



# FY 2010 Major Repair and Renovation Information Session

WIMBA CLASSROOM

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Board of Regents of the University System of Georgia

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# Session Topics

- MRR Program Overview
- Guidelines for Annual MRR Funding Requests
- Developing the FY 2010 Request
- FY 2010 Funding Request Timeline
- Executing FY 2010 MRR Projects Once Approved
- What If MRR Needs Change During FY 2010?
- Resources



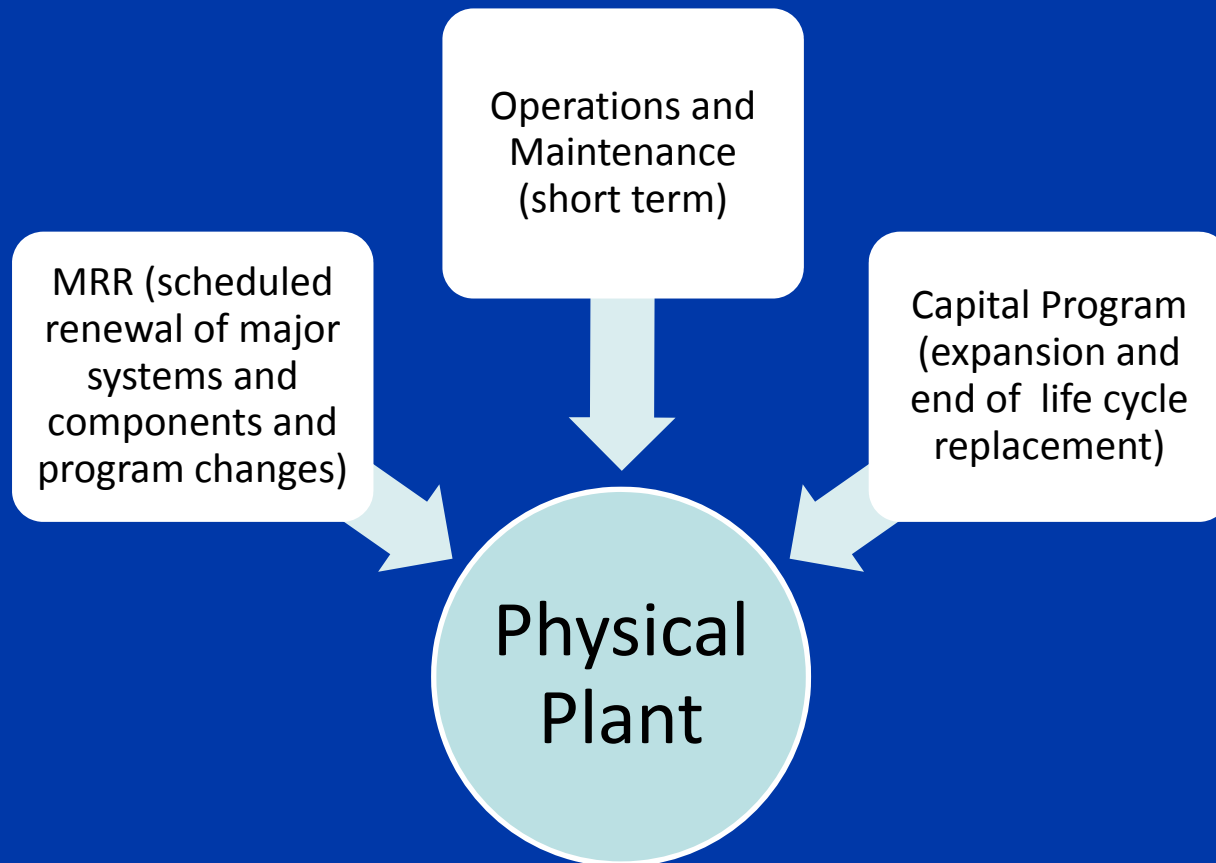
# MRR Program Overview

- Systematically and responsibly perform major repairs and renovations that preserve the State's physical plant investment
- Annual funding requests provide USG institutions with a well-thought out, consistent, and documented method for requesting MRR funds for their intended purpose



# MRR Program Overview

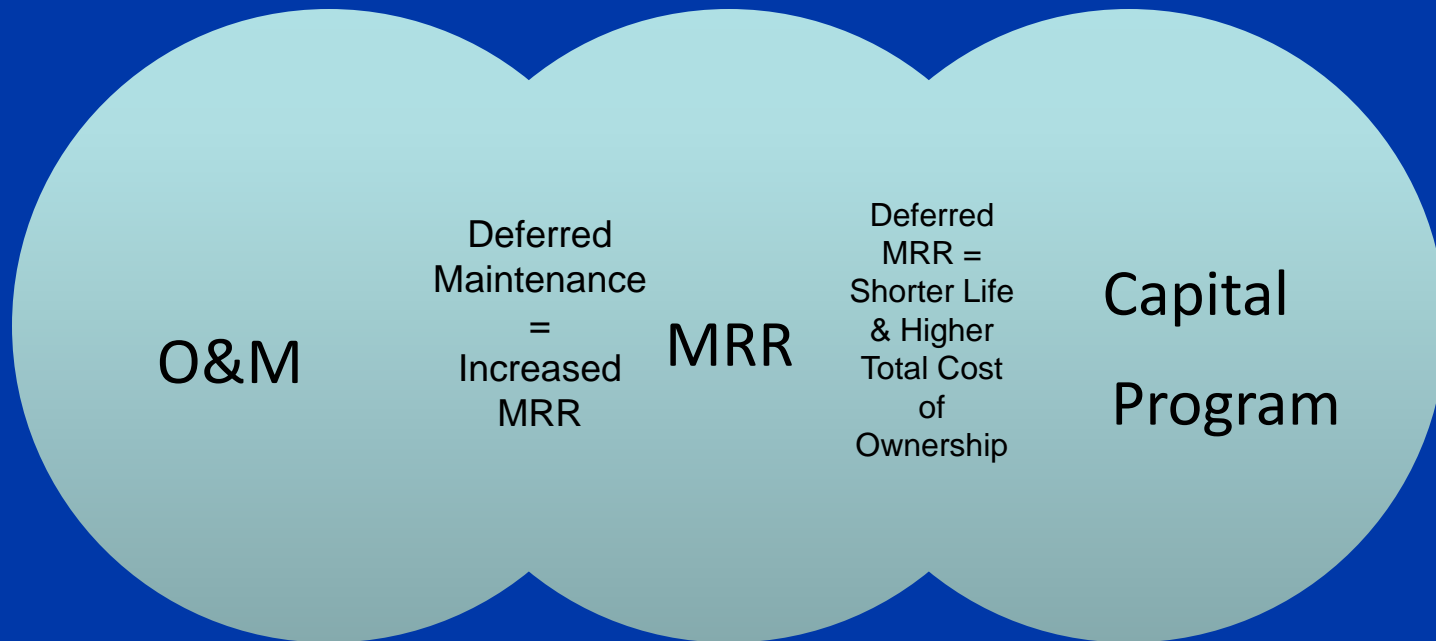
MRR is Part of a Three-Pronged Funding Strategy



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# MRR Program Overview



Deferred Maintenance vs. Deferred MRR



# MRR Program Overview

## How are MRR Funds Allocated?

- The State and the BOR provide MRR funding allocations annually
- To each USG institution based on:
  - \$100K Base
  - Gross square footage each campus has for resident instruction space
  - Adjusted age of the facilities
  - Renewal factor
- This information comes from the USG Facilities Inventory System (FIS) update, which is required by the BOR
- MRR funds are to be used for major repairs and renovations that fall outside of the scope of the normal M&O budget
- Can be cash, bonds, or some mixture of both (has been all bonds for past 2 years)
- Has remained at \$60M for the system for the past several years
- \$70M recommended by the Governor for FY-2010



