Tulane

Master Plan
Proposed Project
Procedures

(R) September, 1999

Prepared by:
The Office of Campus Planning
Tulane University
Each project will have individual goals and priorities which may require variation from the standard schedule. Nonetheless, it is imperative that the outline of the schedule be followed and particularly that the appropriate administrative staff and committee agencies and individuals be contacted as specified.

1.0 IDENTIFICATION OF BUILDING NEED
The Dean, Department Head, or Administrator who recognizes or foresees a facility need shall contact the Office of Campus Planning. A short summary of the existing conditions, anticipated changes and projected needs shall be prepared by the Office of Campus Planning staff.

2.0 INITIAL CONSIDERATION OF PROPOSAL
The project summary developed in 1.0 shall be distributed to members of the Steering Committee for the Office of Campus Planning as a potential for discussion at a subsequent meeting.

2.1 Analysis of Funding and Financial Implications
The Senior Vice-President for Operations and CFO, along with the appropriate Dean or Department Head, shall review funding possibilities and establish the scheduling requirements of the funding alternatives.

2.2 Analysis of Siting, Architectural and Spatial Considerations
The Office of Campus Planning shall consider the general implications, scope and urgency of the request and identify major campus planning issues to be addressed in the development of the project. This analysis shall be presented for review by the Steering Committee and the Senate Physical Facilities Committee.

3.0 PRELIMINARY BUILDING ANALYSIS
The analyses begun in 2.0 above shall be continued in increasing detail.

3.1 Development of Preliminary Program
The preliminary program may be developed by the facility users through an Ad-Hoc Building Committee under the direction of the Office of Campus Planning. The Ad-Hoc Building Committee shall include the Dean, Director or Department Head, the Senior Vice-President for Operations and CFO and the Director of the Office of Campus Planning. The committee may also include the Associate Vice-President for Physical Facilities, and faculty, student or staff members as appropriate. The Office of Campus Planning can provide guidelines for initiating programming discussions.

3.2 Pre-Schematic Analysis of Siting and Impact on Campus Development
The Office of Campus Planning shall study the implications of a development or renovation of the general size and character established in 3.1. Consideration shall also be given to issues such as campus circulation, relation of built to open space, functional and formal relations to adjacent buildings and spaces, land utilization and zoning patterns, landscaping needs, infrastructure requirements, campus history, security design issues, and code requirements. For new construction projects, the studies shall also include analyses of site alternatives. If necessary, this work can be performed by the selected architect. The studies shall be summarized in reports and recommendations to be distributed to the members of the Steering Committee for review.

3.3 Review of Preliminary Findings
The Steering Committee for the Office of Campus Planning and the Senate Physical Facilities Committee shall
review the programmatic and siting reports and recommendations compiled to date and shall request additional studies or information as needed. An agreement as to the general scope of the program and the siting should be reached at this point. A representative of the Ad-Hoc Building Committee should be involved in this review.

5.0 ARCHITECT SELECTION

5.1 Statement of Intent
The Senior Vice-President for Operations and CFO shall confirm the University's intent to proceed with a specific project and a brief description of the project. This statement will represent the University's commitment to the project and will indicate that the Office of Campus Planning should begin the process for architect selection.

5.2 List of Potential Firms
The Office of Campus Planning shall initiate a list of architectural firms appropriate for the type of project.

5.3 Expansion of the List of Potential Firms
The initial list shall be expanded or otherwise modified by solicitation of recommendations from other members of the general University community, including related department representatives, representatives of the School of Architecture, the Administration, and other professionals and professional organizations as appropriate to the undertaking.

NOTE: In 1991, the Committee on Architecture Selection Process approved the following policy: "Full-time members of the School of Architecture may not contract with the University, nor may they be paid consultants for the University. Members of the School of Architecture may, however, serve as paid consultants to firms performing University work. Part-time members of the School of Architecture Faculty may receive commissions or consult with the University, but they must give up their University affiliation during the period of their consultation and for a one-year period after the completion of the project."

5.4 Selection Committee
A "Selection Committee" shall be formed including the members of the Steering Committee for the Office of Campus Planning, modified as appropriate for the project, along with a maximum of two representatives of the anticipated users.

5.5 Selection Criteria Statement
The Office of Campus Planning shall develop a selection criteria statement by which the candidates can be evaluated. It will consist of:

a. A general list of goals and standards developed for all University projects.

b. A project specific list of goals and standards based on the programmatic and siting studies previously completed.

5.6 Requests for Letters of Application and Statements of Related Work
The Director of the Office of Campus Planning shall issue written requests for letters of application and state-
PROCEDURES : NEW CONSTRUCTION OR MAJOR REHABILITATION

ments of related work from the list of firms (from 3 to 15) preferred by the Selection Committee. The Statement of Intent, Selection Criteria Statement, preliminary program, schedule and estimated budget shall be made available to the firms so that they can tailor their replies to most effectively respond to the project goals. A statement should be distributed which indicates the University agents and collegial processes that will be involved in the selection and implementation processes, as well as the schedule for interviews and award.

5.7 Summary of Applications
The Office of Campus Planning shall prepare outline summaries of the submissions based on the priorities established in the Selection Criteria Statement.

5.8 Short List
The Selection Committee shall reduce the candidate list to a short list of approximately 3 - 5 firms, and invite these firms to the University to present their credentials to the Committee. Firms not selected for the short list shall be so notified by telephone and in writing; these firms shall be thanked for their submissions and provided with a list of those firms which were selected for the short list.

5.9 Interviews
The Office of Campus Planning shall prepare a pre-programmed interview format which can be used to conduct the interviews and keep discussions focused and objective. The firms should be represented at the interview by principals and key staff members to be assigned to the project.

5.10 References
The Office of Campus Planning shall check references before and/or after the interviews by contacting previous clients and verifying jobs. Visits to completed projects designed by the finalists could be helpful in the final selection.

5.11 Award
All firms which have made submissions shall be notified by telephone and then in writing of the final award. Written notices will be issued after a contract has been executed with the selected architect.

6.0 DEVELOPMENT OF FINAL DESIGN PARAMETERS
Program
The program shall be finalized by the Ad-Hoc Building Committee and the Architect, under the direction of the Office of Campus Planning. This will allow for input by an architect selected for special expertise in a particular building type.

Siting
At the discretion of the Steering Committee for the Office of Campus Planning, the University may hire the selected architect to perform additional siting studies.

7.0 DESIGN REVIEW
The project shall be reviewed by the following groups during schematic design and design development.

7.1 Preliminary, Schematic and Design Development Work Reviewed by the Ad-Hoc Building Committee, the Steering Committee for the Office of Campus Planning, the Senate Committee for Physical Facilities and the Board of Administrators Committee on Physical Facilities and Campus Development
NOTE: The Ad-Hoc Building Committee will meet jointly with the Steering Committee for Campus Planning as necessary to achieve approval.

7.2 Final Proposal Approved by Ad-Hoc Building Committee and Steering Committee for the Office of Campus Planning

- Project Amount: <$100,000
- Conditions:
  - Approval of Senior Vice President.
  - Competitive process not required.
  - Report to Board Committee on Campus Development not required.

- Project Amount: $100,000 but <$500,000
- Conditions:
  - Approval of Senior Vice President.
  - Competitive process not required.
  - Report to Board Committee on Campus Development not required.

7.3 Final Proposal Presented to Senate Committee for Physical Facilities for Review and Recommendation to the Senate

- Project Amount: >$500,000
- Conditions:
  - Approval of Board Committee on Campus Development required.
  - Competitive process required.

7.4 Final Approval Required from Board of Administrators Committee on Physical Facilities and Campus Development

7.5 Contract Documents

- Contract documents should be submitted to the Office of Campus Planning for dispatch to the appropriate parties.

When a competitive process is required, standard procedure calls for the architect or engineer to develop a bid package which will be sent to a selected list of bidders.

8.0 CONSTRUCTION MANAGEMENT

8.1 Contractor Selection

- Authorization procedures for contractor selection on architectural or engineering projects are as follows:

For negotiated contracts, selected contractors should be screened by use of a qualifying questionnaire. Negotiated contracts should develop a guaranteed maximum price with a cost sharing option.

8.2 Construction Supervision

- Verify University agency to be responsible for overseeing construction.
- This shall be determined on an individual project basis and designated by the Senior Vice-President for Operations and CFO.

9.0 POST OCCUPANCY REVIEW

- The Office of Campus Planning shall prepare a post-occupancy analysis and report to the Steering Committee. If an engineering improvement, this function shall be provided by the Associate Vice-President for Facilities. This report shall also be distributed to the Senate Physical Facilities Committee.
This form is to be completed by the Dean, Department Head, or Administrator who identifies a building need, with the assistance of the Office of Campus Planning (x5441).

This summary has been completed by:

Name:
Department:
Date:

PROJECT OUTLINE
Department:

Existing Location:

Existing Square Footage:

Existing Uses and Users (general outline):

Adequacy of Existing Facility for Existing Uses and Users:

Projected Facility Needs:

Anticipated Changes in Uses and Users (please indicate time frame):

Other Comments:
ARCHITECT SELECTION CRITERIA STATEMENT

This Architect Selection Criteria Statement is to be used by the Architect Selection Committee to evaluate architect candidates for all projects. It should be used in conjunction with the Architect Selection Criteria developed for each specific project.

