Space Renovations: Guidelines for Faculty and Facilities

This guideline has been developed as a collaborative effort to educate and clarify two things that will lead to a successful and cost-efficient project:

- What options exists to complete the project, and
- What each stakeholder’s role is in each option.

Introduction

In general, Facilities Services (FS) is responsible for the cost of maintaining existing building structures, finishes, equipment and infrastructure (everything that was provided when the building was built). This includes:

- Painting/crack repairs
- Lighting (e.g., replacing burnt out bulbs and updating fixtures)
- Flooring (e.g., sealing floors, repairing cracks and floor finish replacement)
- Plumbing (e.g., repairing leaks, replacing damaged or worn out fixtures)
- Functionality of existing infrastructure (e.g., mechanical exhaust and supply, heating and cooling, electrical distribution systems, chilled water systems, etc.)

Costs incurred to upgrade existing infrastructure to meet current research/creative activity needs, or for additions to laboratories and other space, as well as remodeling, is the responsibility of the faculty member who is using the space for his or her research/creative activities. Faculty start-up, departmental, grant, or other funds available to the faculty member would normally be utilized for these projects.

For example, the faculty member would be responsible for the cost of:

- conduit, supplies, and even a new electrical panel if the existing panels are full and additional electrical service is required
- The hoods, ductwork, exhaust fans, supporting infrastructure for the installation a new fume hood (or any other lab equipment) if these things do not exist.
  - If there are existing hoods, ductwork, or exhaust fans, FS is responsible for the cost associated with testing, maintenance and replacement (in kind) of the equipment and related infrastructure.
- The sink, plumbing parts, and installation for a new sink
- Any updating of fixtures, drywall installation or painting

Initiating a New Project

In collaboration with their department head, the faculty member wishing to initiate a project should carefully inspect their space where the renovation is desired, and develop as detailed a renovation plan as possible prior to contacting FS personnel. This will clarify future communication about the project scope. This includes items such as (but not limited to):

- Electrical requirements
  - Number of outlets required and type of outlet
  - Voltage and amperage requirements
  - Lighting needs
- Mechanical requirements
  - Fume Hoods
  - Ventilation
  - Air conditioning
  - Sinks/drains
• Utility needs
  o Vacuum
  o compressed air
  o cold/hot water
  o gas
• Benches and cabinets
  o Linear feet
  o Cut-outs for desk/leg space
  o Drawers/shelving

For the quickest and most accurate transfer of information, it is best for the faculty member to speak directly with FS in order to be absolutely certain that no misunderstandings occur. When requesting estimates, faculty members should contact the University Estimator, Kane Urdahl (x5230) in all cases. Urdahl will assess the scope of work, work with the faculty member to determine the proper options to exercise, and coordinate with the appropriate designers.

Questions about mechanical/electrical systems in your building should be directed to:
• University Engineer (x7092), or
• Assistant Director and Manager of Engineering & Utilities (x5471).

Architectural questions about your space should be directed to:
• University Architect (x5040).

Building Supervisors must be informed of any renovations planned for the buildings they supervise. Contact them or your department head for guidance on how to proceed during any phase of the project. When the faculty member seeking a project estimate or design initiates this first phase, it is essential to ask if costs are being accrued. Depending on the complexity of the project, FS may or may not need to charge for the estimate. FS is not required to charge for the Estimator’s time, but if some level of design is required (evaluation of existing systems capacities, sizing of new equipment, routing of new infrastructure, etc.), or investigation by the Trades (mechanical, electrical, or plumbing) is required to inform the estimating process, FS may need to process a work order charged to the faculty member for that service. FS will inform the faculty member that charges will be incurred at this point. If design or investigation services are required, the charges may vary between $52-80/hour during this initial phase. These costs could amount to a few thousand dollars before any renovation work begins. Also, keep in mind that the engineering staff available to provide preliminary designs and estimates is limited to approximately 1.5 FTE engineers. FS may contract with private sector design firms to level their workloads, to expedite a project, or simply because the faculty member prefers to use a private sector design firm.

