Departmentally Managed Projects Workshop

November 7, 2012

Agenda

Part I. PROJECT INITIATION

- Welcome and Introduction
- Form I Process
- Capital Accounting/Funding
- Procurement/Contracts
- Space Management
- Jurisdictional Entitlements (GUP/ASA)

Part II. PLANNING AND DESIGN

- Campus Planning and Design
- Plans Review and Operations Support
- EH&S/SUFMO
- Utilities/Sustainability
- Community Relations

Part III. PERMITTING, CONSTRUCTION AND CLOSEOUT

- Permitting
- Construction Logistics
- Record Drawings and Project Closeout

Part I

Project Initiation

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http://lbre.stanford.edu

Department of Project Management Resources

- Background
- Mission
- Vision

Background

- Approximately 20 Schools and Departments choose to manage construction projects with their own staff. These are known as Departmentally Managed Projects (DMPs)
- Projects vary in size and complexity
- Project Management expertise of DMP project managers range from novice to advanced
- No central university resource for DMPs

Mission

- Provide project management resources to schools and departments who elect to manage facilities and infrastructure improvements with their own departmental staff, versus using the professional project management services within LBRE
- Resources will include web based training providing certification for school and department project managers
- Training will focus on Stanford resources along with the relationship we have with our permitting jurisdiction, Santa Clara County
- Training will not provide project management skills, but instead cover the policies, process, procedures and resources for successful project delivery

Vision

- Aggregate communication between schools and departments
- Provide resources for DMP project managers on University policies and procedures
- "Certify" DMP Project Managers through an online training and development program
- Not a management service – DMP project managers maintain authority and responsibility for the project
- Serve as liaison and point of contact for jurisdictions (County) - PMs continue to work directly with SCC for plans review and permit process
- The goal is to assist in successful project delivery on behalf of the University

Helpful Links

- DMP Policy: http://lbre.stanford.edu/cap_plan/sites/all/lbre-shared/files/docs_public/LBRE_DMP_Policy.pdf
- LBRE org chart: http://lbre.stanford.edu/org_chart
- PMR website is under construction. Look for us on the LBRE website in January 2013!

Contacts

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Form 1 Process

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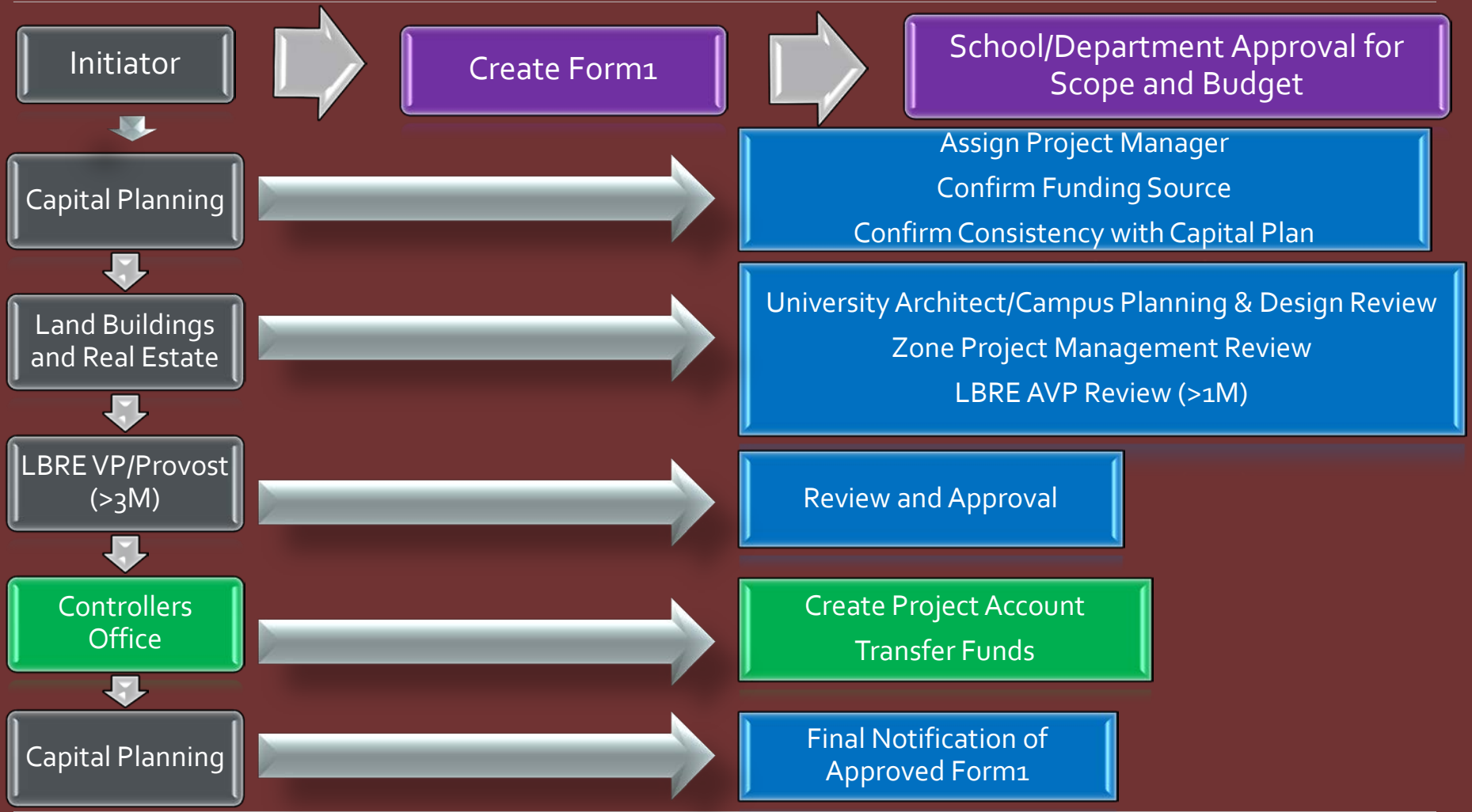
http://lbre.stanford.edu/cap_plan/

