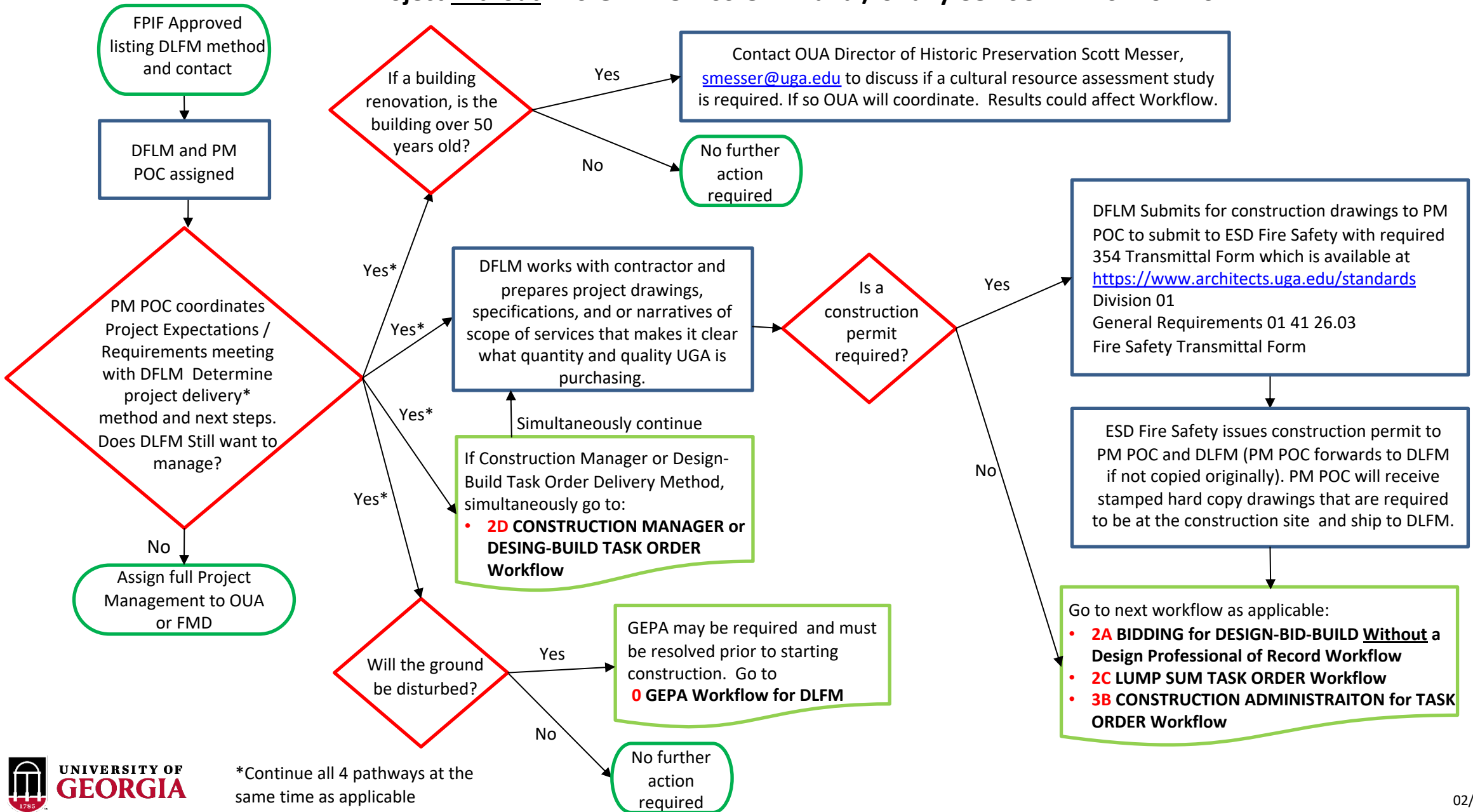


\*The action is a land disturbing activity, including but not limited to scraping, plowing, clearing, dredging, grading, excavating, transporting or filling of land, or placement of any structure or impervious surface, dam, obstruction or deposit.

