PROJECT FACT SHEET (PFS)

INSTRUCTIONS

A. Submit PFS immediately for locally funded projects

B. Submit PFS for initial project approval and pre-bid expenses for Capital funded projects

C. Submit PFS with each Capital Request for Capital funded projects

D. Submit a revised form any time additional funding is requested

E. Submit a revised form when Project Budget or Project Timeline Commitments change

F. Submit a revised form to close a project Banner number.

PROCEDURE:

A. B. C. D. E. F.:

Complete top section on front of form and the back of form, attach necessary backup (e.g. approvals from outside funding sources), obtain Division Head approval, review with Business Manager, and submit to Associate Vice President for Facilities

A. B. C. D. E. F.:

Associate Vice President for Facilities will approve, and submit to Vice President for Finance and Business Services for approval, when necessary.

A. C. D. F.:

After approval(s), Administrative Asst. to Assoc. V.P. will send a copy to the Project Coordinator and the Business Manager for their information only, and forward the original to the Plant Funds Accountant for processing.

B. E.:

After approval(s), Administrative Asst. to Assoc. V.P. will distribute copies to all final copy recipients. (No action required of Plant Fund Accountant for these PFS purposes.)

A. C. D. F.:

Plant Funds Accountant will acknowledge and perform necessary functions and return form to Administrative Asst. to Assoc. V.P. Plant Funds Accountant will also send a copy to the Responsible Person of the funding source for project closeouts, when not PFD.

A. C. D. F.:

Administrative Asst. to Assoc. V.P. will distribute copies to all Final copy recipients, and send a copy to the TMA Mgr. for project closeouts.

8/27/02