University of Illinois at Urbana-Champaign

F&S Customer Forum
How to start a Capital Project

Wednesday, May 1, 2019
Capital Delivery Process Overview

• Pre-Planning/ Initiate Project/ EX1
• Project Programming & Planning
• Professional Services Consultant Selection
• Design (SD, DD & CD)
• Bid and Award
• Construction
• Owner Occupancy
• Post Construction
Pre-Planning

Types of Construction Projects

• Small non-capital projects (less than $250k)
  o In-House Construction
  o Contractor Services
  o Job Order Contracting (JOC)

• Initiate project through F&S Construction Services portal on the F&S website
Pre-Planning

Capital Construction Project

• Small Capital Projects ($250k - $2.5m)
• QBS (No BOT) Capital Projects ($2.5m - $5.0m)
• QBS & BOT Capital Projects (above $5.0m)
Pre-Planning

Project Basics

Every Project can be defined using these three criteria:

• Scope
• Schedule
• Cost
Pre-Planning

Define the Project Scope

Inspiration • Innovation • Leadership • Perseverance • Agility
Pre-Planning

Develop a Project Schedule

Capital Programs Division
Capital Project Timeline By Project Type

- Pre-Programming
- Client Approval
- Campus Approval
- Capital Programs

- RWO <$2.5 M
  - 21 Mo. AVG (7-37 Mo. RANGE)
  - 3 (0.25-5 Mo.)

- QBS (NO BOT) <$5 M
  - 32.5 Mo. AVG (20.5-50 Mo. RANGE)
  - 4 (2-6 Mo.)
  - 6 (5-9 Mo.)
  - 8 (5-12 Mo.)
  - 11 (6-18 Mo.)

- QBS & BOT > $5 M
  - 46 Mo. AVG. (27-64 Mo. RANGE)
  - 6 (4-8 Mo.)
  - 16 (5-10 Mo.)
  - 12 (6-16 Mo.)
  - 18 (9-24 Mo.)

- Programming / Project Approval
- PSC Selection
- Design
- Bid & Award
- Construction

**Conceptualization Phase Not Included**
**Add 4 Months AVG. (2-6 MONTHS) TO DESIGN PHASE IF IT IS INCLUDED**

ADD 1 MONTH IF PSC APPROVAL NEEDED

12 MONTHS WARRANTY NOT INCLUDED IN TIMELINES

Illinois Facilities & Services

Inspiration • Innovation • Leadership • Perseverance • Agility
Establish the cost/ define a budget

- Construction Costs 75-85%
  - Bid Contingency
  - Construction Contingency
- Owners Cost 5-10%
  - Project Management, Quality Control
  - Code Review, IT & FM Assist
- Professional Services Fees 7-15%
  - Architects and consultants fees
  - Construction Managers (CM) fees
Project Initiation

www.fs.illinois.edu/services
Inspiration • Innovation • Leadership • Perseverance • Agility
Project Initiation

HOW TO START A CAPITAL PROJECT REQUEST

Starting a capital improvement project request involves the completion of the request for Campus Approval for Capital Project or Feasibility Study Request referred to as an “Exhibit 1.” A “Net Zero Growth Space Policy Letter” and “Variance Approval Request” may also be needed as part of this process.

The Exhibit 1 form requests foundational project information, funding sources, proposed scheduling, and includes an updated budgeting rate table to develop initial cost estimates.

The Net Zero Growth Space Policy Letter and/or Variance Request Form are required in addition to the Exhibit 1 if a project will result in a net increase in gross square footage of the premises and facilities owned, leased, occupied or otherwise controlled by the University on behalf of the Urbana campus. As part of this document, a justification and proposed space credit offered by the unit are requested in accordance with the Campus Administrative Manual, Net Zero Growth Space Policy.

Please follow the following steps for the submittal of each document:

Note: Some information to be listed in the Exhibit 1 may be used again in the Net Zero Growth Space Policy Letter or the Variance Request Form, where applicable.

Exhibit 1
1. Save the form
2. Fill out the required areas
3. Prepare the following required attachments
   (1) Academic program statement
   (2) Relationship to mission and long range planning
   (3) Alternatives considered
   (4) Existing and projected personnel; student enrollment; student contact hours; research funding
   (5) Summary of existing space inventory (indicate Net Zero Growth justification if required)
   (6) Donor feasibility (Associate Chancellor for Development)

4. Acquire director/department head signature on the form and provide a requestor signature
5. Save a finalized file for your records
6. Send the completed form and attachments to CampusCapitalApproval@illinois.edu

Net Zero Space Growth Policy
1. Save the form
2. Fill out the required areas
3. Provide a requestor name, title, and unit (Dean, director, or department head)
4. Save a finalized file for your records
5. Send the completed form and any corresponding attachments (as necessary) to: Associate Provost for Capital Planning
   Matthew Tomaszewski matthew.tomaszewski@illinois.edu

Variance Request Form
1. Save the form
2. Fill out the required areas
3. Save a finalized file for your records
4. Send the completed form and any corresponding attachments (as necessary) to: CampusCapitalApproval@illinois.edu
5. Variance Process Committee members will provide approval or denial
Project Initiation

CAPITAL PROJECT TIMELINE BY PROJECT TYPE

This timeline begins when a fully executed Campus Approval for Capital Project or Feasibility Study Request (Exhibit 1) is submitted to CampusCapitalApproval@illinois.edu.

