

**UC MERCED CAPITAL PLANNING PROCESS  
CAPITAL PROJECT DEVELOPMENT**

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## **I. Executive Summary**

The purpose of this process paper is to clarify the roles and responsibilities involving principal unit heads reporting to the Vice-Chancellor for Administration for matters that relate directly to capital planning, physical planning, design and construction, environmental permitting, and environment health and safety. This information is made available to the UC Merced campus community for purposes of explaining and identifying both UC policy and campus procedures associated with capital project development.

## **II. Overview of the UC Merced Capital Planning Process**

The Office of the Vice Chancellor – Administration manages the capital planning process at UC Merced, primarily through three key units: 1) Capital Planning; 2) Physical Planning, Design & Construction (PPDC); and 3) Environment, Health and Safety (EHS). The process includes consideration and management of a variety of capital related matters including: space planning - detailed project programming, siting of buildings, land-use considerations, architectural design, construction and outfitting, and building occupancy for structures renovated or constructed in support of the mission of the University. Project scope typically includes new construction; renovation of existing facilities; infrastructure/utilities improvements; acquisition of capital equipment; or life-safety related projects. The framework to guide capital improvement projects is provided through a key-planning document located on the UC Merced Website: the Long Range Development Plan.

UC Merced Link: <http://www.ucmercedplanning.net/information/draftuclrdp.html>

Companion to the campus LRDP are draft campus design standards, and principles of environmental stewardship/sustainability. Sustainability is an important component of capital project design, construction, and operating practices that focuses on conservation of natural resources. The UC Green Building Policy and other related information can be found on the Web at:

UCOP Link: <http://www.ucop.edu/facil/greenbldgs/>

UCM Link: [http://www.ucmerced.edu/about\\_ucmerced/environmentalstewardship.asp](http://www.ucmerced.edu/about_ucmerced/environmentalstewardship.asp)

The following overview explains the two major components of the capital process: the capital improvement program (capital resource planning) and capital project development (individual projects moving from concept to occupancy).

### **I. State and Non-State Capital Improvement Programs**

#### ***State Program***

The State Capital Improvement Program, also known as the State CIP, entails an annual process to identify a "rolling" five-year capital program. The funding is typically made

available through California voter-approved bond elections; that is, if the voters approve a bond measure, the State sells General Obligation bonds and pays the debt service through General Fund allocations (tax collections). The Campus works closely with the Office of the President in all aspects of the State program, including the types of projects eligible for the funding, the amount of the five-year funding allocation, and the cost and schedule of the projects. The focus of the State program is on instruction and research, including closely related support activities, infrastructure, and utilities. On the Campus, the Chancellor has established a broadly represented campus committee that is responsible for identifying the space and capital needs of the campus, discussing and reviewing specific projects that could meet those needs, and recommending a prioritized list of projects for inclusion in the State CIP. That committee is the Campus Physical Planning Committee (CPPC). The process schedule for the State Capital Improvement Program, along with a description of the Campus Physical Planning Committee appears in **Appendix A**.

### *Non-State Program*

The Non-State Capital Improvement Program complements the State program as it covers facility needs such as housing, dining, parking, recreation, and other non-academic needs. Because of the wider array of projects and fund sources, the Non-State program is larger and growing more quickly than the State program within the University of California system. Non-State projects are driven many times by targets of opportunity created by rapidly evolving funding availability or programmatic requirements. CPPC does not prioritize these projects; the needs and funding emanate from the pertinent campus unit. This includes, for example, new student housing that is pursued by Student Affairs in coordination with Administration and funded by student housing fees. Funding for Non-State projects may include gifts, campus reserves, internal university funds, or external financing (approved by The Regents). Financing may be secured by campus funds including revenues and fees.

The approval process for these projects is varied and depends on the type of funding and total cost of the project. The Vice-Chancellor for Administration, or the Chancellor can approve select capital projects according to total project cost and the type of funding. Certain projects based on total project cost or the need for external financing must go before the UC Board of Regents for budget approval. For a concise summary of these approval thresholds, please see **Appendix B**.

## **II. Capital Project Development**

Below is a chronological listing of the six major phases involved in developing a major capital improvement project, with each phase broken down into detailed steps, which are listed in the index on the left. It should be noted that not all projects entail all of the steps or follow the exact sequence depicted below.

