University of Florida Internal Operating Memorandum

Number: 02-3

Date: December 11, 2002, Revised June 14, 2005

Subject: Development of Facility Programs
Authority: Board of Governors Resolution adopted January 7, 2003; Sections 267.061(2), 1013.31, 1013.64(4)(a), 1001.75(5), 1001.74(28), F.S.

Purpose: To provide guidelines for the preparation of facility programs.

A. Introduction.

The scope of each project shall be clearly established to facilitate the management of construction projects, to provide for more accurate long-range campus planning, and to comply with the requirements of the Florida Statutes.

The university shall develop a facility program for all projects for which the construction cost exceeds $1,000,000.

B. Facility program committee.

The Facilities Planning & Construction Division (FPCD) shall assure that facility programs are developed in accordance with this memorandum. The FPCD shall develop the necessary organizational structure, assign adequate personnel, and allocate resources as required to achieve this purpose. The Director of FPCD, or a designated representative, shall appoint facility program committees to develop the facility programs for all projects which require a facility program.

The composition of a facility program committee may vary with the complexity and scope of a project. The Director of FPCD shall make appointments to a facility program committee to meet the administrative needs of the university and to include the expertise required to develop a clear, concise, and comprehensive facility program for the project.

C. Development of facility program.

Upon appointment, the facility program committee shall develop the facility program for the project, considering the following requirements:

1. Use of the proposed facility based on authorized courses and activities.

2. When appropriate, recommendations made by the survey team in current educational plant surveys conducted pursuant to 1013.31 F.S.
3. Program areas will be guided by the "Size of Space and Occupant Design Criteria Table" of Rule 6-2.001, F.A.C.
4. Any specific requirement of the discipline or activity which will occupy the proposed facility and which must be included in the project scope for proper function of the facility.
5. Impact of the proposed facility on the campus master plan and existing campus infrastructure.
6. Future expansion requirements of the proposed project.
7. Consistency with the university's adopted campus master plan and any associated campus development agreement.

D. Required signatures.

Upon completion of the facility program, the Director of FPCD shall review and verify that the document has been developed in accordance with the requirements specified above. The Director of FPCD shall obtain the following approvals by having the appropriate person sign the signature sheet of the facility program document.

1. Vice President of the Office of Finance and Administration: Signature signifies the University's approval; that the facility program is consistent with the anticipated funding in the three- year priority list; and for the CIF projects student body approval is obtained.
2. Director of the Facilities Planning & Construction Division: Signature signifies that facilities program has met the requirements as described in the memorandum.
3. University of Florida Information Resources Manager: Signature signifies that the university's information resources management requirements have been met in the development of the facilities program.
4. Director of the Physical Plant Division: Signature signifies that the utilities infrastructure element of the facilities program is developed in conformance with the approved campus master plan.
5. Director of Office of Academic Technology: Signature signifies review and acceptance of the aspects of the facilities program that describe classroom elements; and are required for all projects that include classrooms and lecture halls.
6. Dean, Director or Chair of the User Group agency: Signature signifies User Group's acceptance of the Facilities Program Committee recommendation.
7. Chair or User Group representative of the Facilities Program Committee: Signature signifies User Group's Facilities Program Committee recommendation for approval of the facilities program.

E. Amendments to facility programs.

Whenever the program needs require that a previously approved facility program be amended, the university shall develop an amendment to the program. The amendment must be

submitted and approved in the same manner as the original program. Amendments are required if:

1. **Schedule.** The project cannot be delivered by the appropriation reversion date or, the original program schedule no longer corresponds with the funding appropriation date.
2. **Program Change.** There is a change in the academic mission and/or intended use of the facility or, the program space has increased or decreased by a factor of 10% or greater.
3. **Project Cost.** The construction budget is increased by 10% or greater.
4. **PO&M**. When State funded plant operations and maintenance monies will be affected because of an increase in the total gross square footage of the facility from that originally contemplated in the program. Such increases are identified at the design development phase of the project.

F. Facility program format.

Facility programs shall be developed using the outline format attached. All pages should be numbered. The information specified is the minimum amount of information required. Additional supplemental information is encouraged and may be required for more complex projects.

History: New 12-11-2002, Revised 6-14-2005

Exhibit 1

Facilities Program Outline

Chapter A. Coversheet.
FACILITIES PROGRAM
(Project Name) (Month Date, Year)

Chapter B. Title sheet.
TITLE SHEET
(Project Name) Facilities Program
FOR (User Department) UNIVERSITY OF FLORIDA
Main Campus (Insert street address here: if different from below delete following three lines)
University of Florida Gainesville, Florida

Chapter C. Table of Contents.
TABLE OF CONTENTS

Chapter D. Signature Sheet
SIGNATURE SHEET

PREPARED BY:	Facilities Planning & Construction Division (and User Group)
REVIEWED AND APPROVED:	
University Of Florida	
	Vice-President for Finance and Administration
Facilities Planning & Construction Division	Director
University of Florida Information Resources Manager	Vice Provost & Chief Information Officer
Physical Plant Division	Director
Office of Academic Technology	Director
(Use Department/College)	(User Representative)
Facilities Program Committee	Facility Program Committee, Chair

Chapter E. Introduction.
INTRODUCTION (Provide an introductory statement giving an overview of the program or project. The overview statement shall provide the following information.)

A. PROJECT HISTORY (A general description of the project background and justification.)
B. GENERAL PROJECT DESCRIPTION (General project description.)
C. PROJECT GOALS (An outline of the project goals and objectives. At a minimum, the following three issues should be briefly discussed. Add or modify statements below as desired.)

1. Budget. The total project budget is: ( ). The estimated construction budget is: ( ). During construction document development phase, provisions for additive alternates, as required, should be included to ensure that the basic program scope is met within budget constraints.

2. Program. Strict adherence to the program requirement as described in this facilities program is desired. During the program verification phase and subsequent design reviews, the Architect will interact with the User Group to make necessary program adjustments to maintain budget integrity.

3. Schedule. Once the project schedule is established at the start of the design and construction phases, long range planning for classes and funded research will take place. Consequently, strict adherence to the agreed design deliverable and construction schedule will be required.

D. UNIVERSITY PLANNING AND DESIGN OBJECTIVES (University wide planning and design cultures. These items are required in all Facilities Programs submitted to Vice President, Administration & Finance for review and approval. For interior renovation projects, modify as required.)

1. Tree Preservation. Tree preservation and protection is a high priority at the University of Florida. Existing trees should be saved and incorporated into the total design whenever possible. Planning, design and construction of this building must strictly comply with the current University Tree Protection Policy.

2. Landscaping and Exterior Lighting. Landscaping and exterior lighting shall be incorporated into design not only for function and aesthetics but also for security and safety.

3. Bicycles and Walkways. Bicycles and walkways are the primary modes of transportation to, on, and around campus. Site design for this project must include adequate walkways fully integrated with the existing pedestrian circulation network, convenient, safe and aesthetically pleasing bicycle parking facilities in sufficient numbers.

4. Pedestrian and Vehicular Traffic. Separate pedestrian and vehicular traffic, and separate service vehicles from automobile traffic will be maintained. The first priority in circulation shall be ease of access for pedestrians and bicyclists within the campus. Second priority is the provision for service vehicles necessary to maintain the campus buildings and grounds. Use of privately owned automobiles on the campus will be discouraged. Unimpaired access for emergency vehicles is considered essential in all site development plans.

5. Design for Future Expansion and Renovation. Within program and budget constraints, the site and building will be designed to allow flexibility for future growth and change. The usable life of the facility shall be extended by incorporating features for remodeling and expansion designed to reduce future renovation costs.

6. Contextual Site and Building Design. Site and building shall emphasize the design of the total campus entity rather than the individual buildings. While each building is required to be designed as an appropriate response to its particular program, budget, and site requirements, it must also be compatible with the existing fabric of the campus. The design of the building must enrich the campus both functionally and aesthetically, relating to adjoining buildings, not competing with them.

7. Historical Resources. The University of Florida campus contains numerous significant historical properties and sites which are listed on or eligible for listing in the National Register of Historic Places. The University strongly supports maintenance and restoration of historical buildings. All capital improvement projects must comply with the Programmatic Memorandum of Agreement between the University of Florida and the Division of Historical Resources dated October 27, 1989.

8. Unifying Exterior Treatment Through Use of Brick. The use of Gainesville Range Red Brick for the major portion of the exterior finish is required in order to serve as the primary visual element consistently used in unifying all campus facilities to form a unified University entity.

