

<b>The University of British Columbia Land and Building Services</b>		<b>Projects - Definitions</b>	
<b>Work Procedure</b>		<b>I-D-04</b>	
<b>Prepared by:</b> Frank Geyer	<b>Approved by:</b> David Barnes	<b>Issue Date:</b> 10 October 2002	<b>Replaces:</b> New

## **1. Application**

This document contains the definitions of all key roles in Land & Building Services projects and is to be read in conjunction with Project Services Policies and Work Procedures.

## **2. References**

N/A

## **3. Definitions**

Assigned Estimator	Coordinates, reviews and closes the Construction Estimate on behalf of Project Services, and prepares Gantt construction bar charts.
CRDM Program Manager	Develops, directs and monitors the timely and cost effective execution of the University's Capital Maintenance Program, consisting of cyclical renewal and deferred maintenance (CRDM) projects and Plant Operations-planned Minor Capital projects. The authorized representative of UBC Plant Operations who makes the request for work, also known as the "Customer".
Capital Programs Manager	Oversees all funding issues related to Minor Capital projects, including applications for funding and management of financial resources, and facilitates communication with government funding agencies. Reviews and prioritizes proposed projects, compiles capital requests, receives and allocates minor capital funding, coordinates financial resources throughout a project, and is the authorized representative of Campus & Community Planning who makes the request for work, also known as the "Customer".
Contractor	The person, firm or corporation contracting with the University to provide labour, material and equipment for the execution of the Work in strict conformance with the contract documents.
Customer	The authorized representative of the Faculty or Department making a request for work from Land & Building Services.
Customer Request	The Land & Building Services Customer Request form, which must be completed and forwarded to the area Facility Manager, either by fax or by hand to initiate work. The Customer Request must be fully completed, including important items such as contact name, phone and fax numbers, detailed work description and location, account codes, realistic deadline to complete the work, and whether an estimate is required or not (i.e. proceed with or without evaluation).

Customer Request Package	The completed Customer Request Form, completed New Project Questionnaire Form, marked-up key plans, sketches, equipment data, studies, reports and any other helpful documentation.
Design Leader	Either the in-house Project Architect, Engineer, Designer or Technologist, or an outside prime Consultant. Coordinates and leads all activities necessary for the design and field reviews of selected UBC projects, including coordination of in-house and/or outside engineering and specialty consultants, preparing of, monitoring and adhering to the architectural/engineering budget and design schedule, and assembling regulatory schedules and obtaining building permits.
Design Manager	Leads an in-house team of project architects, designers, engineers or technologists tasked with advising clients and project managers on proposed projects, and developing designs, preparing plans and specifications and conducting field reviews during construction on selected projects. Contracts with outside consultants for as-and-when required design services to augment in-house staff.
Developer	Third-Party Developer, in most cases UBC Properties Trust, which was established to carry out real estate development activities for the benefit of the University. Generally manages and leads all activities necessary for the planning, design and implementation of a UBC major capital project \$1.5 Million or greater in value.
Estimating Manager	Leads an in-house team of estimators tasked with preparing construction estimates and Gantt construction bar charts. Prepares, reviews and advises on quantity surveys, estimates and Gantts.
Facility Manager	Represents UBC Plant Operations within an assigned area of campus as the first line of contact between Plant Operations and Faculties or Departments. Receives, directs, and expedites work requests, inspects buildings for potential maintenance and safety requirements, and responds to complaints or requests for information relating to Plant Operations activities.
FIMP Analyst	Prepares and maintains the master list of buildings requiring renewal at the University, and bases the timing and priority of renewals on a variety of building condition and age indices (the Facility & Infrastructure Management Plan, or FIMP).
FME	FacilityFocus (formerly FM Enterprise) software used by Land & Building Services to manage the physical assets of the University.
Minor Capital Project	Minor capital projects are those that cost less than \$1.5 million, which include most small- to medium-scale renovations to existing structures. The Provincial Government, under the auspices of the Ministry of Advanced Education, Technology and Training (MAETT) allocates funding to be used in renovations and upgrades related to teaching and research facilities. As the UBC campus continues to grow, minor capital funds are used to increase space utilization, to modify outmoded spaces for new use, to improve accessibility, and to update existing infrastructure and prolong the life of university buildings (CRDM Program).

