



University Architect & Associate VP Policy & Procedure #27

TITLE: PROJECT TRANSITION FROM AVP OFFICE TO FP OFFICE

OBJECTIVE AND PURPOSE: To assure a consistent transition process subsequent to the selection of the Project AE up to and through the project design kick-off meeting.

RESPONSIBILITY: ACTION

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| ASSOCIATE VICE PRESIDENT | <ul style="list-style-type: none"> ◆ Solicits A/E fee proposal from awarded A/E firm. ◆ Once the A/E has submitted the fee proposal, distributes A/E proposal to the University Planner, Director of Facilities Planning and designated FP Project Coordinator for review. ◆ Schedules meeting with A/E, if necessary, University Planner, Director of Facilities Planning and designated FP Project Coordinator to negotiate A/E fee. |
| ADMINISTRATIVE ASSISTANT | <ul style="list-style-type: none"> ◆ Prepares draft of A/E Agreement for review with University Planner for finalization by the AVP. |
| ASSOCIATE VICE PRESIDENT & ADMINISTRATIVE ASSISTANT | <ul style="list-style-type: none"> ◆ Finalizes A/E Agreement and forwards to General Council for review and approval. ◆ Upon A/E Agreement executed by all parties a copy of the Agreement is sent to Director of Facilities Planning who notifies the FP Project Coordinator to schedule the kick-off meeting. |
| FACILITIES PLANNING PROJECT COORDINATOR | <ul style="list-style-type: none"> ◆ FP Project Coordinator to schedule kick-off meeting. Kick off meeting to include Occupant's designated contacts, A/E Team, E & U, OSUA, PP, IRM, and Police. <i>(Kick-off meeting to include CM if selected at time of kick-off meeting).</i> ◆ Prepare agenda for a project orientation meeting (normally 1 to 2 hours). Agenda shall clearly define project goals, site, budget, the role of each participant, and schedule. FAU standard documents (i.e., Project Manual, CCGs, PSG) should be distributed to the A/E prior to the meeting and any clarifications to be addressed at the kick-off meeting. The meeting agenda is to begin with a short introduction of the program and project goals by the University Planner. A example of an agenda for the kick off meeting is shown in "Attachment A". |

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APPROVED:	Vice President	Associate V.P.	Director

**UNIVERSITY
PLANNER**

- ◆ Prepares short introduction of the program and area requirements, the project goals, the budget and important issues specific to the project. The University Planner will address the transfer from programming to design and construction. Subsequently, the prime contact for the project will be the FP Project Coordinator.

**FACILITIES
PLANNING
PROJECT
COORDINATOR**

- ◆ It is an option that the FP Project Coordinator schedule a working session, immediately following the introductory session. The working session should include discussions regarding specific project issues, site alternatives, building orientation, and could include conceptual sketches and layouts for review.
- ◆ As per the PSG Manual, the A/E is responsible for minutes of all meetings.
- ◆ Ends meeting with discussion of the schedule and tentatively schedules next tasks and next meeting and/or deliverable date.

A/E KICK-OFF MEETING AGENDA

1. Introductions and Sign-in Sheet.
2. University Planner - Highlights salient points of program, then transitions to Facility Planning Project Manager.
3. FP Project Manager - Describes responsibilities of the members of the Project Team.
 - a. FAU Facilities Planning Project Manager – Single point of Contact. Coordinates and participates in all meetings with Project Team members. Receives all correspondence and design submittals from Project Team members. Reviews and distributes design submittals. Receives comments from FAU Users and Non-User Departments and produces comment list with approval or disapproval letters. Coordinates permit review submittals and responses from review agencies. Assists with preparation of CM's GMP Amendment and Notice to Proceed. Provides construction phase and project closeout support in accordance with Contract and Facilities Planning Policies and Procedure. Assists User in timely furniture selection and ordering.
 - b. User (Building Occupant Representative) – States most important issues, consults on designs proposed by A/E, consults and approves furniture and equipment items and locations, consults and approves special utility services required for rooms, areas, equipment (i.e., data lines, special power voltages or amperages, water, drains, special cooling, etc.), consults and approves finish materials and colors, attend regular meetings during design and construction.
 - c. Architect and Engineer Consultants – Reviews the building program, meets with Project Team, interprets voiced needs and requirements as they relate the program, and resolves conflicts between the two items. Proposes design solutions based on the agreed-upon program. Coordinates all building design elements (i.e., architectural, structural, civil, electrical, mechanical, plumbing, life safety, codes, cost containment guidelines, etc.). Produces and distributes all meeting minutes. Complies with contractual submittal requirements and schedule. Provides a design that can be constructed within the contractual construction budget. Provides bidding and construction administration phase services. Recommends acceptance or rejection of Construction Manager's Guaranteed Maximum Price Proposal. Provides post-construction (11-month walk-through report) services.
 - d. Construction Manager – Provides cost estimates and buildability reviews during design phases. Suggests modifications to details and materials during design phases to improve quality and reduce construction cost. Constructs project within budget and time schedule.
 - e. FAU Non-User Departments – Physical Plant, Information Resources Management, Environmental Health & Safety, Police, Traffic & Parking, Space Utilization – Provides review comments during the design phases, consults with other members of the Project Team.

ATTACHMENT A

4. FP Project Manager - Distributes to Architect, the following (if not distributed earlier):
 - a. FAU Cost Containment Guidelines
 - b. FAU Supplement to the Cost Containment Guidelines (if any)
 - c. FAU Project Manual including Supplements (if any)
 - d. FAU Professional Services Guide
5. FP Project Manager - Distributes to all, the Construction Budget and Schedule.
 - a. Construction budget will not increase unless Facilities Planning authorizes the increase in writing with a corresponding reduction in non-construction budget lines. No additional sources of funding are anticipated.
 - b. Design and construction schedule will not change unless Facilities Planning authorizes the change in writing.
6. FP Project Manager - Arranges for series of prescheduled working meetings with User/ AE / CM to meet schedule
7. Questions / End of Kick-off Meeting.
8. If applicable, hold working session with building occupants, AE, CM and FP.