### *Phasing of Projects*

1. **Initial Planning:** this includes preparation of a Detailed Project Plan (DPP) and Project Planning Guide (PPG), or their equivalent depending on the total dollar value of the project and required approvals. (See DPP section that follows). An important element of space planning includes consideration of State, University and Campus space and design guidelines, including adherence to California Post-Secondary Education (CPEC) space allowances and utilization standards for State-funded projects. The DPP effort includes development of a conceptual cost estimate prepared by an outside cost estimator, and may include a preliminary list of furniture and moveable equipment with a statement of probable cost.
2. **Preliminary Plans (“P”):** this includes schematic design and design development
3. **Working Drawings (“W”):** this includes construction documents and specifications used to “bid” the project.
4. **Construction (“C”)**
5. **Equipment (“E”):** this includes furniture and movable equipment.
6. **Post-Occupancy:** this includes a post-occupancy evaluation by the building users and planners.

### *Needs and Feasibility Assessment*

The development of capital projects is driven by the needs of the Campus. Academic projects in particular are developed based upon approved academic plans consistent with the mission of the University and the objectives of the campus. Through needs assessment -- the first step in the development of capital projects -- the feasibility of a capital project can be determined. In most cases, this step is initiated at the Vice Chancellor level by or on behalf of the prospective users.

During this initial stage, the project is defined in broad terms and its framework is established through use of elementary guidelines such as:

- Project justification (programmatic requirements, space requirements, etc.)
- Project classification (offices, classrooms, laboratories, infrastructure, etc.)
- Project occupants/users (students, faculty, staff, community, etc.)
- Project location such as: Atwater Castle Facilities; Merced (Mondo Building, Main Campus, and Tri-College); Fresno Center; and Bakersfield Center)

Once the needs assessment is completed and the framework is in place, then viable projects can be considered for inclusion into the proposed State Program as part of the CPPC process. If the project becomes a Campus priority, the project advances through the capital project development process where it evolves from its rudimentary beginnings into a fully developed program (i.e., one which entails a well-defined scope of work, justification, project schedule, capital improvement budget, funding plan, and environmental documentation.) Note: Non-State funded projects advance according to need and opportunity and the Non-State Capital Improvement may or may not coincide with the annual "call" for State-funded projects.

### *Cost Estimates*

In connection with the needs assessment phase, the Capital Planning Office prepares a preliminary cost estimate using UC projects as a basis for initial cost comparisons, and with input from the Campus Architect, as well as, from the UCOP Budget Office and UCOP Facilities Administration units, as needed. The estimate is approximate as it is based on a conceptual description of the project. As the project's programmatic requirements are more fully realized through the preparation of the Detailed Project Program (DPP), a more defined construction cost estimate is developed. Upon preparation of the Project Planning Guide (PPG), which is informed by the DPP, a project cost estimate is developed involving both construction costs and soft costs, i.e., indirect costs such as design professional fees, inspection fees, etc. The Capital Improvement Budget (CIB), is a formal document, which expresses the project cost estimate. As the project moves to construction, the CIB may be revised, if warranted, to reflect updated cost estimates. For further information regarding the Cost Factors associated with building at UCM and the various stages involved in determining the cost and schedule of capital projects, please refer to **Appendix C** and Stages that Determine the Cost and Schedule of Projects at UC Merced in **Appendix D**.

### *Funding, Planning, and Analysis*

Once the needs assessment and preliminary cost estimate are known, the Capital Planning Office conducts a funding analysis for the Non-State funded capital projects. The purpose of this analysis is to identify appropriate funding sources and determine the financial integrity of the funding sources and appropriate funding schedules. In addition to the costs normally associated with construction projects, ancillary costs such as interest during construction, costs of financing, and administrative gift fees are identified.

### *Site Evaluation*

Site evaluation is undertaken and a site is selected as early in the process as possible because the choice of site has programmatic, cost, and schedule implications. Programmatic and related facilities information is provided to Physical Planning, Design & Construction (PPDC) by various campus sources, including the Capital Planning Office and the Office of Environment, Health and Safety. PPDC reviews appropriate sites within the context and guidelines of the Long Range Development Plan, and applicable neighborhood plans. PPDC presents its site evaluation to the Building Advisory Committee (BAC) for review and comment. The Vice Chancellor for Administration reviews and decides to present a site evaluation recommendation to the Chancellor and her Cabinet with a presentation regarding the site options and the preferred site choice.

