



Facilities Planning Policy & Procedure #11

TITLE **ORDERING FURNISHING & EQUIPMENT (F&E) AND
COORDINATION OF F&E MOVES – MAJOR PROJECTS**

OBJECTIVE & PURPOSE To assist the building users or departments with ordering furnishings and equipment for timely delivery prior to building occupancy.

RESPONSIBILITY **ACTION**

- PROJECT MANAGER**
- ◆ Identify department contact person or committee members.
 - ◆ Approximately one year prior to Substantial Completion meet with contact person or committee, the Director of the Purchasing Department. Agenda to cover the following:
 - a) Provide budget dollar amount to attendees
 - b) Distribute **Tally & Moving Sheets (Attachments A&B)**, discuss each departments responsibilities.
 - c) Establish a critical path schedule.
 - d) Identify items that are to be purchased with F&E and which are not included in the construction contract. Generally the F&E portion of a fixed capital outlay project budget is restricted to moveable furnishing and equipment items to be housed within the facility and primarily used within the facility. The following types of expenditures are eligible as charges to a fixed capital outlay project F&E budget.
 - Moveable furniture, e.g., chair, desks, tables. Fixed seating is not eligible and must be included in the construction budget.
 - Moveable equipment to be located within the facility such as portable machines, lab equipment, building maintenance or cleaning equipment, computers, and telecommunications equipment such as phone instruments, and the routers and servers to fit user requirements.
 - Miscellaneous items such as signs, directories, bulletin boards, marker boards, and projection screens.
 - Furnishings that are not required to make the building functionally operational such as window treatment, e.g., drapes, blinds. Floor covering is not eligible and must be included in the construction budget.

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APPROVED:	Vice President	Associate VP	Director

- Equipment that directly supports programs or activities to be housed within the facility and requires some installation such as equipment that must be mounted to a wall or permanently connected to utilities, for example, a spectrophotometer or a voltmeter. This type of equipment expenditure does not include essential building systems components such as fume hoods, essential components of building mechanical systems, telecommunication wiring to achieve connectivity to user stations, and built-in equipment such as laboratory casework, benches, and cabinets that are required to make the building function as designed.
 - Delivery and set-up charges for eligible equipment that are normally paid pursuant to applicable purchasing rules and procedures.
 - Moving costs for equipment to be purchased or reused when special expertise is required or when the magnitude of the moving task is beyond the normal capacity of the University to perform.
- ◆ One month prior to the time scheduled to receive the **Tally & Moving Sheets (Attachments "A" & "B")**, call contact and remind them of receiving this information in accordance with the schedule.
- ◆ One month prior to receiving **Tally and Moving Sheets (Attachments A & B)** from using department, meet with Physical Plant (Building Services & Grounds) to determine required purchases for maintenance of new building (walk off mats, waste cans, recycle and trash containers for exterior, etc) and put on a **Tally Sheet for Furniture & Equipment (Attachment B)**
- ◆ Upon receipt of completed **Tally and Moving Sheets (Attachments A&B)** from the contact, compare with A/E's furniture layout. Verify that all existing furniture being moved into and purchased for each new room will fit and comply with ADA requirements.
- ◆ Generate an 8-1/2" x 11" floor plan for each room according to **Tally and Moving Sheets (Attachments A&B)**. Forward a copy of all paperwork to Purchasing and to the department contact and include items required by Physical Plant.

PURCHASING

- ◆ Compiles F&E database with total costs for each room and as a building total from **Tally and Moving Sheets (Attachments A&B)**. Include costs for phone hook-ups, phone moves, new computer lines, computer moves, window treatments (if not in building contract), maintenance equipment, office moves and any other additional costs.
- ◆ If F&E database is over budget, it is sent back to department contact for revision.
- ◆ Once the F&E database is in budget and approved by the User, it is forwarded to Facilities Planning.

PROJECT MANAGER

- ◆ Work with contact and purchasing to color coordinate new furnishings with new building color scheme. Keep a set of F&E color samples with building color samples to coordinate any future finish decisions or last minute product changes.

- ◆ Verify that all equipment has correct power, data or voice and connections as shown on the construction documents. Also, verify that equipment or furniture that requires installation is structurally sound and that installation and hook-up is included in the scope of work for vendor.
- PURCHASING**
- ◆ Finalizes all F&E orders including model #'s, colors, fabric selections, and delivery dates.
- USING DEPARTMENT CONTACT**
- ◆ Reviews requisitions for content, color selections and model numbers of equipment. If any corrections are necessary, discuss with Purchasing. Initial all correct requisitions and forward to Project Manager for processing.
- PROJECT MANAGER**
- ◆ Review all math and totals on requisitions and back-up paperwork, initials if correct and forwards to Assistant Director. Follow purchase Requisitions procedure.
 - ◆ **MOST IMPORTANT** – keep Purchasing Department informed on the Substantial Completion date.
 - ◆ Update the Purchasing Department wherever the Substantial Completion date changes.
- USING DEPARTMENT CONTACT**
- ◆ Responsible for attaching a copy of 8-1/2" x11" furniture layout on the door to each room to instruct movers and installers where to place furniture correctly.
 - ◆ Responsible for having individuals available to receive furnishings and direct movers and installers to proper locations.
 - ◆ Once the F&E database is in budget and approved by the User, it is forwarded to Facilities Planning.
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- ATTACHMENTS**
- ◆
 - ◆ ***Moving Sheet for Furniture & Equipment – Attachment "A"***
 - ◆ ***Tally Sheet for Furniture & Equipment – Attachment "B"***



FACILITIES PLANNING
MOVING SHEET FOR FURNITURE & EQUIPMENT

BR#: _____ BUILDING: _____ ROOM# _____
DEPT.: _____ DATE: _____
NAME: _____ PAGE _____ of _____
PHONE EXTENSION: _____

ITEM #	FROM BLDG. # & ROOM #	DESCRIPTION (INCLUDE WIDTH & HEIGHT)

ATTACHMENT "A"

FACILITIES PLANNING
TALLY SHEET FOR FURNITURE & EQUIPMENT

BR#: _____ BUILDING: _____ ROOM# _____
 DEPT.: _____ DATE: _____
 NAME: _____ PAGE _____ of _____
 PHONE EXTENSION: _____

** (Please list Items in Order of Importance)*

ITEM #	QUANTITY	DESCRIPTION (INCLUDE WIDTH & HEIGHT)	COST

ATTACHMENT B