9. Sustainable Design, Green Architecture and Recycling. The University of Florida builds its buildings to last, it promotes environmental quality and resource conservation through sustainable design, green architecture and recycling in its physical planning and development.

10. Project Budget. The University expects the architect to develop design and contract documents, which will be consistent with the established project budget. This obligation is mandatory. The Architect shall work with the University and/or University's construction management consultant to prepare a cost breakdown at each stage of the project design. If these estimates exceed the budget at any stage the architect will work with the University to modify the design or the program to conform to the budget. However, the design may not vary from the program without University approval.

11. University Committees Reviews. New construction projects to be located on the main campus of the University of Florida must be presented to the following (4) University Committees for approval of the site plan and building exterior design at conceptual schematic design and design development phases:

a. Transportation and Parking Advisory Committee (TPAC)
b. Preservation of Historic Buildings & Sites Committee (PHBSC)
c. Lakes, Vegetation and Landscape Committee (LVLC)
d. University Land Use and Facilities Planning Committee (ULUFPC)

The Architect is expected to address all review comments provided by the Committees, including the program development phase review comments included in the Section XVI of this facilities program.

E. PROJECT DESIGN OBJECTIVES

1. Outline of desired project specific design objectives.
2. (Add additional remarks if required.)

F. CONSTRUCTION DELIVERY METHOD (Modify following for conventional bid method, delete otherwise.)

The project delivery method desired for this project is the conventional Design, Bid, and Build.

(Modify following for CM method, delete otherwise.) The following responses are presented for the President or designee's approval for the selection of Construction Management as the project delivery method:

1. Size of the project is sufficiently large and/or complex to require major emphasis on the qualification of the contractor to provide specific expertise in highly specialized cost estimating, value engineering, and scheduling during the design process with continuity of construction management through both design and construction phases. (Add "Not Applicable" as appropriate.)

2. The initial construction funding is appropriated and construction is begun with the expectation of substantial appropriation in subsequent years, thereby making it advantageous to retain a single contractor for the duration of the project. (Add "Not Applicable" as appropriate.)

3. The project is an alteration of an occupied facility which requires working around or relocating occupants while keeping the facility fully operational. (Add "Not Applicable" as appropriate.)

4. The project is a repair or renovation where the conditions requiring correction can not be determined and specified without extensive contractor involvement in the removal and examination process during the design phase. (Add "Not Applicable" as appropriate.)

5. The timely completion of the project is critical to the University's ability to repay debt services or to meet grant obligations. (Add "Not Applicable" as appropriate.)

(Modify following for Design/Build method, delete otherwise.) In accordance with UF-PM-05, Design/Builder Services Selection Process following responses are presented for President or designee's consideration in approval for the election of Design/Build construction delivery method:

1. The need for the facility is of significant enough to require a substantial reduction of normal delivery time, requiring overlap of design and construction phases. (Add "Not Applicable" as appropriate.)

2. The design and construction of the facility require minimum interface with the users. (Add "Not Applicable" as appropriate.)

3. Project is performance based and require the development of a plan for life cycle cost savings and a design solution which will accomplish savings. (Add "Not Applicable" as appropriate.)

Chapter F. Introduction

ACADEMIC PLAN (Identify any proposed academic programs that will be housed within the facility and provide the following information: Add "Not Applicable" as appropriate.)

A. UNIVERSITY OF FLORIDA MASTER PLAN (Include a statement that the proposed academic program is consistent with the current adopte Academic Master Plan. University level Academic Plan Review by the University Provost should be conducted.)
B. ACADEMIC PROGRAM REVIEWS Give the date and program numbers of all relevant academic program reviews. Explain how the proposed facilities program meets the recommendations of the last academic program review.
C. RECOMMENDATIONS OF THE REVIEW CONSULTANTS (List the recommendations of the survey consultants. The current five-year Education Plant Survey should be reviewed or, if required, Special Spot Survey should be requested (for 100% PECO funded projects only.)
D. JUSTIFICATIONS (If the proposewd academic program is consistent with the current adopted Academic Master Plan, explain how the program meets the recommendations of the review consultants or otherwise justify any variation.) (The current five-year Space Needs Assessment Report accompanied by User Group level analysis should be included.) (The University Space Inventory Manager should be consulted in order to determine space needs based on the Full Time Equivalent (FTE) enrollment based space needs formula.) (Planning for future growth is based on the University's approved Academic Plan; review of the academic plan is required prior to developing the following section of the facilities program.)

