

CAPITAL PROJECT PROCESS

May 2009

GETTING STARTED

What is a **project**?

- A **project** is defined as all work (**maintenance & repair or renovation**) that requires \$5,000 or more in time and materials and/or is sufficiently complex that it requires in house coordination/planning and multiple shops (electrical, plumbing, carpentry, etc) to accomplish the work. A project can also be defined as work requiring contracted design and/or contracted services. Please call University Facilities at ext. 1700 if you have any questions about what constitutes a project.
- **Maintenance and repair** is defined as work performed for regular maintenance, repair and replacement. Examples may include repair and replacement of roofs, electrical and mechanical systems, floors, ceilings and walls (interior and exterior), plumbing, elevators, fire alarms, and grounds (e.g., landscaping)
- **Renovation** is defined as work which materially changes the programmatic purpose of an existing space (e.g., changing a classroom to a laboratory; adding space through construction; demolishing walls in an office) or upgrades the existing programmatic use of the space.

The capital project process begins when a Department/Unit recognizes the need for upgrades or improvements to a building, department space or area. All construction, renovations, modifications or changes to existing facilities on campus must be coordinated by University Facilities. The facility/business manager for a department/unit may initiate the process by contacting University Facilities via e-mail at projects@drexel.edu. Please provide a brief explanation of the services that are requested, the location and a telephone number so that someone can call you back.

AVAILABLE SERVICES

University Facilities will work with you to assess your needs, determine the scope of work and create a preliminary budget estimate (PBE). These services can include but are not limited to;

- *Programming* – Includes an interview process that defines your renovation needs and/or space requirements.
- *Survey and Planning* – Field measurements will be taken of the scope of work if plan files are not updated, and a preliminary plan will be done for approval and sign off.
- *Design Services* – A member of the Interior Design Group (IDG) can be consulted for any planning or upgrades to your space. This includes plan changes, finish or furniture specifications and installation coordination.
- *Budgeting*- See below for the Preliminary Budget Estimate (PBE) process.

- *Construction Documentation*- Drawings will be created for bidding, permitting and construction of your project.
- *Project Management* – A project manager (PM) will be assigned to your project as soon as a project budget is approved. This person will manage all the parts of the project to be sure that all the pieces come together in an organized and timely fashion for a successfully completed project.

PROCESSES & SCHEDULES

A Project Implementation Plan (PIP) will be developed once a PBE is signed. The PIP will begin with a Kick-Off meeting to review the intended scope and a project schedule will be developed for review by all parties. Schedules for projects will vary based on scope. Some projects require minimal reconfiguration of finishes and will take a few weeks to design and implement. There will be other projects, however, that will require several weeks of design, documentation, permitting and a bid process. This will all be discussed in the Kick -Off meeting.

How long will it take to complete my project?

In general, the life cycle of a project involves the following phases:

Project Phase	Length of Time	Tasks
Receive & review emailed project request	<1 week	Project office reviews project request.
Scope definition	1 week	The ideas and plans of an academic or departmental group are developed into a potential project.
Feasibility	1 week	Project office reviews and develops options initially arising during the Scoping phase.
Programming	2 weeks	Client's objectives, space requirements, and operational plan will be translated into a facility program in sufficient detail.
Project budget estimate development	1-2 weeks	Project office will develop a budget estimate and send to client.
Client budget estimate authorization	1-2 weeks	Client will provide cost center number for funding and obtain appropriate signatures.
Construction documents prepared	2 weeks	Drawings, mock-ups, and detailed plans are developed to present a coordinated, clear view of the project's major elements.
Bidding	2 weeks	The construction documents are used to competitively bid the work among qualified contractors.
Construction	4-8 weeks	The project is built according to drawings and specifications at the quality level included in Documents within the budget, schedule, and scope defined and approved.
Install furnishings	1week	Fixtures and furnishings are installed.
Project Closeout	1 week	Project manager will facilitate and coordinate occupancy and turnover of the facility to the client.
Moving		
Occupancy		

These phases are common to all construction and remodeling projects; however, each project is different so that timelines will vary due to the scope and unforeseen conditions of the space being renovated.

NOTE: Any user requested changes to the project must be directed in writing to the Project Manager. The revision will be evaluated and priced and the user will be asked to identify a funding source for the requested change. No changes to the agreed upon project scope will be implemented without corresponding documentation and funding.

Projects under \$25K

The project work will begin as soon as the signed PBE is received by University Facilities with a cost center number and valid signature.

