A&E - Preparing a 2018 Capital Budget Request Including Predesign Guideline Updates

Gregory Ewig
System Director, Capital Development
651.201.1775
Gregory.ewig@so.mnscu.edu

Michelle Gerner
Senior Planner
651.201.1531
Michelle.gerner@so.mnscu.edu

Originally presented via Webinar May 3, 2016
Part 1 – 2018 Capital Budget

Part 2 – Predesign Guidelines
Part 1 – 2018 Capital Budget

01 About bonding
02 Strategy and Guidelines
03 Getting Work
04 Campus Engagement
05 Deliverables
06 Building a list
A&E – Preparing a 2018 Capital Budget Request

MnSCU Campuses

28 MILLION square feet represents about one-third of the total square footage of Minnesota public buildings

22 MILLION square feet is dedicated to academic and student support space

Source: EMS Campus/ISRS
It’s not widely known, but Minnesota State Colleges and Universities is the largest provider of higher education in the state of Minnesota, larger even than the University of Minnesota. Each year the system confers some 41,000 degrees.

Size of System
With 28 million square feet, MnSCU makes up about 1/3 of the state’s public building inventory.

Bonding Bill
Since its inception, MnSCU receives about half of its capital bonding request in an average biennium.

Backlog
Minnesota State Colleges aggressively invests in asset preservation, a number one priority in its bonding bills. Current system backlog is 0.10, meaning just 10% of the building systems are in backlog status.

Serving over 400,000 students
It’s not widely known, but Minnesota State Colleges and Universities is the largest provider of higher education in the state of Minnesota, larger even than the University of Minnesota. Each year the system confers some 41,000 degrees.
In the last 10 years, MnSCU has requested $2.6 billion and received about $1 billion.
Our system measures ourselves by the quality of our graduates, not by the number of applicants we turn away.

-Charting the Future, November 2013
The Strategic Framework informs our capital investment strategy and guidelines

The three strategic framework objectives are:

1. Ensuring access to an extraordinary education for all Minnesotans
2. Being the partner of choice to meet Minnesota’s workforce and community needs
3. Delivering to students, employers, communities, and taxpayers the highest value/most affordable option
1. Maintain, improve and modernize existing campus spaces to support current and emerging academic needs of a region and the state of Minnesota

2. Improve opportunities for student success by updating support services, academic advising, and tutoring spaces.

3. Prioritize space that improves transferability between institutions (college and universities) and access to baccalaureate programming.

4. Preserve and maintain the space we have by reinvesting in campus infrastructure and prioritizing renovation over adding new square footage. Additional square footage should be considered only in unique situations where options for reutilization or replacement of existing space have been exhausted.

5. Build for the future with flexible and adaptable space that prioritizes energy efficiency.
Campus CFOs have direct line authority over Facilities and a campus’s capital budget request.
# A&E – Preparing a 2018 Capital Budget Request

## Predesign requirements

<table>
<thead>
<tr>
<th>Full</th>
<th>Limited</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Capital Projects</td>
<td>HEAPR projects with a construction cost between $100,000 $750,000</td>
</tr>
<tr>
<td></td>
<td>HEAPR projects with a construction cost over $750,000</td>
</tr>
</tbody>
</table>

All capital projects now require a predesign regardless of expected project size. Many of our smaller projects end up exceeding the $750,000 threshold after inflation is applied.
This year, in addition to the traditional predesign requirements, certain areas require particular attention:

1. Enrollment trends and demographic forecasts
2. Accreditation status of program
3. Cost estimating
4. Having the right expertise on the team
5. FF&E and Technology
The campus’s current comprehensive facilities plan is mandatory reading and should offer insight into the project and constituencies served.
New and updated predesigns

Campuses are being asked to prepare full predesigns whether the project is brand new or is a carryforward from a previous year bonding bill

1. An “updated” predesign is still a “full” predesign.
2. Treat it as a new assignment
3. Use our updated predesign guidelines
## Responsibilities during predesign

<table>
<thead>
<tr>
<th>Campus</th>
<th>A&amp;E</th>
<th>System Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide data and establish process</td>
<td>Identification of data and process requirements</td>
<td>Assist campus with data gathering, if needed</td>
</tr>
<tr>
<td>Facilitate access to campus and campus community</td>
<td>Collaborate with project stakeholders, campus community</td>
<td>Review/comment on predesign drafts</td>
</tr>
<tr>
<td>Submit drafts to system office via SharePoint</td>
<td>Develop predesign drafts</td>
<td>Provide guidance on standards, statutes, funding</td>
</tr>
<tr>
<td>Presentation to system office</td>
<td>Deliver final documents</td>
<td>Feedback to campus and consultant following presentation</td>
</tr>
</tbody>
</table>

Source: Placeholder example
A&E – Preparing a 2018 Capital Budget Request

2018 Capital Budget Process

- **Starting the process – Guidelines approved**
  - 3/17/2016

- **Today**

- **Predesign work**

- **Scoring of Projects**
  - 1/4/2017 - 1/5/2017

- **Board of Trustees approves 2018 Capital Budget List**
  - 5/1/2017 - 6/21/2017

- **Legislative Tours of Campus Projects**
  - 8/1/2017 - 12/30/2017

- **Legislative Session**
  - 1/1/2018 - 5/21/2018

- **Legislature adjourns - Bonding Bill!**
  - 5/21/2018
A&E – Preparing a 2018 Capital Budget Request

Predesign Schedule

- **Board of Trustees approves Capital Program guidelines**
  - **3/16/2016**

**2016**

<table>
<thead>
<tr>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Hire predesign architect**
- **4/1/2016 - 6/1/2016**

**Collection of data**
- **6/1/2016 - 8/1/2016**

**Consultation with campus constituency**
- **8/1/2016 - 10/31/2016**

- **50% predesign document, narrative and spreadsheets due to system**
  - **8/1/2016**

- **95% predesign document, narrative and spreadsheets due to system**
  - **9/21/2016**

- **100% (final) predesign, narrative and spreadsheets due to system**
  - **11/15/2016**
Deliverables

Predesign documents and the companion narrative and workbooks for projects are shared widely.
Documents you’ll need

Project Narrative Template

REQUEST FOR PROPOSAL (RFP)
FOR
PREDESIGN SERVICES FOR
Name of the Project at Campus Name

Predesign Guidelines – Updated
A&E – Preparing a 2018 Capital Budget Request

Submittal Documents

Project Narrative Template

Predesign Document

Project Workbook Template
Renewable Energy Requirements

1. Required for new construction or significant remodels
2. Analyze cost/benefit of renewable energy systems (solar, wind, geothermal)
3. Solar energy systems strongly encouraged
Building a List

How MnSCU arrives at a prioritized bonding list
Capital Projects scoring process

After final predesigns are submitted, presidents nominate college and university scoring team members.

Nominees represent academics, student affairs, IT, finance and facilities.

Scoring teams convene in early January for a two-day scoring event.

3 teams score each project.
A&E – Preparing a 2018 Capital Budget Request

Capital Projects scoring

Scoring Team 1

Scoring Team 2

Scoring Team 3

Average Score

Three teams score each project.
No team member scores a project from their campus.
Keys to successful projects
Or, “How can I get the campus project to score well?”

1. Summarize key terms of the project
2. Explain what problem it solves
3. How does it meet the strategic framework and capital guidelines
4. How much does it cost
5. How is it being delivered?
Scoring Sheet

Minnesota State Colleges & Universities
FY2018-2022 Capital Projects Review and Comments
Scoring Team Project Analysis

Scoring Team Name:

Institution and Campus:

Project Title:

Project Type (check one):

Major capital project

Initiative (less than $2 million)

Project Sq. Ft. (see Narrative):

New

Renovate

Renew

Demolish

Instructions:

For each scoring item, circle your team’s chosen score.

For each section, the likely location of the information is noted in the description (e.g., See Narrative).

You may write comments explaining your score, as well as suggestions to improve the project, within each section and at the end of the scoring form.

If a project includes significant new net square footage, you will receive a Supplemental Scoring Form to fill out in addition to this form.

Core commitments in the Enriched Framework for capital planning in FY2018-2022 are:

Ensure access to an extraordinary education for all Minnesotans.

Be the partner of choice to meet Minnesota’s workforce and community needs.

Deliver to students, employers, communities and taxpayers the highest value/most affordable higher education option.