\*\*If yes, follow both paths simultaneously

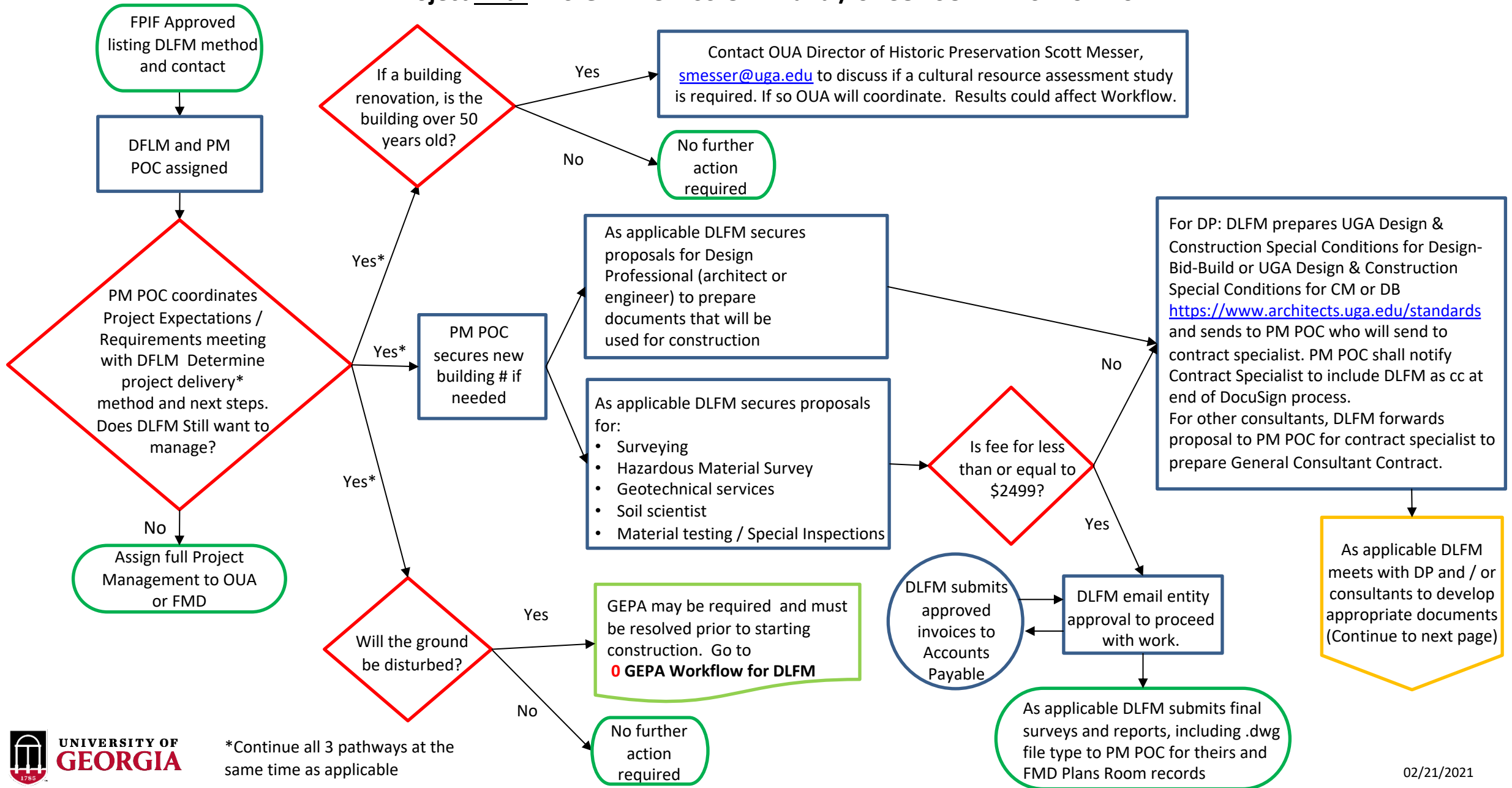
# Designated Local Facilities Manager (DLFM) Project

