Facilities Minor Project Process

September 7 & 8, 2016
Minor Capital Projects

- **Staff**
  - Associate Director
  - 8 Project Managers
  - Planner / Estimator / Scheduler

- **Funding Model**
  - Base funding covers 16%
  - Remaining operating costs come from project management fees (7%)

Minor Capital Project Loads

- **278 Active Projects**
  - 125 projects this summer
  - 60% annual projects in summer

- **25 Projects per PM**

- Complete approx. 200 projects per year

- **63 Unassigned Projects**

- 3-6 month backlog for assigning projects

- **50/50 split between Maint & Upgrades**
How we deliver projects

- In-House Trades
- Contractors
  - Job Order Contraction (4 wks to contract)
  - Low Value Public Works (<$5k)
  - Bids (4 months to contract)
  - Maint Bids (2 months to contract)
- Design
  - In-House (4 architects on staff, interior designer)
  - Task Order Service Agreements – contracted design professionals

Project Tips to start

- Designated Point of Contact
- Clear scope of work
  - Desired outcome
- Budget – available funds
  - New C.O. project funding requirements
- Schedule
  - Summer / Winter
  - Alternate work location
- Equipment selected with specifications
- Timely response
Small Projects

- 1-6 month process
- Office furniture
- Finish upgrades
- Minor modifications
  - Doors, blinds, AV, security, flooring
- Does not need approval from
  - Dept State Arch – ADA
  - Seismic Peer Review
  - State Fire Marshall
- Minimal hazardous materials (lead & asbestos)
- Request 4 months in advance

Large Projects

- 12-18 month process
- Office suite remodel
- Change or use or occupancy
- Structural changes to building
- Install of equipment that requires changes to bldg systems
- Requires professional design & permitted plans
- Requires approval (DSA, Seismic, SFM)
- Full abatement of hazardous materials
- Request 12 months in advance
Project Challenges

- Scope creep / change in scope
- Cost of construction
- Regulatory (ADA, SFM, Hazmat)
- Late notice
- Competing resources (in-house trades, contractors, contract support)
- Communication
- Partial scope management
  - Department purchase equipment, etc

Facilities Project Portlet

- Check project status
- Check costs of project
- Help contact
  - Jessica Hunter
  - 756-7568
  - jhunter@calpoly.edu
### Facilities Project Portlet

#### Overview

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<tr>
<th>Project Number</th>
<th>Estimated Total Cost</th>
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- **Description**: RENOVATE DRYING ROOMS - BLD 52 RMS D13,015,020-024
- **Project Manager**: BRENNAN, MICHAEL
- **Building**: SCIENCE
- **Room**:
- **Request Date**: 17-MAY-2015
- **Estimated Completion Date**: 12-SEP-2016
- **Status**: IN_CONSTR
- **Requestor**: GRAGGON, JEREMY

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### Facilities Project Portlet

#### Project Work Orders: P000549

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Facilities Project Portlet

Chartfield Strings - PJ0005459

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Minor Capital Process

- Process on website
- Steps described
  - Facilities role
  - Client role
  - Portal Status
  - Duration of Step
- afd.calpoly.edu/facilities/services_minorconstruction.asp
Future Improvements

- Refine project intake
- Increased transparency on current project status
- Help departments with 5 year plans
- Expand contracting methods, increase capacity
- Strategic Business Services collaboration & client relationships
- Better communication
- Better customer service

Facilities Minor Project Process

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