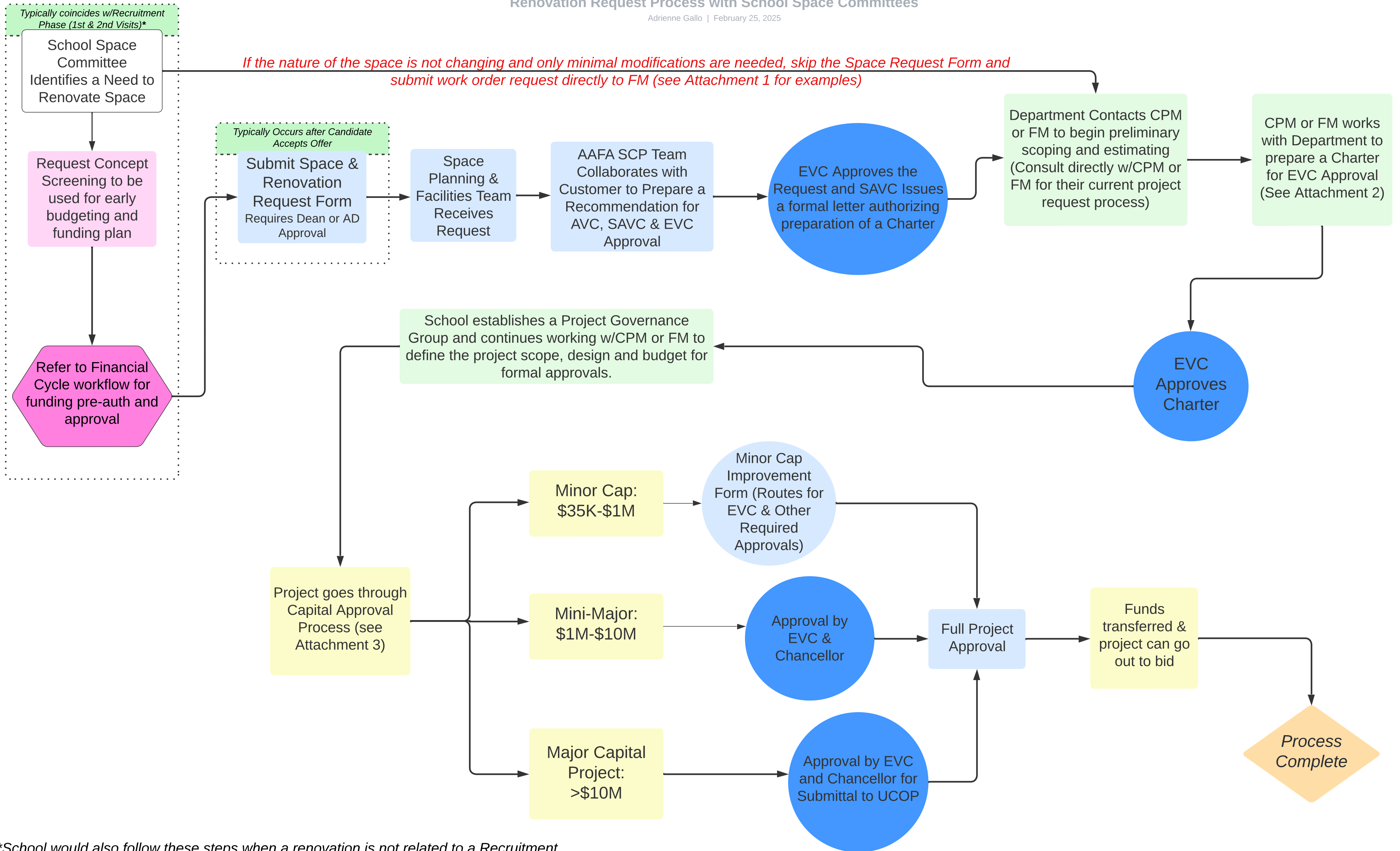


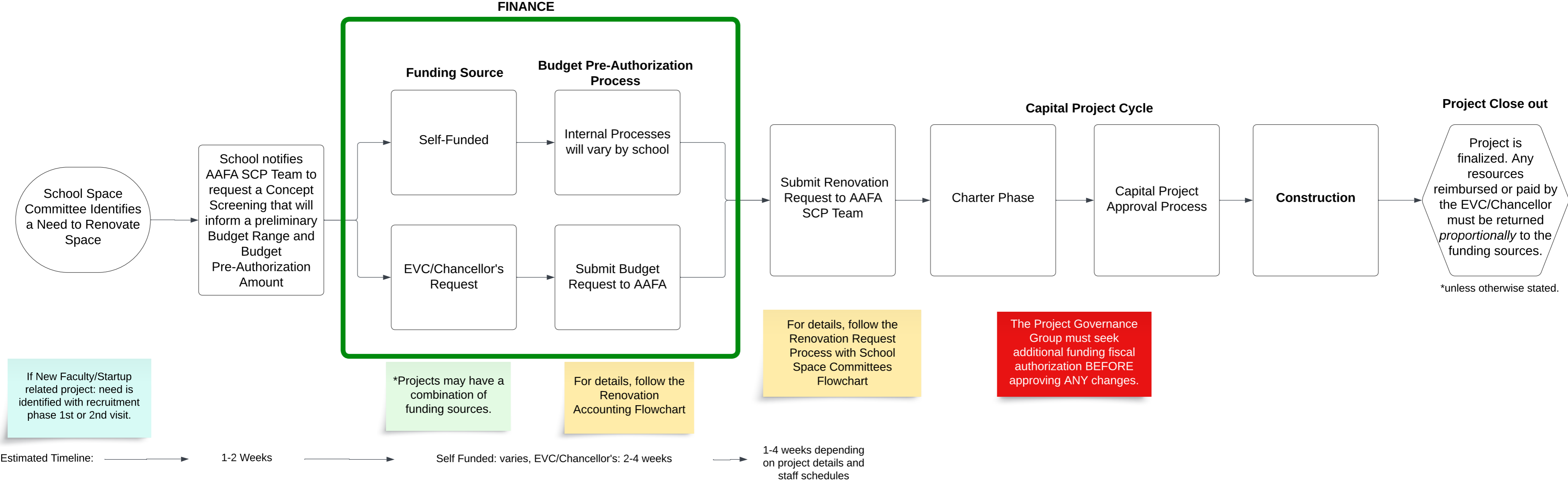
# Renovation Request Process with School Space Committees