## 1A Project without DESIGN PROFESSIONAL and / or any CONSULTANTS Workflow



# Designated Local Facilities Manager (DLFM) Project

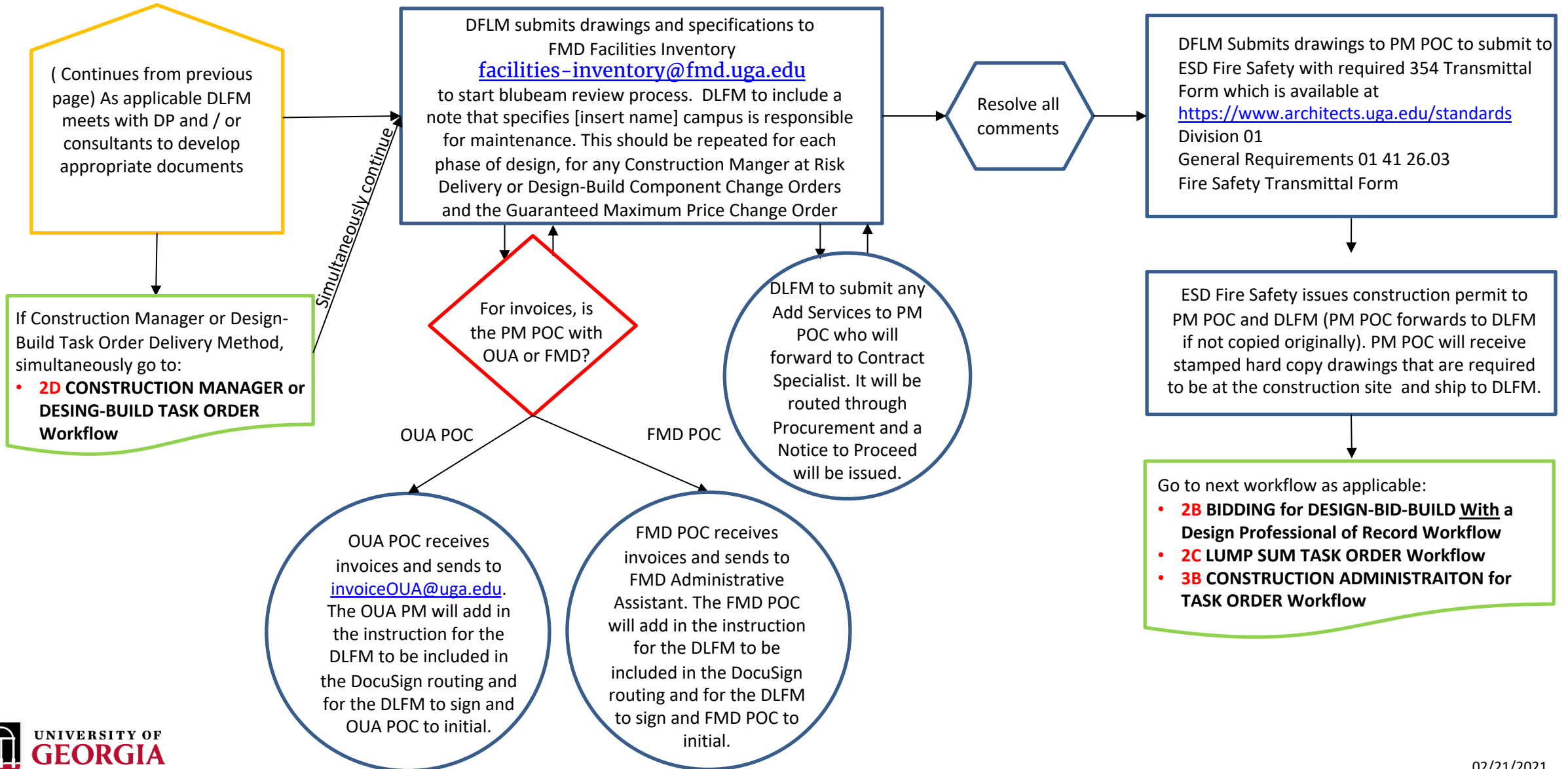
## 1B Project With DESIGN PROFESSIONAL and / or CONSULTANTS Workflow