Chapter G. Space Needs Assessment.

SPACE NEEDS ASSESSMENT

A. FACILITIES DEFICIENCIES (Describe the facilities problem in terms of current and future facilities deficiencies; Describe the proposed solution and what alternative solutions were considered such as rescheduling, remodeling of existing space, jointly using facilities on or off campus, and leasing of space.)
B. ALTERNATIVE SOLUTIONS (If a new facility is proposed, provide reasons why other alternatives were not chosen and why a new facility is the best solution.)
C. QUANTITATIVE ANALYSIS OF PROGRAM SPACES (Provide quantitative analysis indicating how the proposed amounts and types of space were arrived at using requirement of the program to be housed.)
   The Size of Spaces and Occupant Criteria Table contained in the State Requirements for Educational Facilities Chapter 6, Section 6.1, Size of Spaces and Occupant Criteria Table was utilized as a guide in the development of the program.
D. PROJECT AND SURVEY RECOMMENDATIONS (Describe any differences between the project and survey recommendations for the project.)

Chapter H. Consistency with the Adopted Campus Master Plan.

CONSISTENCY WITH THE ADOPTED CAMPUS MASTER PLAN (The University Planner should be consulted in order to ensure correct interpretation of the Campus Master Plan; the University Planner is responsible for the coordination and submittal of amendments to the CMP.)

A. THE ADOPTED CAMPUS MASTER PLAN (Include a statement as to whether the proposed project is consistent with the adopted campus master plan and associated campus development agreement)The proposed project is consistent with all elements of the Campus Master Plan (CMP). (Add following if apply:) An amendment to the Capital Improvements Element section of the CMP will be required to program the scope and siting of the proposed project. Following interpretations of the relevant sections are within the permitted threshold established under the CMP. (Add following if apply:) An amendment to the CMP and associated campus development agreements will be required to identify the scope and siting of the proposed project. Following interpretations of the relevant sections are well within the permitted criteria established under the CMP. (If the proposed project is not consistent with the adopted campus master plan and/or the associated campus development agreement, include a description as to how the campus master plan or campus development agreement must be amended.)

B ANALYSIS OF THE CAMPUS MASTER PLAN

1. Urban Design Element. (Identify specific aspects of this elements that directly impact the project.)
2. Future Land Use Element. The Land Use Element of the CMP identifies the proposed project site as ( ) area in the Future Land Use Map. The proposed project is consistent with the Land Use Element of the CMP. (Add following if apply:) Presently the site is identified as ( ). The Future Land Use Map will be amended to reflect the rearrangement of land use; and there will be no net decrease in the amount of open space, natural areas, or buffers on campus reflected in this amendment.
3. Facilities Element. (Only one of Facilities Element apply for each project: Academic, Support Facilities, Housing, Recreation and Open Spaces, and General Infrastructure Element)
4. Utilities Element. (Identify specific aspects of this element that directly impact the project.)
5. Transportation Element. (Identify specific aspects of this element that directly impact the project.)
6. Intergovernmental Coordination Element. (Identify specific aspects of this element that directly impact the project.)
7. Capital Improvements Element. (Identify specific aspects of this element that directly impact the project.)
8. Architectural Design Guidelines Element. (Identify specific aspects of this element that directly impact the project.)
9. Landscape Architectural Guidelines Element. (Identify specific aspects of this element that directly impact the project.)

C. AMENDMENTS TO THE CAMPUS MASTER PLAN (Modify following (including the TOC) if amendment to the CMP is not required.) The proposed facility is consistent with the definition of (appropriate Element as described in the CMP) Element (and all other aspects of the CMP). Although the Capital Improvement Element of the CMP does not identify the proposed project currently, this element of the CMP is updated annually and the project will be added during the next (appropriate Year) amendment cycle. In anticipation of the scheduled submittal of required amendment, and a finding of consistency with the adopted CMP, it is University desire that the project (as described in this facilities program) be approved as submitted.

Chapter H. Site Analysis.

