EQUIPMENT PURCHASE OR CAPITAL PROJECT.... WHO ARE YOU GOING TO CALL?

TED CHRISTY, ASSOCIATE DIRECTOR
University Procurement Authority

Business and Financial Policies and Procedures Section 7.1 – Purchasing Operations

• Purchasing Authority
  • The Purchasing Division has responsibility to purchase commodities, equipment and services requested by various campus departments.
  • Units should submit properly approved purchase requisitions to the Purchasing Division to authorize initiation of the purchasing process according to established procedures.
  • Limited purchasing authority is delegated to campus units by use of the procurement card.

• Construction and Construction-Related Services (Capital Projects)
  • The University Office of Capital Programs and Real Estate Services, the Departments of Facilities Management (UIC), the Office for Planning, Design and Construction (UIS), and the Facilities & Services (UIUC), handle construction projects.
  • Any of these campus offices may ask the Purchasing Division to issue competitive bids and/or purchase orders for construction projects.
Capital Projects Responsibility Matrix

Board of Trustees → Owner

UOCPRES

UIC → Policy Systems Master Planning

UIS

UIUC → Campus Planning Project Programming Design Construction
Definition of a Capital Project

A capital project is an undertaking that results in a creation, an alteration or a connection to real property.

Capital projects include the development of project scopes, budgets, schedules and procurement of all construction related services for new buildings, additions/modifications to existing buildings, and associated backbone infrastructure.

Consultant services related to capital projects such as programming, conceptualization/feasibility studies, construction documentation, bidding, construction observation and warranty services are included in the definition of a capital project.
Divisions of Work

*Illinois Procurement Code 30 ILCS 500/30-30*

For building construction contracts > $250,000, separate specifications will be prepared for all equipment, labor, and materials in connection with the following 5 divisions of work to be performed:

- Plumbing
- Heating
- Ventilation
- Electrical
- General Contract
Construction Project Limits

• Campus Units may procure and manage work < $78,300 (small purchase limit)

• Projects $0 - $250,000, contact the F&S Service Office via my.FS Portal
  o Contractor Services may be used up to $78,300 per trade
  o Job Order Contracting (JOC) may be used up to $250,000
  o F&S Crafts and Trades may be used up to $500,000 if authorized by F&S Executive Director

• Projects > $250,000, contact F&S Project Planning
  o Campus Capital Project approval process required
  o Design/Bid/Build project execution process applies
  o PSC Retainer Work Orders may be used for projects up to $2.5M
  o Qualification Based Selection is required for fees more than $25,000

• BOT Approvals
  o Projects > $5M
  o PSC Fees > $1M
  o Construction Contracts > $2.5M
Capital Project Initiation

Statement of Need
The Campus Client Group (CCG) must contact their respective Campus Construction Unit (CCU) to obtain the necessary forms for campus approval of their project proposal.

Campus Construction Units (CCU):
- UIC – Office for Capital Programs
- UIS – Facilities & Services
- UIUC – Facilities & Services
Identification of Project Need

- CCG creates the project proposal and provides a cost opinion
- CCG contacts CCU for approval submission forms
- Proposal is reviewed by the Director or Dean, Vice Chancellor, and Provost
- New buildings, major additions or total renovations will require additional campus approval from the Chancellor’s Capital Review Committee (CCRC)
- Following receipt of campus authorization, F&S Project Planning may proceed with development of the project
## Responsibilities

<table>
<thead>
<tr>
<th>Campus Planning</th>
<th>Capital Project Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master Plan Interpretation</td>
<td>Capital Project Start-Up and Development</td>
</tr>
<tr>
<td>Site Selections</td>
<td>Deferred Maintenance Program</td>
</tr>
<tr>
<td>Campus Capital Priorities</td>
<td>Feasibility and Conceptualization Studies</td>
</tr>
<tr>
<td>College and Classroom Master Planning</td>
<td>PSC Selection and Contract Execution</td>
</tr>
<tr>
<td>Historic Preservation</td>
<td>BOT Approval Submissions</td>
</tr>
<tr>
<td>City/County/Regional Planning Interface</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Capital Project Management</th>
<th>Space Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design and Construction Management</td>
<td>Space Request Analysis</td>
</tr>
<tr>
<td>Contract Execution</td>
<td>Lease Management</td>
</tr>
<tr>
<td>Project Closeout</td>
<td>Building Demolition Program</td>
</tr>
</tbody>
</table>
## Active Capital Projects

75 current projects totaling $690M

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>Cost</th>
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</thead>
<tbody>
<tr>
<td>Feasibility Studies</td>
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<tr>
<td>Planning</td>
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<tr>
<td>A/E Selection</td>
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<tr>
<td>Bid/Award</td>
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<td>Design</td>
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<tr>
<td>Construction</td>
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<td>$433M</td>
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QUESTIONS