



Project Management & Construction Services

Standard Operating Procedures

I. Title: Estimate Review and Approval

II. Purpose : Provide a clear procedure for Estimate Document Review and approval

III. Actions

1. PM completes Scope of Work and Estimate.
2. PM develops estimate letter and attachments. Team Members (if determined by PM), Sr. PMs, Managers should be listed as CCs for initial purposes only. Attachments are listed on the Estimate Letter.
3. PM gives estimate package and routing information to Project Specialist.
4. Project Specialist routes estimate letter to team members (if applicable), Sr. PMs, Managers and Associate Director for review (review will be performed consecutively). If the estimate letter is acceptable, the reviewer shall initial next to his/her name.
5. Reviewers return estimate package with any comments to Project Specialist.
6. PS routes estimate package with comments back to PM.
7. PM addresses comments.
8. If necessary, the Project Specialist routes the estimate package to the Director of PMCS for review. See the Approval Levels spreadsheet for Director Review requirement.
9. Project Specialist routes the estimate (electronic AND paper copy) and attachments to the client for approval and files electronic estimate in project folder.
10. Update project status in FAMIS to SD_EST_SNT.
11. If the client approves the estimate, the project can move into the Design Document phase.

If the client does NOT approve the estimate, the PM must work with the client to determine what action to take.

If client doesn't follow up regarding estimate within 90 days, PM will contact client to determine if CP can be cancelled.

IV. References





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Client Summary Budget tab of Estimate Form
Preliminary Estimate Letter
Client Authorization to Proceed