

REHABS AND RENOVATIONS: WHERE DO I START?

University at Buffalo Business Day 2015
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WE ARE HERE TO HELP:

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**ENVIRONMENT, HEALTH &
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FACILITIES PLANNING & DESIGN

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Associate Director

FACILITIES OPERATIONS



WHO ARE WE?



RENOVATIONS PROCESS

Facilities Operations Work Orders

Smaller projects that involve one or two trades including carpentry, custodial, electrical, lock shop, mechanical repair, lock shop, painting, plumbing, recycling, signs, etc. may be submitted through the facilities work order system and will be completed by *Facilities Operations*.

Small Scale Capital (Rehab)

Typically a project that will not have a major impact on the campus and the total cost of which shall be paid for by the unit and require building permits

- Design and/or construction are completed in-house. The use of consultants may be necessary in times of high project demand
- No fee for in-house planning + design services

WORK ORDER PROCESS

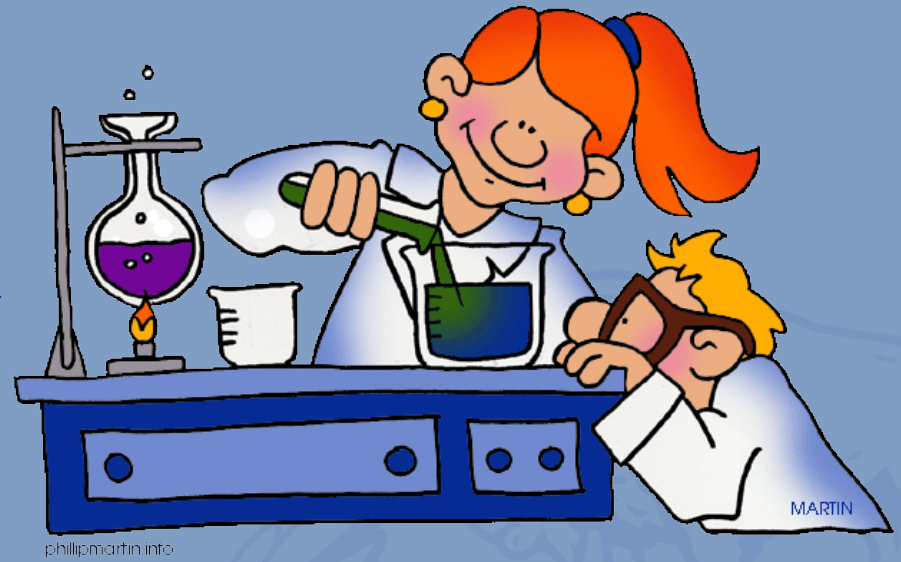
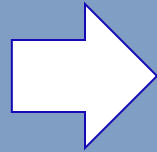
- Initiated by the client
- *Work Order* form online or call 645-2025
- Estimates are available
- RF & UBF Authorization Forms required
- Please refer to the facilities web site for more additional information:
<http://www.buffalo.edu/facilities.html>





WHEN
DO
YOU
NEED
ONE?

CHANGE IN OCCUPANCY OR USE



BUILDING OR REMOVING WALLS AND DOORS



PLUMBING WORK, ADDING SINKS, ETC.



MODIFICATIONS TO HVAC SYSTEM

PROJECT INCEPTION

- Initiated by the Primary Client
- *Small Scale Capital (Rehab) Request* form
- Signed by your units Facilities Planning & Management Officer (FPMO)
- CPG review for appropriate use of space and alignment with the master plan and attainability
- May determine if work should be performed as a *Work Order* at this point (or later in the process)



WHO IS MY FACILITIES PLANNING & MANAGEMENT OFFICER?

Academic Affairs	Hernandez	Christina R.
Administration and Finance	Bailey	Cheryl A.
Architecture	McDonnell	William J.
Athletics	Titus	Nickolas
Business Services & Human Resources	Krzystofiak	Susan A.
CAS	Greenfield	Kimberly M.
CIO	Kielar	Nancy M.
CTRC	Smith	Terry-Ann
Communications	Manne	Kathleen
Dental Medicine	Colombo	Stephen P.
Philanthropy & Alumni Relations	Mahon	Gary E.
Education	Ragland	Kevin
Educational Opportunity Center	Osswald	Lawrence C.
Engineering	Bovino	Linda H.
Environmental Health & Safety	Raab	Joseph T
Facilities Planning & Design	Thompson	Kevin M.
International Education	Shyhalla	Patricia
Law	Cook	Marlene M.
Libraries	Hood	Kenneth E.
Management	Costello	David
Medicine	Koenig	Andrew
Nursing	Emminger	Lynn
Pharmacy	Konovitz	Cindy
President	Hashem	Stacie L.
Provost	Pfohman	Sandra
Public Health	Whitehead	April E.
Research	Smith	Elizabeth A.
Research Institute on Addictions	Krygier	James J.
Social Work	Cerrato	Anna R.
Student Union	Odojewski	Michael
UB Foundation	Schneider	Edward P.
University Life & Services	Nadbrzuch	James S.