Discussion Topics

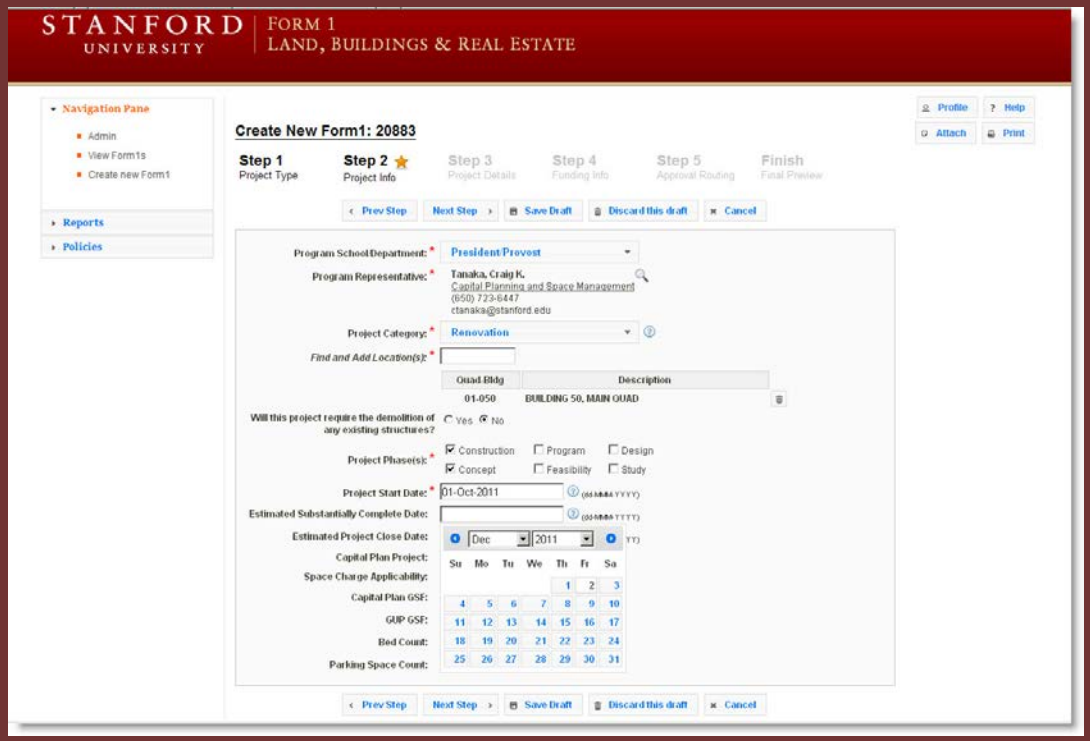
- Form 1 Process
- Projects Requiring Form 1's
- What You Need to Know Before Entering a Form 1

Form 1 Process



Form 1 Initiation Process

- Project description
- Project manager
- Budget
- Funding
- Approval
- PTA setup



https://form1.stanford.edu

Projects Requiring Form 1's

- New construction
- Building renovations
- Building and/or interior space demolitions
- Feasibility, planning and cost estimates, studies
- Building exterior changes
- Projects funded with central funds

Note: These projects are typically capital, but some non-capital projects also require a Form 1.