Site evaluations are typically shared with the BAC and presented to the Vice Chancellor for Administration on two occasions, initially for introduction and discussion and subsequently for action. Criteria typically considered by the BAC includes consistency

with the applicable Campus plans and guidelines, compatibility with surrounding land uses, vehicular and pedestrian accessibility, expansion opportunity, displacement impacts, availability of utility infrastructure, and site environmental constraints.

In addition to the above information, the Office of Environment, Health and Safety (EHS), which reports directly to the Vice Chancellor – Administration is responsible for preparing and processing all environmental documentation, and to monitor environmental mitigation, if required.

### ***Building Advisory Committees***

A Building Advisory Committee (BAC) is convened for most projects with budgets exceeding \$400,000 (the threshold for a Major Capital Improvement project). See **Appendix E**. The committee works closely with the selected design professionals to ensure that a capital project meets the goals and objectives of the Campus and users. The membership, which is appointed by the Vice Chancellor - Administration via a charge letter, will vary according to the type of project, but is intended to have a broad representative body of the Campus.

### ***Design Professional Screening and Selection Process***

Capital projects requiring the services of key design professionals adhere to the Design Professional Screening and Selection process coordinated by Capital Planning and directed by the Campus Architect. When such projects are estimated to exceed \$1 million or consultation fees exceed \$100,000, policy requires that the selection process include public advertising to invite design firms to submit documents supporting their qualifications for a particular project. Design professionals are approved by the Chancellor for projects of \$1 million or less and by the Office of the President for projects exceeding \$1 million.

The Design Professional Screening and Selection process entails two committees: a screening committee that narrows the pool (typically resulting in three to five preferred candidates) and the selection committee that interviews such firms. Following the interview process, the selection committee recommends the leading candidate to the Vice Chancellor – Administration. The Vice Chancellor – Administration would then recommend the Executive Architect to the Chancellor or the Office of the President (Senior Vice President - Business and Finance) for appointment. The Senior Vice President of Business and Finance has delegated authority to approve the Executive Architect to the Assistant Vice President – Facilities Administration.

A list of alternates is also provided at this time in the event negotiations with the leading candidate fall through, the appointment is not approved, etc.

The Chair of the Building Advisory Committee, the Campus Architect, and the Capital Planning Director are members of both the screening and selection committees, with the Campus Architect directing both processes. The balance of the membership for each

committee is derived from the Building Advisory Committee. The Vice Chancellor – Administration may serve as a member of the Selection Committee at her discretion.

### ***Detailed Project Program (DPP)***

A Detailed Project Program (DPP) or architectural program is typically developed for the purpose of guiding the project’s design professional in the design process. In addition, the DPP also serves as the foundation for the subsequent Project Planning Guide (PPG). The DPP defines building organization and function for both assignable (e.g., offices and labs) and nonassignable (e.g., elevators and hallways) areas. Normally, a design professional takes the principal role in producing the DPP, working closely with the Building Advisory Committee. Among the topics addressed in the DPP are: the overall assignable square feet (asf) and gross square feet (gsf) of the project; the definition of each room by size, function, and design features; the relationship of the building to its surroundings; site planning; building form and massing; building design criteria; key building components and systems; access and circulation requirements; energy conservation; sustainability; and construction cost estimates.

### ***Environmental Documentation***

The Office of Environment, Health and Safety reviews the project and prepares an Environmental Impact Classification form (EIC). The EIC form is used by the University to determine whether a project has already been analyzed in a certified Environmental Impact Report (EIR), is “exempt” or “categorically exempt” from the California Environmental Quality Act (CEQA), or if an Initial Study or LRDP EIR Amendment should be prepared. An Initial Study is prepared to determine if the project may have a significant effect on the environment that has not been substantially and adequately analyzed in a certified EIR. An amendment to the LRDP EIR is prepared to describe minor revisions to the design or location of a project from the facilities described in the LRDP EIR.