PROJECT NUMBER AND TEAM ASSIGNMENT

- CPG assigns a planner and a secondary planner
- CPG requests a project number from FP&D
- FP&D assigns a project team members including:
 - Architect in Charge (AIC)
 - Project Manager (PM)
 - Team Members
- The entire project team consists of the Primary Client, FPMO, Planner, AIC and the PM (and are involved in most meetings and decisions)
- CPG/FP&D sends a *Project Notification Letter* to the all involved

SMALL SCALE CAPITAL PROCESS

University at Buffalo Small Scale Capital Process (<i>Rehab</i>) *						
PHASE	PLANNING PHASE	TRANSITION TO DESIGN PHASE	DESIGN PHASE	TRANSITION TO CONSTRUCTION PHASE	CONSTRUCTION PHASE	
ADDRESSES	Program Scope / Budget / Schedule		Design and Cost Quotation		Construction Schedule / Project Completion	
CONTACT	CONTACT A Planner		CONTACT B Architect in Charge		CONTACT C Project Manager	
MEETING	Scope Walk-Throughs & Planning Meetings		Kick-Off Meeting & Review Meetings	Sign Off Meeting	Updates & Meetings	Close Out Meeting
MEETING ATTENDEES	PROJECT TEAM: • Primary Client • FPMO or Rep • Planner • Architect in Charge • Project Manager		PROJECT TEAM: • Primary Client • FPMO or Rep • Planner • Architect in Charge • Project Manager INVITED: • Financial Responsibility • Other specialists as necessary	PROJECT TEAM: • Primary Client • FPMO or Rep • Planner • Architect in Charge • Project Manager INVITED: • Financial Responsibility	Project Manager provides weekly written updates to • Primary Client • FPMO or Rep • Planner • Financial Responsibility • Architect in Charge	PROJECT TEAM: • Primary Client • FPMO or Rep • Planner • Architect in Charge • Project Manager INVITED: • Financial Responsibility
REQUIRED DOCUMENT SIGNATURES	<i>Scope Statement</i> REQUIRED: (electronic turn around: 5 business days) • Primary Client • FPMO or Rep • Planner • Architect in Charge • Financial Responsibility • Project Manager		30% 60% 90% design review and meetings as necessary Estimate is updated with each submittal	<i>Cost Quotation & Drawings</i> REQUIRED: • Primary Client • FPMO or Rep • Planner • Architect in Charge • Project Manager • Financial Responsibility <i>Funds are transferred</i>	<i>Client Requested Change Orders</i> REQUIRED: • Primary Client • FPMO or Rep • Planner • Project Manager • Financial Responsibility COPY: Architect in Charge <i>Punch List</i> REQUIRED: • Primary Client • Project Manager COPY: FPMO	
MEETING MINUTES	Sign-in sheets and meeting minutes are taken at all meetings and distributed to all attendees and to appropriate staff in Facilities Operations, Environment Health & Safety and CIT. Meeting minutes are distributed by the designated contact leading the Phase.					

SCOPE

- The Point of Contact during the Planning stage is the Planner from the Capital Planning Group (CPG)
- The Planner arranges a scope kick-off meeting with the Project Team at the project site
- The Planner submits a preliminary *Scope* to Project Team for input by the Design Team on
 - Scope Budget (historical Square Foot Cost)
 - Schedule
 - Preliminary Code Review
- Facilities Planning + Design (FP&D) will arrange for hazardous materials testing at this time
- Bi-weekly meeting are held with Operations, UBit and EHS to explain the projects intent and to solicit feedback
- The Planner will finalize the *Scope* and forward electronically to everyone that signs the document before moving forward to design



SMALL SCALE CAPITAL PROCESS

design phase

University at Buffalo Small Scale Capital Process (Rehab) *

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DESIGN PHASE

- Point of contact through out the Design Phase is the Architect In Charge (AIC) from Facilities Planning + Design
- Coordinates the efforts of the other Project Team members and Design Team. (*Example: Mechanical Engineer, Electrical Engineer, Drafts people, etc.*)
- Ensures that Facilities Ops, EHS and UBit are kept informed of the project and that their input is received
- The design process begins