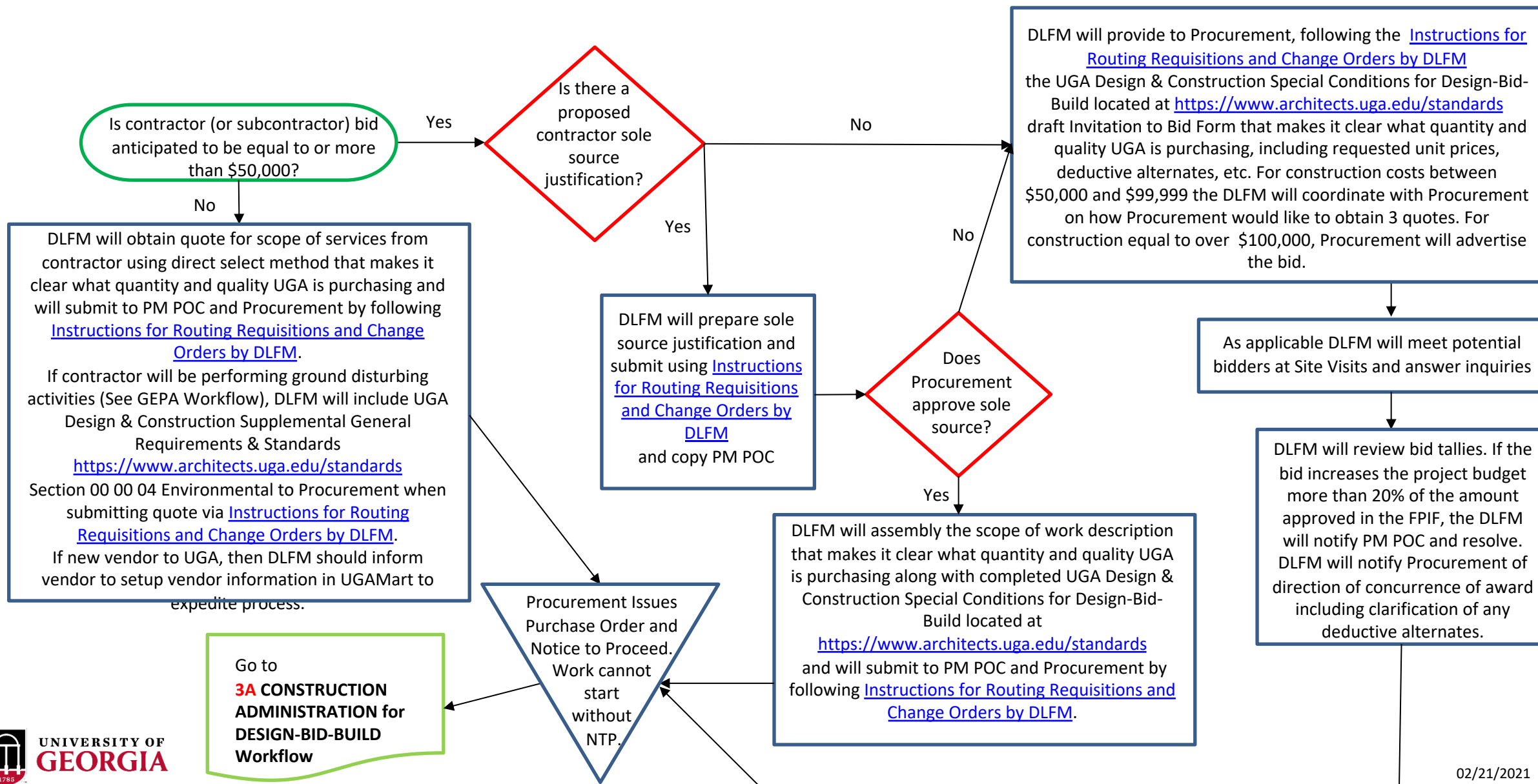
# Designated Local Facilities Manager (DLFM) Project