For those occasions when an Initial Study or LRDP Amendment is prepared, the documents are forwarded to UCOP for approval. Depending on the cost of the project, the environmental document is approved by the Senior Vice President of Business and Finance, the Regents Committee on Grounds & Buildings, or the Board of Regents. Upon completion of the approval process, a “Notice of Determination” is prepared and filed with the Governor’s Office of Planning and Research by the UCOP, Office of Planning Design & Construction.

If a project is deemed “exempt” or “categorically exempt” from CEQA a “Notice of Exemption” is prepared and filed by the UCOP, Office of Planning Design & Construction.

### ***Funding Agreement***

A Funding Agreement is required for all Non-State capital projects. Such documentation, which is prepared by the Capital Planning Office, outlines the budgetary and financial components for a capital project and ensures that financial responsibilities associated with such components, including potential funding shortfalls, are clear. To effect such commitments, a Funding Agreement is signed by senior management on behalf of the appropriate Campus entities. The document is typically signed prior to seeking project approval but not later than bid advertisement. Availability of funding and funding authorization is subject to State and Regents policies.

### ***Project Planning Guide (PPG)***

The purpose of the Project Planning Guide (PPG) is to present a clear and concise justification for a capital project. The PPG includes a project description, justification, scope of work, space program, Environmental Impact Classification, site, budget and funding sources, and schedule.

The Project Planning Guide is required by the Office of the President for all State-funded projects and those Non-State projects with a total project cost greater than \$5 million. The Capital Planning Office takes the principal role in producing and submitting the PPG, working closely with the Building Advisory Committee, Physical Planning/Design & Construction, Facilities Management, Information Technology, EHS, and the Vice Chancellor - Administration. The PPG serves as a document of understanding or “contract” between the Campus and the Office of the President. For State-funded projects, the State may also be considered a party to the agreement with the expectation that the project scope, budget, and schedule outlined in the PPG be implemented without significant changes.

Projects requiring State-funded movable equipment require an additional approval document, the Equipment List. This list includes a complete equipment inventory for each room, including equipment to be purchased by State funding and existing equipment to be relocated to the new building.

### ***Project Approval***

The Office of the Vice Chancellor – Administration and the Capital Planning Office take the lead in obtaining Project Approval for all UC Merced capital projects. Project Approval is defined as the formal approval necessary to allow the Campus to proceed with the preliminary planning phase (“P” phase) and move forward to design approval. Depending on the total project cost and the funding sources, the approval is granted by The Regents, the President with concurrence from appropriate Regental chairs, the President solely, the Vice President for Budget, or the Chancellor.

The approval process follows one of two tracks: State or Non-State. Generally, if any State funding is required for the project, then it follows the State process. Non-State

funding, such as gifts, campus funds, and external financing, is a faster process with less oversight by entities outside of the University. More detailed information regarding the State and Non-State processes is provided in the initial paragraphs of this document. No matter what funding sources or project cost is involved, Project Approval grants the campus the authority to prepare a design that can be supported by the budget. Accordingly, if the scope of work changes significantly or the budget requires augmentation, subsequent review and approval may be required.

### ***External Financing***

On occasion, capital projects are fully or partially funded through external financing. Both interest during construction (IDC) and project costs can be funded by this means. While external financing can be obtained for a period up to 30 years, the length of financing depends upon the accounting useful life of the project and, therefore, can be for a shorter term. The UC President can approve most internal University financing. The Regents of the University of California must approve external financing. Project costs and Interest During Construction receive separate approvals. External financing is obtained through the coordinated efforts of the Campus, the UCOP Budget Office and the UC Treasurer's Office.

Various external financing mechanisms available to the University, such as:

- Commercial paper, an interim funding mechanism for projects that will eventually be financed by bonds;
- Bank loans;
- Private placement of funds provided by institutional investors; and,
- Revenue bonds issued by the University consisting of pool bonds, bonds for specialized research (Garamendi Bonds), hospital bonds, and Certificates of Participation (COP) for energy related projects.