ENVIRONMENT, HEALTH, & SAFETY SERVICES

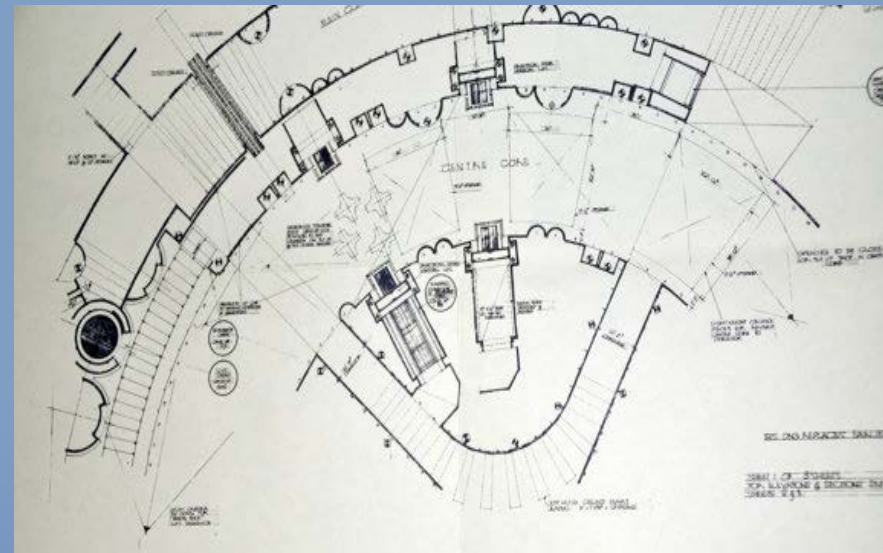
Design phase

FP&D/EHS Liaison

- Single point of contact for project managers and CPG
- Understanding of multiple projects and interactions

Drawing Review

- Fire and Life Safety
- Ergonomics
- Laboratory layout and operation
- Mechanical safety (tie-offs, ladders, etc.)
- ADA
- Environmental impacts (air and water)



COST QUOTATION (Client's Maximum Cost)

- Cost to the Client: estimate and university contingency (10%)

DESIGN, COST QUOTATION & SCHEDULE SIGN-OFF MEETING

- AIC will coordinate and schedule the *Design & Cost Quotation Sign-Off Meeting*.
- Final Construction Documents, Cost Quotation and Construction Schedule are presented to the Primary Client, FPMO and Financially Responsible Party.
- Signatures required from Primary Client, FPMO, Financially Responsible Party or CFO, Planner, AIC and Project Manager.



CONTINGENCY PROCESS

- Construction will not begin until the sponsor identifies current funds for full project cost plus a 10% contingency based upon the *Cost Quotation*
- University Business Services (UBS), upon receipt of the signed *Cost Quotation*, will move the funds from the project sponsor's account to a centrally managed capital projects account (administered by UBS)
- Cost overruns will be paid from contingency funds with an institutional backstop (unit will never pay more than 10% over the *Cost Quotation*)
- In principle, project sponsors will receive back the difference between the *Cost Quotation* and the actual amount spent for completion of the project
- Unused contingency will be rolled to future fiscal years; as history is developed an evaluation will be made of whether the 10% should be revised up or down
- For large and specialized projects, the university may require a competitive design/build consultant to achieve project goals. Units will pay design costs and contractor profit and overhead in these situations

CONTINGENCY: AN ILLUSTRATION

	Construction Estimate	Project Contingency	Total Project Cost	Actual Cost	Return to Unit	Contingency Use
Project 1	100,000	10,000	110,000	90,000	10,000	-
Project 2	50,000	5,000	55,000	65,000	-	15,000

SMALL SCALE CAPITAL PROCESS

construction phase

University at Buffalo						
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CONSTRUCTION PHASE

- Point of contact during construction is the Project Manager (PM) from FP+D.
- Upon project approval, the PM shall work with Facilities Customer Service to send out a Customer Service Email notice about the project two weeks in advance.
- Materials ordered.
- Project Manager sends out *Project Status Reports* periodically
- Construction Coordinators direct utility shutdowns in advance
- Construction Coordinators shall arrange for all inspections
- Construction Coordinators arrange for all required safety permits from EHS
- PM shall schedule a walk-through with the team and the client to create a *Punch List*



ENVIRONMENT, HEALTH & SAFETY SERVICES

construction phase

Ensure a safe environment for University faculty, staff, students, and visitors who may be directly or indirectly affected by the construction activities

- Fumes, Dusts, Odors
- Emergency egress and hazard area access control
- Noise
- Physical hazards
- Exhaust vapors/Carbon monoxide
- Heavy equipment and cranes

Protect research from construction activities

- Dust
- Vibrations
- Noise (animals)
- Utility shut-down
- Relocation



ENVIRONMENT, HEALTH & SAFETY SERVICES

construction phase

Ensure a safe environment for contractors

- Safety plans
 - Fire Safety
 - Carbon monoxide safety
- Dig-Safe
- Work Zone Safety
- Contractor Safety Guidebook
 - <http://www.buffalo.edu/facilities/ehs/construction-safety.html>



CLIENT SURVEY

- A *Customer Survey* is sent out to the Primary Client
- Honest feedback is encouraged
- Some selected projects will receive a much more in-depth review



QUESTIONS?



CONTACT US

www.buffalo.edu/facilities

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