Adrienne Gallo | February 25, 2025

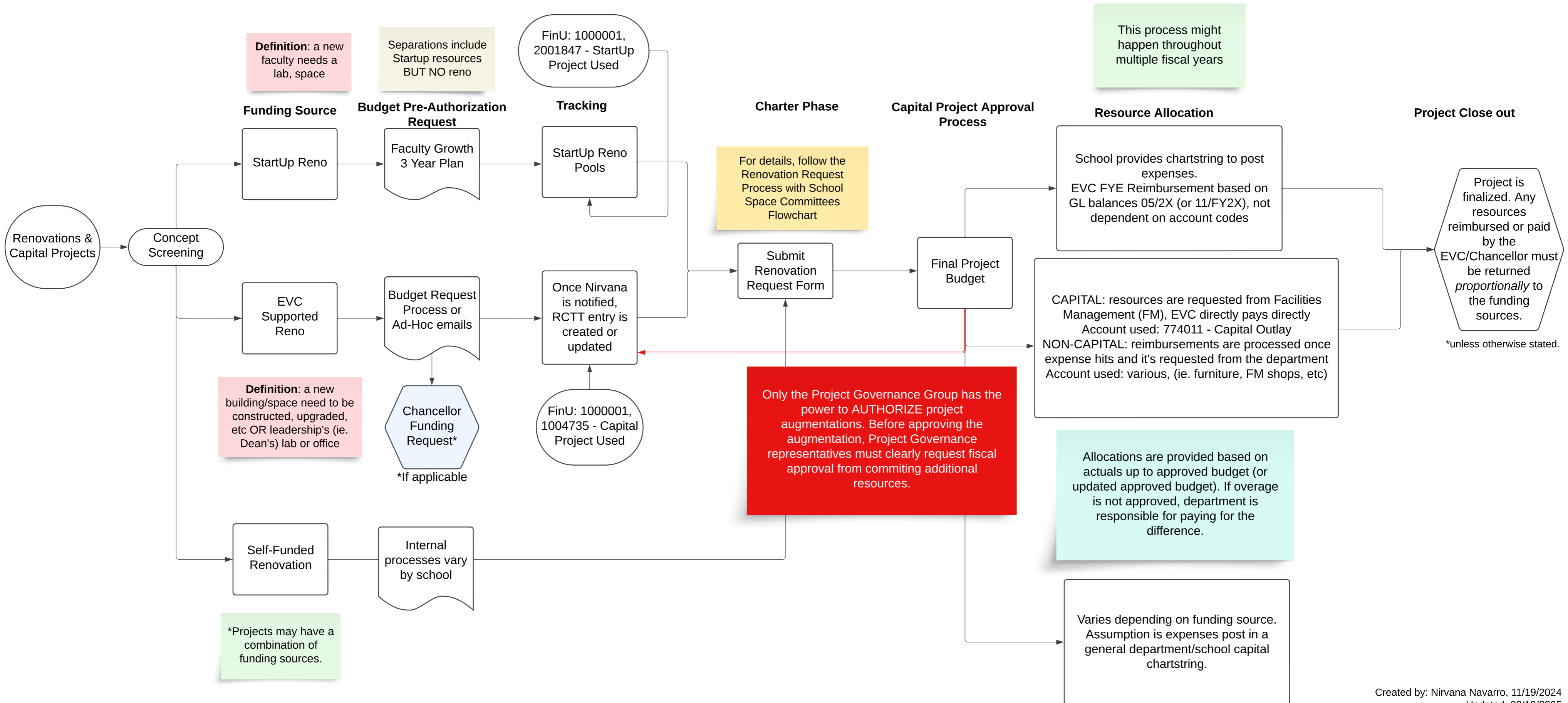


\*School would also follow these steps when a renovation is not related to a Recruitment.

# Academic Affairs Renovation & Capital Projects Financial Cycle



# Academic Affairs Renovation & Capital Projects Accounting Cycle



## Attachment 1

If the nature of the space is not changing and only minimal modifications are needed, skip the Space/Renovation Request Form and initiate process with Facilities Management.

A Space/Renovation Request Form would **not** be required for the following:

1. Scope with a total budget<sup>1</sup> less than \$35,000 that the School, College, department or unit will self-fund.

*Note that any scenario where the total project budget exceeds \$35,000 is required to go through the Space/Renovation request process, followed by completion of the [capital improvement approval process](#).*

2. Per UCOP Guidelines, there is a special exception for Painting: All painting projects over \$25,000 require a formal bid process to be administered by Facilities Management.

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<sup>1</sup> The total project budget includes all design fees, construction management/administration, and construction costs.

## Attachment 2: Charters

As described below by Capital Program Management (CPM):

### Rationale:

- Project Charters are intended to provide our clients/customers with a very quick, rough idea of “how long” and “how much” a project may cost BEFORE significant time, money, and energy are expended.
- They also serve as a means of informing Campus leadership of the project and its Need, Intended Goals, and Objectives.

### Purpose:

- A Decision-Making tool for potential projects
- Fast, loose, Rough Order of Magnitude (ROM) guesstimate for Cost and Schedule for capital projects with a defined scope, i.e., space, location, program, etc.
- Cost and Schedule are expressed as ranges – from low to high probability.
- Charters provide the projected “investment” required to develop the design documents- typically thru Design Development.
- At completion of Design Development, a detailed cost estimate and project budget will be prepared, memorializing the actual projected cost and schedule for the project and validating assumptions on Code, Capacities, and Conditions, etc.