### ***Research Revenue Bonds (Garamendi Projects)***

These projects are funded under special State legislation from indirect cost recovery. Garamendi financing warrants additional discussion since it differs from other funding mechanisms in that it addresses how debt is repaid rather than how funds are obtained. Established in 1990 through State legislation (Section 15820.21), this mechanism allows for the use of bonds to fund University of California research facilities that benefit the State economy. It is unique in that it allows facilities that house sponsored research activities, other than the normal Instruction and Research, to pay for themselves. Under this mechanism, incremental indirect cost recovery generated by federal contracts and grants made possible as a result of the capital project is used to pay for operations and maintenance of the project and for debt service. It should be noted that the Legislature and Governor through the annual Budget Act or special legislation approve each "Garamendi" project individually. The Office of the President is not currently supporting Garamendi projects given concern with overall UC system-wide debt capacity and other costs.

## *Schematic Design and Design Development*

Preliminary Plans (PPs) are developed in two phases: schematic design and design development. The schematic design phase involves studies and feasibility analyses of various alternative layouts and systems applicable to the project. Schematic plans are derived from this process. The design development phase reviews the schematic plans, along with the related cost estimate. If the budget for the capital project exceeds \$5 million, a value engineering study (a discipline that uses formalized procedures to identify systems, materials, and methods to best meet functional requirements of the project at a cost that provides the best value) may be required after one or both phases. During these phases, the design professional, working under the direction of the Project Team (PPDC Project Director, Campus Architect, Capital Planning Director) consults with the Building Advisory Committee. This joint effort ensures that the project addresses the concerns, needs, and interests of the Campus.

### *Design Review Process*

The design review process and eventual Design Review Advisory Board (DRB), under the direction of the Campus Architect, is an advisory board to the Vice Chancellor – Administration, and is charged with the review of facilities design and major landscape projects to ensure such projects are architecturally appropriate and consistent with the Long Range Development Plan and the UC Merced master planning principles. Projects that have significant visual impact on the Campus, regardless of the size of the project, are also reviewed. Final local design approval will rest with the Chancellor based upon a recommendation by the Vice Chancellor – Administration.

Typically, major projects are reviewed three times before being submitted for design approval. The three reviews are: pre-design, concept presentation, and final schematic design. On occasion, additional reviews may be required; specifically, a review of the proposed exterior materials and color or when a project has been previously approved by as part of independent design review, but later modified by value engineering or for some other reason. In all cases, however, the design review process must be completed prior to submission for Regental design approval.

### *Design Approval*

Design Approval, which includes environmental approval, takes place after completion of preliminary planning ("P" Phase) and prior to the initiation of working drawings ("W" Phase). Authorizations for such approval are subject to the following thresholds: Regents' Committee on Grounds & Buildings (\$10,000,000+); Senior Vice President - Business and Finance (\$5,000,001 - \$10,000,000); Chancellor (\$5,000,000 or less). The approval processes for the different authorization thresholds are similar with few exceptions. To provide the reader with a general idea of what is involved in such processes, a description of the Design Approval process, which includes environmental approval, for projects exceeding \$10,000,000 is provided below.

*Design Approval - Regents' Committee on Grounds & Buildings:* This review process starts with the submission of a Regents' item to the Office of the President (OP) followed by an initial review of design materials. Graphics and environmental documentation are submitted shortly thereafter to OP and then presented by Campus representatives, along with the finalized Regents' item, to a quorum of the Regents' Committee on Grounds & Buildings. All approvals are reported at the next Regents' full board meeting. The time frame for this entire process is approximately two and one-half months. Information regarding the design approval process and the design review calendar is often posted on the UC Regents web site, or is provided by UCOP Non-State Capital Planning Office.

The Design Approval Process for Major Capital Improvement Projects (as of June 2003) and the Design Review Calendar for 2004-2005 as an example, provide more detailed information on this subject.

### ***Construction Documents***

Construction Documents (CDs) consist of drawings and specifications that describe the quality, configuration, size, and relationship of all components to be incorporated into the project. Specifications are the written description of the construction materials and processes required to complete the project with the drawings serving as the visual complement.

The documents must be consistent with the project program, the construction budget, and the project schedule. To ensure this objective, the documents are reviewed by numerous internal and external entities. Campus reviews are conducted by the campus Physical Planning, Design & Construction Office in consultation with Capital Planning, Environment, Health & Safety, Information Technology, Facilities Management, Building Advisory Committees, the Division of State Architect, and the Office of State Fire Marshal, as needed.

The construction documents, which are part of the contract package, serve as a basis for obtaining bids from contractors in the bid/award process.