0.5 Preliminary Considerations

Strategic Framework Elements

No

Yes

Documentation

0.5.1 Project will result in a net reduction in square footage when completed. (See Narrative.)

0

10

Insert expected net reduction in square footage:

0.5.2 Project received funding for design and/or construction in 2016 or a prior year. (See Narrative and Workbook.)

0

5

Identify the years(s) funding was received:

0.5.3 Project pre-design analysis shows an energy reduction of at least 20% over current consumption. (See Narrative.)

0

10

Identify estimated energy reduction:

TOTAL POINTS - SECTION 0.5 (Max: 25 points)

1.0 Ensure access to an extraordinary education for all Minnesotans

Projects must reflect alignment in academic and facilities planning, support state and regional academic programming and collaboration, and long-term space requirements on a regional basis, enhance facilities that support and improve access for traditionally underrepresented students with emphasis on how the project enhances student success. Projects shall have evidence that:

Integrated Planning: The project aligns campus facilities, technology and academic planning and shows coordinated campus priorities.

Guidance on discrimination reached for Low = Are = High score

1.1 Academic priorities. Targets regional and statewide academic priorities, such as STEM and technical programs.

1.1.1 Regional priorities. Meets long-term space requirements for programs in a regional and multi-regional basis for programs (including multiple campuses of a single institution).

1.1.2 Project is described in the latest comprehensive facilities plan. (See Narrative)

1.1.3 Is supported by the campus’s existing campus infrastructure, utilities, technology and transportation. (See Narrative)

1.2 Address non-student demographics: The project is meant to repurpose existing campus space into space that takes into account the needs of students, and continues to enhance student experience and exposure to higher education.

1.2.1 Improves areas available for academic advising and tutoring.

1.2.2 Targets individualized learning and advising.

1.2.3 Is intended to improve diversity of existing student body.

1.2.4 Uses technology to make learning more accessible to a wide range of learners, including underrepresented students.

Subtotal, Section 1.2 (Max: 14 points)

1.3 Creating more flexibility in learning spaces

1.3.1 Includes features that yield informal learning spaces and blur the line between traditional classroom learning and other features that support informal learning or "loos'n it" space.

1.3.2 Prioritizes space that improves transferability between our colleges and universities.

Subtotal, Section 1.3 (Max: 7 points)

Low – There be no evidence provided by the project team that project aligns with academic, technology, and facilities planning to show that projects that result in academic or regional priorities as requested by existing facilities infrastructure.

Medium – Project identified in comprehensive facilities plan, but little to no evidence of coordination with academic or technology plans. Project meets some academic or state regional priorities, but not the state prioritized. Significant effort has been made to align existing facilities with the project, but there is no evidence of coordination with academic or technology plans. Project plans provide some evidence of an academic or state regional priorities, but the state prioritized are not well supported.

High – Evidence provided that the project aligns with academic, technology, and facilities planning to show that projects that result in academic or regional priorities as requested by existing facilities infrastructure.
## Part I - Preliminary considerations

### Additional Points

1. **10 points for reducing overall square footage**

2. **5 points for prior year legislative funding**

3. **10 points if energy reduction from the renovation/building is 20% or greater**
Part 2 - Major Categories

Organized around Strategic Framework

1. 65 points for Ensure Access
2. 48 points for Partner of Choice
3. 74 points for Highest Value
4. 212 points possible (including 25 points in preliminary considerations):
Part 3 – Only for New Square Footage requests

For new Square Footage requests only:

1. Over 5,000 sq. ft.

2. In addition to the other scoring items

3. Max of 35 points – only applicable among other New sq. ft. projects
A&E – Preparing a 2018 Capital Budget Request

Resources: Planning and Programming

Planning and Programming (Comprehensive Facilities Plans, Predesigns)

The Planning and Programming team integrates facilities planning with system-wide academic and strategic priorities. The group is responsible for the development of project requests to the legislature, preparing projects for revenue bond sales, and capital financing, and works with the Design and Construction group for delivery of new facilities, major rehabilitation, and ongoing repair and renewal of existing facilities. Contact Planning and Program for:

- **Solicitations**
  - Current listings of requests for information, requests for proposal, requests for qualifications for projects, and employment opportunities.

- **Capital Budget**
  - Forms, processes, and procedures concerning all aspects of the capital budget, such as the HEAFR process, capital budget scoring, and the current capital budget request for the biennia.

- **Comprehensive Facilities Plans (formerly Master Planning)**
  - Information on campus comprehensive facilities plans, including the preparation of RFPs, guidelines, and scheduled presentations.

