

Facilities Management Services



Working with
Planning,
Design,
And
Construction



Our Mission: Facilities Management Services will design, construct, and maintain an exceptional and cost effective living, learning and working environment.

The FMS Planning & Design and the Project & Construction Management teams are resourced to provide services to the university for the updating, renovating and creating new construction of the campus. These resources are assigned based on university priorities, as authorized by the administration and as workload permits. It is important to understand the authorization for projects is typically through the annual budget hearing process and the requestor is responsible for obtaining that authorization.

The planning, design and construction process can be complicated and sometimes unpredictable. The design and project management professionals assigned to your project will be responsible for guiding you through the process and keeping you informed of the project status. The following sections are intended to serve as a reference of the overall process.

The planning process is the most valuable tool for colleges and departments to assist in being prepared for budget hearings and having projects completed in time to meet program needs. It will take a typical project (ie: minor building renovations) one year to complete. FMS will help you develop planning documents for your facilities and space needs.



Meet our Team

Planning and Design Group

Jim Yarrington - Director, University Architect

Tori Budgeon-Baker - Sr Architect

Tim Vann - Mechanical Engineer
- Architect

Matt Buckman - Designer

Construction and Project Management

Paul Drozdziel - Director

Mark Williams - Sr Project Manager

Ted Weymouth - Sr Project Manager

Trever Talevera - Sr Project Manager

Chic Bruno - Sr Project Manager

Marielle Santoriello - Sr Project Manager

Rob Carey - Sr Project Manager

Elicia Drake - Project Manager

Mike Dellefave - Project Manager

Mark Lindenmuth - Small Projects Manager



College Planning

The Planning and Design group is responsible for assisting Colleges and Departments with facilities planning. The planning team can provide the programmatic space requirements for new or changing academic programs. The team has access to space data, industry standards and architectural standards to provide accurate and detailed space requirements based on your defined programs. This team has the skills to help college level planning with short term needs as well as long term planning.

The purpose of the planning discussions are to help the college and the university develop long term plans for enrollment, staffing, space planning and financial planning. This level of planning information is useful in the justification of future projects for the budget hearing process. Understanding that typical projects will take one year from the request date to completion, planning will be essential for your college and department to achieve its objectives.

College Deans and College Facility Managers should request planning meetings with the Planning and Design office at least once per year but we would recommend once a semester. The planning team will keep records of the meetings and the plans to support the college in its facilities planning efforts.

In order to schedule a planning meeting, contact our FMS Senior Staff Specialist, Kathleen Rydelek via email at kmrfms@rit.edu.

Facilities Service Request

Submit a Request Online

- **Project Request** (chargeable)
- **Events Request** - Use this form to:
 - Order tables, chairs, pipe & drape, linens, tents, other event needs
 - Request room setup
 - Request grills
- **Key or Lock Change Request** (chargeable)
- **Sign Request** (chargeable)
- **Furniture Move Request** (chargeable)
- **Shipping Request** (chargeable)

Find a Request

- [View all Active Requests](#)
- [Advanced Search](#)

Facilities Service Request > Project

Project Request System

[CREATE PROJECT REQUEST](#) [VIEW ALL ACTIVE PROJECT REQUESTS](#) [ADVANCED SEARCH](#)

Requester Information

First Name
John

Last Name
Moore

Email
jfmfs@rit.edu

Phone Number
Ex. 5-1234 or 475-1234 or 385-475-1234

Department Number
Ex. 18108

When should I create a Project Request with FMS?

A project request is needed whenever there is a physical change needed to be made to a building, space, office, lab or classroom. Typical changes would include the following:

- **New program needs**
- **Change in the use of a space**
- **Reconfiguring of a space**
- **Renovations of a space**
- **New Furniture** in excess of \$5,000
- **Room Painting**
- Changes in **technology** in a space
- **Fixed Equipment Change** (new or a replacement)
- **Access control** installations

When is it a Work Request?

- A repair is needed to existing space or equipment
- Services are needed to support your operations
- Additional keys are needed for your area

In the following sections, the process for completing these requests is described in more detail. The more simple projects can be completed more expediently. However, it is important to follow the process to ensure that RIT is protected from faulty workmanship and always obtains the best value.

