



OVERVIEW

PROJECT MANAGER'S MANUAL

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DEPARTMENT ORGANIZATION

FPC Organizational Chart

The Facilities Planning and Construction (FP&C) department [organizational chart](#) diagrams the reporting structure of all FP&C personnel. The following lists general roles and responsibilities for FP&C team members. For a complete list of job responsibilities, individual position descriptions may be requested from Human Resources through the director.

Department Roles**Directors**

The directors (Director I or II, Facilities Planning) are responsible and accountable for the overall operation and performance of the department. The directors meet regularly with clients and other F&S directors to ensure that priority projects are being addressed, and ensure that project goals and objectives are achieved. The directors play a major role in the design, bidding, and construction of all major projects.

Managers

The managers (Manager I or II, Facilities Planning) are responsible for the daily operation of the department.

Managers who work in Construction oversee Project Managers, review the status of all active design and construction projects, and manage special projects as necessary. They work closely with the PMs to determine the appropriate design and construction companies to use for rotation/justification work, ensuring that FP&C procurement requirements are being followed. They are involved in all major and minor projects, ensuring quality delivery throughout the design, bidding, and construction phases.

Managers who work in Planning manage the Space Planning functions of FP&C, including preparing Academic Program Statements, Space Summaries, and Building Programs for major capital projects. They manage the Campus Planning functions of FP&C, including statutory Campus Master Plan Updates (CMP) and Amendments, and oversee Facilities Information Services (FIS), including FP&C Archiving and Records Management. The Manager collaborates in the preparation of key planning tools such as the 5-year Capital Improvement Plan (CIP), the Campus Development Agreement (CDA), and Land Use Plans (LUP), and serves as a member or resource to the University Space Committee, the University Master Planning Committee, and other advisory and steering committees. They Champion UCF's move to Active Learning by recommending classroom concepts and furnishings that support team-based learning.

Project Managers

The Project Managers (Project Manager I, II, or III) are the primary points of contact for Major and Minor Projects. They meet with campus clients to understand project Scope, create written Scope of Work documents for review and comment, manage the

Continuing Service architects and engineers needed to design projects, create funding documents with complete Scopes of Work for approval, manage the construction of projects, review and facilitate all financial transactions during projects (invoices, pay applications, etc.), and obtain the necessary paperwork for project Close-out. PMs update projects in e-Builder, and in addition, regularly communicate with campus clients regarding project status, informing them when input or action is needed.

Construction Project Coordinator

The Construction Project Coordinator is responsible for processing all new Minor Project requests, recommending process improvements, overseeing the intake of projects, working with the team to finalize project Close-outs, and providing critical status updates to FP&C leadership and clients.

Office Technology Manager

The Office Technology Manager serves as the eBuilder administrator, provides computer aided design (CAD) and building information modeling (BIM) graphics support to the department, maintains the FP&C website, and stays abreast of the latest software options to help with other departmental needs.

Construction Project Assistants

Construction Project Assistants (CPAs) either support PMs with project startup, Close-out, and support functions, or work in a document control role.

CPAs acting in a Project Support role create project shells in e-Builder for approved projects, assist with the routing of invoice/pay applications, communicate with PMs and vendors to acquire missing documents for project files, and review project files before Close-out to ensure all required material is included, organized appropriately and correctly executed.

CPAs acting in a Document Control role maintain the project archive and assist PMs with forms, documents, and project archiving.

Campus Planners

Campus Planners are responsible for preparing, maintaining, and updating the University Campus Master Plan as needed. They are responsible for ensuring coordination with all University entities and committees related to campus planning.

PROJECT MANAGER RESPONSIBILITIES**Communication**

The Project Manager is the key owner of design and construction projects. This section of the manual does not represent an all-inclusive list of every duty and responsibility that a PM may have to encounter on every project, but it does address primary considerations and areas of general responsibility. A practical PM should use their professional judgement to determine the best method to execute projects and navigate roadblocks. A project's success or failure depends on the PM's communication, guidance, thoroughness, and ownership.

Communication with campus clients, project stakeholders, architects, contractors, and department leadership is the key to successful projects. The importance of this element of project management cannot be overstated.

It is critical that our campus clients have a positive project experience. They are the people who we serve, and they ultimately serve the core University Mission of student success. If our campus clients are not happy, we have not done our job well.

Most of our campus clients are established contacts within various colleges and departments. We know them, and have relationships with them, that have been built over several years. Their needs are not unrealistic or unreasonable. They want to know what is going on with their project, to be kept informed by their assigned PM, and for the PM to provide strong leadership and direction to vendors in order to deliver their projects as quickly and efficiently as possible. Regular and proactive communication is a basic expectation of our PM team. With Campus Clients, it is much better to over-communicate, than to under-communicate.

Guidance

A fundamental responsibility of a PM is to meet with a campus client to understand their project, and develop a Scope of Work that includes all parts and pieces related to their project. However, this is only a basic level of service – we must strive to provide more value. First, PMs must educate our campus clients on the steps needed to accomplish a project, and why these steps are important. PMs must understand the core need of the campus client, and offer suggestions for accomplishing this need that may make a project less expensive or quicker to accomplish. And PMs must advocate for UCF, pushing vendors and contractors for aggressive budgets and schedules.

Thoroughness

There are many, many elements that go into projects, most of which are discussed in this PM Manual. It is critical that a PM understands the full complexity of project execution – both for the project scope of work, and the internal steps required to properly execute a project. Skipping steps in the process will lead to problems later – whether a product gets installed that does not meet UCF Standards, a stakeholder did not get consulted who should have,

Ownership

The contract is the primary document referenced during disputes, and takes precedence over almost all other directions

Understanding the contract is important as it should provide guidance and clarity around most questions

or a payment is not made in a timely manner to a vendor, compromising their performance and relationship with the University. The PM must understand and control all aspects of all projects under their leadership.

Ownership of projects is a critical part of our FP&C culture. We have intentionally designed our department structure so that a Project Manager owns a project from inception to completion. There are no hand-offs in this process; the success or failure of a project lies solely on the PM. They are responsible to drive the project to success. If input is needed from a campus client, stakeholder, or department leadership – it is the PM's responsibility to get that information. While FP&C has support personnel to help on projects at inception and completion, the project is still the responsibility of the PM until it is completely closed.

Other responsibilities of the PM, of a more functional nature, include:

- Contract Management
 - Review and understand the responsibilities the contracted entity has, and duties they are obligated to perform.
 - Become familiar with contractual deadlines associated with specific activities. The PM may find it helpful to remind the contracted entity about these deadlines during the kickoff meeting, as well as the consequences of not adhering to them (Evaluations, project delivery performance)
- Budget Management
 - Create, monitor, and proactively update the project budget
 - Develop and/or review project estimates, as requested
 - Review bids and Guaranteed Maximum Prices (GMPs), as requested
 - Review and approve contractor invoices and payment applications, coordinate with the Facilities and Safety Business Office to ensure on-time payment of completed work
- Schedule Management
 - Create, monitor, and proactively update the project schedule
 - Ensure that all relevant stakeholders are involved in the project and keep them active in decision-making

- Ensure that designers and contractors are on schedule with deliverables – if not, require recovery schedules and elevate to department leadership if necessary
- Scope Management
 - Understand the details of the project Scope of Work and review construction documents for errors and omissions prior to bid and permit issuance
 - Review and understand all pertinent contracts for vendors working on projects, and hold vendors to their contractual responsibilities
 - Ensure that vendors are compliant with the contractual responsibilities; likewise, do not add scope to contracts without the proper approvals
 - Document any significant project risks, and elevate to department leadership for resolution
- Document Review
 - Become intimately familiar with the design plans, specifications, and standards of your projects
 - Make sure the final design and construction deliverables are compliant with UCF Standards
 - Understand and support campus sustainability efforts related to new construction and renovation projects
- Permitting
 - Ensure the contractor complies with all laws and regulations and has secured the necessary permits
- Construction Oversight
 - Coordinate campus construction efforts, and identify potential issues that may result in poor financial performance, schedule delays, or quality problems
 - Manage designer and contractor performance through periodic inspection of progress of work compared with correct schedule, percent vs. percent complete

If the Project Manager cannot handle a project challenge alone, they must elevate it to a manager or director. Not only should the Project Manager be aware of these responsibilities, it is vital that all persons directly or indirectly involved in the project also understand the role of the Project Manager and make cooperation with and support of the Project Manager their highest priority.

Project Manager Assignment

Project Manager assignments are the responsibility of FP&C department leadership. Assignments will be based on a PM's campus relationships, experience, capabilities, and availability. Projects can be reassigned to alternate PMs at any time by FP&C

Project Manager Capacity

department leadership, but this practice is discouraged and only undertaken when there are strong reasons to do so. The number of projects a Project Manager can handle is a function of project size, priority, complexity, and the capabilities of the individual Project Manager.