It is important to contact FS as soon as possible, and once a solid design plan is ready, in order to initiate the planning process, good preparation at this stage will save the time of both the faculty member and FS, thus helping to control overall costs.

**Scale of Projects**
The path forward depends on the value and complexity of the project.
The MSU Construction Activities Policy (http://www2.montana.edu/policy/construction_activities_policy.htm) states that “… all construction activities, regardless of the source of funds, shall be administered by either Facilities Services (FS) for maintenance and small scale projects or by Facilities Planning Design & Construction (FPDC) for large scale projects, projects which require design services, contract management, and projects designed and/or constructed by private consultants and contractors employed by the University. All construction contracts shall be issued and administered by FPDC (or the State Architecture & Engineering Division, through FPDC, as appropriate), and all construction activities shall be performed under the administrative oversight of FPDC or FS.”

In most cases, FS or FPDC are required to charge for this service. Depending on the level of design required, these costs may range between 5-20% of construction costs.

For projects that do not require design services or an estimate, you may fill out a “Request for Services” form (http://www.facilities.montana.edu/fs/workcontrol/files/RFS.pdf), provide your Banner Index number that will be used to pay for the project, and the requested work will be scheduled. All estimates can be requested using the “Estimate Request Form” found on this website: http://www.facilities.montana.edu/fs/workcontrol/

Projects valued at $25,000 or less:

Design and/or construction can be accomplished in three ways: Facilities resources, with private sector resources, or some combination of the two depending on the wishes of the requestor or the workload at FS.

As stated above, there are no charges for estimates on smaller projects when design services are not required. The faculty member should ask whether or not charges will be incurred for any estimates that are requested. You may contact the University Estimator, (x5230), or Campus Maintenance Project Manager (x7533) to discuss your needs and how to proceed. These projects typically include scopes of work including (but not limited to):

- Painting
- Flooring (installation where it did not exist before or replacement of flooring that is not worn out)
- Ceiling Systems (installation, upgrades, or replacement of suspended ceiling systems)
  - Light Fixtures (installation, upgrades, or replacement of lighting systems)
- Minor plumbing or electrical additions or upgrades
- Moving furniture/equipment

Projects costing more than $25,000 require:

- Various levels of authority (depending on the size and funding source of the project). Each authority adds time to a project schedule:
  - Presidential, all projects, 1-2 weeks,
  - Commissioner of Higher Education, 75K < project < 150K, 2-4 weeks,
  - Board of Regents, projects > 150K, 2-4 months
  - Governor, private funds, 3-5 months
  - Legislative, new square footage, up to 2 years

- Various methods to secure a designer (depending on the size of the project):
  - PDC Staff, projects < 75K, 2-? weeks to start depending on work load

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- Direct select private sector, design fees < 20K, 2 weeks
- Short List to Helena, fees > 20K, project cost < 500K, 4 weeks
- Advertise, fees > 20K, project cost > 500K, 3 months

Various methods to secure a contractor (depending on the size of the project):
- FS Crews, projects < 75K, 2-7 weeks to start depending on work load
- Informal Bids, 25K < project < 75K, 2-4 weeks
- Advertise and bid, projects > 75K, 2-4 weeks
- Alternative Delivery Method, large/complex projects, 2-3 months.

**Splitting Larger Projects into Multiple Smaller Projects**

Splitting projects into multiple parts or stages to avoid statue requirements (see Options section above) is not allowed. Phasing projects for legitimate reasons (e.g. funding frequencies, space acquisitions, staffing levels) is acceptable. In the event that you would like to do part of a project now, and another part at a later time, speak with Facilities to determine if such a process is allowed.

**Billing**

In the current accounting system, monthly bills are sent to the party responsible for the Banner Index number. This responsible party varies depending on how the project is fiscally structured. The bills may be sent directly to the faculty member, the Department Accountant, or the manager of the Plant Fund (if it was required on the project). FS is currently in the process of upgrading to a new Computerized Maintenance Management System (CMMS) that will allow anyone associated with a project to monitor the project’s job costs (multiple times a day if need be) regardless of the billing cycle.

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