## 1B Project with DESIGN PROFESSIONAL and / or CONSULTANTS Workflow (Continued)



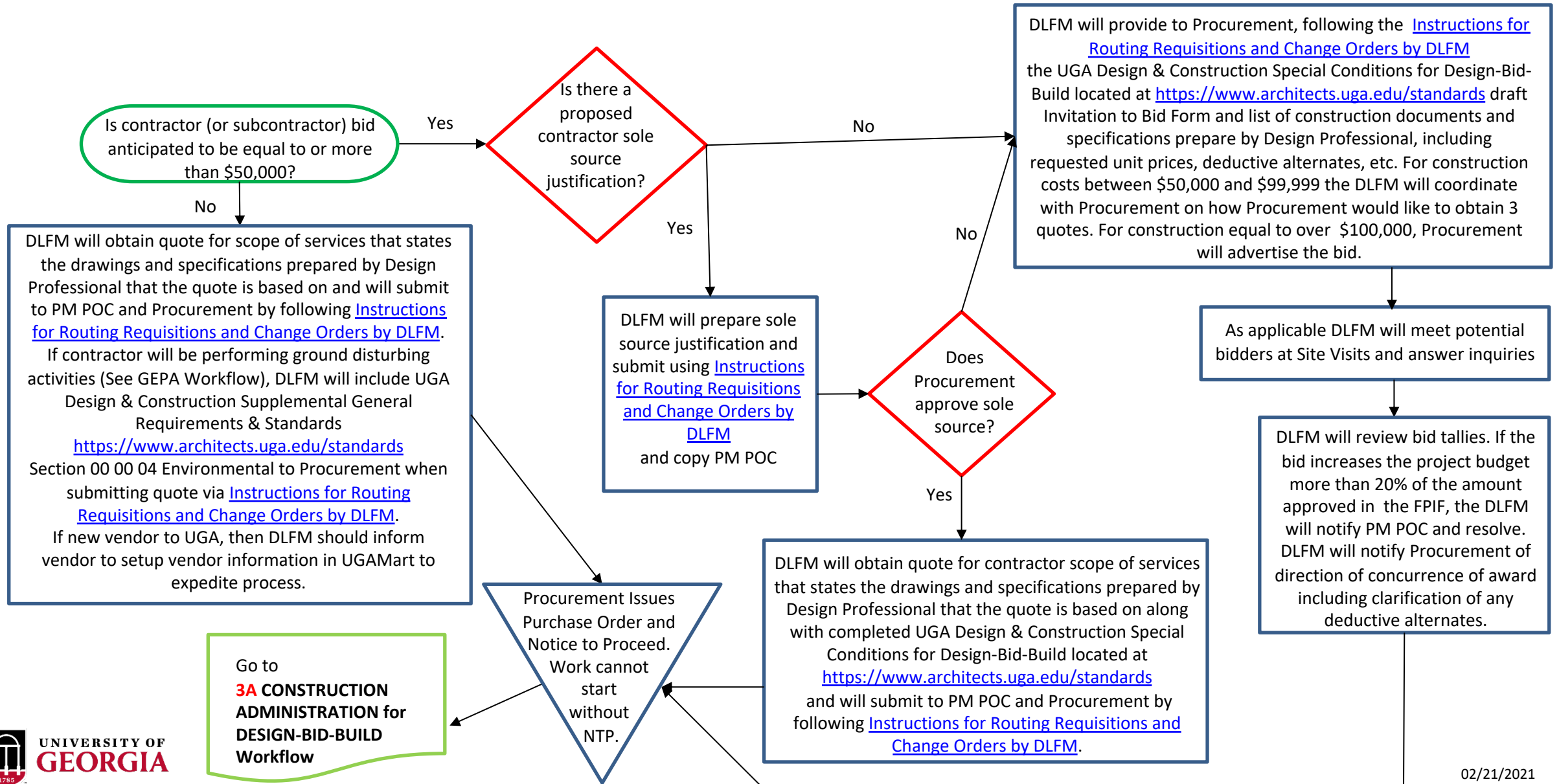
# Designated Local Facilities Manager (DLFM) Project

## 2A BIDDING for DESIGN-BID-BUILD Without a Design Professional of Record Workflow



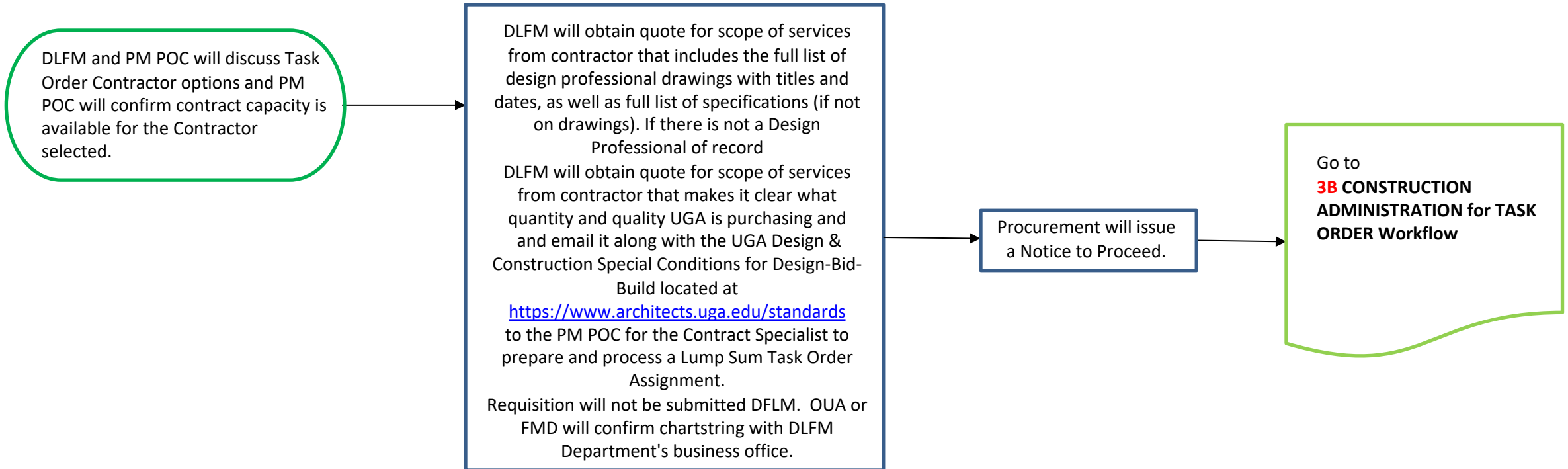
# Designated Local Facilities Manager (DLFM) Project

