Owner’s Project Requirements

University of Chicago
Facilities Services
Capital Project Delivery

Insert Project Name
Project Manager: Insert Name
Architect: Insert Firm Name

Issued: Insert Date

Version X - Revised: Insert Date
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# Project Approvals and Funding

## Approvals

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<th>Version</th>
<th>Date</th>
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## Funding Source

- Capital A&R, Center-Funded, Unit Funded, etc.
- Funding dates:
  - 5% Funding – XX/XX/XXXX
  - 20% Funding – XX/XX/XXXX
  - 100% Funding – XX/XX/XXXX
Project Overview

- Project address:
- Gross Square Footage:
- # of Floors:
- Project Type: New construction, Renovation, Landscape, Infrastructure, Study
- Total Project Cost:
- Total Construction Cost:
- Schedule Start:
- Schedule Complete:

Project Organization

Executive Sponsor:
Steering Committee:
User Group Representative:
CPD Project Manager:
Architect:
Contractor:

For specific project organizational structure, see Appendix E Project Governance / Organization

Construction Procurement Strategy

Project Delivery Method

- Design/Bid/Build, CM At-Risk, Design-Build, Other
Project Budget Parameters

- Insert Budget Summary and Contingency Management Plan Table
Milestone Project Schedule

- Insert Milestone Schedule Table
Program and General Design Criteria

Program Criteria
What are the programmatic needs for the project? Is there a program study or report?

General Design Criteria
Describe the overall project scope, goals, and design criteria.
Campus Planning

Zoning/Planned Development

Site Plan Approval
Required?

Part II + Permitting
Required?

Campus Planning Considerations

Heritage
Is this a Heritage project?

Accessibility
What are the Accessibility goals for the project?

Stormwater Retention and Irrigation
If applicable, what is the strategy?

Exterior Signage
Will exterior signage be required? Will there be donor or other signage besides University standard?

Landscaping/Sitework
Does this project include Sitework? Meet with CP+S/Landscape to review project.

Bird Safety
Does this project include Sitework or building façade modifications that have impact on Bird Safety? Are Bird Safety measures included in the budget?
Sustainability

LEED Certification
Is the project pursuing LEED or other type of sustainability certification?

Project Requirements
What other measures are taken to enhance sustainability?

Design Criteria
In addition to LEED criteria, Facilities Services also has sustainability guidelines. These guidelines are documented in FS2 and include a Life Cycle Cost Analysis and Component Useful Life Schedule.

Indoor Environmental Quality Requirements

Ventilation
What are the ventilation standards that are applicable to the project?

Lighting and Lighting Controls
Does the project have a lighting control system? Are there exterior lights, have they been tied to the Building Automation System?

Design Criteria
Insert relevant design criteria that apply to Sustainability.
Engineering and Utilities

Describe the scope of the project involving MEP systems, Building Automation Systems, and Utility Services.

Utilities:
Will there be new utility service to the building? What new service or modification of existing service is required?

- External utilities?
- University central plant utilities?

Energy:
Are there energy use targets for this project? EUI?

Equipment and System Design Criteria
Describe the MEP systems

Mechanical

Electrical

Plumbing

Fire Protection

Building Automation Systems

Design Criteria – example table

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<th>Type</th>
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<td>Other Spaces</td>
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<tr>
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<td>Humidity</td>
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For more detailed information, please refer to Appendix B, Basis of Design.
Commissioning

What is the Commissioning strategy for the project? Will there be a commissioning agent?
Operations and Maintenance

Building Envelope
Does this project include new work or modifications to a building envelope? What is the scope of work?

Interior Finishes
What is the interior scope of work for the project? Does it involve door hardware? Will there be attic stock for finish materials?

Elevators
Does the project include new elevators or modifications to existing? Does the project have an elevator consultant?

Building/Project Specific Operational Considerations
(Example below)

- The hours of operation are anticipated to be between 8 AM and 6 PM, M-F. The building will be unoccupied under normal circumstances at night and on the weekends.
- This facility will be operated by the University facility services staff. Facilities Services will be responsible for day-to-day operation and maintenance of HVAC, electrical, plumbing and other major systems as well as major repairs. All equipment will be accessible for routine maintenance including safe access to any rooftop units, adequate room to pull coils and sufficient access to any components that require maintenance.
- Training will be provided by the construction team prior to building turnover and shall consist of classroom sessions (which provide instruction on system overview/theory of operation and also provide an overview of the operation and maintenance manuals) and hands-on sessions (which provide instruction at the actual equipment including demonstration of startup, shut-down, safeties, maintenance procedures, etc.). BAS contractors shall instruct the facilities engineering staff on the design and operation intent, sequences of operation, setpoints and alarms, and setup and use of building automation system trend reports to evaluate system performance (at a minimum).
- O&M manuals are to be included for all equipment and delivered at 50% construction.
- Only the University’s shop supervisors will have full access to the BAS (with override authority). Remote alarms will be sent to all facility engineers listed by the owner.
- Warranties for MEP systems shall be as per the project specifications but never be less than one year.
- Spare parts to be provided at the turnover of this project shall be per project specifications.
- Warranty Requirements in excess of standard FS contracts:
- Attic Stock to be provided at the turnover of this project shall include (at a minimum):
- Measurement and Verification Requirements:
- Room, suite, floor, and mechanical system numbering:
- Special Maintenance Programs and Procedures to be Developed:
Appendices

Appendix A – Program Report
Appendix B – Basis of Design
Appendix C – LEED Checklist (if applicable)
Appendix D – University of Chicago Facility Standards (FS2) updated 1/10/2013
Appendix E – Project Governance Structure
Appendix A – Program Report

(By Reference)

Prepared by _____________

Updated XX/XX/XX
Appendix B – Basis of Design

(By Reference)

Prepared by _________________

Updated XX/XX/XX
Appendix C – LEED Checklist (If Applicable)
Appendix D – University of Chicago Facility Standards
(by reference)

University’s facilities standards can be found on-line at:
http://facilities.uchicago.edu/about/facilitiesstandards.shtml

Updated XX/XX/XX
Appendix E – Project Governance Structure

Updated XX/XX/XX