# Guidelines for Annual MRR Funding Requests

- **MRR funds are for major repairs and renovations outside of normal M&O budget**
- **Scheduled replacements based on facility component age, condition assessments, and program needs are the best approach**
- **Submit more projects than funds anticipated to give a look ahead and indicate real need**
- **Generally, for projects less than \$1M (over \$1M, consider funding via Capital Improvement Program)**
- **Prioritize per need and urgency**



# Guidelines for Annual MRR Funding Requests

ELIGIBLE	INELIGIBLE
Existing building components systems equipment and site infrastructure	Auxiliary revenue generating facilities
Professional fees for studies and design of MRR-related construction projects	Construction of new space or installations
Haz Mat testing and abatement, IAQ, ADA, code compliance	Leased facilities
Changes in existing buildings to accommodate academic mission requirements	Purchase or acquisition of land



# Developing the FY 2010 Request

- Develop Project List as Discussed
- For each project, complete the following:
  - MRR Project Information Form
  - Project Record and Approval Form (President or Designee Signs)
- Attach supporting documentation
- Compile prioritized list on the FY 10 MRR Summary List Excel Form (President Signs)



# Developing the FY 2010 Request

## General Tips for Naming Projects

Use the most specific verb as the first word of each MRR project name. Words like “upgrade” are too vague to accurately describe the work to be done. Examples of specific verbs include:

- Replace
- Repair
- Renovate
- Retrofit
- Refurbish
- Remediate
- Install
- Abate



# Developing the FY 2010 Request

## General Tips for Naming Projects

- Standardize project names
- Keep project titles short and simple, with the action first, followed by a comma and the specific building name.
- Include a descriptor of the building use if it is not evident in the building name. Example:
  - **Replace Roof, Reed Hall administrative building**
- All flooring projects should be ***titled*** “Replace Flooring” whatever the material
  - Give the type of material in the project description (i.e., carpet, VCT, tile, etc.).



# MRR Project Information Form

Page 1

Institution: *Place the name of your institution here*  
 Project Title: *Place the project title here*  
 Campus Priority: *Project Priority # (within campus' overall FY10 MRR request)*

BOARD OF REGENTS OF THE UNIVERSITY SYSTEM OF GEORGIA  
 Major Repair and Renovation (MRR) Project Request (FY-2010)

FOR RENOVATION PROJECT COMPLETE THE FOLLOWING:

**Building Information**

Building Number	0000	Building Name	Sample text
No. of Stories	0	Total Building Area (sf)	0,000
Original Construction Date	0000		
Date(s) and extent of renovation(s)	0000	<i>This text is provided as an example for completion of the form</i>	
	0000	<i>This text is provided as an example for completion of the form</i>	
	0000	<i>This text is provided as an example for completion of the form</i>	
Building Condition (interior & exterior)	<i>This text is provided as an example for the completion of the form</i>		
Structural system/wall/roof construction	<i>This text is provided as an example for the completion of the form</i>		

**Roof Information**

Roof Age	0 years	Roof Area (sf)	00,000
Type of Warranty	0 year	Warranty Valid Thru	0000
Describe present condition of the roof, flashing, parapet, etc.	<i>This text is provided as an example for the completion of the form</i>		

**Proposed Renovation**

Floor area to be renovated (gsf)	100,000
What percentage of the building will be renovated?	0%
If a partial renovation, will the remaining portion of the building remain in use during construction?	<i>This text is provided as an example for the completion of the form</i>
Describe the proposed renovation.	<i>This text is provided as an example for the completion of the form</i>
Provide justification for the project.	<i>This text is provided as an example for the completion of the form</i>
List functions/programs currently housed in the building and describe relocation plans.	<i>This text is provided as an example for the completion of the form</i>
List new/proposed functions for the renovated space and indicate current location.	<i>This text is provided as an example for the completion of the form</i>
Has the presence of hazardous materials been investigated? If so, describe the extent and estimated cost of required abatement.	<i>This text is provided as an example for the completion of the form</i>
Describe the extent of any site work required, i.e. utilities, parking, etc.	<i>This text is provided as an example for the completion of the form</i>
Describe how the building's HVAC systems will be impacted as a result of the renovation.	<i>This text is provided as an example for the completion of the form</i>



