



Administrative Affairs

Operations Detail: Facilities Planning & Management - 10

Facilities Planning & Management

Planning for Facilities Modifications and Special Events

November 2021

1.0 PURPOSE

This operational detail describes the Planning requirements for Facilities Modifications and/or Special Events prior to starting feasibility, design, permitting, construction or a special event that requires permits. This detail also provides guidance on the required activities and timeframes to Planning for projects.

The campus is required to follow Education Code, California Building Code and CSU policies. These laws, codes, regulations and CSU policies ensure the public health, safety and welfare of everyone on campus. This operational detail provides guidance on the most cost-effective methods to achieve these requirements.

This operational detail supports the Strategic Plan Initiative 5, Goal 5 to improve campus infrastructure and organizational capacity.

2.0 BACKGROUND

Facilities capital planning functions are the foundation of every effective capital improvement project.

The College of Environmental Design teaches these planning, architecture and space/site programming skills to students on campus. The College of Engineering also teaches these skills to engineering disciplines such as civil, structural, electrical, mechanical and environmental. The Facilities Planning & Management (FP&M) department works with these Academic units and other complimentary colleges/departments to provide student employment opportunities to support student success through “learning-by-doing”. FP&M employs several graduates of those programs.

FP&M has oversight over building use, design and construction and infrastructure systems to ensure code compliance for all facilities on campus. In addition, FP&M has full responsibility for the complete lifecycle of all state-owned facilities to ensure, safe, effective work and classroom environments.



New facilities, major additions and renovations of Facilities and Infrastructure are required to be programmed into the campus' 5-Year Capital Outlay Plan submission to the Chancellor's Office.

Fixtures, furnishings and equipment specific to academic programs are the responsibility of the academic college/department. All building equipment and systems must comply with the applicable building codes and regulations such as maintenance record keeping. Special events are subject to these requirements and the Facilities Modification operational detail.

Higher Education facilities/capital planning provides the following benefits to the campus.

1. Ensuring the programmatic needs of the client will be met through the contemplated capital expenditure.
2. Ensuring legal, regulatory and policy compliance
3. Ensuring the project is aligned with the adopted Strategic, Academic, Physical and Infrastructure Master Plans.
4. Ensuring compliance with CSU system space standards and applicable guidelines to access systemwide Capital funding
5. Ensuring financial feasibility rough order of magnitude (ROM) cost of the project.
6. Ensuring scarce capital funding is invested in projects that provide returns for the lifetime of the improvement.

The five Project Planning steps entail:

1. Document Problem, Project Purpose and Need
2. Review and Validate Project Scope, Schedule and Budget
3. Conduct Preliminary Regulatory Compliance Review
4. Confirm Project Buy-in and Stakeholder Support
5. Validate Project Costs, Financial/Expenditure Plan, Delivery Method and Roles and Responsibilities

3.0 OVERVIEW

The steps in Project and/or Special Event Planning are described in more detail below:

1. Document Problem and Project Purpose and Need
 - a. Define problem or issue
 - b. Define project purpose and need
 - c. Identify project goals/objectives
 - d. List desired outcome and expectations
 - e. Prepare comprehensive Owner's Project Requirements (OPR)

2. Review and Validate Project Scope, Schedule and Budget
 - a. Detailed scope of work or event description
 - b. Provide permit drawing of facility modification or event request
 - c. Location, time, duration and demand expected for special event
 - d. Detailed project requirements and specifications
 - e. Identify committed and available funding
 - f. Verify project readiness and schedule requirements
3. Conduct Preliminary Regulatory Compliance Review
 - a. Architectural or design standards review
 - b. Compliance with Space and Facilities Database and Academic Planning Database
 - c. Compliance with CSU System space standards and sustainability considerations
 - d. Preliminary code evaluation review
 - e. Review of potential environmental, health & safety concerns
 - f. Building or event access/circulation review
4. Confirm Project Buy-in and Stakeholder Support
 - a. Confirm project sponsor and affected parties
 - b. Validate alignment with college/department mission
 - c. Consistency with adopted Academic, Strategic and Master Plans
 - d. Confirm approval by department Chair/Dean/Provost
 - e. Confirm project communications protocols
5. Financial viability at the Planning phase is determined through rough order of magnitude (ROM) cost estimate. Market conditions, supply chain disruptions, contractor backlogs can significantly affect the accuracy of all estimates.
 - a. Validate Project Total Project Costs, Financial/Expenditure Plan, Delivery Method, and Roles & Responsibilities.
 - b. Identify total project costs and funds available or committed and funding restrictions