## 2B BIDDING for DESIGN-BID-BUILD With a Design Professional of Record Workflow



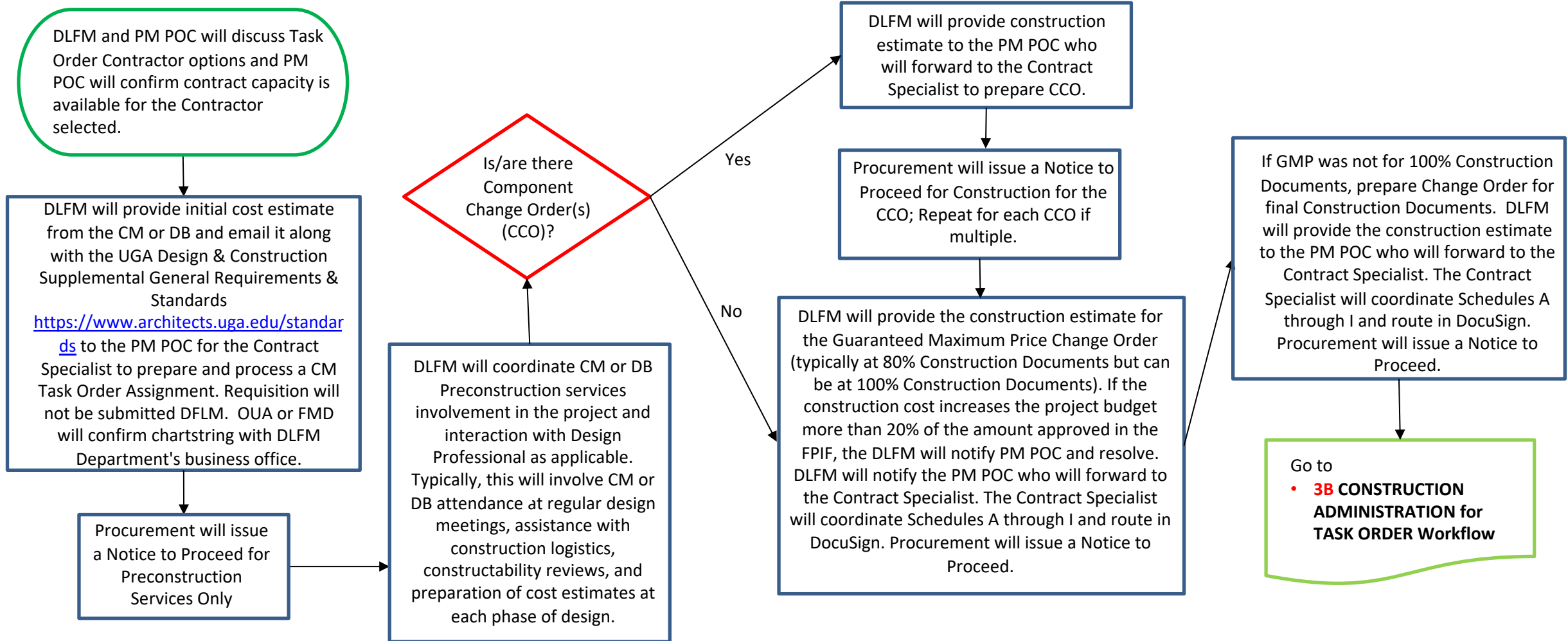
# Designated Local Facilities Manager (DLFM) Project