Select the following (see below for additional directions and definitions):
1. Professional Service Consultant (PSC) Agreement Type
2. Submission Date
3. Timespan
4. BOT PSC Approval
5. Conceptualization

- Programming/Project Approval
- PSC selection
- Design
- Bid and Award
- Construction
- Cumulative Total

Capital Programs Timeline

Estimated Project Completion Date: June 1, 2021
Project Initiation

**Exhibit 1: REQUEST FOR CAPITAL PROJECT OR FEASIBILITY STUDY**

**UNIVERSITY OF ILLINOIS URBANA CHAMPAIGN CAMPUS**

<table>
<thead>
<tr>
<th>Proposed Project Title:</th>
<th>Project Type:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>New Building</td>
</tr>
<tr>
<td></td>
<td>Building Addition</td>
</tr>
<tr>
<td></td>
<td>Master Plan</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Building Name and Number:</th>
<th>Site Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Room Number(s):</td>
<td>Utilities Improvements</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Proposed Schedule (month, year):</th>
<th>Start</th>
<th>Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus Approval</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Approval</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Architect / Engineer Selection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feasibility / Conceptualization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bid / Award</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Proposed Source of Funds (select all that apply):</th>
<th>Other Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept. Funds</td>
<td></td>
</tr>
<tr>
<td>R &amp; R</td>
<td></td>
</tr>
<tr>
<td>State Capital Request</td>
<td></td>
</tr>
<tr>
<td>Federal</td>
<td></td>
</tr>
<tr>
<td>Gift/Grant Funds</td>
<td></td>
</tr>
<tr>
<td>Other (please specify)</td>
<td></td>
</tr>
</tbody>
</table>

**Feasibility Cost Estimate (See Feasibility Rate Scale per GSF):**

<table>
<thead>
<tr>
<th>Project Cost Estimate (See Total Project Budget/GSF Rate Scale):</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Operations/Maintenance Annual Estimate (See New Area Funds-O&amp;M/GSF Rate Scale):</td>
<td></td>
</tr>
<tr>
<td>Utilities Annual Estimate (See Utility/GSF Rate Scale):</td>
<td></td>
</tr>
</tbody>
</table>

**Required Attachments:**

a. Academic Program Statement (need and expected contribution to educational services)

b. Relationship to Mission and Long Range Planning (relevance to Campus Strategic Plan)

c. Alternatives considered

d. Existing and projected: (1) Personnel; (2) Student Enrollment; (3) Student Contact Hours; (4) Research Funding

e. Summary of existing space inventory (include net zero growth justification if required)

f. Donor feasibility (Assoc Chancellor for Development)

**Requesting Individual:** ______________________

**Approved by:**

- Director / Department Head (signature required)
- [Dean (VCAA units only) (signature required)]
- [VCR / VCSA or Designee (signature required)]
- Provost or Designee (signature required)

**Print Name**

**Date:** ______________________

**Print Name**

**Date:** ______________________

**Print Name**

**Date:** ______________________
Dear Associate Provost Tomaszewski:

Pursuant with the Campus Administrative Manual "Net Zero Growth Space Policy" (Section VIII.23), we are requesting the Office of the Provost grant the use of space available from demolition ☐, square footage bank ☐, and variance request ☐ to off-set the proposed building addition by:

Brief Explanation:

Project Description (including GSF/NASF):

Justification:
Dear Jeff,

Thank you for contacting the Capital Programs Division to assist you with your project. This email serves as notification that we have received your Exhibit 1 form for the above referenced project, which provides our office with campus authorization to begin working with you to confirm your scope, cost and projected time of completion.

I have discussed your request with Doug Reddington, Senior Planner for Project Planning, and he has advised me that Dennis Craig will be the Planner assigned to work with you on this effort. Dennis will begin the process of moving your project forward, however if you have any questions, he can be reached at 300-2077.

If I may assist you further or answer any questions regarding this process, please do not hesitate to give me a call.

Best Regards,
Ted

TED L. CHRISTY LEED AP
Capital Programs, Associate Director for Project Planning
1501 South Oak Street
Champaign, IL 61820
Phone: (217) 265-6515
Email: tchrissy@illinois.edu
http://www.fs.illinois.edu/