14 AUGUST 2012

FROM: DESIGN AND CONSTRUCTION SERVICES

TO: CLIENT DEPARTMENTS

RE: GUIDELINES FOR DEPARTMENT STAFF INVOLVED WITH RENOVATION AND NEW CONSTRUCTION PROJECTS

Departments that are sponsoring repair, renovation or new construction projects need to be intimately involved in the planning of those projects to ensure that their goals are met. After obtaining campus approvals of project scope and budget through the Office of Planning and Budget, projects are assigned to Design and Construction Services for implementation. The staff of D&CS is then responsible for managing the design of the project, development of bidding documents, bidding and construction.

On larger projects a Building Committee will be appointed by the Control Point to work with the design team in developing a schematic design that conforms to the scope and budget approved by the Chancellor.

During construction, the building committee is typically no longer involved but a department staff representative continues to represent the department as issues arise that require consultation or coordination with the department. This representative is particularly important on renovation projects.

The following outline is intended to avoid role confusion and clarify the relationships between department staff and D&CS Project Management staff on all projects.

1. Department Representatives:
   A. The department representative will facilitate decision making and answer questions or obtain clarifications during programming, design and construction. All communication between the department and the DCS Project Manager will flow through a single department representative.
   B. The department representative will not communicate directly with or give direction to contractors, subcontractors, architects or other consultants. All communication will flow through the D&CS project manager.
   C. The department representative will not perform any project management functions including obtaining cost proposals from contractors or consultants, or writing contracts.

2. Approvals:
   A. The department representative will approve the following documents: project program or scope of work, schedules, cost estimates, schematic, design development and construction drawings, specifications, and bid forms including bid alternates and unit prices.
3. Design Management:

A. The department representative will establish the preliminary project budget, amounts funded by equity or debt, timing of equity contributions, and scope of work.

B. The Project Manager will establish the budget categories and amounts including the construction budget, contingency, internal and external fee allocations and all other budget line items.

C. The final scope of work and budget approved by the Chancellor will not be expanded or modified during the design phase without a formal amendment approved by the Budget Office. The entire approved scope will be depicted in the bid documents.

D. The department representative will identify bid alternates to the extent that the cost estimate indicates that available funds may be less than actual bids. Bid alternates for work not in the approved scope require approval of the Budget Office.

4. Construction Management:

A. The Project Manager will not process any elective change orders or scope changes that have not been approved by the EVC in accordance with the Campus Scope Control Policy.

B. The department representative may attend construction meetings for coordination purposes.