**III Initial Planning and Investigation**

Many projects require initial planning or investigation. If a work request is for: signage, subdivision of a space, programming or planning, a study, code verification or \_\_\_\_ it needs to be reviewed by Planning. New construction or major renovation will also require planning.

**a) Small Projects vs. Capital Projects**

**What is it?**

* A ‘small project’ is anything under $100,000. It may involve a single trade or several trades. It may require a consultant or State approval, but just as often will not.
* A Capital Project is a project in value over $25,000 which also… New construction and major renovations are included in this category.

**Who is involved?**

* The Planning department or a project manager skilled in investigating the request should initially receive the project. The estimator can also be the first point of contact.

**How/Process**

**Checklist**

**Timeline Considerations**

**Forms**

* The Project Turn-Over form and GIRF Checklist are two critical tools. Floor plans and photos should be included.

**Filing**

* See Ib: Setting Up a Folder for additional information.

**b) Space Request/ Approval Process**

**What is it?**

* When space is vacated, it reverts back to Facilities for reassignment. A customer can request assignment of space. The University has a Space Committee that oversees the request and subsequent re-assignment.

**Who is involved?**

* The Space Committee is chaired by the Vice President of Finance and Facilities. The rest of the committee is comprised of the Provost (Vice President of Academics), the Vice President of Research, and the Executive Vice President. Others support the committee as assigned.

**How/Process**

* A space request can be entered online at \_\_\_\_. Currently, the space request does not have a number associated with it.

**Checklist**

**Timeline Considerations**

**Forms**

* The only way to enter a work request is online.

If a request is made verbally or via email, it should be logged online.

**Filing**

* (depends)

**c) Classroom/ Assembly Use vs. Business/ Administrative Use**

**What is it?**

* Classroom/Assembly Use: Requires a consultant to seal drawings and State submittal and Bureau of Fire Safety (BFS) review.

A room or building defined as ‘classroom’ or ‘dormitory’ must be submitted to the State of Michigan Bureau of Fire Services (BFS) for review when remodeling, renovation or addition/new construction will occur. Any and all work that penetrates a fire wall or work that is done above the ceiling (electrical, lighting, HVAC) must be submitted to the State BFS. ‘Maintenance’ or ‘cosmetic remodeling’ is exempt.

Definition: (modified) A room or building “occupied by 6 or more students for 4 or more hours per day or more than 12 hour per week”.

Please see link below for full definitions:

<http://www7.dleg.state.mi.us/orr/Files%5CAdminCode%5C964_2011-002LR_AdminCode.pdf>

* ‘Mixed occupancy’ buildings only require a review of the ‘classroom’ or ‘dormitory’ portion of the building.
* Business/Administrative Use: Does **NOT** require State review, but may require a consultant.

**Who is involved?**

**For Planners:**

Projects with a construction value greater than $15,000 require sealed documents from a licensed professional (architect or engineer). Projects with a construction value under $15,000 will be prepared internally. For a list of requirements, please reference the following link:

<http://www7.dleg.state.mi.us/orr/Files%5CAdminCode%5C1000_25_AdminCode.pdf>

A State application and the fee must be submitted along with the documents.

How to fill out a State application form:

Be sure to include plan review fees in the financial summary spreadsheet! On very large projects, these fees are substantial ($30M construction cost = approximately $60,000 fee).

**For Project Managers:**

A project that has been submitted to the BFS for review will have an application number. The contractor will need this number in order to pull permits and schedule State inspections. State inspections are required for: Mechanical, Electrical, Plumbing, (Fire Protection??)

Inspectors are rotated periodically, so do not assume you will see the same person on the next job.

Fire Marshal will only review on state-owned and leased buildings when DMB requests.

(State approval for fire alarm systems and fire suppression systems in non-state authority buildings is unclear at this time)

**How/Process**

**Timeline Considerations**

* BFS can take upwards of 30 days to process an application.
* The BFS is busiest during the summer, in preparation for Fall classes.

**Forms**

**Filing**

* All documentation should be filed hard-copy with the project. Electronic files are under \_\_\_\_, and include: State Application form and documents, copy of the check covering fees, response from the State BFS, any follow-up commentary or documentation from the consultant or planner,

**d) Checklists/ Questions to Ask**

**What is it?**

**Who is involved?**

**How/Process**

**Timeline Considerations**

**Forms**

**Filing**

**e) Interior Palette Selection/ Standards**

**What it is?**

* The Interior Building Standards file is in development. This is a tool to help all Planners and Project Managers at D&CS know what finish standards we have established in multiple buildings around campus. Standards include: flooring, wall finishes, fixtures, furniture, and restroom standards. It also includes finishes and furniture used in recent projects – information that will aid for future projects in the same buildings.
* Planning is also responsible for approving any interior finishes that deviate from building standards or are newly proposed for public interior spaces, corridors, general purpose classrooms, restrooms, and stairwells, prior to release of construction documents for bidding.