SITE ANALYSIS

A. SITE CONDITIONS
1. Site Topography. (Site topography and soil conditions.) Refer to Section X, Utilities Impact Analysis for site maps.
2. Storm Drainage. (Site water table, flood hazard and storm water drainage requirements.) Refer to Section X, Utilities Impact Analysis for site maps and description of the site storm water system.
3. Vehicular and Pedestrian Circulation.
4. Site Vegetation.
5. Archaeological History. (Archeological history (per Section 267.061(2), F.S.). Check the Archeological Zones of Sensitivity Map and determine if Archeological Surevy and approval of the Florida Division of Historical Resources may be required. Archeological Senstivity Zone map is available for review at PPD, Building 700 or CPCM office.)
6. Existing Utility Locations. Refer to Section X, Utility Impact Analysis for campus utility infrastructure maps and description of site utilities.
7. Architectural Significance of Adjacent Structures.
8. Unusual Site Conditions.
9. Direction of Prevailing Winds. There is no University wide study of the prevailing wind patterns. Generally the wind patterns vary seasonally reflecting the global patterns associated with the summer tropic air currents from the southeast and winter arctic winds from northwest. More importantly, the Architect must study the effect of microclimate created by existing tree canopy and site conditions (in addition to the relationship to adjacent building exhaust, fresh air intake and vehicular traffic patterns) in siting the building and in designing for views and HAVC/MEP systems.
10. Additional analysis, if desired.

B. BUILDING CONDITION SURVEY (Complete this section if renovation or remodeling of existing building is planned. Verify that section XV Budget Summary includes cost for correcting all deficiencies.)
1. Physical Description. Identify all building deficiencies and the estimated costs for correcting these deficiencies.

C. CAMPUS MAP & SITE MAP
Refer to Section X, Utilities Impact Analysis for site maps. (Use statement to the left or list below as desired.)
1. Campus and Facilities Location Map (PPD provides this map.)
2. Site and Topographical Map (PPD provides this map.)

D. FLOOR PLANS (Complete this section if renovation or remodeling of existing building is planned. Delete otherwise. Identify areas to be renovated or remodeled.)
1. Ground Floor Plan (These Floor Plans may be obtained from FPCD or PPD.)
2. Second Floor Plan (Other Floor Plans as Required)

Chapter I. Program Area.

A. PROGRAM AREA TABLE
Reference: State Requirements for Educational Facilities Chapter 6, Section 6.1, Size of Spaces and Occupant Criteria Table

B. SUMMARY BY SPACE CATEGORY (Modify, add or delete space categories as required. Contact the University Space Inventory Manager for guidance and assistance. This table should summarize by Room Use Code only.) Reference: U.S. DOE, Postsecondary Education Facilities Inventory and Classification Manual.

Chapter J. Utilities Impact Analysis.

UTILITIES IMPACT ANALYSIS

A. UTILITIES IMPACT ANALYSIS (PPD Utility Planner provides the utility infrastructure improvement impact and cost analysis. Preliminary program and site information should be provided to the Utility Planner for timely completion of this section.)

1. Chilled Water. (Estimate tons required and identify source of supply (Package or Central Plant). Include analysis of adequacy of off-site pipe capacity.)
2. Steam. (Estimate BTUH required and identify source of supply. Analyze adequacy of off-site pipe capacity.)
3. Electrical. (Estimate KVA load and identify source and adequacy of supply.)
4. Potable Water. (Identify number of gallons per day, identify soure of water supply. Analyze capacity of supply sources.)
5. Sanitary. (Identify number of gallons per day, identify method of sewage disposal. Analyze capacity of disposal sources. Dicsuss permit requirements.)
6. Irrigation. (Identify number of gallons per day required and identify supply source. Discuss permit requirements.)
7. Storm Water Management. (Following items 7-14 are recommended and provided by PPD. Include discussion of St. Johns Water Management District (SJWMD) permitting requirement.)
8. Natural Gas.
9. Telecommunications.
10. Fire Alarm System.
11. Energy Management Control System.
12. Site Lighting.
13. Surface Improvements.

B: UTILITIES INFRASTRUCTURE COST ESTIMATES (This information provided by PPD.)

Chapter K. Information /Telecommunications Resources Requirements.