The following is a list of general criteria that should be met by architects selected to do work on the Tulane campus. However, since all projects are different, the relative importance of these criteria will vary from project to project. Each project and each architect candidate should be individually considered and evaluated.

Project Design Experience

1. The firm should have high design standards and its work should show evidence of successful complex problem solving abilities combined with aesthetic and design excellence. Design excellence is the primary criterion by which candidates should be evaluated.

2. The firm’s work should show successful functional development of their projects, clear understanding and response to the programmatic needs of the buildings as evidenced by client satisfaction.

3. The firm should have familiarity with design and construction of the particular building type in question and knowledge of its specific functional and technological requirements; this condition may be satisfied by inclusion of a consultant group with the required expertise.

4. The firm’s work should show successful handling of building technology and integration of technology into building design. This is important for all buildings in so far as it affects their energy consumption, but is especially critical for building programs with special equipment requirements.

5. The firm should have concern for and an understanding of issues such as zoning and building code requirements, handicap access requirements, energy conservation and environmental standards.

6. The firm should have demonstrated excellence with projects for which siting relationships, siting demands and integration with surrounding buildings and circulation systems are of a high priority. Experience with campus design is desirable.

7. The architect’s work should show successful integration of building with landscaped environment.

8. The firm may be required to have experience working projects into historically significant surroundings and show success in integrating modern building requirements, technology, materials, etc. into areas with strong historic character.

Client Experience

9. The firm should demonstrate an understanding of the special requirements of working on university or college campuses and with university and college clientele.

10. The firm should demonstrate an ability to work with institutional clients who are represented by committees and to coordinate with the various Tulane committees which will be involved in the project’s development.

11. The firm should have a history of responsiveness to client requests.

Architectural Staff & Project Management

12. The composition, size, experience,
etc. of the architect's staff should be appropriate for the project. The firm should specify the key staff members who will be involved in the project.

13. The firm's work load should be appropriate to accommodate the schedule and scope of the Tulane project; they should be able to demonstrate their ability to devote the appropriate time and attention to the project.

14. The architect's office should be organized and efficient and able to produce the project design and documentation as required. Their work should show acceptable development of contract documents.

15. The firm should have the ability to provide design documentation in computer format suitable for integration with the Office of Campus Planning and Physical Plant Department records.

16. The firm's work history should show an appropriate use and selection of consultants as needed. They should identify consultants for the project and indicate the consultants relevant experience.

17. The firm should have a history of completing high quality projects on time and within budget. They should be able to work with the scheduling and budgeting demands of the University and show concern for the effect of their design decisions on the maintenance and operation budgets of their buildings.

18. The firm should have a record of successful cooperative relationships with contractors.
STATEMENT OF UNIVERSITY AGENTS

This statement is to be given to the architects chosen to submit applications and statements of related work for a construction project.

The following individuals and committees will be involved in the development of all major construction projects on campus.

Senior Vice-President for Operations and CFO
Anthony P. Lorino
Gibson Hall
(504) 865-5204

Director, Office of Campus Planning
Henry H. Fry
Physical Plant Building
(504) 865-5441

Associate Vice-President for Physical Facilities
Allen D. Perry
Physical Plant Building
(504) 865-5441

NOTE: Specific responsibilities of the above individuals should be verified for each project.

Ad-Hoc Building Committee
Committee composed of University administrators and representatives of the department which will use the new facility under the coordination of the Director of the Office of Campus Planning.

This committee will prepare the preliminary program for the project and coordinate with the architect throughout the design process to ensure that the programmatic needs of the project are met.

Steering Committee for the Office of Campus Planning
Committee is composed of members of the campus community to review conditions and processes for environmental change. Primary function is to review matters of facilities planning and design. Communication and collective consideration should lead to more effective results.

This committee will coordinate with the architect throughout the design process to ensure that the project is in compliance with campus development goals.

Board of Administrators Committee on Physical Facilities and Campus Development
Subcommittee of the Board of Administrators of the Tulane Educational Fund. This committee will review the project through all phases and will be asked for final approval for the project program and design.

Senate Physical Facilities Committee
Standing committee of the University mittee Senate.

This committee will review the project along with the Ad-Hoc Building Committee.
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<tr>
<th>Firm Name and Address:</th>
<th>Related Work:</th>
<th>References:</th>
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<tbody>
<tr>
<td>Contact Person and Phone Number:</td>
<td>Current Projects:</td>
<td>Please attach a copy of a statement verifying insurance coverage through a $1 million liability policy.</td>
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<td>Project Team:</td>
<td>Consultants:</td>
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