

FACILITIES DESIGN AND CONSTRUCTION

A DEPARTMENT IN FACILITIES

3. PROJECT ESTIMATE REQUEST & PROJECT DATABASE ENTRY/PROJECT TRACKING

A. PROJECT ESTIMATE REQUEST – SPACE & MINOR RENOVATIONS REQUEST FORM

The process is initiated when a department recognizes the need for modifications which involve: renovations, landscape furniture/ partitions installations, improvements to finishes, space changes involving wall removal/ installations (structural) relocations, and Changes in space use. For a detailed workflow description refer to the Appendix A “Space & Minor Renovations Workflow Process Guidelines.”

- The request form is submitted electronically through the online link located on the FDC, FOPs, OSM & Safety web sites at: <https://provost.uncg.edu/secure/OSM/forms/intakeform.aspx>

(See Exhibits R1 & R2)

All requests, remodeling as well as new space requests, are received, triaged & assigned to FDC, FOPs, or OSM w/ in 24 hrs. An email to confirm receipt of the request issued stating:

“Your space request number #####-### has been sent to the Facilities Design & Construction. A representative from that area will contact you within 5 business days to set up a meeting at the site to review details of your request.”

When in the opinion of OSM the request should not be recommended for implementation, OSM will communicate with the requestor that the project is not recommended for implementation and list the specific reasons. This notification will provide the requestor the option to appeal OSM's recommendation to the Office of the Vice Provost.

B. PROJECT ESTIMATE ASSIGNMENT

Requests are emailed from Central Intake to the Director of FDC. Within five (5) business days of receipt of request the Director of FDC and the Assistant Director for Renovations (AD) or University Architect (UA) will review the request for design and SCO review requirements. The AD/UA will assign the request to a Project Manager and shall issue an email to customer which shall include the following (see Exhibit R):

“Your project request number (CCCC) has been assigned to (name of project manager) who will contact you in the next five business days to set up a meeting at the site to review details of your request”

If the Director of FDC in consultation with the Assistant Director for Renovations or University Architect decides that the project should be handled by Facilities Operations due to its size or nature, the AD/UA will communicate via email with the customer, the Director of Facilities Operations, OSM and the Office of Safety indicating the nature of the project request and the reason

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why FDC is recommending that Facilities Operations assume responsibility for the request. The email shall include the following:

“Based on our review, FDC believes that your request will be most efficiently implemented by Facilities Operations. We are forwarding project request number (CCCC) to that department and a representative will contact you within 5 business days. We apologize for the inconvenience.”

In the event that after reviewing the project request, the Director of FDC and the AD/UA conclude that the request may not be completed by the deadline requested by the customer on the Space & Minor Renovations Request Form, the AD/UA shall issue an email to the customer with copy to OSM and Office of Safety which shall include the following:

“Dear customer, After careful review of your request we regret to inform you that we are not able to meet the requested project completion date because (detail reasons, for example, the duration of preparation of design drawings, review by stage agencies and expected construction time render the completion date beyond the requested dead line). We would like meet with you to review options for implementing this project, including a later completion date or completing a preliminary project estimate and schedule for your future use. Please respond to this email indicating a couple of potential meeting dates and times convenient to you. Thank you”

- Within five (5) business days of receipt by FDC Director
- AD/UA assigns the request to a project manager.
- FDC Administrative support or Project Manager enters project information into the renovations project database.

C. JOINT ASSESSMENT MEETING (JAM)

The purpose of this step is to identify major or key project elements regarding space, infrastructure, code, and schedule, in order to provide a preliminary cost estimate and project schedule to the customer. Either OSM, Office of Safety, Facilities Operations or FDC may schedule a Joint Assessment Meeting (JAM).

Within 5 business days of the project being received at FDC, the Director of FDC and the AD/UA will decide if a JAM is required. If required, the project manager will schedule an initial face to face meeting with the customer, representatives from OSM, the Office of Safety, FDC Director, Assistant Director of Renovations, and the University Architect. The AD/UA or Project Manager shall complete and submit the FDC JAM Session Request Notice to the Business Operations Coordinator to set up the meeting. The Project Manager shall indicate the priority level, required attendees, and additional invitees, including contact information for the meeting.

- Areas for review (infrastructure, code, space) will be identified and assigned to representatives for investigation and research.
- Project manager shall document discussion items, resolutions, and agreements.
- The project manager will bring to the meeting the project request, meeting minutes from the initial face to face meeting with the customer, and architectural and PME drawings of the project area.
- Within two working days of the meeting, the project manager will issue meeting minutes to AD/UA or FDC Director for review prior to distribution.
- Meeting minutes to be distributed to attendees within five (5) business days of the JAM meeting.
- Issue email to the customer indicating the status of the project and a target date for the customer to receive a preliminary cost estimate and schedule for the project.

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If after the Joint Space Assessment any of the following parties: Office of Safety, OSM, FDC or Facilities Operations recommends against the implementation of the project request, this party will convene a meeting to explain concerns. If the group agrees on recommending against implementation of the project a memorandum from the Joint Assessment Team will be issued to the requestor with proper explanation. The memorandum will provide the requestor the option to appeal the recommendation of the Joint Assessment Team to the office of the Vice Provost.

If a verbal request is received directly by a Project Manager, the Project Manager shall, after receiving preliminary information from the client, inform them that a Form-59 must be completed and submitted with appropriate signatures before the process can continue beyond the informal discussion stage.

D. PROJECT DATABASE ENTRY/PROJECT TRACKING

- At the time the estimate is assigned to the Project Manager, the AD or the Project Manager (at the AD's request) will make the initial entry of information into the Access database for project tracking.
- From this point forward it is the responsibility of the assigned Project Manager to update the database once every week, or more frequently if warranted by the progress of the project, in order to keep all required information current and complete. Information entered into the project database is made available to our customers in the Project Status Report found on the FDC website at <http://www.uncg.edu/fpl/>.

EXAMPLES – PROJECT ESTIMATE REQUEST & PROJECT DATABASE ENTRY/PROJECT TRACKING

Exhibit R-1 – Estimate Request data Sheet

Exhibit R-2 – Space & Minor Renovations Request Form (Output)

Exhibit R-3 – Informal Projects Naming Protocol

Exhibit R-4 – Notification of Receipt Letter

Exhibit R-5 – Notification of Receipt (with JAM) Letter

Exhibit R-6 – Notification of Transferal to Facilities Operations

Exhibit R-7 – Notification of Recommendation of Request Denial

Exhibit R-8 – Request for JAM Meeting Letter

Exhibit R-9 – Project Log Data Entry Form

Exhibit R-10 – Sample of the Facilities Design & Construction Website Project Status Report