- **Predesigns**
  - Project predesigns develop the scope and feasibility of a construction project, and is a necessary prerequisite to a capital request.

- **Reports, Studies, and Guidelines**
  - Current reports relating to facilities planning, including parking, entrance studies, and similar documents.

- **NEW -- Capital Renewal (formerly Facilities Renewal Reinvest Model (FRRM))**
  - Login page for colleges and universities to update campus backlog and renewal forecasts. This tool includes calculations of the campus Facilities Condition Index backlog, projected renewal requirements. Campuses may contact Emily Zuming, emily.zuming@so.mnsu.edu for login credentials.
A&E – Preparing a 2018 Capital Budget Request

Resources: Capital Budget Website

www.finance.mnsu.edu/facilities/capitalbudget/

Capital Budget

The Board of Trustees submits a capital request to the state legislature for capital funding during every even-year legislative session. The system-wide Capital Budget is comprised of a request for Higher Education Asset Preservation and Renewal (HEAPR) funding and individual capital projects and initiatives to renew and address changing market conditions, opportunities and strategic direction of our campuses. The process is further sketched out in the following links.

Capital Budget Overview
A summary overview of the capital budget process and how it works.

Capital Planning Process
Capital process diagram which demonstrates the flow of information between the campuses and the System Office.

2018 Capital Budget

Preparing the Request

- **2018 Capital Program Guidelines**. Guidance used in scoring capital project submittals for 2018 capital budget request. Approved by the Board of Trustees March 16, 2016.
- **Project Forms**
  - Narrative (Word)
  - Workbook (Excel)
- **Scoring Forms**
  - All projects
  - Projects with new square footage
Part 2 – Predesign Guidelines

01 Updates to the Predesign Guidelines
02 Guidelines structure and format
03 Form templates and other requirements
04 Updates to the Predesign RFP
05 Proposal requirements
06 Acceptable proposal bindings
Updates to the Guidelines

The updated Predesign Guidelines are now available on the Facilities website.
Minnesota State Colleges and Universities

Predesign Guidelines

April 26, 2016

Greg Ewig, System Director, Capital Development
651-201-1775
gregory.ewig@so.mnscu.edu

Michelle Gerner, Facilities Senior Planner
651-201-1531
michelle.gerner@so.mnscu.edu

*The Minnesota State Colleges and Universities system is an Equal Opportunity employer and educator.*
A&E – Preparing a 2018 Capital Budget Request

Introduction answers questions about the predesign process

Context for Predesign
What’s the role of predesign within MnSCU?
What comes before predesign?
What’s the relationship of predesign to the first major funding?

When is a predesign required?
Type of predesign required for different types of projects
Requirements for different types of predesigns (full vs. limited-scope)
What is the predesign’s role after funding is, or is not, received?

Developing a predesign
Who performs predesign?
What are the responsibilities of the campus, consultant, and system office?
What does predesign cost?
What are the results of predesign?
Predesgin structure hasn’t changed

<table>
<thead>
<tr>
<th>Predesign Section</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Front Matter</td>
<td></td>
</tr>
<tr>
<td>1: Summary Statement</td>
<td></td>
</tr>
<tr>
<td>2: Project Narrative</td>
<td></td>
</tr>
<tr>
<td>3: Project Description (Scope)</td>
<td></td>
</tr>
<tr>
<td>4: Sustainability and Energy</td>
<td></td>
</tr>
<tr>
<td>5: Financial Information - Capital Expenditures</td>
<td></td>
</tr>
<tr>
<td>6: Financial Information - Ongoing Operating Expenditures</td>
<td></td>
</tr>
<tr>
<td>7: Schedule</td>
<td></td>
</tr>
<tr>
<td>8: Technology Plan/Budget</td>
<td></td>
</tr>
<tr>
<td>9: Appendix</td>
<td></td>
</tr>
</tbody>
</table>
## Limited Scope predesigns (HEAPR)