**Who Is Involved?**

* Planning is responsible for updating and maintaining the Interior Building Standards record file.

**How/ Process** – None.

**Checklist** – None.

**Timeline Considerations** – None.

**f) Furniture**

**What it is?**

* Furniture procurement process at the University – and D&CS’ involvement – depends on the type, quantity, and cost of the furniture that the customer wants to purchase.

**Who is involved?**

* Furniture procurement process at the University – and D&CS’ involvement – depends on the type, quantity, and cost of the furniture that the customer wants to purchase.
* Any furniture that needs power, installation, or needs to be fixed to the building, regardless of price, requires D&CS approval.
* Furniture valued at less than $10,000 may be purchased directly by the customer through the Procurement & Strategic Sourcing office (P&SS).
* Furniture valued at over $10,000 requires D&CS involvement; it may also be required to be bid out publicly by P&SS if it is valued at over $20,000. When furniture does not have to be bid, it may be purchased directly through a dealer with a Purchase Order (see more on preferred furniture vendor agreements below). When furniture does have to be bid, a designer has to be hired by D&CS to develop a bid package (D&CS will do this on occasion for less complex projects, not involving electrical or much installation). The designer is to develop a Cost Schedule C, Specifications, and Drawings detailing the customer’s needs; this will then be sent to P&SS along with a bid matrix so that a buyer is assigned and the project is released for bids.
* **Preferred Furniture Vendor Agreements – Office:**

The University currently has a 5-year Standard Service Agreement in place for office furniture. Any office furniture project or major renovation must utilize the preferred vendor’s services and product, unless working with a reconfiguration of existing product or in a building already “standardized” on a certain brand. Interior Environments is an approved Allsteel dealer and local office furniture dealer located at: 48700 Grand River Avenue, Novi, MI 48374, (248) 213-3010.

* **Preferred Furniture Vendor Agreements – Classroom:**
* Contract to award a classroom furniture provider is currently pending approval (CPH 11/6/15).
* **Preferred Furniture Vendor Agreements – Research/Lab:**

Contract to award a lab furniture provider is currently pending approval (CPH 11/6/15).

**How/Process**

* To process a purchase order for furniture, a draft requisition will need to be filled out and standard PO process followed. Form may be found under ‘Toolbox’ file.
* To process a purchase order for furniture to one of the preferred suppliers (Office furniture, classroom furniture, or lab casework vendor), this will need to be processed via Procurement & Strategic Sourcing’s website, WayneBuy, [www.buy.wayne.edu](http://www.buy.wayne.edu).
  + Before processing, send email to Business Services indicating amount of PO and PFA that it will be charged to.
  + Limit on purchase orders is 100 line items. PO’s with more line items will need to be split into several POs.
  + Account information (PFA number or index & referenced FO) will need to be included on WayneBuy, as well as Account Code. Account Code for furniture is: 72164.

**Checklist**

* When a furniture installation is completed, do a punch list. *(See section XVIII. Punch List 🡪 b. Furniture for more information)*

**Timeline Considerations**

* Typical lead times for furniture average 6-8 weeks. During less busy times, this may be 4-6 weeks. During busy times (example: summer months or holidays), lead times will be 8-10 weeks. Lounge furniture typically has longer lead times than office or classroom furniture. Lab casework has an average 8-10 week lead time. If furniture is being released for bids, add 6 weeks to the schedule for bidding process, interview, award, and contract processing. Specifying special finishes or COM (Customer’s Own Material) fabrics will often extend lead times as well to account for textile approval, testing, and shipping to manufacturer.

**Forms**

* WayneBuy
* Draft Requisition

**Filing**

* File quotes, Purchase orders (contract) and associated furniture invoices with the project file. Purchase orders processed through WayneBuy will need to be printed out by Planner or PM from WayneBuy, as they do not get sent to the front desk or Business Services automatically.

**g) Room Numbering**

**What Is It?**

**Who is involved?**

**How/Process**

**Timeline Considerations**

**Forms**

**Filing**

**h) Legal Information**

**What Is It?**

**Who is involved?**

**How/Process**

**Timeline Considerations**

**Forms**

**Filing**

**i) Commissioning**

**What Is It?**

**Who is involved?**

**How/Process**

**Timeline Considerations**

**Forms**

**Filing**

**k) Schedules**

**What Is It?**

**Who is involved?**

**How/Process**

**Timeline Considerations**

**Forms**

**Filing**

**l) Specialty Consultants**

**What Is It?**

**Who is involved?**

**How/Process**

**Timeline Considerations**

**Forms**

**Filing**