Minor Work	Defined as work estimated to take between 2 and 20 worker days to complete or between \$1,000 and \$10,000 in value.
Minor Works Supervisor	Organizes and leads all activities necessary for the construction of Minor Work, including: preparing, obtaining approval and managing of construction estimates; obtaining architectural or engineering input as necessary; scheduling and coordinating in-house trades; and coordinating construction close-out.
New Job Strategy Session	<p>A weekly meeting to review new Projects (as defined herein) coming into Land &amp; Building Services. The committee provides a central clearing point or gate with a measure of consistency and control for all incoming projects (with the exception of municipal, Major Capital and Capital Maintenance), as well as to identify opportunities for the synergizing of new projects with other projects and/or funding.</p> <p>The projects are reviewed by the committee to ensure that they comply with overall academic planning and technical requirements and are assigned to either: Campus &amp; Community Planning (Capital Planning, Space Administration); Plant Operations (Project Services or Technical Services); or IT Services (Network Facilities), all of which have representation on the committee. The New Job Strategy Session is chaired by, and agenda and decision records maintained by the Capital Programs Manager.</p>
Project	Generally defined as work estimated to take more 20 worker days to complete or over \$10,000 in value.
Project Coordinator	Coordinates and leads all activities necessary for the execution of the Work using in-house forces, or a combination of in-house forces and sub-contractors, including: preparing and managing of construction budget and schedule; retention and organization of in-house and contracted trades; obtaining necessary inspections, approvals; and coordinating commissioning, construction close-out and move-in.
Project Manager	Manages and leads all activities necessary for the planning, design and implementation of a UBC renovation, construction or major maintenance project typically less than \$1.5 Million in value, including initiation, organization and direction of the project team to achieve the project budget, scope and schedule. Is the prime contact with the Work Requester during the life of the project.
Resource Planner	Prepares and maintains a forecasted or “planned” schedule of upcoming activities of the Plant Operations trade groups as well as any contractors augmenting this workforce. Maintains three resource schedules: short-term (2 to 3 months), mid-term (6 months), and long-term (1 year).
Routine Work	Defined as work expected to take less than 2 worker days to complete or valued at less than \$1,000.
Scheduler	Prepares and maintains a continuous schedule of activities of the Plant Operations trade groups as well as any contractors augmenting this workforce. Maintains a four-week schedule consisting of: the previous week’s work, the present week’s workload, the upcoming two weeks workload.

Service Centre Coordinator	Processes all fee-for-service customer requests received into Plant Operations, creates, updates and issues work requests.
Site Supervisor	The site representative on larger projects constructed by in-house forces, or a combination of in-house forces and sub-contractors. Organizes and directs site forces assigned by Trade Heads, ensures site safety, security and building code procedures adhered to, receives goods, maintains schedule and site documentation and other related tasks.
Space Administration Manager	Programs and assigns space through requests from departments (including any swing-space required to accommodate groups during renovations of their space), prepares conceptual floor plans and move plans.
Trade Head	Organizes, allocates and supervises the work of trade and other skilled or unskilled workers within the craft(s) assigned.
University Project Coordinator	<p>On Third-Party Developer projects, is assigned by, and represents Land &amp; Building Services, and is a central figure in the project process. Monitors the quality of the process and the built product on behalf of the University, and throughout the duration of the project:</p> <ul style="list-style-type: none"> <li>- Monitors the Project for conformance with University guidelines and regulations;</li> <li>- Monitors project progress based on established budgets and schedules;</li> <li>- Ensures compliance as committed by the Third-Party Developer with University guidelines and regulations (including but not limited to: Trek 2000; Official Community Plan; Neighbourhood Plan; UBC Planning Principles; Technical Guidelines; Development Approval Process; Project Management Process; Board of Governors submission and approval processes; and any other applicable UBC Policies identified in the University / Developer agreements).</li> <li>- Assists in communications between the User, Developer, Land &amp; Building Services and other UBC departments.</li> </ul>
Work	Defined as an addition, move or deletion of a component of a building system (architectural, structural, civil, mechanical or electrical), furnishing, fixture or equipment, or a change in use and/or occupancy.
Work Request	Generated by FME, is the vehicle for assigning and tracking costs and other pertinent data, once work is approved to proceed.