Procedure Guide

Interaction with the University Planning Office during project development

University of Oregon
September 2000
University of Oregon Planning Office
Mission

The University Planning Office manages the creation of places and spaces that support and enhance teaching, research, and public service activities at the University of Oregon.

Services

Campus Planning
• Preserve the integrity of campus by maintaining and administering the Long Range Campus Development Plan.
• Guide development of the university’s capital construction program.
• Prepare the Biennial Implementation Plan, which ensures that sufficient capacity exists for future growth.
• Advise the Campus Planning Committee and coordinate its activities.
• Evaluate the feasibility of campus development proposals.
• Assist the Campus Planning Committee in the development of transportation policies. Act as university contact for transportation policy issues with other agencies such as the City of Eugene and LTD.

Project Design Management
• Manage large construction projects through the design phase, including defining the project, appointing the user group, hiring the architect, managing the design process, and securing the necessary university and non-university approvals.

Stewardship
• Review all proposals that affect the appearance of the campus to determine proper approval process.
• Ensuring compliance with laws, regulations, administrative rules, codes, and standards for construction and renovation projects.
• Ensuring progress toward a campus free of physical barriers to people with disabilities.
• Represent the university to the Oregon University System, City, and State on matters relating to campus development.

Space management
• Help campus units find specific space solutions.
• Maintain a space inventory to inform decisions in the allocation of space.
• Analyze space allocation proposals.

In a nutshell, the challenge of our task is to realize the visions of Project Sponsors, while responding to the needs of individual campus users and preserving the beauty of the campus.
## Procedure Guide

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## Check Points

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### Critical variables

- Institutional mission
- Funding
- Plan compliance
- Cost, scope, schedule

## Participants

### On campus

- Deans/Directors/Project Sponsors
- User group
- Planning office
- Project management
- part of Facilities Services
- Facilities services
- Operations
- Recycling
- Public Safety
- Environ Health
- Energy
- Telecommunications
- Network services
- UO Foundation
- Americans with Disabilities Act

### Off-campus designers/builders

- Conceptual Designer
- Programmer
- Architect/Engineer/Landscape Arch
- Builder

### Off-campus regulators

- City of Eugene
- Department of Justice
- Oregon Office of Energy
Introduction

This procedure guide outlines the steps a building project follows from its inception to its construction. It presents both the broad procedural responsibilities of the various participants and illustrates with specific examples how these procedures may be applied to different projects. Project management at a public institution of higher education involves multiple responsibilities. The public nature of the university, with its responsibility to the public trust, requires a system of checks and balances. As steward of public resources, the university also must establish well-defined procedures to protect the quality of its physical environment and ensure unified development. Such procedures need not impose a rigid structure on the project-management process. They should, instead, recognize the unique nature of each project and accommodate flexibility in how each project is managed.

With this in mind, the reader may use this document as a general guide for all projects rather than as an inflexible rulebook. At each step of project development and design, Planning Office staff will hold ongoing discussions with the Project Sponsor to maintain the best understanding of the project's goals.

The creation of functional, inspirational spaces is of the utmost importance in developing the campus. Our goals are to achieve this at the lowest cost possible, both initially and in the long term, without sacrificing quality; to complete the project within the desired time frame; and to accommodate the client's programmatic needs. By providing current and potential Project Sponsors with a general overview of project processes, this document is the first step towards achieving these goals.

I hope you find this document useful as you develop your vision of new spaces.

Christopher Ramey, AIA
Director and Architect, University Planning
1. Project Formulation

When a Project Sponsor (usually a unit's dean or director) formulates ideas for a building project—a new building, addition, or renovation—the University Planning Office evaluates the feasibility of the project by providing information about the existing building's architecture and the constraints and opportunities it holds, the possibilities for siting new buildings and/or additions within the context of the Long Range Campus Development Plan, possible funding opportunities and the politics involved, and other considerations specific to the contemplated development. Early in the process, quick studies of the physical layout of the proposed project can assess implications for the surrounding campus. The Planning Office can provide guidance on how the contemplated development may correlate with academic and institutional goals and also can provide early cost estimates and schedules that may influence

Planning Office responsibilities:

- Work with the president, provost, and vice presidents to respond to institutional initiatives that have a facilities component.
- Work with deans, directors, and department heads to respond to institutional initiatives that have a facilities component.
- Develop initial siting alternatives and concepts for new buildings and building additions.
- Identify design guidelines contained in the Long Range Campus Development Plan that may affect project development.
- Identify replacement costs for existing uses that may need to be relocated.
- Develop a preliminary cost for construction a project budget containing all projects costs.
- Assist in identifying possible funding sources.
- Discuss options for project-delivery methods, including hiring processes for project designers.
- Develop a rough project schedule.
## University of Oregon Planning Office

### Procedure Guide

#### University of Oregon Process for construction

**Before full funding**

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#### Participants

**On campus**
- Deans/Directors/Project Sponsors
- User group
- Planning office
- Project management
- Facilities Services
  - Operations
  - Recycling
  - Public Safety
- Environment Health
- Energy
- Telecommunications
- Network services
- UO Foundation
- Americans with Disabilities Act

**Off-campus designers/builders**
- Conceptual Designer
- Programmer
- Architect/Engineer/Landscape Arch
- Builder

**Off-campus regulators**
- City of Eugene
- Department of Justice
- Oregon Office of Energy
2. Capital Construction List and Legislative Authorization

All projects costing more than $500,000 (regardless of their funding source) must be authorized by the state legislature. Projects that depend in whole or in part on private gifts need to be recognized as university construction priorities before fund raising can begin.

The university acknowledges the legitimacy of a capital project by including it in its listing of capital construction needs and recommending it for inclusion in the Oregon University System's capital construction program. Development of the university's biennial capital construction program begins in the fall of odd numbered years. The process is managed by the University Planning Office. Deans and many department heads and directors are asked to identify their needs for new construction. The Planning Office develops these proposals into summary narratives, which are prioritized by the vice presidents using clearly defined criteria. Following a comment period, the prioritized list is forwarded to the president and then to the Oregon University System. Eventually projects may become part of the state legislature's higher education capital construction bill and may be authorized for construction.

Projects that are formulated after the capital construction process and are not dependent upon state funding can be authorized by the legislative Planning Office responsibilities:

- Ensure that institutional initiatives that include a facilities component are included in the university's capital construction list.
- Develop a document describing institutional, OUS, and state trends, initiatives, and funding realities to guide Project Sponsors in project formulation, and assist vice presidents in developing overall institutional priorities.
- Assist deans, directors, and department heads in identifying construction needs.
- Develop project summary narratives for use by vice presidents as they set the university's priorities.
- Assist vice presidents in developing the university's priorities.
- Prepare the university's capital construction list for submission to the OUS.
- Answer inquiries from the OUS as system priorities are established.
- Answer inquiries and provide information to the OUS, the governor's office, and legislators as required during the legislative process.
- Initiate and manage the processes involved in obtaining state legislative emergency-board approvals for projects.
### University of Oregon Process for construction

**University Planning Office**  
*September 2000*

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3. Program

An architectural program describes the space needed by a unit to best perform its activities. Generally this is described in terms of quantity (usually expressed as gross square feet) and quality (usually expressed in terms of the levels of finished materials or type of lighting required). Program descriptions also will include analysis of adjacency requirements of particular activities (what needs to be close to what) and may include the constraints of a particular site, especially if the project is an addition to an existing building. Finally, programs can include the overarching goals of a project, often expressed as “pattern statements.” Pattern statements describe how an aspect of a project might be designed. For example, it might be desirable for the offices in a building to have windows. A pattern statement that describes this goal might say, “Natural light is important to the well-being of the workers in this building. Therefore, let all work spaces have some amount of natural light.” The creation of a program usually begins with an understanding of the unit’s mission and future vision. Because of its broad and inclusive nature, it may engage every member of a particular unit. Programs are very helpful in understanding the scope of a unit’s needs and sometimes are done

Planning Office Responsibilities:

- Assign a project planner to the project.
- Work with the Project Sponsor to develop a budget and monitor all costs associated with the program phase.
- Assist the Project Sponsor in the selection of a suitable architect/programmer and handle all matters related to contract administration and fee payments.
- Assist the Project Sponsor and the architect/programmer in creating an appropriate process and timeline for creation of the program document.
- Review the proposed program and supply comments to the Project Sponsor and the architect/programmer.
- Advise the Project Sponsor and the architect/programmer on the desired form of the program document.
4. Conceptual Design

Projects that depend in whole or in part on private gifts are faced with a classic “chicken-and-egg” problem. Sponsors cannot attract funding without a design to show donors; yet they cannot start designing until they know how much they will have to spend. One way of surmounting this dilemma is to commission a conceptual design. Typically, a conceptual design is created by an Architect working with minimum participation by the users of the building and describes the size and cost of the project as a concept. Most conceptual designs include several architectural renderings of various program spaces within the building as a way to describe to potential donors or other funding sources how the programs might be accommodated. Conceptual designs are neither reviewed nor accepted by the university. It is university policy that conceptual designs are always noted as such and will be “redesigned” in accordance with university planning principles after the project is funded.

A conceptual design usually is paid for by the sponsoring unit, although funding can be obtained in the form of a planning advance from

Planning Office responsibilities:

- Assign a project planner to the project.
- Work with the Project Sponsor to develop a budget and monitor all costs associated with the conceptual design.
- Assist the Project Sponsor in the selection of a suitable architect and handle all matters related to the architect’s contract negotiation, contract administration, and fee payments.
- Assist the Project Sponsor and the architect in creating an appropriate process and timeline for the conceptual design process.
- Inform architect and Project Sponsor of all applicable campus planning principles. Make them aware of the necessity of complying with local zoning and building code issues that might affect the conceptual design.
- Review the proposed program space allocations, design, and budget; provide comments to the Project Sponsor and the architect.
- Advise the Project Sponsor and the architect on the desired form of the conceptual design document.
University of Oregon
Process for construction
University Planning Office
September 2000

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5. Design Consultant Selection

Once funding for a project is in place, the next step is hiring an architect to design the project. Capital projects on the University of Oregon campus are guided by a user group made up of faculty, staff, and students, who use the facility (or will use a new facility), as well as representatives from neighboring buildings, one of the professional design schools (landscape architecture, architecture, or interior architecture), and the Campus Planning Committee. The user group serves as the university’s client representative throughout the duration of the project. It is charged with making all decisions about the design of the project beginning with the selection of the architect and including making the inevitable trade-offs that will occur when desires outstrip resources. Based on recommendations from the Project Sponsor and the project planner, the Campus Planning Committee chair appoints the user group. The Project Sponsor, usually the unit’s dean or director, serves as user group chair. The group’s first task is to write a project description, which describes the project goals to prospective architects so they understand what kind of building is being envisioned. While the project description is being prepared, advertisements are placed in appropriate publications inviting interested architectural firms to submit their qualifications, based a brief project description. At least five firms are selected by a selection committee made up of user group and members of the Campus Planning Committee to be invited for interviews. These finalists are provided with the project description to aid in their preparation and are interviewed by the Selection Committee.

When a contract has been negotiated with the selected firm, the design can begin. All selection procedures are guided by OAR 580-50-020. Some variation on the process listed above may occur to meet the needs of each

Planning Office responsibilities:

- Work with the Project Sponsor to have a user group appointed by the chair of the Campus Planning Committee.
- Assist the user group in the architect selection process, including advertising, creating a project description, and interviewing prospective consultants.
- Assist the user in the selection of a suitable architect, including contract negotiations, contract administration, and fee payments.
- Advise the university administration of the selection and seek university approval.
- Throughout the process ensure compliance with OAR’s that apply to the contracting process. At appropriate points during the process, obtain approvals from the Oregon State Department of Justice and other entities as required.
6. Schematic Design

Once the Architect has been hired, the design process begins in earnest with the schematic design phase. The purpose of a schematic design is to fix the scope, cost, and appearance of the project. When the schematic design is completed, the university will know what the project will look like, which programs it will accommodate, and how much it will cost. For many projects, public comment sessions are held during this phase to inform those who are external to the process and to give them the opportunity to comment on its direction.

At the conclusion of this design phase, the project user group will present the design to the Campus Planning Committee (CPC), which will review it for consistency with the Long Range Campus Development Plan. If the CPC approves the design, it will make a recommendation to the Planning Office.

Planning Office responsibilities:

- Work with users and the Architect to develop a process and schedule for this part of the design process.
- Educate the Architect about principles contained within the Long Range Campus Development Plan that may affect the design of the project.
- Make the Architect aware of other university personnel or departments that will establish standards for design in each of their areas of responsibility (i.e., Accessibility Coordinator, Facilities Services, Environmental Health and Safety, and Public Safety).
- If necessary, retain the services of a qualified arborist to assess the health of all trees within the project’s immediate area. A plan for the protection of all trees to remain will be developed. The Planning Office will ensure that this plan is integrated into all documents that guide the construction of the project.
- Develop a plan for the replacement of all functions to be displaced by the project, including documentation and cost of their replacement.
- Facilitate the Architect’s work with the user group and other university personnel and interested parties during project design.
- Assist the Architect in meetings with the City of Eugene to identify land use or building code issues.
- Act as liaison to the Oregon Arts Commission for the One Percent for Art Program and to the Oregon Office of Energy for the State Energy Efficient Design Program.
- Assist the users in hosting campus-wide public comment sessions.
- Assist the users in obtaining a positive recommendation from the Campus Planning Committee.
- Review the draft schematic design report for completeness and conformance with Long Range Campus Development Plan principles and with contract requirements. Provide comments as necessary.
- Work with Facilities Services and others to establish a project budget that will include all costs of the project beyond those associated with the cost of construction.
- Review and approve progress payments and supplements to the Architect’s contract.
- Work with the user group chair and Facilities Services to select the method of project contracting. Alternatives include (1) the traditional bidding process with the project bid as one package and the low bidder receiving the contract for the work or (2) the Construction Manager/General Contractor method in which the general contractor is preselected and each portion of the construction work is bid separately.
## University of Oregon Process for Construction

### University Planning Office

**September 2000**

### After full funding

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**Off-campus regulators**

- City of Eugene
- Department of Justice
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7. Design Development

During the Design Development phase, the Planning Office works closely with the Architect to finish developing the project’s functional and aesthetic elements while adhering to the program and design intent and the costs established at the conclusion of the schematic design phase. Planning Office staff will participate in discussions about the inevitable trade-offs that must occur when quality, quantity, and cost are balanced. Whenever possible, the final decisions about such trade-offs will be made by the user group or the user group chair. Final decisions about colors and materials will be made by the user group and should be consistent with the schematic design intent. Major variations from the schematic design will require further review by the Campus Planning Committee for consistency with the Long Range Campus Development Plan and additional recommendations to the president.

During this phase, the Planning Office will help the Facilities Services Project Manager coordinate Facilities Services reviews for adherence to relevant university construction standards. Planning Office staff will coordinate reviews for ADA compliance, energy conservation, historic preservation, and local building and/or land use Planning Office responsibilities:

- Work with the users and the Architect to develop a process and schedule for this part of the design process.
- Attend user group meetings, project team meetings, and value engineering meetings.
- Work with the Facilities Services Project Manager to coordinate reviews by Facilities Services staff, Environmental Health and Safety, Public Safety, and the Accessibility Coordinator.
- Assist the Architect in meetings with the City of Eugene to resolve land use or building code issues.
- Act as liaison to the Oregon Arts Commission for the One Percent for Art Program and to the Oregon Office of Energy for the State Energy Efficient Design Program.
- Review the design development documents for completeness and conformance with the approved schematic design. Provide comments as necessary.
- Monitor the project budget and modify it as necessary.
- Work with Architect, Facilities Services Project Manager and Project Sponsor to determine the contracting method, if this was not done in the Schematic Design Phase.
- Review and approve progress payments and supplements to the Architect’s contract.
### University of Oregon Process for construction

**University Planning Office**

**September 2000**

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8. Construction Documents

During the Construction Documents phase, every aspect of the project is detailed in specifications and drawings to allow for competitive bidding by prospective building contractors. The University Planning Office will attend meetings and review documents to ensure that throughout this phase the functional, aesthetic, and cost guidelines established at earlier phases are maintained. The Planning Office reviews both the Architect’s estimate and an independent estimate to ensure that the estimated cost of the project is within the amount set aside for its construction.

The Planning Office will help the Facilities Services Project Manager coordinate reviews of the project by the appropriate Facilities Services personnel. Planning Office staff will coordinate reviews for ADA compliance, energy conservation, historic preservation, and local building and/or land use compliance.

The Planning Office will work with the user group, the Architect, and the Facilities Services Project Manager to establish bidding alternatives to be priced by building contractors in order to ensure that a “cushion” is available in the event that bids exceed the estimate.

The overall project budget will be monitored by the Planning Office, and adjustments will be made as necessary.

Planning Office responsibilities:

- Attend project team meetings and value engineering meetings.
- Work with Facilities Services Project Manager to coordinate reviews by Facilities Services and other university departments as necessary.
- Assist the Architect in meetings with the City of Eugene to resolve land use or building code issues.
- Act as liaison to the Oregon Arts Commission for the One Percent for Art Program and to the Oregon Office of Energy for the State Energy Efficient Design Program.
- Review the construction documents for completeness and conformance with the approved schematic design. Provide comments as necessary.
- Monitor the project budget and modify it as necessary.
- Review and approve progress payments and supplements to the Architect’s contract.
10. Bid/ Award

The bidding process results in the identification of a builder (contractor) for the project.
As a result of the bids received, it may be necessary to adjust the overall project budget with regard to the amount set aside for construction. Decisions may need to be made about the alternates to be added or subtracted from the base bid. At the conclusion of this phase, the primary responsibility for the overall budget moves to Facilities Services, which will oversee construction. Once the project is completely bid out and under construction, management of the project is the responsibility of Facilities Services. The Planning Office remains responsible for a number of elements: ensuring that construction complies with the approved design; reviewing the protection of remaining trees; and reviewing the completion of any work related to the replacement of preexisting functions such as

Planning Office responsibilities:

• Review the bids and alternates and participate in decisions about which are selected.
• Modify the project budget as necessary.
# University of Oregon Planning Office Procedure Guide

## Process for Construction

### Construction Documents

<table>
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<tr>
<th>Check Points</th>
<th>Bid/Award</th>
<th>Construction</th>
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<tbody>
<tr>
<td><strong>Campus approvals</strong></td>
<td>![Icon]</td>
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<td>Dean/Director</td>
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<td>User Group</td>
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<tr>
<td>Provost/VP Admin/VP PAD</td>
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<tr>
<td>President</td>
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<tr>
<td>VP Admin (often acting on behalf of President)</td>
<td>![Icon]</td>
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<tr>
<td>Campus Planning Committee</td>
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</tbody>
</table>

### Off-campus approvals

| OUS/OSBHE | ![Icon] |
| Legislature | ![Icon] |

### Critical variables

| Institutional mission | ![Icon] |
| Funding | ![Icon] |
| Plan compliance | ![Icon] |
| Cost, scope, schedule | ![Icon] |

### Participants

#### On campus

- Deans/Directors/Project Sponsors
- User group
- Planning office
- Project management (part of Facilities Services)
- Facilities services
- Operations
- Recycling
- Public Safety
- Environmental Health
- Energy
- Telecommunications
- Network services
- UO Foundation
- Americans with Disabilities Act

#### Off-campus designers/builders

- Conceptual Designer
- Programmer
- Architect/Engineer/Landscape Architect
- Builder

#### Off-campus regulators

- City of Eugene
- Department of Justice
- Oregon Office of Energy
11. Construction

During the Construction phase, Facilities Services is responsible for managing the project on a day-to-day basis. The Planning Office attends meetings upon request to help with issues relating to the budget, program accommodation, and design decisions made during earlier phases of the project’s development. The Planning Office is responsible for seeing that the approved design is carried out and that commitments to replacing displaced functions (especially parking) are upheld.

Planning Office staff also will participate in meetings relating to the protection of trees, the One Percent for Art Program, historic preservation, and local building and/or land use compliance.

Planning Office responsibilities:

• Attend project team meetings when notified to address issues relating to cost, programmatic accommodations, and design.
• Assist the Architect, Contractor, and Project Manager to resolve City of Eugene land use or building code issues.
• Act as liaison to the Oregon Arts Commission for the One Percent for Art Program and to the Oregon Office of Energy for the State Energy Efficient Design Program.
• Review proposed changes during construction for conformance with the approved schematic design.
• Monitor the conditions of the trees on the construction site to ensure their health. Coordinate the work of the university’s arborist.
• Review and approve progress payments and supplements to the Architect’s contract.