What you Need to Know Before Entering the Form 1 Site

- The Form 1 database can only be entered by authorized Stanford staff
- Project Scope Details (Description, Justification, Schedule and Deliverables)
- You will need to know the funding Oracle PTA to fund the project
- Requests for central funds must be approved as part of the Capital Plan
- Projects using GUP gsf must be approved as part of the Capital Plan

Helpful Links

- Form1 Policy: https://form1.stanford.edu
- GUP Entitlement Fee Policy: http://lbre.stanford.edu/sites/all/lbre-shared/files/docs_public/dcp_gup_v3.pdf
- Supplement to the GUP Entitlement Fee Policy: http://lbre.stanford.edu/cap_plan/sites/all/lbre-shared/files/docs_public/dcp_gupsupplementpolicy_v4.pdf
- Stanford Infrastructure Program (SIP) Policy: http://lbre.stanford.edu/sites/all/lbre-shared/files/docs_public/DCP_SIP_Policy_r_092012.pdf
- Admin Guide 83.1: http://adminguide.stanford.edu/83.pdf
- Capital Plan process: http://lbre.stanford.edu/cap_plan/capital_planning

Contacts

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Capital Accounting/Funding

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Controller's Office
eliot.alfi@stanford.edu

http://www.stanford.edu/group/fms/fingate/staff/capitalequip/index.html/

Discussion Topics

- Capital Accounting Mission
- Capital vs Fund Accounting
- Accounting Controls

Capital Accounting Department Mission

- Protect and ensure the proper use of University funds designated for capital assets and accurately record and report on these assets
- Properly use, record and report on external and internal debt of the University
- Monitor, track and account for the University's real estate portfolio

Capital vs Fund Accounting

- Capital Accounting
  - Create Capital "PPE" projects/tasks/wards
  - Transfer/direct the transfer of funds from Schools & Departments
  - Provide project controls and budgets
  - Review and approve PPE journals and Requisitions
  - Accounting/policy resource
  - Assist you when help is needed (e.g., expediting a payment)
  - Related accounting and compliance

- Fund Accounting
  - Create non-capital and non-Sponsored PTAs
  - Transfer funds from MP, FFE, Pending and DAF funds
  - No PTA monitoring, and currently no budget set-up

Capital Accounting Controls

- Capital Projects
  - $50K minimum threshold ($5K for Fixed and Modular equipment)
  - Capital project decision tree (>$50K may not be capital)
  - Requisitions and ijournal end-routing
  - Project names and attributes
  - Not included - rush check fees (administrative expense, not project)
- Debt
  - Capital expenditures only (not permitted: check fees, internal parking, and other non-capital expenditures)
  - Allowable use of space
  - Annual compliance sign-off
- Reporting - including gift/pledge information (four options):
  - Reportmart3 reports/Oracle/CADMS/OBI (pre-defined/ad hoc)

Helpful Links

- Gateway to Financial Activities (Fingate: Capital Accounting) http://www.stanford.edu/group/fms/fingate/staff/capitalequip/index.html
- CADMS (need authority to access) https://ofweb.stanford.edu
- OBI (need authority to access data) https://bi.stanford.edu
- CADMS training materials http://www.stanford.edu/group/fms/fingate/staff/capitalequip/training.html
- Admin Guide
  - Financing of Purchases #53 http://adminguide.stanford.edu/53.pdf
  - Capital Projects #83 http://adminguide.stanford.edu/83.pdf

Contacts

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Discussion Topics

- Purchasing assistance
- Selecting a contractor
- Requesting a contract
- Contract requirements

Purchasing Assistance

Lead Time: All requisitions go to Procurement/Contracts. Allow enough time for P/C processing