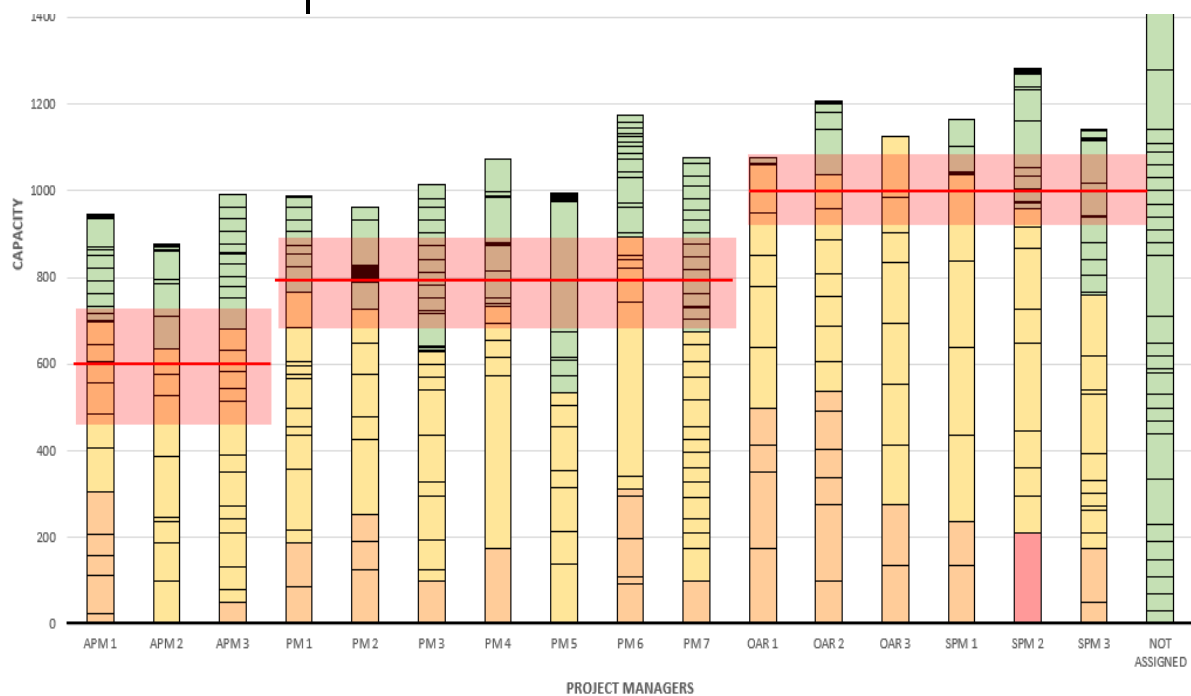
Facilities Planning & Construction leadership uses the Project Manager Capacity Report to guide the assignment of new projects. The report criteria factors in:

- Monetary Value of the Project
- Delivery Method (Major or Minor Project)
- Design Required
- Assigned Priority Level
- Current Phase
- Project Category

The following graphic is an illustration of individual PMs and their assigned workload. Each color box represents one project. Larger boxes represent more expensive and more complex projects, where small boxes represent less expensive and less complex projects.

Colors represent priorities:

- Red – Emergency
- Orange – Urgent
- Yellow – Expedite
- Green - Routine



**Communication
Methods**

Projects are complicated endeavors: proper execution of even seemingly simple projects requires extensive communication and numerous approvals. Project Managers must use their best judgment and conduct themselves professionally when communicating with project stakeholders. This includes campus clients, partner departments, and vendors. Project Managers are reminded that they represent FP&C, Facilities & Safety, Administration and Finance (A&F), and UCF as a whole, and that all communications are subject to records requests in accordance with the Florida Statutes Chapter 286 "Sunshine Law". Project Managers may use all communication methods at their disposal, including:

In-person meetings

Meetings are often the most productive way to discuss projects, review documents, and make decisions. They are an absolute requirement for reviewing field conditions and developing a project Scope. In-person meetings must be followed up with written communications to document project decisions and approvals.

Phone calls

Phone conversations are encouraged, especially when setting up initial meeting times with campus clients, or when unexpected news (i.e., a project is over budget) needs to be communicated. Phone conversations cannot be relied upon for project approvals, and must be followed up with written communications to document project decisions and approvals.

Emails

Emails are necessary to document important decisions made in person or on the phone, and to obtain approvals. They are also useful for communicating important project information to a large number of project stakeholders. Project Managers should always keep a professional tone in written communications, and are strongly encouraged to reread emails prior to sending, to ensure that the intended tone and content is expressed. Hastily-written emails may not come across as intended, which can lead to miscommunication.

Letters

Official correspondence usually requires official communication by letter. This includes items and occasions such as Notice to Proceed, Additional Service Authorizations, contract approvals, Liquidated Damages, and Termination. When in doubt, consult with department leadership to determine if an email or a letter is the appropriate mode of communication.

Meeting Minutes and Correspondence

e-Builder



Text messages

Text messages should not be used for official communications. While often used for quick communication between team members, they are not always reliable and are difficult to document. Any information conveyed via text message must be followed up by official written communication.

e-Builder Comments and Notifications

The e-Builder application is set up with the ability to be a repository for PM project comments, acting as both a project diary and an audit trail, as well as allowing notifications to be sent to project stakeholders once defined criteria have been met. The PM must make it a habit to enter comments on a consistent basis, and become familiar with how to use e-Builder notifications, so they can advise project stakeholders about when and why notifications will be received, and provide guidance on how the stakeholder needs to respond.

Meeting minutes are a critical part of proper documentation of project decisions. If a Project Manager is meeting with a client without a vendor (A/E or Contractor), it is the Project Manager's responsibility to document the conversation and share the minutes with the client to get their approval and any corrections. If a Project Manager is meeting with a client with a vendor, it is the Project Manager's responsibility to obtain meeting minutes from the vendor, screen them for accuracy, distribute them to project stakeholders for additional screening and feedback, and communicate approval (or changes) back to the vendor in a timely manner (generally one week). Failure to properly document project decisions can have major consequences when decisions are questioned.

FP&C's project management software, e-Builder, is the central repository where ALL PROJECT DOCUMENTS AND DATA must be stored. e-Builder has many custom workflows which are needed to execute projects, and elaborated upon in the Minor and Major Project sections of the PM Manual. Regular use of e-Builder is a mandatory requirement for all Project Managers and is a part of a PM's annual performance appraisal. This includes keeping all vendor information, financial information, schedule information, and notes up to date for all projects at all times. Project notes must be descriptive and include information on recent activities completed, critical next steps, and anticipated schedule milestone dates.

STAKEHOLDERS AND PARTNER DEPARTMENTS

Stakeholders

Below is a list of the typical project stakeholders who provide input on our projects. This list is not comprehensive, and the Project Manager should endeavor to include all relevant stakeholders in the process, whether on this list or not.

Campus Clients

Campus clients are the end users of our projects; thus, projects must meet their needs, or they will not be successful. Campus clients must be involved in all aspects of a project's development, including:

- Scope, schedule, budget development, and approval
- Regular design and construction meetings
- Communications related to building or partial-building shutdowns
- Punch list creation
- Final completion approval
- Input on vendor performance

**University Master Plan Committee (UMPC)**

The UMPC is a broadly represented group of faculty, administrators, staff, and students, whose charge is to make recommendations to the President of the University regarding matters of aesthetics and modifications of the campus landscape, utilities, and building exteriors. The UMPC meets monthly to review short-range and long-range issues related to land use, facilities planning, and future development of the campus, including protection and preservation of natural resources on the campus. The UMPC also reviews signage, site furniture, public art, and some temporary installations, at the charge of the Vice President for Administration and Finance and the Associate Vice President for Administration and Finance (Facilities & Safety).

Project Managers with projects that have an exterior impact on campus must submit project plans to the UMPC, and attend the monthly UMPC meeting to review the project requests. A UMPC memo and supporting documents must be submitted to the Chair of the UMPC committee, in order to be considered for the UMPC agenda. This memo must be submitted through the FP&C Director or Manager. Adequate time (generally 2 weeks prior to the requested meeting date) must be allowed for the proper routing of these documents for approval, and for announcement of the agenda to the UMPC committee members.

Partner Departments**Space Administration (Space Admin)**

www.spaceadmin.ucf.edu

Space Admin is a department within the Information Technologies & Resources division. The Office of Space Admin has been designated by the Provost and Vice President for Academic Affairs, the Vice President for Administration and Finance and Chief Financial Officer, and the Vice President for Research and Dean of the College of Graduate Studies, to serve as the entity entrusted with the optimum and efficient allocation and assignment of space to meet the University's Mission. This is done in collaboration with those administrative offices and the respective University colleges and divisions.

Space Admin reviews and approves space requests, establishes procedures for space acquisition and allocation, maintains an accurate space inventory for internal and external reporting purposes, and provides information and analyses regarding current and future University space needs. Space Admin also represents the University on regularly scheduled Educational Plant Survey (inventory validations and space needs assessments) teams on campuses throughout the State University System, as required by the Florida Board of Governors. In addition to these university-wide responsibilities, Space Admin works closely with FP&C to oversee space project requests, including planning, construction, maintenance, and where necessary, facility upgrades.

Space Admin must be involved in the following aspects of project development:

- Review all Minor Projects to determine if they are acceptable to the University, on a space category and use basis.
- Building number assignment for new construction
- Room number assignment for all projects – Space Admin should be involved in this process as early as possible, and at the Design Development phase at the latest
- Turn-over of electronic plan modification information at the close-out phase

Utilities & Energy Services (UES)

www.energy.ucf.edu



UES maintains energy-efficient building system operation through education, optimization, implementation, and verification, while providing professional leadership and fostering sustainable growth. UES is responsible for supporting a wide variety of mission-critical services, including green building accreditation, commissioning, building automation system specification, building automation integration and enterprise management, utility production and procurement, statutory concurrency management for utility capacity and interconnection, and energy management services for

all campus buildings, comprising 7.8 million gross square feet of space.

UES must be involved in all projects that have any impact to campus utilities, and in the following aspects of project development:

- Utilities
 - Utility concurrency management in accordance with Florida State Statue 163.3180
 - Florida Department of Environmental Protection (drinking water standards)
 - St. Johns River Water Management District (consumptive use permit capacity)
 - Chilled Water
 - Natural Gas (University-owned and TECO-owned)
 - Purchased and produced domestic water
 - Reclaimed Water
 - Sanitary collection
 - Purchased & University Generated primary power – in particular, all contact with Duke Energy by UCF or our vendors must go through UES
 - Storm Water
- Commissioning (CxA)
- Building automation enterprise management
- Test & balance
- Administer Sunshine 811 in accordance with Chapter 556 F.S. for university-owned infrastructure within UES's domain
- GIS Field Services and utility mapping
- Evaluations of HVAC adequacy for Minor Project renovations
- Utility outages requiring third-party utility provider and campus generated support
- Punch list
- Turn-over of utility plan modification information prior to utility interconnection

**Landscape & Natural Resources (LNR)**

www.green.ucf.edu

LNR enriches the community by creating and maintaining an inviting and sustainable outdoor environment, providing high-quality service for operational activities, and generating research and educational initiatives that guide conservation and stewardship of natural resources.

LNR must be involved in the following aspects of project development:

- St. Johns River Water Management District (SJRWMD) permitting
- Gopher Tortoise surveys
- Landscape and irrigation design and installation on all projects with an exterior scope
- Punch list

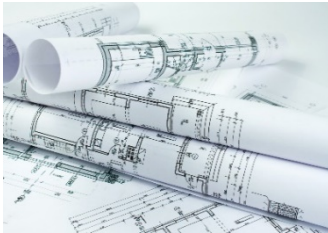
**Environmental Health & Safety (EHS)**

www.ehs.ucf.edu

EHS promotes a culture of safety, health, and environmental protection in collaboration with the University community, to support education, research, and service. It is dedicated to reducing injuries, accidents, and environmental impact, while ensuring compliance through high-quality training, comprehensive workplace evaluation, hazardous materials management from acquisition to disposal, managing regulatory information, and minimizing future potential liabilities.

EHS must be involved in the following aspects of project development:

- Laboratory projects of any type
- Projects where Design requires release of chemical storage information
- Building or partial building shutdowns
- Hot work permits
- Occupational Safety
- Indoor Air Quality (IAQ)
- Air Pollution permits
- Storage Tank installation, construction, repair, closure or disposal



- Generators with a capacity greater than 200KW

Building Department

www.buildingdepartment.fs.ucf.edu

The Building Department is a division of Administration and Finance, and is responsible for the permitting and inspections of all projects on all UCF property.

The Building Department must be involved in the following aspects of project development:

- Preliminary code review of drawings/specs at 50% CDs
- Permit review of drawings/specs at 100% CDs (signed sealed drawings)
- State Fire Marshall (SFM) coordination – All communication with the SFM Tallahassee office during design must go through the Building Department – neither FP&C nor the A/E team is allowed to contact the SFM directly without approval from the FP&C Director
- Inspections
- Occupancy
 - Certificate of Completion issuance (minor projects)
 - Certificate of Occupancy issuance (major projects)

**Department of Emergency Management (DEM)**

<https://police.ucf.edu/emergencymanagement>

DEM prepares the University of Central Florida by enhancing partnerships and coordinating all activities necessary to build, sustain, and improve the University's ability to mitigate, protect, and prevent against; respond to; and recover from natural, technological, and human-caused threats and hazards. DEM develops and maintains the UCF Comprehensive Emergency Management Plan (CEMP), coordinates emergency exercises, manages the Emergency Operations Center (EOC), and provides the University with emergency preparedness information

DEM must be involved in the following aspects of project development:

- Development and review of Mass Notification project scope

**Department of Security (DS)**

police.ucf.edu/security

The Department of Security manages the access control and camera network on campus. They are both a stakeholder in projects, and are often a requester of projects. They must be involved in the following aspects of project development:



- Access Control
- Cameras
- License Plate Recognition

Office of Instructional Resources (OIR)

www.oir.ucf.edu

OIR designs, selects, and installs multimedia systems and equipment across all UCF campuses to maintain a consistent experience in all of our learning spaces, and to ensure that UCF's multimedia standards are being met. OIR is also closely involved in the Technology Fee project process, since many of these projects have a multimedia component.

OIR must be involved in the following aspects of project development related to classroom and conference room instructional resources:

- Projectors
- Fixed and retractable projection screens
- Document cameras
- Instructional Podiums
- Instruction media equipment
- All supporting infrastructure for the above items

Note that auxiliary and direct support organizations are not required to use OIR for their audio/visual needs.



UCF IT (Information Technology)

www.it.ucf.edu

UCF IT, a unit within the Information Technologies and Resources Division, provides central information technology resources – including software, databases, computer networks, telephones, and IT staff – to support UCF's academic, research, and business activities. FP&C coordinates closely with UCF IT on all projects that require telecommunications infrastructure and/or services. UCF IT is the sole provider of UCF's telecommunications systems, and is responsible for their design, standards and guidelines, installation, operation, maintenance, and warranties. This includes, but is not limited to:

Construction

- Outside plant duct bank
- Outside copper, fiber and COAX systems
- System, topology and Structured cabling designs, install, and terminations

*FP&C and UCF IT have a **Memorandum of Understanding (MOU)** that requires FP&C to give UCF IT the first right of refusal to do all telecom scope on all UCF projects.*

- Main and intermediate distribution frames (MDF/IDF)
- Cable television network infrastructure (wired and wireless)
- Distributed antenna system (DAS)
- Emergency Blue Light Phones
- Two-way radio systems
- Access control rough-in (if applicable)
- All material procurement and distribution
- Other technology-related services

Furniture Fixtures & Equipment (FF&E)

- Network Electronics design, procurement, configuration and installation
- Wireless equipment design, procurement, configuration and installation
- LAN hooks ups
- Telephone installations
- CATV installations

It is important to note that FP&C and UCF IT have a Memorandum of Understanding (MOU) that requires FP&C to give UCF IT the first right of refusal to do all telecom scope on all UCF projects. Rarely will UCF IT consider using outside vendors for telecom scope. Project Managers are not allowed to use any outside vendors for telecom scope without the FP&C Director's written approval.

UCF IT must be involved in the following aspects of project development:

- Temporary removal or relocation of existing telecommunications infrastructure for Minor Projects
- Outside telecommunications infrastructure (Vaults, etc.)
- Inside telecommunications infrastructure
 - MDF rooms
 - IDF rooms
 - Cable trays
 - Cable installation
 - Telecom outlet installation
- All supporting infrastructure for the above items
- Building or partial-building shutdowns

It is important to coordinate and schedule all UCF IT scope as early as possible to ensure proper design and scheduling of their Scope

of Work. It is critical that our Scopes of Work state that there must be no painting of new or existing UCF IT cabling, as this voids the cable warranty, requiring replacement in full at the Contractor's cost.



Facilities Operations (FO)

www.fo.ucf.edu

Facilities Operations comprises Housekeeping, Maintenance, Recycling, and Reliability Engineering, and is focused on operating and maintaining buildings and assets, both on the main UCF campus and remote campuses. FO implements preventative maintenance programs and performs corrective maintenance work to ensure that every building is safe, functional, clean, and attractive. FO also supports all recycling efforts by students and faculty.

FO must be involved in the following aspects of project development:

- Drawing reviews of all new building projects to ensure that operations and maintenance needs are considered during design
- Spare parts and attic stock
- Asset reviews, Warranty Turnover, and Claims
- Building or partial-building shutdowns



Resource Management (RM)

www.rm.fs.ucf.edu

Resource Management performs multiple support functions within Facilities and Safety (F&S), including Central Receiving, Central Stores, warehouse storage, contract audit and management, F&S accounting, F&S information technology, real estate management, policy and procedure management, postal services, records storage and destruction, and surplus property management.

RM must be involved in the following aspects of project development:

- Surplus of UCF property
- Deliveries of building equipment
- Warehousing



UCF Police (UCF PD)

www.police.ucf.edu

UCF PD's mission is to reduce crime and the fear of crime by providing a safe environment for students, faculty, staff, and visitors, and the safeguarding of constitutional guarantees. UCF PD provides law enforcement services to the University community as well as several University-affiliated housing communities near

campus. UCF PD is involved in the planning and design of all new building projects, with a focus on safety, security, and Crime Prevention through Environmental Design (CPTED).

UCF Police must be involved in the following aspects of project development:

- Project security reviews
- Crime Prevention through Environmental Design
- Coordination of roadway or intersection rerouting or shutdowns

UNIVERSITY AGENTS

Projects often involve local agencies or third parties, who may require approvals or may impact the project. The Project Manager has shared responsibility with the contractors, and Architect/Engineers to function as the conduit between Facilities & Safety and third parties or local agencies for all matters that could be related to the project. The Project Manager has the ultimate responsibility in Facilities & Safety to maintain project coordination as needed.

Commissioning Agent (CxA)

The commissioning process is not a singular event at the end of construction, but an ongoing activity that takes place starting at the inception of a project. The goals of the CxA process are to design and install building systems that improve building performance, reduce energy costs, and reduce life-cycle operation and maintenance costs. UCF has the option of performing commissioning services internally through UES, or by hiring a third-party company. Continuing services CxAs can be used for these services. This choice must be discussed with UES on a project-by-project basis, and will depend greatly on the complexity of the project and the availability of UES resources.

UCF also performs total building commissioning, which involves third-party review of all building systems including MEP/FP and building envelope systems. For building envelope system commissioning, UCF employs building envelope consultants, which are discussed in the following section.

Utilities and Energy Services (UES) has a CxA staff who must be given the first right of refusal to perform CxA on UCF projects.

The CxA must be involved in the following aspects of project development:

- Developing the Owner's Project Requirements (OPR) in conjunction with the Owner and with the Owner's approval
- Reviewing and commenting on the Architect and MEP/FP Engineer's Basis of Design (BOD) document, which describes how the OPR will be achieved
- Attending all project meetings and workshops
- Reviewing and commenting on all design deliverables, to ensure compliance with the OPR and UCF Standards
- Reviewing construction submittals related to MEP/FP scope for compliance with the contract requirements
- Reviewing and testing installed MEP/FP systems for compliance with the contract document and approved submittal requirements

- Reviewing building envelope installation, if within the scope of the CxA

The Project Manager, will receive a cost proposal from UES that provides the following information for the CxA:

- The CxA selected for the project
- The CxA's Scope of Work
- The CxA fee schedule

The PM is responsible for coordinating the requisitions and purchase orders related to the CxA services, coordinating initial meetings between the CxA and UCF to establish the OPR, and inviting the CxA to the appropriate project meetings.

Building Envelope Consultant (BEC)

All projects with an exterior skin scope must have a building envelope consultant.

The BEC must be involved in the following aspects of project development:

- Providing input into the OPR document for scope related to the building envelope
- Reviewing and comment on all design deliverables for compliance with the OPR and UCF standards
- Reviewing construction submittals related to the building envelope scope
- Reviewing mockups and field installation conditions to ensure that the installation complies with the design details and intent
- Water testing (and re-testing when required) installed conditions to verify that the installed conditions are water-tight
- Certifying that the building is water-tight, in compliance with the Substantial and Final Completion procedure.

Some minor projects, such as re-roofs and building envelope repairs, have only a building envelope Scope of Work. In these cases, a Continuing Service BEC can be hired to produce the entire Scope of Work package, answer RFIs, review Contractor Submittals, review the installation of the work, and certify proper completion of the work.

Threshold Inspector

[2019 Florida Statutes – Title XXXIII – Chapter 553.79 \(5\)-\(8\)](#)

During new construction or during repair or restoration projects in which the structural system or structural loading of a building is being modified, the Building Department shall require a special inspector to perform structural inspections on a threshold building

pursuant to a structural inspection plan prepared by the engineer or architect of record.

A Special Inspector is a licensed engineer or architect with a certification as a "Special Inspector" of threshold buildings.

A threshold building is any building which is greater than 3 stories or 50 feet in height, or which has an "Assembly" occupancy classification that exceeds 5,000 sq. ft. in area and an occupant content of greater than 500 persons.

The special inspector may use an Authorized Representative to perform day to day inspections. This representative shall have qualifications that include being a licensed engineer or architect, graduation from a related engineering or architectural program, successful completion of the National Council of Examiners for Engineering and Surveying (NCEES) Fundamentals examination, a Florida licensed general contractor, or a Florida licensed Building Inspector.

PM Highlights

- The inspection fee for the Threshold inspector is paid by the Owner
- A Structural Inspection Plan must be prepared by the Engineer of Record and submitted to the Contractor and Building Department.
- The Contractor must call for inspections of structural components listed in the Structural Inspection Plan
- All shoring and reshoring procedures, plans and details shall be submitted to the Building Department for record keeping.
- Each shoring and reshoring installation shall be supervised, inspected, and certified to be in compliance with the shoring documents by the contractor.
- Prior to the issuance of a Certificate of Occupancy, the Special Inspector must submit a signed and sealed statement to the Building Department in substantially the following form:

To the best of my knowledge and belief, the construction of all structural load-bearing components described in the threshold inspection plan complies with the permitted documents, and the specialty shoring design professional engineer has ascertained that the shoring and reshoring conforms with the shoring and reshoring plans submitted to the enforcement agency.

UCF PROCUREMENT SERVICES

Procurement Services supports the academic and administrative departments in the timely procurement of goods and services to sustain, foster, and promote the educational and research mission of the University. This is accomplished in the most ethical, efficient, and courteous manner possible while adhering to the letter and intent of all applicable laws, regulations, and policies.

FP&C has a strong relationship with Procurement Services. While FSBO coordinates all accounting and project requisitions, Procurement Services issues the purchase orders for our projects. PMs are expected to maintain proactive and professional communication with Procurement Services.

The Procurement Services website (www.purchasing.ucf.edu) has a wealth of information regarding solicitations, forms, guidelines, vendors, and contracts. While F&S policies and procedures are independent from UCF Procurement Services, they are written to be complementary and to avoid conflicts on procurement and dollar threshold limits. The PM must review and understand all basic UCF Procurement Services policies and procedures.

General Monetary Thresholds

Procedure FSP 2015 FPC0008 – Award of Projects to Continuing Service Contractors selected through a Qualifications Basis supersedes the general monetary thresholds set by Procurement Services. In some cases, under advisement by Procurement Services, the PM can use the following General Monetary Levels and Limits:

- Less than \$10,000: Quotes are not required, however, competition and quotes from minority businesses are encouraged
- \$10,000.01 - \$35,000: Two or more informal price quotes are required, and at least one quote from a certified small, woman, or minority vendor is encouraged
- \$35,000.01 - \$75,000: Three or more formal written quotes from different companies are required, and at least one quote from a certified small, woman, or minority vendor is encouraged
- \$75,000.01 – Above: Formal Invitation to Bid/Negotiate is required

See the UCF Purchasing Manual on the Procurement Services website for additional information

Invitation to Negotiate (ITN)

In some cases, construction projects may be solicited using UCF Purchasing procedures. This most often takes the form of an Invitation to Negotiate. An ITN is “a written solicitation for good or

services, where factors other than price are to be considered in the award determination. These factors may include such items as vendor experience, project plan, design features of the product(s) offered, etc. An ITN is used when the specifications cannot be identified; the end result is explained but we want qualified companies to offer their solutions for consideration.” As ITNs are infrequently used by FP&C, they are not described in detail in this manual.

Waiver of Competition

In limited circumstances when only a single vendor can provide a service, FP&C may apply for a Waiver of Competition through Procurement Services. The Waiver of Competition Form must be completed with clear and substantial justification for such a waiver. Few waivers are granted, and this should only be considered in extreme circumstances when competition is not possible. A PM should check with FP&C leadership if they believe a Waiver of Competition is needed for a project.

Sole Source Purchases

In limited circumstances when only a single product will work for a purpose, FP&C may apply for a Sole Source Purchase through Procurement Services. The Sole Source Purchase Form must be completed with clear and substantial justification for such a waiver. Few sole source purchases are granted, and this should only be considered in extreme circumstances when competition is not possible. This process requires extensive justification from the department, which must include an explanation showing that the University is receiving a fair and reasonable price, and extensive research by the Purchasing Specialist to verify that the commodity is actually a true sole source. A PM should check with FP&C leadership if they believe a Sole Source Purchase is needed for a project.

Emergency Purchase Certification

When the president or designee (AVP F&S) determines in writing that a condition exists that threatens the health or safety of person(s) or animal(s), the preservation or protection of property, or the continuance of a vital university function, the University may proceed with an emergency purchase certification without a competitive solicitation. The emergency purchase shall be limited to the type of items and quantities for a time period sufficient to meet the immediate threat, and shall not be used to meet long-term requirements.

Emergency purchase certifications are the only situations where FP&C-related work should be performed prior to the issuance of a Purchase Order. The PM must consult with FP&C leadership and obtain written approval from the AVP F&S prior to any emergency purchase certifications, and follow up with the required paperwork to document the situation. Violations of this procedure can incur financial penalties to FP&C, and may result in disciplinary action to its personnel.

Signature Authority

The UCF Office of the General Counsel maintains the Signature Authority Policy and Signature Authority List for the University. This policy spells out in detail what persons or bodies have authority to sign contracts or approve purchases for various dollar thresholds and scopes of work. This information can be found at the General Counsel's website: www.generalcounsel.ucf.edu

In short, Project Managers are NOT authorized to sign any contracts or approve any purchases of any value whatsoever, and must not do so under any circumstances. Considerable penalties can be applied to the FP&C department, and disciplinary action (including termination) can be taken to FP&C employees who violated this requirement.

CONTINUING SERVICE VENDORS

**Design
Professionals**

If the project will require a design professional, the PM must identify and recommend a Professional service vendor, who will be responsible for creating and presenting for review, design options for the work. Additionally, other Professional service vendors may be engaged if the project requires their expertise.

UCF retains a pool of pre-qualified Professionals on Continuing Service Contracts. Minor projects are typically assigned to this pool of Professionals in accordance with the [Award of Projects among Professionals Selected through a Qualifications Basis to Provide Continuing Services](#) policy. As part of the Project Charter Process, the PM must recommend professional service vendor(s) to execute the work. These recommendations are focused primarily on the ability of the professional firms' personnel to perform the given scope of services, and also address:

- Expertise of firm related to the specific scope of work of the project
- Past performance of the Professional firms
- Ability to meet time and budget requirements
- Recent, current, and projected workloads of the firms
- Volume of work previously awarded to each firm by UCF

These professionals have a unique opportunity to shape the physical environment of the campus, and serve as the Owner's consultant throughout the design and construction process. Design Professionals are expected to act in the best interest of the University, and to be proactive in their leadership and management of projects. Professional skill, expertise, timeliness, regular and effective communication, and coordination of internal and external team members are the expected norm. The design of new facilities requires the input from many stakeholders, so Design Professionals must understand the needs of the Owner, incorporate input from multiple, varied sources, and be knowledgeable in the cost and constructability of proposed products and systems.

Scheduling

The PM shall work with the Design Professionals and stakeholders to establish a schedule for services that fully accounts for reviews, presentations, production of cost estimates, holidays, and other conflicts or constraints. Once established, the Design Professionals shall meet or exceed design schedule milestones, or shall provide justification for deviations or extensions. Likewise, during construction, the Design Professionals shall provide efficient management and construction administration to assist the Contractor in meeting its contractual responsibilities and delivering the project on time.

Cost Estimates

The Design Professionals shall thoroughly evaluate design alternatives using their own expertise, and/or cost consultants, unless this scope has been delegated to the Project Manager or Construction Manager. All designs must adhere to the Owner's Standards, unless deviations are approved in writing using the [Deviations from UCF Design and Construction Standards procedure](#). Any value engineering or benefit analysis of design alternatives required to meet target budget must be completed in adequate detail to fully appraise the net impact of these choices on the project program, schedule, and cost. Reductions or deletions in project scope or quality made for economic reasons must be balanced with substitutions that provide adequate quality and service while meeting program and design intent. Every effort must be made to provide comprehensive analysis of the net impact of value engineering and design alternatives.

The Design Professionals will provide the PM with written documentation regarding any communication that establishes or resolves a question of scope, budget, or schedule.

Contract Documents

The Design Professionals shall be competent in design practices, technical specifications, and knowledgeable of code requirements leading to a design solution that is within budget, aesthetically pleasing, functional, durable, easy to operate and maintain, energy efficient, and compliant with codes and standards. Buildings must be designed for a minimum 50-year life. Design Professionals will develop and present design concepts using the latest available technology. Documentation shall be thorough and coordinated, incorporating all code, permitting and University Standards requirements and address and incorporate any comments from these entities. Design Professionals and PMs shall ensure that all permits are applied for and received in a timely manner. During construction, Design Professionals shall make inspections and observations with frequency and timeliness sufficient to ensure that the Contractor is complying with the requirements of the Construction Documents, and shall coordinate the requirements for achieving Substantial Completion and Final Completion with the Contractor.

Meeting Minutes

Meeting minutes are a critical part of all projects and are required to document project decisions. The Design Professional must create minutes for all project meetings within 5 days, and send them first to the PM only for review. The PM will request that the Design Professional make any necessary corrections. Once the PM is satisfied with the content of the meeting minutes, he or she will distribute them to all project stakeholders for review and comment. Once a Contractor joins the project, the Design Professional and Contractor can decide who will maintain the meeting minutes going forward.

**General Contractors
and Construction
Managers**

UCF retains a pool of pre-qualified Contractors on Continuing Service Contracts. Minor projects are typically assigned to this pool of Contractors in accordance with the [Award of Minor Projects to Continuing Service Contractors Selected through a Qualifications Basis](#) policy.

General Contractors

General Contractors (GC) are often used for projects with a defined scope that do not need significant cost estimating or pre-construction services. GCs can be rotated, justified, or competitively bid to award projects. There are advantages and disadvantages to each selection method. A number of factors should be taken into consideration when determining the selection method, which the PM should follow. These factors should include, but not be limited to, the following:

- Time
- Cost
- Type of Project (General, Lab, Exterior)
- Workload

Job Order Contractors

Job Order Contractors (JOC) are a subset of general contractors, which have executed a Job Order Contract amendment with the University. Job Order Contractors compile project cost estimates using values from the RS Means Database then apply their contract percentage increase to the total. The University limits JOC projects to under \$500,000.00 in construction cost. The primary benefit to the PM of using JOC is to shorten project delivery time, as the project does not have to wait for bidding to occur. JOC contractors tend to develop institutional knowledge the more they are used, which improves their productivity over time.

Construction Managers

Construction Managers (CM) are used for projects that are sufficiently large or complex that may require cost estimating, value engineering, or scheduling during the design phase; that require coordination with many subcontractors; and/or with schedules that require early purchasing of long-lead equipment. The CM then provides a GMP for the project's construction phase, and executes the construction of the project. A GMP requires more accounting documentation than a hard-bid project, such as certified payroll and expense documentation.

General Contractors and Construction Managers are generally referred to as "Contractors" throughout this document.

Additional Vendors

UCF also has continuing services vendors for the following disciplines. Refer to the FP&C website [Continuing Services Firms List](#) for a complete and current list of vendors on active Continuing Service Contracts (CSC).

- Architects
- Civil Engineers
- Commissioning
- Building Envelope
- Building Envelope Contractor
- Landscape Architect
- Landscape Contractor
- Mechanical Contractor
- Mechanical Contractor \$200K
- Minor Projects GC - \$500K
- Minor Projects GC - \$2M
- Roofing
- Threshold Inspection
- Tree Care Services
- Electrical
- Mechanical, Electrical, Plumbing – Fire Protection
- UES Utilities – Professional
- Fire Alarm Systems
- SEM Plant Maintenance
- Natural Gas
- Intramural Turf Fields
- Building Automation Systems
- Test and Balance
- Structural Engineers C&S
- Access and Security Contractor

PROJECT FUNDING

Project Funding Sources**Public Education Capital Outlay (PECO)**

PECO is the primary source of facility funding for the State University System. State universities collectively represent the entity with the highest amount of state government square footage (80 million sq. ft.) of any entity in Florida. Institutions use PECO funds to build new teaching and research facilities, as well as for deferred maintenance to keep existing buildings functional. PECO also can be used to retrofit space in older buildings to serve new functions, like the comprehensive research labs critical to building a more stable, knowledge-based Florida economy. For the last several years, PECO funding has been minimal due to the economic downturn, declining State revenues, and refusal by the Governor to bond PECO projects. There are now years-long delays in funding even the initial design phases of the highest-priority projects, while at the same time, major preventive maintenance activity is not happening on schedule.

Capital Improvement Trust Fund (CITF)

By law, PECO funds cannot be used to construct student life facilities, such as student unions, cafeterias, recreational fields, and wellness or fitness centers. Therefore, these facilities have traditionally been funded by student-paid fees, which are deposited into the state's Capital Improvement Trust Fund. The Building Fee (\$2.32 per student credit hour) and the Capital Improvement Fee (\$6.76 per student credit hour) were established at their current levels in 1988 and have not changed, even though inflation and student enrollment have increased dramatically. In 2010, the Florida Legislature directed that a survey be conducted to collect more details on the student life facilities needs of the State University System. The survey showed \$2 billion in needs, the majority of which could be funded from bonds that are paid for from student service fees; however, the demand for student facilities would never be met within the existing framework and bonding availability. CITF funds may be released to the universities yearly, or they may be held for a period of several years before being released. In the past, CITF funds have been used to support such projects as the Student Union, the Recreation and Wellness Center, the Career Services Building, and other student support-type projects. For the past few years, the Student Government Association has elected to use the funds for the Library Expansion project.

Critical Deferred Maintenance

For two years, one-time Critical Deferred Maintenance funds were received by the State for specific projects. Projects that were funded had specific funding amounts associated with them, and allocated funds could only be spent on the approved project. The funds must be encumbered within 31 months or are subject to

reversion, which makes initiation and completion of these projects a high priority.

Other State Funding

At the discretion of the State Legislature, and with approval by the Governor, some capital projects are funded with General Revenue funds, funds set aside for economic development, or other sources. This requires special legislation and is not typical.

Debt

The Board of Governors approves all debt incurred by the universities or their Direct Support Organizations (DSOs). In order to ensure that the universities and their DSOs engage in sound debt management practices and that their use is consistent with the university mission, the Board of Governors requires all universities to adopt debt management policies consistent with their guidelines. Bond financing normally is restricted to projects that can produce revenue (e.g., parking garages, student housing, etc.).

Donations (Gift-In-Kind)

UCF may receive donor funds through the UCF Foundation, Inc. for specific projects or as part of a larger capital campaign. These funds must be allocated in accordance with the donor's wishes and must comply with any terms of agreement. It should also be noted that use of donor funds must follow all policies and procedures of the University and of Facilities and Safety, including the procurement of Professionals and Contractors to perform work. For a number of years, the State funded the Alec P. Courtelis State University System Facility Enhancement Challenge Grant Program for the purpose of assisting the SUS in building high- priority instructional and research-related capital facilities. Under this program, the foundations serving the universities solicited gifts from private sources to provide matching funds for capital facilities. This program became defunct during the economic downturn and has not been re- instated.

Carry Forward

Funds that are unspent at the end of the fiscal year become carry forward funds, which are removed from department budgets and collected into a central pool. While return of the funds is not guaranteed, they have been given back to the departments for the past 7 to 8 years. Typically, the Associate Vice President for Administration & Finance (Facilities & Safety) "sweeps" this funding and uses it to fund deferred maintenance projects or projects of importance to the University. Requests are submitted using the Carry Forward Funding Request Form.

Auxiliary Enterprise Funds

An Auxiliary Enterprise is a budget entity comprising ancillary support units on each university campus. Major activities include student housing, food service, bookstores, central stores, some facilities maintenance, and computer support. Auxiliaries cannot be supported by Education and General (E&G) funds and must

operate as self-funded business units. There are a number of auxiliary organizations within UCF that generate income and pay for projects using auxiliary funds.

Direct Support Organization (DSO) Funds

Board of Governors Regulation 9.011 authorizes university Boards of Trustees to allow direct support and health services support organizations to use university property, facilities, and personal services. Conditions and requirements for use must be established, such as budget, audit review, and oversight. DSOs must comply with BOG regulations related to design and construction of facilities, which has been a source of discussion at UCF, where at least one DSO has developed its own purchasing policy and often solicits its own professional and construction firms.

Public Private Partnerships (P3s)

The Board of Governors has adopted a regulation to cover P3s, but because of the constraints placed on universities wanting to enter into P3s, they are not common.

University Self- Funding

Because of reduced State funds and restrictions on tuition increases, and because facility demands are not being met, UCF has undertaken self- funding for a number of projects over the last two years. All of these projects follow State- approved processes. Technology Fee projects fall into this category.

Department Funding

The majority of our Minor Projects are self-funded by individual departments, using their E&G funds. Often, these departments must save for multiple years to fund building improvements. Therefore, these departments are always critical of project costs due to limited available funding.

Budgeting Design Fees

BOG regulation 14.077 (1)(a), states: "For professional services, the contract shall be negotiated using the Department of Management Services (DMS) approved fee schedule as a guideline for individual projects or maximum hourly rates for Campus Service Agreements and design criteria agreements. The fee schedule to be used shall be negotiated based on the level of complexity and the scope of the services required, and shall be based on historic fee data. The basic fee schedule shall relate the fees to the complexity and size of the project and provide a guideline for negotiation of a fair, competitive, and reasonable fee for the services to be provided."

The DMS fee curve is a web-based tool, located at the link below:

https://www.dms.myflorida.com/business_operations/real_estate_development_and_management/building_construction/forms_and_documents/design_professional_fee_guidelines/fee_guide_calculator_for_ae_services

DMS Fee Curve

The DMS fee curve considers the dollar value and complexity of the project as described by seven categories in the table below:

A	Considerably more than average complexity	Complex Laboratories, Medical Hospitals
B	More than average complexity	Average Laboratories, Mental Hospitals, Simple Medical Hospitals, Clinics, Court Houses, Theatres, Complex University Buildings, Special Purpose Classrooms, Laboratory Classrooms, Libraries, Auditoriums, Museums, Air Terminals, Food Service Facilities, Specialized Detention Areas, Detention-Treatment Areas, Residences, Emergency Management Centers
C	Repairs and Renovations	Miscellaneous Repairs and Renovations, Alterations to Office Space or Dormitory Space, Fire Code Corrective Work
D	Average complexity	General Office Space, General Teaching Space, Gymnasiums, General Detention Living Facilities, Factory Buildings
E	Less than average complexity	Apartment Buildings, Dormitory Buildings, Service Garages, Stadiums, Repetitive Design Facilities, Office Buildings with Undefined Interior Space (open for later partitioning), Specialized Parking Structures
F	Considerably less than average complexity	Warehouses, Parking Garages, Storage Facilities
G	Building Engineering Services	Mechanical, Electrical and Structural not exceeding \$1,000,000 in construction; not including Site Civil

The Architect/Engineer initiates a design proposal by generating a written letter describing the project scope, schedule, concept budget, and proposed design fee. The Project Manager must verify that the proposed fee does not exceed the recommended amount from the DMS fee curve based on the project budget and complexity. On smaller projects, the Architect/Engineer may base their proposal off an estimated number of hours per staff member, multiplied by that staff member's hourly rate – in these cases, where reasonably justified, the fee may exceed the DMS fee curve. The PM must always attempt to keep design fees at a fair and reasonable level for the benefit of the University and our campus clients.

Basic and Additional Services

UCF has developed the [Basic and Additional Services for Major and Minor Projects](#) policy to define what services are a standard service versus a specialized service. Basic services are expected to be part of an Architect/Engineer's base fee, as determined by the Department of Management Services (DMS) Fee Curve; where additional services are considered extra services in addition to the DMS Fee Curve.

The Project Manager must familiarize themselves with this policy to ensure the University is not over-charged for professional service fees.

ADDITIONAL SERVICES & EXPENSES:

The following services are considered Additional to Basic Services and are not included within the basic fee represented by the fee guides:

Feasibility Studies/ Analysis	Facility Programming
Master Planning	Soils Investigations/Reports
Surveys -Topographic/Boundary <i>Vegetation/Improvements/Utilities</i>	Measured Drawings of Existing Facilities
Site Environmental Assessments	Existing Facilities Analysis
Toxic Substance Mitigation Surveys and Consultation	Site DRI, PUD, Site Plan Review and/or Zoning Modifications
Site Lighting Design	Existing Site Utility Infrastructure Improvements
Specialty Consultants <ul style="list-style-type: none"> <i>Voice/Data Communications</i> <i>Electronic/Audio Visual</i> <i>Food Service Equipment</i> <i>Hazardous Material</i> <i>Hospital/Laboratory</i> <i>Interior Design</i> <i>Indoor Air Quality</i> <i>Quality Control</i> <i>Theater/Acoustical</i> <i>Security</i> 	Civil Engineering Design <ul style="list-style-type: none"> <i>Paving</i> <i>Grading</i> <i>Utilities</i> <i>Drainage/Storm-water Management</i> <i>Environmental & All Site Permitting</i>
LEED Consultation	Graphic and Signage Design
Life Cycle Cost (ROI) and/or Federal DOE Energy Analysis	Special Code Reviews including ACHA
Detailed Cost Estimates	Structural Threshold Inspections
Documents Prepared For: <ul style="list-style-type: none"> <i>Alternate Bids Exceeding Contract Scope</i> <i>Excessive Change Orders</i> <i>Multiple Construction Contracts</i> <i>Record Documents/As-Builts</i> 	Reimbursable Expenses* including, but not limited to: <ul style="list-style-type: none"> <i>Reproduction/printing costs</i> <i>Travel expenses</i> <i>Special mail service expenses</i>
Prolonged Construction Contract Administration Services	Project Representation During Construction Beyond Bi-Monthly Administration
Administration Services for Multiple Contracts	Building Commissioning and Training Services
Additional Construction Contract	Renderings/ Models
Owner Requested Changes to Approved Documents	Post Occupancy Inspections/ Evaluations
Substantive Changes to Scope, Size or Complexity	

UCF STANDARDS AND REQUIREMENTS

Owner's Standards

In construction, UCF is considered to be an Owner, who is responsible for requesting and funding work. Vendors who bid on projects are required to perform the work required to complete the project in compliance with the Owner's Standards. UCF Construction Contracts define Owner's Standards as:

- The executed construction Agreement and all exhibits;
- proposal(s) submitted by contracted vendors and accepted by Owner in writing, if any;
- the plans, drawings and specifications for the Work ("**Construction Documents**") but only after said Construction Documents have been completed by Professional and approved in writing by Owner;
- any amendments or addenda executed by Owner and Vendor;
- Owner approved Change Orders;
- UCF Standards
 - UCF Design, Construction, and Renovation Standards
 - UCF Professional Services Guide
 - UCF IT Telecommunications Design Standards
 - UCF Office of Instructional Resources Standards
 - UCF Green Building Construction and Renovation Requirements
 - UCF Building Energy Systems Commissioning Procedure
- All other standards of Owner in effect at the time of the performance of the Work

These are collectively referred to as "**Owner Standards**".

UCF Standards

Compliance with the UCF Standards is mandatory on ALL projects, both small and large. All contracts are written to ensure compliance, for both Major and Minor projects.

UCF Design, Construction and Renovation Standards

The Project Manager must review and understand the current version of the UCF Design, Construction and Renovation Standards (posted on the FP&C website under Resources). All Scopes of Services and Scopes of Work must reference these standards to ensure compliance.

Prior to payment for any design deliverable, the A/E must submit a completed Critical Needs Checklist, which references specific

**Professional
Services Guide**

drawings and specifications as necessary, addressing critical need items. The PM must ensure that this document is complete and accurate prior to approval of Professional service invoices.

Projects without A/E services, designed and submitted directly by Contractors, are also required to comply with UCF Standards. The contractor shall ensure the standards are applied to the design, indicate the standards version and applicable features on the documents, and seek deviation when necessary.

Any deviations to the UCF Standards must be submitted in writing to the Standards Committee, and must follow FS 2012 FPC0005 – Use of the UCF Standards regarding Exemptions and Change Orders. Deviations presented solely to save costs will not be considered.

Any revisions to the UCF Standards must follow procedure FS 2013 FPC0014 – Revising the UCF Design, Construction, and Renovation Standards.

The UCF Professional Services Guide (2013) is displayed on the FP&C website under Resources, and is referenced in the Design Professional contract. This document provides valuable information regarding the delivery of project documents, including:

- Understanding the Owner
- Communications, Meetings, and Minutes
- Site Information
- UCF Standards (reference)
- Drawing Requirements
- Drawing Phases
- Bidding and Award
- Construction Administration
- Design approval exhibits

PMs must review and understand the contents of the Professional Services Guide. If conflicts are discovered with recent policies and procedures, bring them to FP&C leadership for resolution.

**UCF IT
Telecommunications
Design Standards**

Guidelines created to assist the Architect / Engineer / Construction Manager Design Team (A/E/CM) in designing a project to UCF and Telecom Industry Standards. More information can be found at the [UCF IT webpage](#).

**Office of
Instructional
Resources
Standards**

Multimedia spaces, equipment, and control design shall be approved through the UCF Office of Instructional Resources (OIR). This document provides additional standards and equipment specification information related to OIR items. Additional information can be found on the [OIR webpage](#).

**Green Building
Construction and
Renovation
Requirements**

Wordmark used with the
permission of the US Green
Building Council

**Building Information
Modeling**

UCF continues to make substantial commitments to the stewardship of environmental resources. The University has established minimum standards for design, construction and operations of high-performance green buildings. Buildings are UCF's primary contributor to CO2 emissions on campus. In support of the UCF President's Climate Action Plan, the University strives to balance environmental responsibility, resource efficiency, occupant comfort and well-being, and community sensitivity, with an overall goal of becoming carbon neutral in 2050.

UCF will adhere to the latest version of the Leadership in Energy and Environmental Design (LEED) program, established by the U.S. Green Building Council (USGBC), for all new construction and renovation projects, regardless of funding source. Each project shall strive to achieve the highest level of certification, with emphasis on conserving precious water resources and improving energy efficiency.

UCF requires that LEED standards are achieved, as outlined in UES's "[Green Building Construction and Renovation Requirements](#)". UCF requires LEED Gold as the standard, and specifies 22 mandatory credits (49 mandatory points) that must be achieved by the design and construction of the project.

For small Minor Projects, LEED is not required. If the PM is unsure if a project qualifies, he or she should request clarification from FP&C and UES leadership.

Building Information Modeling (BIM)

When Building Information Modeling (BIM) software (such as Revit) is used on a project, a BIM Execution Plan (BEP) must be developed by the Owner, Architect, and Contractor. All parties are expected to participate in clash detection workshops during Design Development and Construction Document phases to minimize drawing conflicts for major building systems.

OTHER REQUIREMENTS

Design Elements

Large projects may also include the following basic requirements. These components are in addition to those listed in the UCF Standards, which the PM must also be familiar with and coordinate where applicable.

Interior Finishes

The choice of interior finishes must consider the long-term maintenance needs of the University. The selection of materials shall be assessed for long-range, life-cycle cost analysis. The PM must be familiar with UCF Standards Division 9 – Finishes, and ensure that all proposed finishes are consistent with these requirements.

For large Minor Projects and all Major Projects, the Architect or Interior Designer shall provide a non-returnable, detailed interior color board, including all paints, wall tiles, grouts, wood door finishes, millwork, cabinet/countertops, and any other publicly visible interior finishes as identified in UCF Standard Critical Need CN9-2.

The Senior Director, Facilities Planning and Construction is the ultimate approver of all interior finishes.

FP&C has developed a set of pre-approved coordinated interior finish selections, including carpet, paint, base, tile, wood accent panels, and other associated finishes. If these finishes are acceptable to a campus client, no further approvals are required.

CPTED

Crime Prevention Through Environmental Design (CPTED) is a multi-disciplinary approach to deterring criminal behavior through environmental design. Construction Managers, Architects, Landscape Architects, CPTED-trained UCF Police personnel, and Facilities staff are to work together to ensure that current CPTED principals and recommendations are incorporated into the design of all UCF new construction and renovation projects. The UCF Project Manager will coordinate these efforts, involving the proper stakeholders throughout the design phase of a project

Art-In-State

Established in 1979, Florida's Art-In-State program sets aside up to 0.5% (one half of one percent) of the construction budget for PECO state funded projects, up to \$100,000, for the procurement or development of art within new buildings. These funds should be identified and set-aside early in the project. It is important to note that this requirement is not in place for projects that are not PECO-funded. For projects where Art-In State applies:

The FP&C director will determine the FP&C representative(s) for the Art-In-State committee for each project. The committee will set the parameters and priorities for the artwork, solicit artist proposals, shortlist and interview final artists, and select the final artist.

**Material and
Equipment Selection**

Once an artist is selected, the PM will coordinate meetings with the artist, committee, and architect to finalize the art design, and ensure that it is coordinated with the design of the building. If the design requires modification to architectural, structural, or MEP drawings, the architect will coordinate these modifications as part of basic services.

The PM must ensure the project budget contains a line for this cost, and funding for the cost has been added to the project. The PM will need to issue a commitment for the Artist, so a Purchase Order can be created. The artist is typically paid a flat fee in installments, and is responsible for the cost of obtaining all approvals and permits related to the art, conceptualizing, designing, fabricating, insuring up to final acceptance, transporting, and installing the art. UCF will enter into a contract with the artist, which will detail the duties and responsibilities of each party. The Resource Management Business Systems Analyst or Senior Manager, Office of Contracts and Real Estate Management (OCREM) can provide the PM with the contract and more specific information.

Materials for use on UCF projects shall be selected to provide optimum service and lowest maintenance for the cost. As a best practice, products and materials manufactured in the U.S. and Florida should be used if possible. Projects pursuing LEED certification must incorporate regionally-available products and materials. Federally-funded projects may require incorporation of, and adherence to, Buy American provisions.

Drawings and specifications shall be prepared so that the bidder will be permitted a choice of materials or equipment that are equally satisfactory for the intended purpose, and comparable in cost and quality when subjected to open market competition.

The Design Professional shall comply with the provisions of UCF Standards or justify, and obtain University approval for, proposed variations. Manufacturers listed in the UCF Standards are included to establish a standard acceptable to the University and are not intended to exclude others unless specifically stated. "Or equal" is implied, even if not stated, unless the list of acceptable manufacturers is appended with the phrase "No others are acceptable," in which case substitutions are not allowed.

The use of asbestos or asbestos-based materials (including vinyl asbestos tile) is prohibited in buildings being renovated, remodeled, or constructed for the University.

**Code Compliance
and Life Safety**

With each design submittal, the Design Professional shall provide a listing of all codes and regulations applicable to design of the project. The Design Professional shall abide by and certify compliance with same by signing & sealing construction documents at the 100% CDs and/or Conformed Bid Documents stage, and at issuance of partial documents for fast-tracked construction.

Space Summary and Area Calculations

At the end of each phase of design, the Design Professional shall calculate the area of the facility to be constructed or renovated using AutoCAD or BIM as outlined below. This information must be indicated in the drawings. Space quantities shall be tabulated using the University's form, to allow for a comparison at each phase to the original program and prior design submittals.

- **Gross Square Feet** - Determine the total building gross square feet by adding the sum of the floor areas of the building included within the outside faces of exterior walls for all stories, or areas that have floor surfaces. Gross area should be computed by measuring from the outside face of exterior walls, disregarding cornices, pilasters, buttresses, etc., which extend beyond the wall face. Gross area should include basements (except unexcavated portions), attics, garages, enclosed porches, penthouses, mechanical equipment floors, lobbies, mezzanines, all balconies (inside and outside) utilized for operational functions, and corridors, provided they are within the outside face lines of the building. Stairways, ducts, and mechanical service shafts (excluding elevator shafts) are to be counted as gross area on each floor through which the shaft passes. Exclude open courts and light wells, portions of upper floors eliminated by rooms or lobbies that rise above single floor height, but include non-enclosed covered walkways.
- **Net Assignable Square Feet** - Determine the sum of room areas, excluding non-assignable areas. Room area is defined as the net area of the room in square feet, measured between the inside surfaces of walls and partitions. Non-assignable areas include interior circulation space (including stairs), custodial areas, mechanical and electrical rooms, structural areas, public rest rooms, exterior circulation space (including stairs), elevators, elevator machine rooms, elevator shafts, and telecommunications & security equipment areas.
- **Non-Assignable Square Feet** - Determine the net room area of all non-assignable spaces as defined in Item #2 above.
- **Impervious Surface Gross Square Feet** - Measure impervious surfaces created as part of the project site plan, including sidewalks, service drives, parking, plazas, etc., excluding areas covered above.

Designers shall consult the State Requirements for Educational Facilities (SREF)

<http://www.fldoe.org/core/fileparse.php/7738/urllt/srefrule14.pdf>,

which serves as the University's space planning guideline, particularly Chapter 3 for space programming guidance and Chapter 6 for space size and occupant design criteria.

Emergency Shelters

Section 1013.372 of Florida Statutes provides that protective public shelters should be considered when constructing educational facilities. The Design Professional shall assist DEM in evaluating the proposed construction for appropriateness for use as a protected public shelter. The degree of compliance will depend on factors which vary with the type, size, location, and cost of the individual structure or facility. Unless specifically instructed otherwise, the Design Professional will consider such protective construction in the planning, and shall provide an evaluation of its cost.

Generators

Building generators must only be used for life safety components. The PM must coordinate with the Design Professional to select and specify the proper generator size for the project. If additional generators are desired for research equipment or other considerations, duplicate generators must be provided to separate those needs from life safety needs. The UCF Standards contain additional information and requirements regarding generators. The entity responsible for funding the maintenance of non-life safety generators must be discussed and agreed upon in writing during the design phase.

Permits for generators must be coordinated through EHS. The PM should contact the Environmental Management Coordinator for additional information and requirements. See the EHS website for additional information (www.ehs.ucf.edu.)

Electrical Projects

Buildings at UCF, especially older facilities, may have undergone many renovations over time. Current sets of drawings, especially electrical drawings, may only exist for recently constructed buildings. Investigations by Facilities Operations have shown that most of UCF's research buildings (Biology, Chemistry, CREOL, Engineering, and Physical Sciences) are near their electrical capacity for both regular electrical panels, MDP panels, and generators. The addition of further electrical to these buildings is therefore heavily scrutinized.

Facilities Operations has developed a Standard Operating Procedure, [FS 2016 FO0007](#) Completing the Electrical Panel Load Calculator, which provides guidance on filling out the Electrical Panel Load Calculator for permitting purposes. Electrical Designers and Contractors are required to follow this procedure when designing or constructing projects with added electrical capacity. The PM must make all Designers and Contractors aware of this procedure. This policy, and the [Electrical Panel Load Calculator](#), is on the FP&C website. Additionally, the AVP of

The AVP of Facilities and Safety must review all construction drawings with electrical scope prior to submission for permit.

Facilities and Safety must review all construction drawings with electrical scope prior to submission for permit.

Fire Alarm

UCF maintains contracts with Continuing Service fire alarm vendors, so that they can be used for fire alarm repair, renovation, or replacement projects. These groups can be used to design and install these systems, or bid on design packages produced by third party engineers.

All fire alarm designs must comply with the UCF Fire Alarm Detection Systems Section 28 31 00 (found on the FP&C website at (<http://fp.ucf.edu/resources/specifications/>)) The PM must review and understand the requirements of this document, and refer to it in the Scope of Services and Scope of Work documents related to any projects that include new, modified, or replaced fire alarm systems.

Fire alarm systems are important Life Safety systems that must be in operation throughout the occupancy of projects. When taken off-line for more than 4 hours, a fire watch (people physically present in the building to visually watch for fires) is required. Fire watches require significant labor, and are expensive; therefore, taking fire alarms offline should be closely coordinated with the time frame minimized whenever possible. If a fire watch is required, the PM must follow policy FS 2013 FS0010 – Facilities and Safety Fire Watch Procedures.

Fire alarm projects are Life Safety projects, and thus must carry a high priority in the PM's portfolio of projects.

Fire Suppression

The Fire Protection Engineer will design, at a minimum, the primary branch line distribution and indicate this scope on the bid documents.

Furniture, Fixtures, and Equipment

Many furniture vendors provide furniture resources to UCF, and some distributors may have established relationships with end users. However, furniture design and installation often trigger the need for permitting, which makes it a Minor Project.

FP&C has developed a process for furniture review that does not require the submission of a Minor Project. End users can fill out the Furniture Review Form and submit it to FP&C for review. This process is described in detail on the FP&C website under "Submit Project Request". If the furniture requires power or triggers changes to life safety components which makes a permit necessary, then a Minor Project request must be completed to properly evaluate and design the furniture solution.

Major Projects must follow Procedure FS 2013 FPC0016 – Procedure for the Design, Procurement, and Installation of Furnishings and Equipment for Major Projects. Major Projects that use construction funds to purchase furniture and equipment must

*The **AHJ** for UCF construction projects is the UCF Building Department.*

follow Procedure FS 2013 RM0017 – Furnishings & Equipment Approval Procedure, for the financial approval of FF&E.

Florida Product Approval

As required by Florida Statutes, the Builder must provide information on certain structural and building envelope products and components to the Authority Having Jurisdiction (AHJ). Therefore, the Design Professional must ensure that products, materials, and systems subject to such approval are specified accordingly. The AHJ for UCF construction projects is typically the UCF Building Department. Product submittals are reviewed during Plan Review, or as required if product changes are made during construction.

Quality Control

The Design Professional shall thoroughly review, check, and coordinate all elements of each submittal, including those created by consultants, to eliminate errors, omissions, and conflicts. These checks shall be made by persons other than those preparing the material, and the name of the reviewer shall be indicated on all drawings, computations, and other submittals.

Each design submittal shall include a certification (part of the Critical Needs Checklist) confirming that the design:

- Meets the requirements of the facilities program, the OPR, and the BOD
- Has been coordinated between disciplines for accuracy, consistency, quality, and constructability
- Complies with the UCF Standards

If design reviews indicate a lack of such quality assurance & control, the materials may be rejected and returned for revision.