### Use:

- Initial requests are funneled through RMP Sr. Director portal and are evaluated for content.
- Triaged requests will be forwarded from RMP Sr Director to FM/CPM (depending on size and complexity) where a project manager will be assigned to develop a Project Charter.
- Charters should typically be developed and returned to requestor within two to four weeks from date of assignment – depending on size. Complexity, and quality of information.
- The Charter with its stated assumptions becomes the project parameters for scope, schedule, and cost.
- ALL requests for “Scope” additions to the Charter require Vice Chancellor approval before incorporation into the Charter, or if significant a new Project Charter.
- “Discovery” issues that add time or money also require Vice Chancellor approval
- All Charters must be approved/signed by the responsible Vice Chancellor

### Charters are not:

- Defined/Detailed Cost Estimates
- Feasibility Studies or Option Studies – These must be accomplished PRIOR to the development of the Charter thru “seed monies” provided by the respective VC’s office. The entity managing these initial efforts (CPM, RMP, FM, CPD) is dependent on size, complexity, and scope.

*A Charter prepared by Facilities Management will take approximately 6-8 weeks to complete from the request date.*

*A Charter prepared by CPM may require more time depending on the size and scope of the project.*

## Attachment 3

### Capital Improvement Approval Process

The capital approval Process is a UC Systemwide requirement. Refer to UCOP Facilities Manual, Volume 2, Chapter 7 for guidelines:

<https://www.ucop.edu/construction-services/facilities-manual/volume-2/vol-2-chapter-7.html#7-1>

Campus Planning works with project managers and stakeholders to prepare approval documents and administer the approval process. Refer to their website for the most current thresholds.

<https://plandesignbuild.ucsd.edu/planning/capital.html#Capital-Process>

Project Approval Thresholds		
Approvals vary depending on the project budget. See the chart below for a quick overview:		
Classification	Budget	Level
Minor ( <a href="#">Form PDF</a> )	>\$35K – \$1M	Campus Building Official
Mini Major	>\$1M – 10M	Chancellor
Delegated Campus	>\$10M – 70M	Chancellor with UCOP Endorsement
Regental	Over \$70M	Regents