Projects over \$25K

The project work will begin when a capital cost center is opened and funds are transferred into the cost center.

Estimating your Projects

A Preliminary Budget Estimate (PBE) will be provided for every project request. The PBE# becomes the project number. Included as Appendix A is the PBE template.

Depending on the project's complexity, the PBE can be a simple one-page estimate with attached sketches and meeting minutes outlining a scope; or a multi-page document including scope summary, schedule and estimate with actual bids and proposals for the work involved.

Parts of the Budget Estimate:

- Contractor's Contingency is included in the construction section of the project budget to cover unforeseen conditions that may occur during the construction phase.
- Owner's Reserve is included in the overall project budget to cover unforeseen conditions that may occur during the delivery of the project. More specifically, the time it takes, what it costs, and the issues or problems that arise.

Funding and Approvals

The PBE will be sent to you for approval and funding source. Appropriate signatures indicate that the funding is available and may be used for the project you are requesting. Academic units need approval by the Provost's Office before any work can begin. A copy of the PBE will be sent to the Provost's Office as well.

Projects under \$25K

The cost center number you provide on the PBE will be charged for the total project cost after all work is completed and all invoices have been paid.

Projects over \$25K

After the signed PBE is returned to University Facilities, the Director of Business Operations for University Facilities will create a capital cost center by completing a cost center request form and a funding transfer form using the signed PBE as approval to transfer the funds.

APPENDIX A CAPITAL PROJECT PROCESS



University Facilities

**Preliminary Budget
Evaluation (PBE) # 150**

Classroom
Project Name: Renovation

Date: 05/05/09

Funding Approval:

I have reviewed the project plans and approve the implementation of this project as summarized in the summary/meeting minutes. I understand that the project implementation plan will be developed when a cost center is opened and funding is secured.

Funding Source:

Cost Center# :

Cost Center# :

Authorized by: _____ Authorized by: _____

Please return completed form to University Facilities-Projects

CONSTRUCTION COSTS

	<u>Categories</u>	<u>Code</u>	<u>Cost</u>	<u>Notes</u>
Div. 1	General Requirements	3440	\$ -	
	Cleaning		\$ -	
	Moves		\$ -	
Div. 2	Site Work	3440	\$ -	
Div. 3	Concrete	3440	\$ -	
Div. 4	Masonry	3440	\$ -	
Div. 6	Wood & Plastic	3440	\$ -	
	Millwork		\$ -	
Div. 7	Thermal & Moisture Prot.	3440	\$ -	
Div. 8	Doors & Windows	3440	\$ -	
Div. 9	Finishes	3440	\$ -	
	Painting		\$ -	
	Ceiling		\$ -	
	Carpet/VCT		\$ -	
	Drywall		\$ -	
Div. 10	Specialties/Misc	3440	\$ -	
Div. 11	Equipment	3440	\$ -	
Div. 13	Special Construction	3440	\$ -	
Div. 15	Mechanical	3440	\$ -	
	HVAC		\$ -	
	Sprinkler		\$ -	
	Plumbing		\$ -	
Div. 16	Electrical	3440	\$ -	
	Fire Alarm		\$ -	
	Recepticals		\$ -	
	Security		\$ -	
	Lighting		\$ -	
	Subtotal		\$ -	Includes 10% Contractor Contingency

FF&E

	<u>Categories</u>	<u>Code</u>	<u>Cost</u>	<u>Notes</u>
Div. 11	Equipment	6330	\$ -	
Div. 12	Furnishings	6305	\$ -	
	Furniture		\$ -	
	Fixtures		\$ -	
	Subtotal		\$ -	

Consultant Fees

	<u>Categories</u>	<u>Code</u>	<u>Cost</u>	<u>Notes</u>
Div. 1	Description of Fee	3406		
	A/E ID Fees		\$ -	
	Reimbursable Expenses		\$ -	
	Studies		\$ -	
	Subtotal		\$ -	

Other Direct Costs

	<u>Categories</u>	<u>Code</u>	<u>Cost</u>	<u>Notes</u>
Div. 1	Description of Costs			
	Tele/Data	4020	\$ -	
	Signage	4090	\$ -	
	Artwork		\$ -	
	Environmental Clearances		\$ -	
	Subtotal		\$ -	

PROJECT SUBTOTAL

\$ -

Owner's Reserve \$ -

PROJECT TOTAL \$ -

Expediting Fee \$ - Mark up required for Fees, Deliveries, Installation and Construction; if requested

REVISED TOTAL \$ -

Approved by:
Planning:

Design:

Construction: