

Campus Services Capital Project Process

OFFICE OF UNIVERSITY ARCHITECT & PLANNING, DESIGN & CONSTRUCTION

Approval Process: Feasibility and Planning Activities

Step 1

Project Idea Inception

- School or department initiates the need for capital project
- Work with UA and PD&C to better define scope
- Discuss with PC and others for consensus building

MILESTONES:

- Formal request to PC & WAM for approval to begin project planning work
- Preliminary budget is developed for funding to take project through STEP 3

Step 2

Feasibility Study

- UA reviews project for compliance w/ Master Plan
- UA works with client to prepare Feasibility Study
- Establishes the Scope of the Project

DOCUMENTATION NEEDED

- User's outline program
- Initial cost studies
- Environmental impacts/LEED analysis
- Site limits, uses, traffic and parking issues
- Infrastructure/utility requirements
- Concept design for fundraising (optional)

MILESTONE:

Budget developed for funding to take project from Steps 4 through 8



Step 3

Feasibility Study Review

- Feasibility Study (FS) distributed and discussed with President's Cabinet and others as appropriate by UA
- Provide adjustments/revisions as required
- Brought by UA to REBG as an information item when appropriate
- FS is shared with WAM for approval

MILESTONES:

Project Manager is chosen once project is funded and approved to move forward into design (steps 4-8)

- WAM approves Feasibility Study and funding for design
- If project exceeds \$1mil., FC must approve

What is the Capital Project Process?

This process is used for the construction of all projects more than \$100,000 or that involve debt financing. The process is described in terms of approval phases and construction phases.

Step 4

Program Document

Develop program document including:

- Detail space program/scope criteria
- Site limits, utilities, conditions and exterior spaces
- Total project budget
- A/E scope of work/consultants
- Preliminary schedule
- Environmental/LEED analysis
- Emory Project Team identified Concept Design for fundraising (optional)

MILESTONE: this document is reviewed by PC and establishes final scope of work.

Step 5

Consultant Selection

- Selection Committee identifies A/E long list for consideration
- List is presented and approved by REBG
- Selection Committee solicits for qualifications proposals, then short lists and interviews the firms being considered
- A/E selection is made and a contract is negotiated

MILESTONE: Final A/E contract is submitted to VP of Campus Services for approval and agreement to begin work

Design and Construction Activities

Step 6

Schematic Design

- Architectural design developed
- Contractor is sometimes selected at this point
- Design Peer Review team identified, if appropriate
- Detailed cost estimate is updated
- Renderings/models created

MILESTONES:

- Design presentations and approvals: PC, CDC, COE, REBG
- Final approval is sought from Trustees; comments incorporated into drawings; budgets revised

Step 7

Design Development

- Design work continues
- Early site package prepared at end of DD (optional)
- Cost estimate is reconciled by Contractor, A/E consultant and cost consultant

MILESTONES: Completed DD documents are shared within Campus Services for compliance with design and construction standards



Step 8

Construction Documents

- Final cost estimate prepared
- A/E consultant completes drawings and specifications for Contractor's use

MILESTONE: Complete documents released for construction; project presented to FC for construction funding approval

Step 9

Construction

- Construction begins
- PD&C project manager oversees the project

MILESTONES: Construction is completed, certificate of occupancy issued, and users move into the project; LEED Application for certification; Campus Services "key" exchange



Participants in the process

PD&C	Planning, Design & Construction (part of Campus Services)
UA	University Architect (part of Campus Services)
PC	President's Cabinet
WAM	Ways and Means Committee
CDC	Campus Development Committee
FC	Finance Committee
REBG	Real Estate, Buildings, & Grounds Committee of the Board of Trustees
COE	Committee on the Environment



Questions about the process should be directed to:
University Architect at 404.727.1593