INFORMATION / COMMUNICATIONS RESOURCES REQUIREMENTS

A. UNIVERSITY INFORMATION / COMMUNICATION STANDARD

The following University of Florida standards govern the information / communications resources requirements for the design of new facilities and renovation of existing facilities at the University of Florida:

a. Telecommunications and Computer Networking Support Structures
b. Intra-Building Wiring Standards and Preferred Practices
c. Inter-Building Communications Infrastructure Standards
d. Inter-Building Cabling Standards and Guidelines
e. Academic Technologies Office - Classroom Standards (when classrooms are present)

These standards may be viewed on the Facilities Planning and Construction website (www.facilities.ufl.edu).

B. UNIVERSITY INFORMATION RESOURCE MANAGER CERTIFICATION

By signature (on the signature page of this facilities program) the University Information Resource Manager certifies that a review of the University information/communication standards has been completed; and that the facilities program was developed in conformance with the University of Florida Information/ Communication Standards in accordance with the Section 282, F.S.

C. GENERAL INFORMATION

The design team shall include the resources needed to fully develop a complete scope of work for all telecommunications, I/T, and audio/visual systems and components (including BICSI or RCDD qualified staff). The Owner may elect to accomplish portions of this work outside of the construction contract, but the construction documents must still account for all work (i.e., with notes for work "by others").

a. (BICSI): Building Industry Consulting Service International, Inc.
b. (RCDD): Registered Communications Distribution Designer

Telecommunications plant work (exterior of facility) is typically purchased by the project through OIT (Office of Information Technology)-Telecom. The architect/engineer shall coordinate with OIT-Telecom to eliminate conflicts with other utilities, landscaping, etc., shall include all such work "by others" in the construction documents, and shall ensure that no gaps exist between the contractors' scope of work and the scope(s) of work "by others."

Likewise, the interior voice & data work may be purchased by the project from OIT-Network Services (or from HealthNET for UF Health Science Center projects). In any event, all such work shall be included in the construction documents and coordinated by the architect/engineer.

The roles and responsibilities of other relevant University of Florida entities include:

a. ATO (Academic Technology Office): ATO Classroom Support will participate in the design and specification of classroom instructional spaces and associated audio/visual and information technology systems. They will also meet with the User Group during program verification to determine classroom needs. The Health Science Center, Office of Academic Information Systems & Support will support the ATO for Health Science Center projects.

b. OIT Network Services: Network Services will participate in the design and specification of all communications rooms, cable pathways, and data network cables. They will also meet with the User Group during program verification to determine their network needs. HealthNET will perform this function for Health Science Center projects.

The Owner may also elect to transfer portions of the Furnishings and Equipment budget into the construction budget (and under the control of the contractor, therefore) if the installation of certain items – particularly the audio/visual components – makes logistical and economic sense.

During Program Verification and the earliest stages of design, the design team and contractor shall produce a matrix of all Furnishings & Equipment, telecommunications, I/T, and audio/visual items to be provided under this program. The consultants shall then work with the Owner to refine this matrix to clearly establish the costs for, and responsibility for, each item.

Chapter L. Codes and Standards.

CODES AND STANDARDS

The University of Florida Environmental Health & Safety Division approved editions of Codes and Standards (and associated review & permitting process), and University standards, where applicable, shall be followed for the design and construction of the proposed facility.

Chapter M. Project Schedule.

PROJECT SCHEDULE *(Select appropriate project delivery method and modify as required, delete the rest. Choose one of the following methods: Conventional; CM with GMP; D/B, or AIA D/B.)*

CONVENTIONAL DESIGN AND BID PROJECT DELIVERY METHOD

CONSTRUCTION MANAGEMENT PROJECT DELIVERY METHOD (The University preference is the CM process with a GMP submittal at the conclusion of design phase adequate for obtaining a GMP.)

DESIGN / BUILD PROJECT DELIVERY METHOD State D/B Project Delivery Process

Chapter N. Program Funds.

PROGRAM FUNDS

A. ESTIMATED FUNDING (Describe in detail the sources of funds available or anticipated: construction, equipment, and operating expenses.)
B. ESTIMATED BUDGET (Establish inital project COIP based on anticipated funding.)

Chapter O. Project Budget Summary.

PROJECT BUDGET SUMMARY

Chapter P. Exhibits.

EXHIBITS

A. UNIVERSITY COMMITTEES REVIEW
B. (Additional Exhibits as required.)