Facilities Services
Project Request Process

Facilities Services, Campus Planning and Projects (FSCPP)
Overview

- What Is A “Project”?
- Universal Project Constraints
- Purchasing Requirements
- Project Process Timeline
- Project Budgets
What is a “Project”?

**PROJECT**
- Offic, lab or classroom renovations/improvements
- Alterations
- New construction
- Specialized equipment
- Installation
- Space allocations
- Future faculty space planning
- Large scale campus planning
- Capital projects

*Project and Space Requests Are Generally Not Funded by Facilities’ Budgets*

**WORK ORDER**
- Building related
- Maintenance
- Repairs
- Utilities
- Custodial services
- Elevator maintenance
- Trash and recycling
- Landscaping
- Lawn Care
- Leaf and snow removal

*The Above Are Generally Funded by Facilities’ Budgets*
Project Constraints

FAST

GOOD

CHEAP

- Low quality
- Low priority
- Pay for quality
BIDDING THRESHOLDS AND RFP’S

$10,000 University-wide competitive bid threshold
  - $10 – 50,000 RFPs conducted by Facilities
  - $50,000+ conducted with Purchasing
  - Qualitative and quantitative decision criteria, utilizing selection committees and decision matrices
  - Allow 3 weeks minimum for RFP and bidding process

F&A Code of Conduct details strict guidelines for vendor engagement, ethical conduct in dealing with vendors

All vendors receive similar communication each January
Lehigh Project Process (up to $1M)

**Request Submitted**
- Duration Varies

**Review & Acceptance**
- 20-30 Days (up to 60)

**Planning & Design**
- No Design: 50-135 Days
- Design Required: 90-235 Days

**Contracting & Construction**
- 30-120 Days

**Project Complete**
**Project Process Timeline**

**How Long Will My Project Take?**

- **Minor** - <2 months
- **Simple** – 2-4 Months
- **Average/Normal** - 6 to 9 Months
- **Complex/Large** - 9 Months to 1 Year +
PROJECT PROCESS TIMELINE

HOW YOU CAN HELP

- Early Identification of Requirement
- Readily Available Funds for Initial Index Set-up & Cost Estimating/Design
- Provide Project Budget Parameters
- Have Basic Scope Assumptions and Parameters Defined
  - MUST Haves vs. Nice to Haves
INSTITUTIONAL FACILITY WORK IS EXPENSIVE!

Reasons:

- Long Life Cycle Requirements
- Quality of Work
- Building Codes, Regulations & Laws
- Risk Management & Liability Issues
- Administrative Contract Requirements
- Short Construction Period Restrictions
- Historical (e.g. OLD) Buildings
- Building System Upgrade Requirements
**Project Budgets**

- **Rough Order of Magnitude**
  +/- 40% or more variance

- **Hired Estimator**
  +/- 25% variance

- **Preliminary Design**
  +/- 15% variance

- **Final Design**
  +/- 5% variance

- **Contract Awarded**
  Actual Construction Cost
CONSTRUCTION COST VS. TOTAL PROJECT COST

Total Project Cost Includes “Soft Costs, typically around 30% (planning factor)

- Design Fees
- Fixtures, Furniture and Equipment (FF&E)
- Technology Infrastructure Upgrades
- AV/Multi Media/Technology not Included in Construction Costs (Provided by LTS)
- Construction Management
- Project Contingencies (5-15% of Estimated Construction costs)

Unused Funds are Returned to Original Funding Index
Process Improvements

- Streamlined Existing Process and Procedures
- Improved Customer Outreach and Communication
- Developed Better Cost Tracking and Control
- Realigned Project Manager Positions
- Split Planning and Projects
- Created Standardized Forms and Methods
- Created New Contract Formats
Lehigh Project Process (up to $1M)

User Submission Phase (Varies by Requester)

- Project Need Identified by Requestor
- Project Request Form (PRF) is Created by Requestor
- PRF is Submitted to Chairperson, Dean/Director, & VP for Approval
- PRF is approved by Facilities and clarified as needed

Facilities Review Acceptance Phase (~20-30 days, Space Committee review could add 30-60 days)

- Space Committee approval as needed
- Approved PRF is Given to Facilities Project Management (FPM) for Completion

Project Planning Phase

(~15-90 days depending on number of open requests)

- Project is Assigned to Project Manager (PM)
- PM Reviews Scope of Work (SOW) with Requestor
- FM determines if a Design is needed
- FMM determines if an Estimator is needed
- Request index for estimating
- FM develops SOW and sends to Estimator for Order of Magnitude Cost

Contracting & Construction Phase

(Normally ~6 0-120 Days)

- FM obtains Proposal from Design Professional
- Design Cost Estimate Sent to Requester for Funding
- Funding for Design and Index Setup Received and Design is Completed & Reviewed by RCP, requester and others

(Normally ~3 0-120 Days)

- Project is Scheduled for Construction (~20-180 days depending on scope)
- Project Construction Commences
- Occupancy and Closeout

Bids if >$10K
- Construction Contracts Executed (~9-14 days)
CONTINGENCIES

- Not to fund a broader scope than originally approved
- Facility Project Managers are NOT authorized to expand the approved scope of a project using contingencies

Use of contingencies to expand the original approved scope must receive approval from Dean and/or Provost
What Changed?

- Standard Of Professionalism And Best Business Practices
- Bidding Requirements
- Liability Insurance-Costs Incurred As A Result Of Uninsured Errors And Omissions
- Building Codes, Regulations & Laws
Why Use External Design Services?

- Standard Of Professionalism And Best Business Practices
  - Bidding Requirements
  - Liability Insurance-Costs Incurred As A Result Of Uninsured Errors And Omissions
  - Building Codes, Regulations & Laws

- Number And Complexity Of Projects Versus Staff Complement

- Variations In Workload/Schedule Constraints

- Greater Breadth And Depth Of Experience Available

- Access To Specialty Disciplines And Innovative Approaches

- Standard Operating Procedure for Schools Our Size
1. Visit: [https://financeadmin.lehigh.edu/facilities](https://financeadmin.lehigh.edu/facilities)
2. Click on the Initiate Service Request box
   - Service Requests/Work Orders/Event Setup

The link will take you to the Initiate Service Request page. Click on the **HERE** link on the webpage, which will take you to a login box. Sign in with your Lehigh user id and password. You will be forwarded to the Work Order Form. Fill in all the boxes and click the Send Form button.

If a work order is entered that is in reality a project or space request, Facilities will notify you and ask you to submit the correct form. Project and space request forms can be found in the left menu of the website.