

UNIVERSITY PLANNING, DESIGN & CONSTRUCTION – SERVICE CATALOGUE

WHO WE ARE

The mandate of University Planning, Design & Construction (UPDC) is to integrate and coordinate across the areas of university planning, project development, design and engineering, and project management to deliver value and consistent levels of service for the University. This mandate is executed in co-ordination with [University of Toronto Scarborough Design and Construction Management](#), and [University of Toronto Mississauga Facilities Management and Planning](#). The department consists of three Directorates:

- University Planning
- Project Development
- Capital Projects (including Project Management and Design & Engineering)

WHAT WE DO

UNIVERSITY PLANNING

Institutionally:

University Planning (UP) engages in a range of activities that impact the physical character of the campuses through guiding the relationship of the University's buildings and open spaces and the planning for appropriate accommodation of the University's teaching and research activities, and ancillary uses including university housing, research and innovation space, to be an asset in the broader urban community.

Areas include:

- Tri-campus master planning and long-term strategic capital planning.

- Leads the Project Planning Committee (PPC) process for major capital projects and major renovations to generate project scope, outlined in a Project Planning Report (PPR); advises on alignment of project with PPR through design development, coordinates and advises on all aspects of development applications (i.e.. rezoning, official plan amendments) through the implementation phase of a capital project.
- Provides project planning support for complex projects under \$5M TPC (Level 1 capital project threshold).
- Participates in the selection process for architects and other professions.
- Serves as Secretariat to the Capital Projects and Space Allocation Committee and Executive Committee, and facilitates and supports tri-campus project governance and approvals through UofT Governance Committees and Boards.
- Serves as Secretariat to the University's Design Review Committee (DRC) and facilitates the review of any project with a significant exterior design component or impact on the public realm or heritage buildings.
- Represents the University and liaises with City Planning and other City departments as well as the broader community.
- Provides Councillor-led Community Liaison Committee (CLC) with updates on major capital projects or other St George Campus planning and design activities.
- Consults on heritage building matters / impacts.
- Conducts feasibility studies to assess the viability and risks associated with future capital projects.
- Conducts space reviews / utilization and master programming studies to assess existing space and makes recommendations for improving space efficiency and identifying future projects.
- Tri-campus maintenance of building plans and space inventory.
- Oversees the application of space and design standards through the capital project planning process (COU, F&S design standards).
- Consults on signage and banner proposals, campus wayfinding, and outdoor landscape elements such as furniture, minor alterations to public realm.

Service to Divisions:

UP provides direct assistance to all departments, divisions and faculties planning for:

- Master plan / master programming exercises;
- Feasibility studies;
- Space utilization studies;
- Major renovations; and,
- Major capital projects, including academic and Four Corners (4C) projects.

Cost Recovery:

UP receives central funding which is partially supplemented by Capital Projects Project Management fees.

PROJECT DEVELOPMENT

The management of architect and consultant selections is the primary responsibility of the Project Development (PD) team. In executing this responsibility, PD manages the necessary due diligence in completing compliant procurements and integrates the frequently evolving procurement regulations into its processes. Beyond this, however, the team offers a broad range of analysis and guidance on budgeting, apportionment, scheduling and early design development on all major capital projects (Level 2 (\$5-\$20M) and Level 3 (over \$20M)) as well as the majority of Level 1 (up to \$5M) projects on the St. George campus. On a regular basis, PD also manages the larger scope of project planning for smaller capital projects (that do not involve UP) and assists with the administrative management of “pre-capital” feasibility studies.

Institutionally:

- Serves tri-campus major capital projects (Levels 2 and 3)
- Serves St. George Level 1, 2 and 3 capital projects

Service to Divisions:

- Regularly sits as a member of Project Planning Committees and provides advice to these committees on costing, scheduling, feasibility and early logistics.
- Manages the Project Service Request process – an application and triage responsibility shared jointly with F&S Property Management. Divisional applications are properly assigned to the right department from initial request, making service delivery more efficient.
- Manages feasibility studies (jointly with UP) which are non-capital projects but that are critical to determining a project’s scope and budget where the client has not determined this information.
- For Level 1 projects that do not involve UP, will work with divisional client to develop scope and program.
- Once preliminary costing and scheduling are complete, produces the first preliminary Total Project Cost document that includes all anticipated hard and soft costs.

- Arranges for early pre-design surveys and studies when needed.
- Manages consultant (design or technical services) selection or design-build selection processes.
 - Prepares Requests for Supplier Qualifications (RFSQs) and Requests for Proposals (RFPs)
 - Administers posting periods
 - Assembles and manages the evaluation committees
 - Prepares all evaluation documents
 - Ensure process adherence to Broader Public Sector (BPS) Procurement Directive and any other university procurement directives/guidelines
- Negotiates final terms and conditions of service contracts for consultants (design or technical services).
- Working with Capital Projects, the divisional client and University Planning staff, co-ordinates the launch of the project into the schematic design phase.
- Contributes to, or leads, the development of new UPDC strategies that will impact overall project delivery (e.g. specific design competitions or broader adoption of Integrated Project Delivery).

Cost Recovery:

PD receives central funding which is partially supplemented by Capital Projects Project Management fees.

CAPITAL PROJECTS

Capital Projects consists of Design & Engineering and Project Management.

DESIGN & ENGINEERING

The department of Design & Engineering is an in-house consulting group and providing full architectural and engineering consulting services to the University for renovation projects undertaken within university-owned buildings and/or affecting distribution systems for university faculties and departments. D&E undertakes projects for a variety of client groups, both academic and administrative, within the University.

Service to Divisions:

D&E provides a variety of services to campus clients during the life-cycle of a project – for a full listing please refer to the Appendix (A: Design & Engineering Service to Divisions) of this document.

Cost Recovery:

All of Design & Engineering's services are cost recoverable; therefore, fees are charged for all services.

Fees for basic services are charged as a percent of the cost of the construction of the project. Basic services include work undertaken in the phases of project development and implementation noted in the Appendix. Basic services include Architectural, Mechanical, Electrical and Structural disciplines. Other design disciplines, if required by the scope of the project, are procured on a project-specific basis at an additional fee.

Additional Services available as a separate fee:

- Feasibility studies.
- Facility programming.
- Value engineering activities related to modify the project scope and related construction estimates.
- Meetings with City Officials or planning submissions to Authorities Having Jurisdiction.
- Renderings for promotional purposes, fundraising or to inform broader client community.
- Presentations to broader client community (other than to user group).

PROJECT MANAGEMENT

Project Management (PM) manages and oversees all major construction and renovation projects for all three campuses at the University of Toronto in compliance with University and broader public sector policy, University of Toronto Design Standards, guidelines and best practices. Project Management administers contracts with consultants to the project, as well as contractors and other consultants required in the execution of a project. Project Managers manage the design process to ensure compliance with the objectives of the project, approved budgets, approved and funded scope, schedule and quality.

Institutionally:

Manages and oversees all major construction and renovation projects for all three campuses at the University of Toronto.

Service to Divisions:

The role of Project Management is to represent the interests of the Project Champions. The PM represents the University of Toronto in contractual relationships with consultants, contractors and other vendors to each project, and is the primary point of contact. The PM administers contracts with each vendor to ensure contractual deliverables are met.

- Formalize engagement of design professionals and ensures compliance with contract. Works with design team to deliver project within scope, budget, quality and schedule.
- Reviews proposed construction delivery and determines whether changes are needed as a result of market or technical developments.
- Procures and manages construction process ensuring strict adherence to the U of T fair bidding policies executed through competitive processes and used to ensure best value for the U of T.
- Prepares and administers contracts for construction and related services.
- Procures loose furniture through consultation with client and co-ordination with contractors. Prepares, issues and manages RFPs for furniture and arranges for selection, delivery and deficiency completion.
- Works collaboratively with clients, designers, constructors, contractors, vendors, suppliers, other project managers, and other University stakeholders to facilitate implementation of renovations and new build within design and industry standards, best practices, and fair dealings.
- Review project invoicing in compliance with contractual requirements.
- Incorporates value for money principles when assessing changes during design and construction and reviewing additional costs to the project (both during design and construction). Negotiates pricing for changes.
- Ensure adherence to relevant construction legislation.
- Guides and facilitates municipal permit approvals.
- Presents monthly status and financial updates to the client, forecasting budget position at all stages.
- Works with U of T Operations groups to turn the project over for internal operations.

- Financial close-out of project ensuring no outstanding payments/credits and facilitates return of unused project funds.

Cost Recovery:

Project Management is funded entirely by PM fees (cost-recovery). The PM fee is a fixed, flat fee on hard construction costs for each project.

