DATE:       June 13, 2016
TO:         Deans, Directors and Department Heads
FROM:       Brian Levin-Stankevich, Interim Executive Vice Chancellor for Academic Affairs
            Steve Keto, Vice Chancellor for Finance and Operations
            Lisa Erwin, Vice Chancellor for Student Life
RE:         Department Requested Campus Renovation Project Process

Currently, if a college, department, or other unit requests a renovation project they are required to submit the request through the UMD Facilities Management Work Order system: http://fm.d.umn.edu/work-request/.

When a work order is received in Facilities Management (FM), it is assigned to the FM project manager or one of four individuals in engineering support services and is usually for an estimate to do the project. Depending on the project size and complexity, the project manager will determine if an outside consultant is required by code. On some projects, a specialty consultant (lab planner, kitchen consultant, acoustical consultant) may also be required and that decision will be made between the requesting department and FM. If an outside consultant is needed, FM is required to follow procurement processes set up by the University system which vary depending on the estimated contract amount for the consultant. This could take 2-4 weeks depending on the amount of the consultant contract and University system policies for that contract.

Once the project cost estimate is developed through consultation with trade supervisors and the code officials, it is sent back to the requesting department for consideration. When FM is given approval by the requesting unit to proceed on the project, design is completed and the project construction is scheduled. Since FM staff are maintenance, not construction, all projects are done at FM cost with no mark ups. FM is not a profit center.

The current Work Order process seems to work fine for the initial requesting of a project and returning a project estimate to the requesting unit. However, it is clear that the process is in need of some improvements that would include a budget form for each project and improved communication to the requesting entity as the project progresses.

Projects can fall into several categories so the work processes will need to vary slightly depending on the type of project. Projects can be capital projects (CAMS), HEAPR projects (Cina), maintenance projects (Malosky turf), infrastructure projects (Glensheen sewer line), R&R (Repair and Replacement) projects (steam valve replacements) and finally departmental projects (Solon Campus Center 23 renovation). Funding sources vary for each of the different types of projects.
For major capital projects and HEAPR projects, the project manager uses a project budget worksheet that can be shared with the user group throughout the course of the project. For these large projects, a project budget worksheet is developed and shared with the user group for the project. See the attached form for the CAMS project, posted on the FM website.

For smaller departmental type projects, FM has modified their existing project budget estimate worksheet (attached) which will be shared periodically with the end user. There is a section at the bottom of this form to outline user-requested project scope changes to the original project and a required signature from the requesting department for each scope change. This will be done to track changes and the impact to the original project budget and should avoid surprises at the end of the project. For projects and scope changes in excess of $10,000, approval by the requesting unit’s vice chancellor (or the Chancellor) is required.

Priorities for departmental summer projects (starting in summer 2017) need to be set in March so that outside contractors can be lined up for the work before they find other summer projects outside of UMD. To accomplish this going forward, all projects that need to be completed in the summer of 2017 will require completed design and funding to be identified by March 1, 2017. This means design requests for summer projects 2017 will need to be submitted to FM with sufficient time to complete design before March. FM can work with the requesting departments and provide a design schedule for a particular project. The use of outside consultants will greatly impact the speed in which a project design can be completed.

If FM doesn't believe the total workload for proposed projects can be accomplished during the summer period, the projects list will be prioritized by each Vice Chancellor for their unit and then presented to the Chancellor and Vice Chancellor for final decisions. Each Vice Chancellor will work collaboratively with their leadership to set priorities for their areas.