<table>
<thead>
<tr>
<th>Predesign Section</th>
<th>Required/Optional sections by type of predesign:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Full predesign</td>
</tr>
<tr>
<td>Front Matter</td>
<td>R</td>
</tr>
<tr>
<td>1: Summary Statement</td>
<td>R</td>
</tr>
<tr>
<td>2: Project Narrative</td>
<td>R</td>
</tr>
<tr>
<td>3: Project Description (Scope)</td>
<td>R</td>
</tr>
<tr>
<td>4: Sustainability and Energy</td>
<td>R</td>
</tr>
<tr>
<td>5: Financial Information - Capital Expenditures</td>
<td>R</td>
</tr>
<tr>
<td>6: Financial Information - Ongoing Operating Expenditures</td>
<td>R</td>
</tr>
<tr>
<td>7: Schedule</td>
<td>R</td>
</tr>
<tr>
<td>8: Technology Plan/Budget</td>
<td>R</td>
</tr>
<tr>
<td>9: Appendix</td>
<td>R</td>
</tr>
</tbody>
</table>
Option 1, Capital Budget (GO Bond) funding/phasing

HEAPR project funding/phasing
Section 1: Summary

Briefly summarize the basic data of the project:
- What the project is,
- Where it is on the campus,
- Who participated (partners, stakeholders) and who benefits (students, etc.),
- How this project serves the strategic framework; how much does it cost; how is the project funded and delivered,
- Why the project is needed, and
- When the project is expected to be designed, funded, and constructed.

Other considerations (summarize within narrative):
- Renewable energy
- Campus contribution
- Enrollment impact (for affected programs and college or university as a whole); are the affected programs new or existing?

Checklist: Section 1: Summary

<table>
<thead>
<tr>
<th>Document Draft</th>
</tr>
</thead>
<tbody>
<tr>
<td>50%</td>
</tr>
<tr>
<td>Brief description of project: Scope, size, cost, schedule, stakeholders, why is the project needed, how will the project be delivered</td>
</tr>
<tr>
<td>Description of how the project is funded</td>
</tr>
<tr>
<td>Brief description of program delivery as it relates to the project</td>
</tr>
<tr>
<td>Description of academic and operational programs affected by the project</td>
</tr>
<tr>
<td>Description of major facilities issues affected by the project: Deferred maintenance/renewal, space utilization improvement, sustainability, B3 Guidelines adherence, renewable energy, etc.</td>
</tr>
<tr>
<td>Cost breakdown: Demolition, new construction, renovation, renewal</td>
</tr>
<tr>
<td>Summary of project schedule, including milestone dates and funding</td>
</tr>
<tr>
<td>Costs and schedules for all project phases, if project includes multiple phases</td>
</tr>
<tr>
<td>Summary of alternatives or options evaluated</td>
</tr>
<tr>
<td>Summary of renewable energy options considered for the project</td>
</tr>
<tr>
<td>Summary of backlog reduction</td>
</tr>
</tbody>
</table>

● = required item
### Checklist: Section 1: Summary

<table>
<thead>
<tr>
<th>Description</th>
<th>50%</th>
<th>95%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brief description of project: Scope, size, cost, schedule, stakeholders, why is the project needed, how will the project be delivered</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Description of how the project is funded</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Brief description of program delivery as it relates to the project</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Description of academic and operational programs affected by the project</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Description of major facilities issues affected by the project: Deferred maintenance/renewal, space utilization improvement, sustainability, B3 Guidelines adherence, renewable energy, etc.</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Cost breakdown: Demolition, new construction, renovation, renewal</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Summary of project schedule, including milestone dates and funding</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Costs and schedules for all project phases, if project includes multiple phases</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Summary of alternatives or options evaluated</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Summary of renewable energy options considered for the project</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Summary of backlog reduction</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
</tbody>
</table>

● = required item
Section 3: Project Description

While previous sections discussed the academic programs that the proposed project serves, the architectural/engineering program ("A/E program") as referenced in this section is a compilation of instructions to the consultants who design the project after predesign is complete. The nature and extent of these instructions are specific to the project.

Projects that include classroom, class lab, applied technology lab, office, library, or student lounge/study spaces are to follow the system’s most current Space Planning Guidelines, available at the Facilities website.

This section should include the forms described below. Note that it is not required that the predesign use these exact templates — campuses and their consultants may reformat the templates to fit the graphic style of the predesign document, as long as all the information on these templates is included in the document.

Space Needs Inventory: A template is located on page 54. Space needs should be thoroughly documented and developed in consultation with the future users of each space type. Current, as well as anticipated, infrastructure or amenities needs should be described in detail. Generally, space needs should be described in Net Assignable Square Feet (NASF).

Building Summary Form: Templates are located on pages 52 (existing buildings) and 53 (new building). Include a separate copy of this form for each existing building affected by the project or for each proposed new building.