Contact: Financial Support Center (FSC) (650)723-2772

Visit FSC: Navigate from University Financial Gateway Site

Submit FSC Help Ticket: Submit a HelpSU ticket

Email BPSC: finhelp@stanford.edu

Telephone BPSC: 650-723-2772

Selecting a Contractor

- RFP or IFB required for most projects
- Invite only contractors licensed by California State License Board: http://www.cslb.ca.gov/
- Include a sample template of applicable form of Agreement, or Construction Agreement w/ General Conditions in RFP/IFB: Contact DPM or Procurement Services for a current PDF template
- Union vs non-union contractors: Contact Jack Cleary's office for assistance

Requesting a Contract

- Requisition with complete information including:
  - Should indicate "Contract Yes"
  - Project expected Start and Completion dates
  - Project manager and contractor contact information (w/email address)
  - Contact info for person designated to receive invoices (w/email address)
  - Insurance certificate

- Supporting documentation to attach (Uploaded into Oracle Requisition):
  - RFP or IFB including addenda, if any
  - All proposals or bids received
  - Competitive bidding required per Admin Guide 51, or Sole or single source justification (if only 1 bid or proposal solicited) per Admin Guide 51

Contracts Requirements for All Contracts

- Do not sign any contracts or agreements that obligates University
- Form 1 approval
- Insurance, including specialty overages such as hazardous material handling, etc. (when applicable)
- California State CLC 2810 Labor checklist
- P & P Bonds or Letter of Credit or bond waiver signed by Form 1 approver
- CA sales tax for purchased goods required, but not for services
- SU Living Wage Guidelines
- Data Security Clause
- Use of Stanford University Trademarks

NOTE: This PROCUREMENT/CONTRACTS PPT will be posted as DMP CHECKLIST on the Fingate Website for reference .

Helpful Links

- Fingate website: http://financialgateway.stanford.edu
- California State License Board: http://www.cslb.ca.gov/

Contacts

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For non-contract related purchases:
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723-9000 pmoss@stanford.edu

Dept. Fax #: 723-2429

Judy Chan
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Space Management and Planning
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650-721-1438

http://lbre.stanford.edu/architect/space_management

Discussion Topics

- Facts about Space Allocation on Campus
- Long Range Space Planning
- Near Term Space Planning

Space Management and Planning

Facts About Space on Campus

School/Dept Name	Gross Square Feet (gsf)	% of total
Dean of Research	673,944	4%
Graduate School of Business	359,468	2%
School of Earth Sciences	211,800	1%
School of Education	138,810	1%
School of Engineering	1,218,755	8%
School of Humanities and Sciences	1,720,334	11%
School of Law	265,839	2%
School of Medicine	1,946,654	13%
Administrative and Finance	1,687,676	11%
Athletics (DAPER)	688,396	5%
Hoover Institution	258,689	2%
Residential and Dining Enterprises	4,805,020	32%
Stanford University Libraries	700,460	5%
Student Affairs	492,495	3%
Grand Total Combined gsf	15,168,338	100%

Ultimately…

ALL space is a limited resource

Managed and planned in support of the Academic Mission

On behalf of the Provost,
we steward University space

Long-Range Space Management Plan

Based on planning principles:

- Support an environment of learning, teaching and research
- Conserve and sustain resources
- Connect and consolidate program adjacencies
- Plan with economy and equity
- Create a sense of place and a place apart

Near-Term Space Management and Planning

SPACE REQUESTS

- The Space Management and Planning Unit collaborates with the Department of Capital Planning to evaluate and advice the Provost Office regarding the use of University space in relation to projected Capital Plan needs and constraints.

- Space Management and Planning receives and tracks requests to utilize University space through the Space Request Form. The Space Request Form is used to plan space within the larger context of the University and possible competing needs.
  http://lbre.stanford.edu/cap_plan/space_requests

Near Term Space Management and Planning

SPACE CHARGE PROGRAM

- The Space Charge Program was implemented in 2008 to establish awareness that space is not a free good at Stanford and to provide incentives to use space efficiently.

- Summary of the Space Charge Program (pdf) http://lbre.stanford.edu/sites/all/lbre-shared/files/docs_public/DCPSM_spacechargeprogram_v2_10-20-08.pdf

UTILIZATION STUDIES

- Initiate and work with schools and administrative units on space utilization studies, fit studies, and repurposing of facilities.