### ***Bid/Award Process***

State law and Regental policy require projects greater than \$100,000 to be publicly advertised for competitive bid. In such cases, Physical Planning Design & Construction makes project specifications and drawings available to the public with contractors submitting bids for construction work based on the construction documents. Competitively bid contracts must be awarded to the lowest responsible bidder, i.e., the bidder able to satisfactorily perform the work at the lowest cost.

### ***Construction Process***

In the majority of new construction projects, the University employs the traditional Design/Bid/Build system of construction delivery. However, other methods of delivery

such as Multiple Prime, Construction Manager at Risk and Design/Build are available and may be used when program requirements warrant such use. For further information on the various methods, refer to **Appendix F**.

Regardless of which method is employed, construction of the project proceeds under the scrutiny of the PPDC Project Director and the Campus Architect. The Project Director and Inspector of Record are charged with the following responsibilities: ensuring the project adheres to the scope of work; monitoring the project budget and schedule; serving as the primary Campus liaison with the clients, contractors, and design professionals; ensuring the project is built according to applicable building codes and is appropriately inspected; and, issuing contractual paperwork such as the "Notice to Proceed," Change Orders, Field Orders, equipment orders, and the "Certificate of Substantial Completion."

In addition to the above and prior to the occupancy of a new building or renovated area, Physical Planning, Design & Construction is responsible for inspecting the project for conformance with the construction documents and specifying work items that must be completed before the project is accepted by the Campus (Punchlists) and a Notice of Completion is filed.

### *Equipment and Furnishings*

For purposes of capital projects, equipment is categorized into three groups: Group 1, which is referred to as "fixed equipment" and Groups 2 and 3, which are referred to as "movable equipment." Fixed equipment is built-in or permanently affixed to a building or structure and is funded through the construction phase ("C" phase) of the Capital Improvement Budget.

Movable equipment, including furniture and furnishings, can be thought of as equipment that would fall out if the building or structure was turned upside down. Group 2 equipment is inventoried, has an acquisition value of \$1,500 or more, is freestanding, and has a useful life expectancy of one year or more. Group 3 equipment, on the other hand, is non-inventorial and has an acquisition value of less than \$1,500. Groups 2 and 3 equipment are funded through the equipment phase ("E" phase) of the Capital Improvement Budget. *Note, the definition for inventoried equipment in the Equipment List is lower than the official University definition of inventoried equipment that includes items with a value of \$5,000 or more.*

Depending on the circumstances, State funds for moveable equipment may or may not be available to support State-funded projects. The amount of funds designated for moveable equipment for a State-funded project is limited by a formula based on the net new space provided by a project and the department or use occupying it. In addition, funding requests for State projects can include custodial equipment required for start up operations and miscellaneous costs related to equipment procurement.

### *Post-Occupancy Review*

Following occupancy of a newly constructed or renovated building, a formal evaluation may be conducted to assess the successes and failures of the processes and implementation of planning, design, construction, and the overall functionality and aesthetics of the project. Projects selected for the review are relatively large in scope and budget, significant in their impact on the Campus, and encompass a broad range of project planning, development and management issues. In general, a thorough evaluation of one such project per year is sufficient, and will generate recommendations appropriate to other projects as well.

The Campus Architect in consultation with the Capital Planning Director, and the BAC chair, may recommend to the Vice Chancellor of Administration, a capital project for review. The Vice Chancellor issues a charge letter to the Review Team stating the goals, objectives, and time frame of the review.

The evaluation commences approximately six months following occupancy of the building, with the selection of a Review Team by the Campus Architect. Members of the Review Team typically include the BAC chair, BAC members from the user departments, the Project Team (BAC members from Capital Planning and PPDC), and a facilitator external to the BAC process for that project. In addition to these members, the Review Team may include other key representatives such as additional users occupying the building other than BAC members, the Executive Architect or other design professionals/consultants, and the general contractor.

APPROVED:

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Lindsay A. Desrochers, Vice Chancellor for Administration

(Date)

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#### ***Further Information:***

For further information on Capital Projects Development, please contact John O. White, Capital Planning Director at (209) 724-4454, or [jwhite@ucmerced.edu](mailto:jwhite@ucmerced.edu).