**PLANNING**

**Under $25,000:** Measurable: 30 days (15 days to Estimator\*)

Obtain project information/ request number

Create a folder

* Long manila pocket folder with following information:

Project name, requisition number, building

Should include: print of work request, all project info

Begin Investigation/ contact customer

Create documents

Goal: Provide clear and concise documentation to estimator/PM

* Project Turn-over Narrative
* Plans
* Photos
* Small Project Checklist

Schedule meeting with Estimator to explain project

Goal: continuity of information to customer/ one point of information

* Schedule walk-through if necessary with customer
* Determine if Planning or Estimating releases the estimate

\*if Planning takes more than 15 days, Planner should have clear idea of values for estimate

**Over $25,000:** Measurable: None

Obtain project information/ request number

Create a folder

Begin Investigation/ contact customer

If funded:

* Write an Appropriations Request

When funded:

* Start a financial summary
* Fill out PTS: FO# for PM fees, status, description, links
* Start a schedule

If Consultant:

* Select and hire a consultant:
  + If PV: proposal, financial summary, certificate of insurance, draft req
  + If not: (red packet)
* See project from schematic design into construction documents
* Familiarize PM with project
* Check drawings, get it released to Procurement, bids, pre-award
* Coordinate furniture and finishes if necessary

If JOC:

* Plans and Narratives