In addition to the above Project Planning Review steps, the following considerations are required for Special Events:

- a. Advance planning and coordination to develop and deploy operational strategies, traffic control plans, protocols, procedures

- b. Details on location, time, duration and demand expected for the special event
- c. A complete Application for Permit that complies with Chapter 1, Section 105.3 Application for Permit and Section 107 Submittal Documents of the California Building Code for review
- d. Review of temporary traffic control plans and evacuation plans

The level of effort of the required Project Planning functions scales with the budget of the contemplated Capital Improvement and its complexity. However, the required steps do not change.

4.0 CITATIONS

[Facilities Modification Ops Detail](#)

[Executive Order 847](#)

CSU Policy Library [Section 9232 Project Plan Development](#)

CSU Policy Library [Section 9034.01 Fiscal Resources for Campus Development](#)

[Temporary Food Facility Permits](#)

California Building Code 2019, [Chapter 1 Scope and Administration](#)

California Building Code 2019, Section 105 [Permits](#)

California Building Code 2019, Section 107 [Submittal Documents](#)

California Building Code 2019, Section 108 [Temporary Structures and Uses](#)

California Building Code 2019, Section 109 [Fees](#)

5.0 PROCEDURES

FP&M can be engaged in Higher Education Facilities Planning by starting a service request and emailing it to fmcustomer@cpp.edu or calling Ext. 3030.

FP&M's Project Intake Committee will review the request and respond within 2 weeks. FP&M's Project Intake Committee consists of the three (3) Directors and the Maintenance Manager. The Sr. AVP of Facilities provides oversight and guidance to this committee and serves as a point of escalation. A campus planner and/or a project coordinator skilled in Planning will be assigned depending on the project details to complete the five (5) steps of Planning.

For the purposes of this operational detail, the level of effort and detail has three (3) categories in terms of scale.

- Small Projects for Capital Investments of <\$2,000,000

- Medium Projects for Capital Investments of >\$2,000,000 to \$15,000,000
- Large Projects for Capital Investments of >\$15,000,000

Executive Order 847 makes the facilities department responsible for providing non-maintenance services and improvements. The campus General Fund operations shall be reimbursed actual direct and indirect costs associated with non-maintenance services provided by the facilities department. The following Project Planning fees will be collected as part of the project:

Project Budget	Fee for normal schedule (8-12 weeks for Planning)	Fee for rush schedule (4-8 weeks for Planning)	Faster than Rush
<\$2,000,000	1.5%	3%	6%
>\$2,000,000 to \$15,000,000	1.0%	2%	4%
>\$15,000,000	.75%	1.5%	3%

All of the timeframes described assume requests for information will be complete within 5 business days. The written responses must be complete from the authorized representative to move on to the next step in Project Planning.

6.0 DEFINITIONS

The full Lifecycle of Facilities includes the Physical Master Plan, Capital Planning, Design, Permitting/Inspection, Construction, Maintenance and near the end of the facility's useful life Planning for renewal/renovation. CSU designs its facilities for a 50-year lifecycle and for cost-effective maintenance.

Cost Estimates: Cost estimates in Planning, Feasibility and Design stages of a project follow a progression of increasing specificity and accuracy.

- ROM cost estimates are used during the Planning phase. They provide a range of costs that errs on over-estimating costs (-25% to +75%) at this early stage of a project.
- Conceptual cost estimates are used during Feasibility phase. These estimates are derived from historical data or industry standard cost books and results in a range from -15% to +30% with 10% contingency. To achieve

these more accurate estimates square footage, units or types of major components and architectural/space programming are required.

- Architect or Engineer's estimates occur near the end of the Design phase and are reliable for 45-60 days.

7.0 CONTACTS

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8. REVISION TRACKING

Revision History

Revision Date	Revised by	Summary of Revision	Section(s) Revised
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Review/Approval History

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10/26/2021	Ysabel Trinidad	1 st publication	All