For projects affecting multiple building systems (HVAC, security, plumbing, fire suppression, etc.), the appropriate subconsultants should be included in the predesign process. These subconsultants must conduct in-person site surveys of all buildings involved in the project before making their recommendations.
Typical Example Graphics Page

Example summary graphics.

Example site plans.

Minnesota State Colleges and Universities
Pre-design Guidelines

Example graphics only illustrate general concepts, and should not be adhered to stylistically verbatim or taken as current factual data.

Example Graphics — Section 1
Areas of Emphasis

- Academic program impacts
- Sustainability, B3, and renewable energy
- Accurate cost estimating
Form Templates

*Sample Predesign Project Data Sheet

Sample Predesign Submittal Cover Letter from Campus

Sample Predesign Submittal Cover Letter from Consultant

Sample Predesign Building Summary Form—Existing Building Data

Sample Predesign Building Summary Form—New Construction

Sample Predesign Space Needs Inventory

*Sample Project Costs Worksheet

*Sample Operating Costs and Construction Costs Worksheets
New Form for Capital Budget Predesigns

Checklist: Front Matter

<table>
<thead>
<tr>
<th>Document draft</th>
<th>50%</th>
<th>95%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title/Cover Page</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Predesign Project Data Sheet</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Cover letter from campus</td>
<td></td>
<td>●</td>
<td></td>
</tr>
<tr>
<td>Cover letter from consultant</td>
<td></td>
<td>●</td>
<td></td>
</tr>
<tr>
<td>Table of Contents</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
</tbody>
</table>
Form Templates

*Sample Predesign Project Data Sheet

Sample Predesign Submittal Cover Letter from Campus

Sample Predesign Submittal Cover Letter from Consultant

Sample Predesign Building Summary Form—Existing Building Data

Sample Predesign Building Summary Form—New Construction

Sample Predesign Space Needs Inventory

*Sample Project Costs Worksheet

*Sample Operating Costs and Construction Costs Worksheets
## Space Needs Inventory

### Predesign Space Needs Inventory and Diagrams

<table>
<thead>
<tr>
<th>Space Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Space number:</td>
</tr>
<tr>
<td>Proposed size (NSF):</td>
</tr>
<tr>
<td>Department(s) served:</td>
</tr>
<tr>
<td>Number of rooms needed:</td>
</tr>
<tr>
<td>Function(s):</td>
</tr>
<tr>
<td>Critical adjacencies:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Systems and Finishes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Typical finishes:</td>
</tr>
<tr>
<td>Typical lighting:</td>
</tr>
<tr>
<td>Typical HVAC, plumbing, electrical requirements:</td>
</tr>
<tr>
<td>Typical technology requirements:</td>
</tr>
<tr>
<td>Furniture, fixtures, and equipment (FF&amp;E) required:</td>
</tr>
<tr>
<td>Other requirements:</td>
</tr>
</tbody>
</table>

*(Provide a typical floor plan, including furniture layout if applicable.)*

*(Provide an adjacencies layout diagram if applicable.)*
6. **Instructional Space:** Classroom-Type 1 (1320 SF, 60 occupants)

- **Department:** None, General Use
- **Room Name:** Classroom-Type 1
- **Anticipated Number of Room Type:** 6
- **Anticipated Number of Occupants:** Maximum of 60 students and one instructor
- **Function:** Typical classroom providing quality learning environment for students.
- **Critical Adjacencies:** None
- **Furniture, Fixtures & Equipment:** Moveable tables and chairs, white board with tack strip, lectern. See Technology Requirements.
- **Typical Finishes:**
  - Floor: Carpet
  - Walls: Painted gypsum board
  - Ceiling: Acoustical Tiles
- **Lighting:** Multi-switched LED/Fluorescents with Motion Controls
- **Mechanical/HVAC/Piping Requirements:** Hot water heat via variable air
**Predesign Submittal Requirements**

<table>
<thead>
<tr>
<th>Draft (50%, 95%)</th>
<th>Final (100%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Electronic (.pdf) only:</strong> review comments will be included within the .pdf and distributed to campus and consultant</td>
<td>Submit to system office <strong>two hard copies</strong> (in 3-ring binder with tabs separating sections) and <strong>one .pdf copy</strong></td>
</tr>
<tr>
<td>Campus uploads drafts to Capital Budget SharePoint along with draft <strong>Narrative</strong> (.doc) and <strong>Workbook</strong> (.xls)</td>
<td>Campus uploads .pdf to SharePoint with final <strong>Narrative</strong> and <strong>Workbook</strong>, along with <strong>photos of existing conditions</strong></td>
</tr>
</tbody>
</table>