College Planning

Looking at facilities needs over next 3 years

Quick Project Process Summary

Project Request

Provide Scope and Justification

Preliminary Review

Scope review, concept planning and budgeting

Preparation for Budget Hearings

Funding Authorization

Budget Hearing (February) and

Board of Trustee Reviews (Feb, May, July, Nov)

Design and Construction

Program Verification, Consultant Selection, Schematic

Design, Design Development, Bidding,

Construction

Occupancy

Owner Training and Moving in



Project Requests

The project request process uses an online request service. You can find it on the FMS webpage at <https://www.rit.edu/fa/facilities/>. FMS will review new requests weekly. Assignments of projects are based on available project management resources. You will be notified that we have received your project request and you will be notified again when a project manager is assigned.

To help us serve you better, please make sure the request includes the following information:

- The reason the project is needed and what it is intended to accomplish. If you know the detailed scope of what you would like to have done, please include it.
- A brief justification for the project. Who will it help and how will it help? Please let us know if the project is part of your long term plans that were generated with the Planning Team.
- If there is a time constraint for the construction or if people will need to be relocated please let us know.

FMS is committed to performing detailed scope reviews so that we can help you establish realistic budgets and schedules. We will assign projects as resources become available and we can deliver a complete and thorough review. Until a project manager is assigned your project will have a status of HOLD.



SW DRINK RAIL PERSPECTIVE

888 ARCHITECTS



Preliminary Review Process

- **The Project Manager (PM) will contact you shortly after the project is assigned.** The PM will review your project request with you to better understand the program needs, work scope, constraints and justification. The extent of this review will be determined based on the complexity of the project. FMS is committed to providing accurate estimates of the work scope, budgets and schedules needed to complete the project.
- **Complex projects will require significant effort from the PM and the Planning & Design Team.** These services may require upfront funding from the department or university. University Level projects may also take additional resources. It is not uncommon for these larger complex projects to take up to a year to clearly develop the program, scope and budget estimates. This process will include the consideration of the Aesthetics Committee, Space Committee and other entities as required. The Planning & Design team will need to work closely with the requestor(s) throughout this process.
- **For typical college level projects (ie: minor building renovations), the Preliminary Review process will typically take about 2 to 4 weeks.** FMS is resourced to provide up to 5 hours to support review of projects of this level and smaller. For even smaller requests (less than \$10,000), the Preliminary Review process is less formal and shorter in duration.
- **Regardless of the project size, FMS will work with you to develop a scope of work that will meet your needs and will likely be supported by the university.** The PM will ultimately deliver a project summary that you can use to secure funding for the project.
- **Once the Preliminary Review process is complete, you, the requestor, will be responsible for the next step, the funding authorization process.** The project will remain in the VETTING status until funding is authorized.
 - In preparation for Funding Authorization, FMS can provide additional documents, renderings and drawings. These services are typically funded by the requesting department and may be requested from the Director of Planning & Design.

Funding Process

The funding process for projects follows the rules established by the Controller, the Budget Office and the Board of Trustees. ***It is the responsibility of the Requestor and the Requesting Department to secure funding for the project.*** The funding process takes time to obtain administrative approvals. Larger projects can be expected to take up to 3 months. Understand that FMS can not perform any further work on the project until funding is authorized.

Funding for University Level projects (Total Project Cost in excess of \$500,000).

1. The Requestor is responsible to submit the project for Funding Authorization during the Budget Hearing Process (annually in February) or through the Provost and Administrative Council.
2. The project will be reviewed and will require the approval of the RIT Board of Trustees. (annual meetings in February, May, July and November)
3. Once the required funding authorizations are obtained, the project will be assigned as PM resources are available. The project status will become ACTIVE.
4. FMS is responsible to obtain the funding allocation from the Senior Vice President of Finance and Administration.

Funding for College/Department Level projects (Total Project Cost \$20,000 to \$500,000).

