**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 group 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.

Business/Administrative Use: Does **NOT** require State review, but may require a consultant.

**Who is involved?**

**How/Process**

**Timeline Considerations**

**Forms**

**Filing**

**d) Checklists/ Questions to Ask**

**What is it?**

**Who is involved?**

**How/Process**

**Timeline Considerations**

**Forms**

**Filing**

1. **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:

Checklist:

Timeline Considerations:

1. **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?

Any furniture that needs power, installation, or needs to be fixed to the building envelope, 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. 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 furniture 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. (New Furniture Contract will be in place in the next several months – process may change, look for updates, CPH 5/25/12)

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

How/Process:

Checklist:

Timeline Considerations:

1. Room Numbering
2. Legal Information
3. Commissioning
4. Schedules
5. Specialty Consultants