*For submittals to the system office. The campus may have different requirements.*
Photos of Existing Conditions

High-quality (uncompressed .jpg or .tif, 10 MP or greater) images of existing conditions
A&E – Preparing a 2018 Capital Budget Request

Predesign Presentation

[Replace all red text]

2018 Capital Budget: Predesign Presentation
[Institution Name – Project Name]

[date of presentation]
[presenters]

Available on the Facilities website:

- Guide to the Predesign Presentation
- Template PowerPoint Presentation
Updates to the RFP

The Predesign RFP has been updated.

There have been changes in the requirements for the structure and format of proposals.
A&E – Preparing a 2018 Capital Budget Request

Required Proposal Sections

Proposals must include all of these sections, presented in this order.

1. Table of contents
2. Responder information
3. Project approach/work plan
4. Schedule
5. Fee proposal
Required Proposal Sections

Cover letter

1. Table of contents
2. Responder information
3. Project approach/work plan
4. Schedule
5. Fee proposal

Include all necessary consultants

Conduct site surveys, review existing conditions

Compare to record drawings (if any)
Required Proposal Sections

1. Cover letter

   1. Table of contents
   2. Responder information
   3. Project approach/work plan
   4. Schedule
   5. Fee proposal

How will cost estimates be calculated?

Method(s) to ensure cost accuracy and completeness

What estimating tool(s) will be used?
Required Proposal Sections

Include 2 weeks’ review time for each predesign draft (50%, 95%)

- Cover letter
- 1. Table of contents
- 2. Responder information
- 3. Project approach/work plan
- 4. Schedule
- 5. Fee proposal
Acceptable Bindings

To facilitate recycling of hard-copy proposals:

- Bind with plastic combs or staples
- No wire or spiral bindings
- No plastic or acetate covers
Facilities

Facilities encompasses a large range of diverse and complex services relating to the buildings, land, and overall environment of the 54 campuses with services centered on acquiring, disposing, financing, constructing, planning, and managing campus land and improvements.

Who to Call

Campus Facilities contacts
Check here for campus finance and facilities contacts.

System Office Program Managers
Get assistance with campus projects

Multi-Regional Training Center
Find CPR training in Minnesota.

Announcements

2018 Capital Budget Planning Starts! Check out the documents on the Capital Budget page to get started on planning for your campus's capital project in 2018.

New Predesign Guidelines are here! Updated predesign guidelines are here just in time for spring. Check them out.

2016 Bonding Book. The $254 million total request includes $206 million of state support and $48.2 million in MnSCU contributions.

Comprehensive Facilities Plan Guidelines. New Comprehensive Facilities Plan Guidelines go into effect September 1, 2015. Here are some details:

- Check out our handout: What's Changed in the Comprehensive Facilities Planning Update Guidelines
- Go to the Comprehensive Facilities Planning page to check out the Guidelines

Solicitations. Place to find current listings of requests for information, requests for proposal, requests for qualifications for projects, and employment opportunities.
A&E – Preparing a 2018 Capital Budget Request

Capital Budget Website

www.finance.mnsu.edu/facilities/capitalbudget/

Capital Budget

The Board of Trustees submits a capital request to the state legislature for capital funding during every even-year legislative session. The system-wide Capital Budget is comprised of a request for Higher Education Asset Preservation and Renewal (HEAPR) funding and individual capital projects and initiatives to renew and address changing market conditions, opportunities and strategic direction of our campuses. The process is further sketched out in the following links.

Capital Budget Overview
A summary overview of the capital budget process and how it works.

Capital Planning Process
Capital process diagram which demonstrates the flow of information between the campuses and the System Office.

2018 Capital Budget

Preparing the Request

- **2018 Capital Program Guidelines**: Guidance used in scoring capital project submittals for 2018 capital budget request. Approved by the Board of Trustees March 16, 2016.
- **Schedule for 2018 Capital Budget Request**: Last updated: April 2016
- **Project Forms**
  - Narrative (Word)
  - Workbook (Excel)
- **Scoring Forms**
  - All projects
  - Projects with new square footage