1. The Requestor is responsible to submit the project for Funding Authorization during the Budget Hearing Process (annually in February) or through the Provost and Administrative Council.
2. If the project exceeds \$250,000 and is determined to include a Conflicted Supplier in the bidding process, then RIT Board of Trustee and Conflict of Interest Committee approvals will be required and will be on the agenda at the next available Board Meeting (annually in February, May, July and November).
3. Once the required funding authorizations are obtained, the project will be assigned as PM resources are available. The project status will become ACTIVE.
4. FMS is responsible to obtain the funding allocation from the Senior Vice President of Finance and Administration.

Funding for Individual Level projects (Total Project Cost is less than \$20,000).

1. The project requires the review and approval of the Assistant Vice President of Facilities.
2. Once the required funding approvals are obtained, the project will be assigned as PM resources are available. The project status will become ACTIVE.

Design and Construction Process

The Design and Construction process will begin once a PM is assigned and the project is authorized to proceed.

The PM will guide you through the Design and Construction process. The process will vary based on the delivery method. FMS and PSO evaluate projects to determine the best method of delivery. Your PM will provide you the specific steps for your specific project. This serves as an overview of a typical design and construction process for reference.

Program Verification

- The PM will engage the requestor and other involved parties to review the program needs, the Preliminary Review documents, authorized budget and expected scope of work.
- The goal of this step is to establish clear expectations as to what will be accomplished with the project.
- 1 month may be required to complete this step.

Consultant Selection

- Depending on the size of the project a consultant may be required to develop or assist in the design as determined by FMS.
- If a consultant is required, FMS will evaluate the use of the Planning & Design Team or an outside consultant. The Planning and Design Team will require funding to support their work.
- If an outside consultant is required, the funding and procurement process will be engaged to secure the services of an A/E firm.
- This funding and procurement process will take 1 to 3 months.

Schematic Design

- This phase of design is intended to demonstrate the general scope of the project, determine building systems involved, present a view of the project direction and to ensure the scope is within budget.
- This phase will require the most engagement of the requestor and other involved parties.
- Deliverables will typically include a written narrative of the project scope, 1 to 3 preliminary drawings, 1 to 3 renderings of key areas, a written summary of the construction process, and a budget level estimate.
- This phase of design will typically take 1 to 2 months.

Design Development

- This phase is intended to progress the design to a more detailed level of architectural and engineering scope, again ensuring the project is within the established budget.
- The requestor will be expected to provide feedback on design information and respond to questions from the designer.
- Deliverables may include full sets of documents showing the building plans, systems, finishes, 1 to 3 renderings of key areas, a proposed construction schedule and a detailed budget estimate.
- The duration of this phase will vary based on the size of the project.

Construction Documents

- This phase is intended to develop documents for the construction bidding process.
- There is limited involvement of the requestor and other involved parties in this phase of design.
- The duration of this phase will vary based on the size of the project.

Bidding

- Bidding for construction is a Procurement Services Office (PSO) process. Based on the delivery method, PSO will advertise, solicit bids, evaluate the bids, award the contract and obtain approved contracts. No physical work is permitted until contracts are fully executed.
- This process can 2 months or more.

Construction

- Based on the delivery method your PM will provide you an overview of the construction process and schedule.
- The construction process will be managed by the PM. The PM is responsible for the budget, schedule and quality of the work.
- The requestor will be updated on a regular basis regarding the project status.

Occupancy

- The goal of this process is to ensure the occupants have an exceptional experience with the completed work. The PM will coordinate training and information as required to ensure the occupants can effectively utilize the new or renovated space.
- The PM will work with the requestor and other involved parties to move in to and occupy the space.
- The PM will remain the requestor's main point of contact for the project for 6 months following the occupancy date. After that, the building and its services will be directed to FMS through the Work Request process.

Facilities Contact Info

Routine Work Requests (FMS)

Web <https://www.rit.edu/fa/facilities/>

Urgent Facilities Concerns (FMS)

Phone 475-2842

Campus Emergencies (Public Safety)

X 3333 or Phone 475-3333

Data, Phone, WIFI, or Internet Issues (ITS)

475-HELP



FMS Planning, Design and Construction Process

FACILITIES MANAGEMENT SERVICES

A Division of Finance and Administration

Facilities Building, 99
Rochester Institute of Technology
120 Lomb Memorial Drive
Rochester NY 14623

585-475-2842

<https://www.rit.edu/fa/facilities/>