State Contracts

The State of Florida, under the Department of Management Services (DMS), has a number of commodity contracts generally referred to as "State Contracts," under which state institutions can purchase goods and services. The full list of products and terms of these agreements can be found on the DMS website at http://www.dms.myflorida.com/business_operations/state_purchasing/. Flooring and furniture are the two primary products that are related to work performed by FP&C:

Flooring

Currently, there are two state contracts in DMS for flooring:

[Flooring Materials, with Related Supplies and Services](#)

30161700-20-ACS

Contract Term

02-17-2020 to 10-11-2023

Description

This alternate contract source includes indoor/outdoor, resilient, ceramic tile, porcelain tile, wood, hardwood, linoleum, rubber, vinyl,

broadloom, carpet tile, epoxy, and other flooring hybrids, floor mats, area rugs, and floor cleaning services; this contract also includes installation services, which may be at an additional cost to the customer.

[Floorcovering and Installation Services](#)

52100000-19-ACS

Contract Term

07/30/2019 to 12/14/2020

Description

This alternate contract source includes carpet (modular, six-foot broadloom, and 12-foot broadloom) and hard flooring (luxury vinyl tile, vinyl composition tile, sheet goods, and rubber flooring); this contract also includes installation services, which may be at an additional cost to the customer.

Prior to proceeding with a Scope of Work to a vendor, the PM must visit the above website and verify which vendors are still under contract with DMS.

These contracts allow UCF to select a specific manufacturer and product.

Furniture

There are many state contracts which provide preferred pricing for types of furniture to state entities, as defined by the contract agreements. All information related to these contracts (pricing, terms, conditions, expiration dates, etc.) can be found on the DMS website related to furniture.

[PRIDE](#)

94131608-16-P

Contract Term

02/11/2016 to 02/11/2021

Description

This memorandum of agreement includes apparel, cleaning chemicals and supplies, office supplies, corrugated boxes, outdoor furniture, bedding, traffic paint, and digital services, such as scanning and indexing.

[Furniture](#)

56120000-19-ACS

Contract Term

06-14-2019 to 12-01-2023

Description

This alternate contract source contract includes conference furniture (seating and tables), dormitory furniture, general purpose tables, high density filing, household furniture, library furniture, office furniture, school furniture, specialty seating, and systems furniture; this contract also includes inside delivery, which may be at an additional cost to the customer.

[Office Furniture and Files](#)

425-001-12-1

Contract Term

03/02/2012 to 09/01/2020

Description

This state term contract includes for the purchase of office and conference/public area furniture, including lateral and vertical steel files, dispatch/911 furniture, conference or training tables, mail processing furniture, conference or training chairs, map files, storage and presentation accessories, reception desks, single and multiple seating units, sofas and loveseats (public areas), and occasional tables. Fireproof files, art work and decorative lamps and accessories are not part of this contract.

[Public Safety Communication Equipment, Phase 2: Batteries, Furniture, Towers, and Power Systems](#)

43190000-18-NASPO-ACS-2

Contract Term

01/01/2018 to 06/30/2021

Description

This alternate contract source is for the purchase of support equipment, such as batteries, furniture, towers, and power systems; this contract is only available for products that are not available on state term contracts.

[Laboratory Equipment and Supplies](#)

41120000-20-ACS

Contract Term

03/02/2020 to 03/31/2021

Description

This alternate contract source includes laboratory equipment and supplies, including, but not limited to, apparatus, biologicals, chemicals, consumables, diagnostics, equipment, furniture, and instruments. This contract provides "hot list" pricing for a list of the most frequently purchased products, as well as discounts off the remainder of the Contractor's full-line catalog, excluding products that are not specifically designed or intended for laboratory use. Please refer to "Pricing" in the Contract Information section above for the current "hot list" and discounts offered by category, product pricing group, and market discount band.

Furniture and the Client

Furniture vendors have relationships with campus clients, and often help them directly with their furniture needs on Minor Projects. When FP&C is contacted about furniture, it is recommended that we notify them of the State Contract procedures to add value to their purchases.

For Major Projects, it is recommended that furniture be managed by FP&C as part of the project. Project Managers are experts at

Donations

coordinating the selection, delivery, and installation of significant quantities of various types of furniture in a way that integrates with all other project activities.

Gift-in-Kind (Donated Products or Services)

On occasion, companies will offer to donate facilities-related products or services to UCF, including design services, installation services, or product donations. The University allows this, but this donation must be clearly documented and accepted by the appropriate authorities within the receiving department, University administration, and the UCF Foundation.

The UCF Foundation has a "Gift-In-Kind Form" <https://www.ucffoundation.org/file/accounting-forms/UCFF-Gift-In-Kind-rev-10-10-2018.pdf> which must be filled out by the donor, department, and the UCF Foundation Chief Financial Officer. The form requires donor information; gift information (description, value, conditions, etc.); a fair market value certification; department acceptance; other required approvals (EHS for equipment with a Life Safety component, VP Administration and Finance for equipment requiring maintenance, VP Information Technology & Resources for technology); and final UCF Foundation approval. The product(s) or service(s) cannot be accepted until this form is completed and approved in its entirety. The PM must inform the client about this form and the accompanying requirements. The department client must coordinate and obtain all required information and approvals related to this form, and provide a copy of the completed form to the PM for record, prior to starting any work.

Once the donation of a product or service is approved, the PM must take additional steps to ensure that the product or service meets the quality standards required by UCF. The PM must write a Scope of Service and/or Scope of Work stating the required UCF standards for products and services. Products (carpet, tile, equipment, etc.) must meet UCF Standards for quality and durability. Service companies (finish installation, design services, etc.) often will not have a contract with UCF, so language must be written into Scope of Service and/or Scope of Work to ensure that UCF receives the design and installation quality necessary for a successful project.



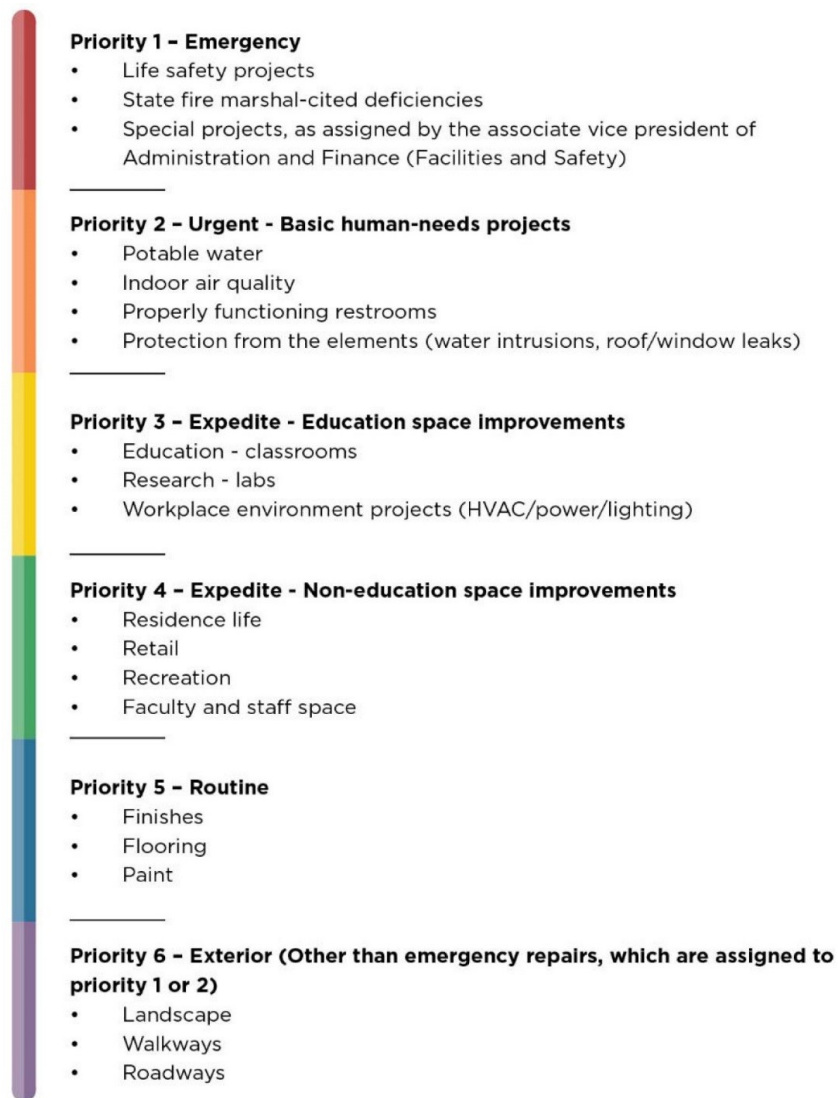
MISCELLANEOUS

Project Priorities

This priority diagram illustrates the priority level and descriptions of our projects. This list was developed and approved by the F&S Working Group, comprising representatives from across campus.

FP&C must prioritize all projects due to the volume of the project workload. Leadership and the PMs must meet regularly with campus clients to discuss the priority of their individual projects and to ensure that their needs are being met.

All projects, when initiated, are assigned a priority level. It is critical for the PM to understand the priority level of each project, so he or she can properly prioritize his or her work load. PMs must use e-Builder to manage their projects, and attempt to expedite projects with higher priority levels. PMs must contact a director with any questions or concerns regarding project priorities.



Project Cancellations

It is also important to note that projects with no client activity for over 60 days should be cancelled, as inactive projects cannot be kept open indefinitely. Inactive projects can be reactivated in e-Builder without restarting the Minor Projects process.

Professional Services and Contractor Orientation

FP&C holds annual Professional Services and Contractor Orientation meetings for its vendors. The Manager, Minor Projects coordinates and spearheads this meeting, with assistance from other members of the FP&C department. A representative from every Continuing Professional Service vendor is expected to attend, and a sign-in sheet will be used to track attendees.

The meeting will cover the following topics:

- Facilities and Safety Organization
- FP&C Organization, Mission, and Vision
- FP&C workload overview
- FP&C new project process
- Cost and Schedule requirements
- UCF Standards and deviation process
- Critical Needs Checklist
- Owner's Project Requirements, CxA, LEED
- Permitting and Bidding
- GC selection
- Substantial and Final Completion
- Close-out
- Accounting, Invoicing
- Vendor Evaluations

The Orientation presentations are located on our website at www.fp.ucf.edu/resources.