APPENDIX A: Design & Engineering Service to Divisions

	Project Stages				
	Schematic Design	Design Development	Construction Documents	Tender and Permit	Construction Phase – Contract Admin.
Data Collection:	<ul style="list-style-type: none"> Collect and coordinate client-supplied data 	<ul style="list-style-type: none"> Collect and coordinate client-supplied data. 	<ul style="list-style-type: none"> Collect and coordinate client-supplied data 		
Evaluation of requirements	<ul style="list-style-type: none"> Evaluate project scope & budget if provided at project start. Develop project scope in consultation with the client if not provided at project start. 				
Design:	<ul style="list-style-type: none"> Develop a proposed schematic design based on project scope. Consult relevant UoT operations groups for infrastructure requirements based on project scope. If applicable, provide high level review of alternative design approaches. 	<ul style="list-style-type: none"> Develop the selected design Coordinate the work of other design consultants required for the project. 	<ul style="list-style-type: none"> Finalized the selected design Coordinate the work of other design consultants required for the project. 		
Review Codes and Standards:	<ul style="list-style-type: none"> Review applicable codes & standards. 	<ul style="list-style-type: none"> Review applicable codes & standards. 	<ul style="list-style-type: none"> Review applicable codes & standards. 	<ul style="list-style-type: none"> Review applicable codes & standards, if required. 	<ul style="list-style-type: none"> Review applicable codes & standards, if required.
Authorities Having Jurisdiction (AHJ):		<ul style="list-style-type: none"> Consult authorities if required. 	<ul style="list-style-type: none"> Consult authorities if required. 	<ul style="list-style-type: none"> Address questions from the AHJ regarding the permit application. 	<ul style="list-style-type: none"> Communicate with AHJ as required.
Documentation:	<ul style="list-style-type: none"> Prepare Schematic Design drawings for a selected design approach. This stage establishes quantities and qualities of 	<ul style="list-style-type: none"> Prepare Design Development drawings and specifications. This stage develops the selected design in response 	<ul style="list-style-type: none"> Complete Construction Documents. This stage develops the documents required to communicate to the 	<ul style="list-style-type: none"> Provide Construction Documents and consultant forms to the PM for the permit application. 	<ul style="list-style-type: none"> Provide 'Issued for Construction' documents to the Contractor . Provide construction review services and administer the

	<p>architectural elements and performance requirements of <i>M&E</i> systems of a selected design approach.</p> <ul style="list-style-type: none"> • Provide final documents to client for submission to <i>CaPS Committee</i> for approval. 	<p>to specific site conditions & aesthetic goals.</p> <ul style="list-style-type: none"> • Materials, fixtures and fittings are selected, quantities confirmed. 	<p>contractor, in graphic and written form, the requirements to construct the project.</p>	<ul style="list-style-type: none"> • Assist the <i>PM</i> with site tour and inquiries during the bidding process, issue addenda as required. 	<p>contract through project close-out and warranty review.</p>
Cost Estimating:	<ul style="list-style-type: none"> • If applicable, provide information regarding alternate design construction costs at an Order of Magnitude level. • Prepare an <i>Estimate</i> based on one selected design approach. • Prepare a <i>TPC</i> sheet. 		<ul style="list-style-type: none"> • Update Estimate, if required, such as when significant scope changes arise during project development. 	<ul style="list-style-type: none"> • Review tender results and provide recommendations to <i>PM</i>. 	<ul style="list-style-type: none"> • Review costs for proposed changes to the project and provide recommendations to the <i>PM</i> and client for approval.
Client consultation:	<ul style="list-style-type: none"> • Review <i>SD&E</i> with the client group and provide any required clarifications and minor revisions. • Client responsible for submission to <i>CaPS Committee</i>. • Obtain client approval to proceed to next stage. 	<ul style="list-style-type: none"> • Review proposal with the client group and obtain client approval to proceed to next stage. 	<ul style="list-style-type: none"> • Review proposal with the client group and obtain client approval to proceed to next stage. 		<ul style="list-style-type: none"> • Consult and/or inform clients during construction as required.

*Abbreviations used in the chart:

<i>PM</i>	UofT Project Manager	<i>M&E</i>	Mechanical and electrical engineering disciplines
<i>Estimate</i>	Statement of probable construction costs	<i>SD&E</i>	Schematic Design & <i>Estimate</i> package
<i>CaPS Committee</i>	Capital Projects and Space Allocation Committee	<i>TPC</i>	Total Project Cost sheet which includes probable construction cost and soft costs required for the project