# MRR Project Information Form

Page 2

Institution: *Place the name of your institution here*  
 Project Title: *Place the project title here*  
 Campus Priority: *Project Priority # (within campus' overall FY10 MRR request)*

**FOR BUILDING SYSTEMS, UTILITY, ENERGY or INFRASTRUCTURE PROJECT COMPLETE THE FOLLOWING:**

<b>Area to be upgraded (If)</b>	<i>This text is provided as an example for the completion of the form</i>
Describe the extent of the systems, utility or infrastructure upgrades or improvements.	<i>This text is provided as an example for the completion of the form</i>

**FOR ENVIRONMENTAL/SAFETY/REGULATORY PROJECT COMPLETE THE FOLLOWING:**

<b>Provide description of the Environmental/Safety/Regulatory Issues</b>	<i>This text is provided as an example for the completion of the form</i>
--------------------------------------------------------------------------	---------------------------------------------------------------------------

**Planning Information** (to be completed for all Renovation, Systems or Regulatory Projects)

<b>Has a design professional been contracted or retained?</b>	<i>This text is provided as an example for the completion of the form</i>
---------------------------------------------------------------	---------------------------------------------------------------------------

Provide the following additional information on a disk (as applicable):

- Record and Approval Form
- Campus map with building or affected area highlighted or identified
- Copies of pertinent Facilities Condition Assessments
- Photographs showing overview and details of existing conditions
- Planning studies
- Floor plans with overall dimensions and area (existing and proposed, if applicable)
- Environmental assessment reports



# Record and Approval Form

## Board of Regents' Project Record & Approval Form

Institution: \_\_\_\_\_

Project Title: \_\_\_\_\_

Brief Project Description: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

<u>PROJECT BUDGET</u>	<u>Estimate</u>	<u>FUNDS AVAILABLE</u>	
Design Fee:	_____ \$0.00	FY 2010 'MRR:	_____ \$0.00
Construction Cost:	_____ \$0.00	Operating Budget:	_____ \$0.00
Misc. & Testing:	_____ \$0.00	Other (Specify):	_____ \$0.00
Contingency:	_____ \$0.00		_____ \$0.00
<b>Total</b>	<b>\$0.00</b>	<b>Total</b>	<b>\$0.00</b>

Contact Person: \_\_\_\_\_ Phone No.: \_\_\_\_\_

Approval: \_\_\_\_\_ Date: \_\_\_\_\_  
 President or Designee

This section to be completed by the Office of Facilities

PROJECT NO: \_\_\_\_\_

**AUTHORIZED ALLOCATIONS**

Amount	Date	Board/Vice Chancellor
		Board
_____	_____	_____
_____	_____	_____
_____	_____	_____

Approval: \_\_\_\_\_ Date: \_\_\_\_\_  
 Program Manager



# Developing the FY 2010 Request

## Attach Supporting Documentation

- Campus map with building or affected area highlighted or identified
- Copies of pertinent Facilities Condition Assessments
- Photographs showing overview and details of existing conditions
- Planning studies
- Floor plans with overall dimensions and area (existing and proposed, if applicable)
- Environmental assessment reports

INSTITUTION NAME				
FY10 MAJOR REPAIR AND RENOVATION PROJECT LIST				
Priority	Project Name	Cost	Category (X, A, B, C, D, E)	Brief Project Description
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
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22				
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24				
25				