## 2C LUMP SUM TASK ORDER Workflow



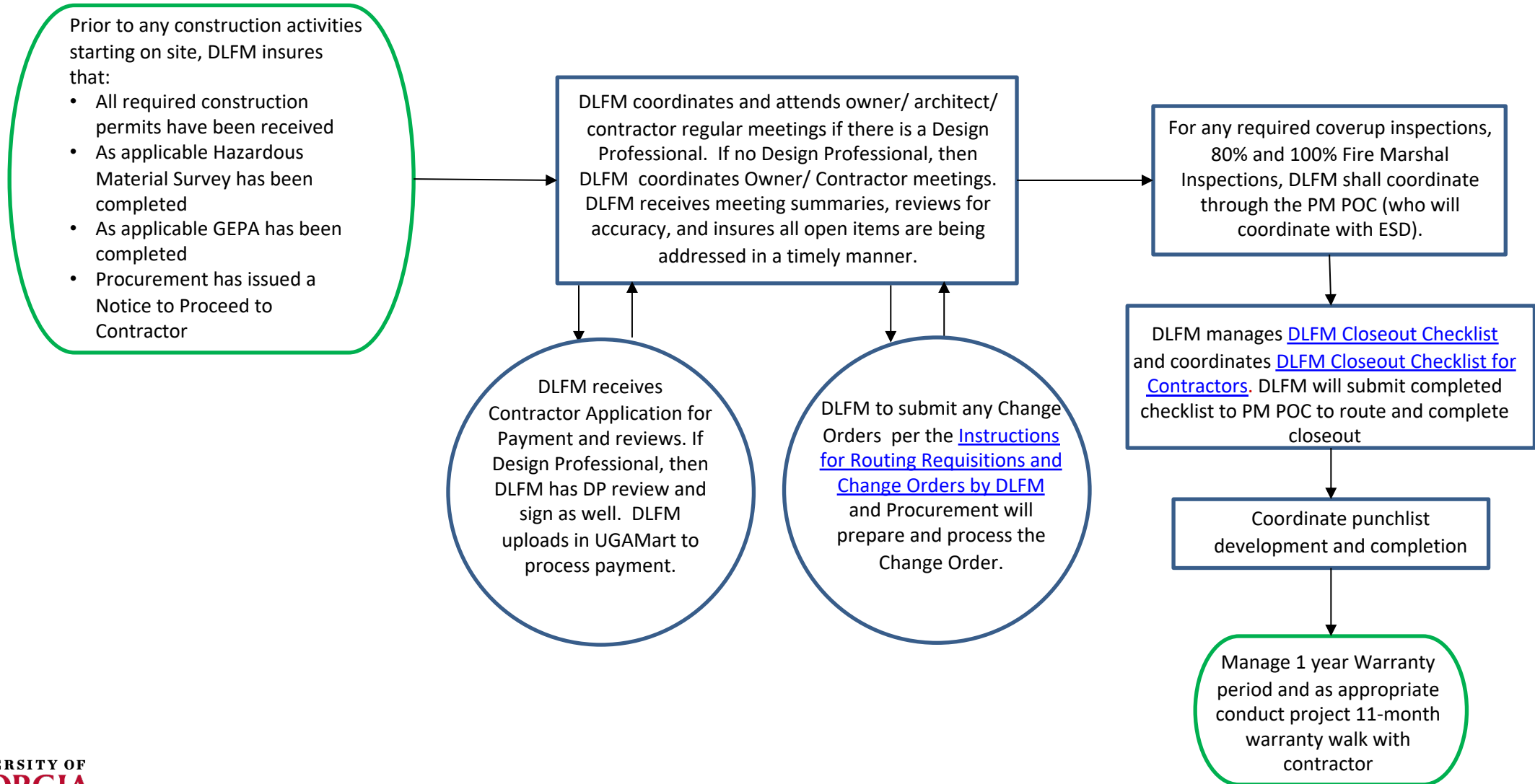
## Designated Local Facilities Manager (DLFM) Project

### 2D CONSTRUCTION MANAGER or DESIGN-BUILD TASK ORDER Workflow



# Designated Local Facilities Manager (DLFM) Project

## 3A CONSTRUCTION ADMINISTRATION for DESIGN-BID-BUILD Workflow



# Designated Local Facilities Manager (DLFM) Project

## 3B CONSTRUCTION ADMINISTRATION for TASK ORDER Workflow