President's Signature: \_\_\_\_\_

Date: \_\_\_\_\_ Page 1



# Developing the FY 2010 Request

## Categories of MRR Projects

- **X** - CRITICAL (imminent danger) Life Safety or code compliance issue.
- **A** - Structural and Building Envelope Stabilization (including roof replacement, waterproofing of glazing systems, retooling and pointing masonry, etc.)
- **B** - Utility Replacement and Upgrade
- **C** - General Renovations and Rehabilitation
- **D** - Regulatory Projects (Non-critical Life Safety Code Issues, Environmental Requirements, ADA and other Regulatory Issues)
- **E** - Other



# Developing the FY 2010 Request

## General Criteria for Prioritizing MRR Projects

Most MRR projects fall into one of these categories, and should be prioritized as follows with minimal exceptions:

- 1. Life/Safety (highest priority)**
- 2. Integrity & Stewardship (second priority)**
- 3. General Renovations (third priority)**



# Developing the FY 2010 Request

## General Criteria for Prioritizing MRR Projects

### **Life/Safety (highest priority)**

- Urgent regulatory-driven projects which are necessary to protect safety and health and/or correct a serious noncompliance situation, such as lack of accessibility.
- Project to address structural soundness deficiencies.
- Installation of physical components of security systems and audible public notification alert systems being installed on or in existing facilities when deemed by the campus to be necessary to protect life and safety in emergency situations such as “active shooter” scenarios, emergency evacuations, etc.

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- Building Envelope
- Roofs
- Systems
- Regulatory projects that are necessary, but not necessarily urgent (example: upgrades of new systems to conform with current codes where current



# Developing the FY 2010 Request

## General Criteria for Prioritizing MRR Projects

### Integrity & Stewardship (second priority)

- Building Envelope
- Roofs
- Systems
- Regulatory projects that are necessary, but not necessarily urgent (example: upgrades of new systems to conform with current codes where current systems may be outdated but do not pose a significant threat to safety and health)

- Building Envelope
- Roofs
- Systems
- Regulatory projects that are necessary, but not necessarily urgent (example: upgrades of new systems to conform with current codes where current



# Developing the FY 2010 Request

## General Criteria for Prioritizing MRR Projects

### General Renovations (third priority)

- Functional Improvements
- Renovations needed to meet enrollment or curriculum needs
- Renovations to create swing space for larger repair or renovation projects



## Submitting the FY 2010 Request

- Submit one electronic and one hard copy to:  
Office of Real Estate and Facilities  
270 Washington Street, S.W.  
Atlanta, GA 30334-1450  
Attn: MRR Requests
- Deadline for submitting is March 27, 2009
- Please submit electronic forms in formats that can be modified (Word, Excel)

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# FY 2010 Funding Request Timeline

- Requests due in System office on March 27, 2009
- April - PMs and Greg work with you to refine requests for recommendation to Board for approval
- Early May - Requests are compiled and formatted for presentation to the board
- Late May – Compiled request is placed on Board June meeting agenda
- June 9, 10: request presented to Board for consideration



# FY 2010 Funding Request Timeline

- June 11, 2009 – Approved request published
- MRR bonds are sold by GSFIC: schedule is determined by GSFIC
- MRR projects may be contracted only after funds are available



# Executing FY 2010 MRR Projects Once Approved

- Campus delegated authority determines who issues contract for the project
- Projects cannot be contracted until funds are available, but should be completed as soon as possible due to bond spend-down requirements
- Refer to building projects procedure manual for project contracting guidelines



# What If MRR Needs Change During FY 2010?

- Redirection of funds
  - *President requests permission to redirect funds from Vice Chancellor Daniels*
  - *Project forms should accompany letter*
- Residual funds may be used to accomplish MRR projects on the submitted request
- Emergency requests are made to Vice Chancellor Daniels by letter from President



# Resources

- Your USG Program Manager
- Greg Adams (404) 463-0672  
[greg.adams@usg.edu](mailto:greg.adams@usg.edu)
- Sandra Neuse (404) 656-2249  
[sandra.neuse@usg.edu](mailto:sandra.neuse@usg.edu)
- Office of real Estate and Facilities Web Page at  
<http://www.usg.edu/ref/compliance/mrr/>



# Questions