- Identify strategies and sequences for removal of interim facilities.

Helpful Tip

What is the process for securing off-campus space?

Administrative Guide Memo 54.3 describes the policies and procedures for securing off-campus space.

http://lbre.stanford.edu/real_estate_forms. Once a Real Estate Request Form has been submitted, it is reviewed and evaluated in the context of available on-campus space and the Capital Plan. If an off-campus need is confirmed the department is directed to either call the LBRE: Real Estate Office or David Thede, Cornish and Carey, Real Estate broker.

Frequently Asked Questions of The Space Management and Planning Units

How do I find out about Space Guidelines, the Space Charge Policy or make a Space Request?

- Policy for Space Charge http://lbre.stanford.edu/sites/all/lbre-shared/files/docs_public/DCPSM_spacechargeprogram_v2_10-20-08.pdf
- Space Requests http://lbre.stanford.edu/cap_plan/space_requests
- Space Planning Guidelines http://lbre.stanford.edu/cap_plan/sites/all/lbre-shared/files/docs_public/DCPSM_SpaceandFurniturePlanningGuidelines_v3_April_2009.pdf
- Classroom Replacement Policy http://lbre.stanford.edu/cap_plan/sites/all/lbre-shared/files/docs_public/dcp_classroomreplacementpolicy_v3.pdf
- Modular Buildings and Trailer Policy http://lbre.stanford.edu/cap_plan/sites/all/lbre-shared/files/docs_public/dcp_modularpolicy_v3.pdf
- Storage Container Policy and Central Storage Facility Policy http://lbre.stanford.edu/cap_plan/sites/all/lbre-shared/files/docs_public/dcp_storagecontainerpolicy_v3.pdf http://lbre.stanford.edu/cap_plan/sites/all/lbre-shared/files/docs_public/dcp_SU_centrStorFac_SAL2_newarkpolicy_v2.pdf

Contacts

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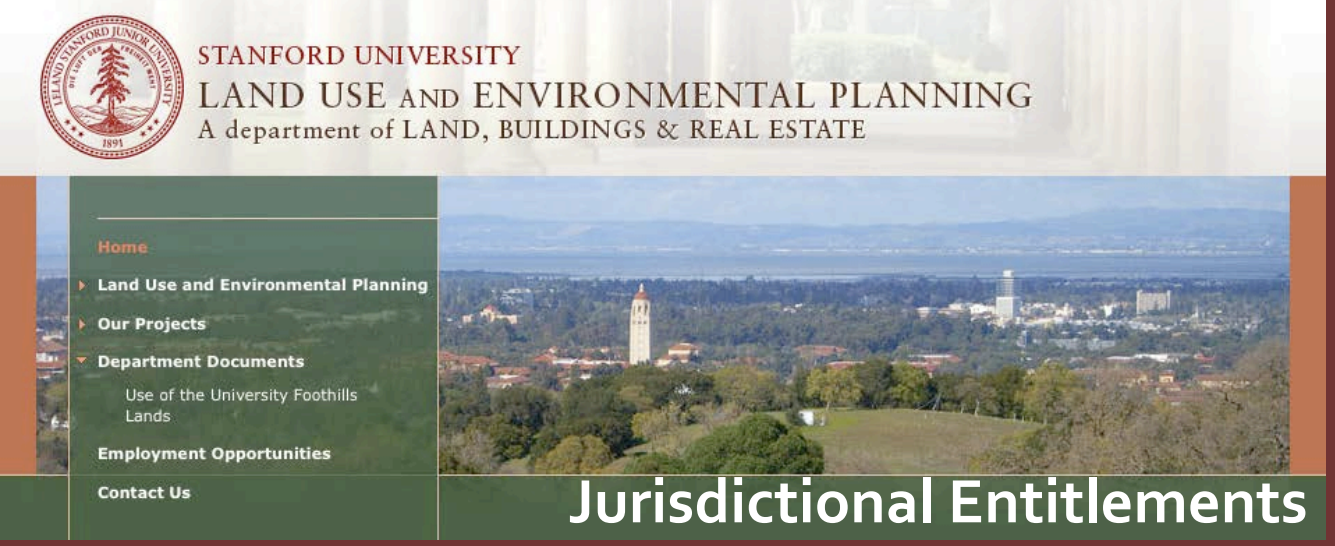

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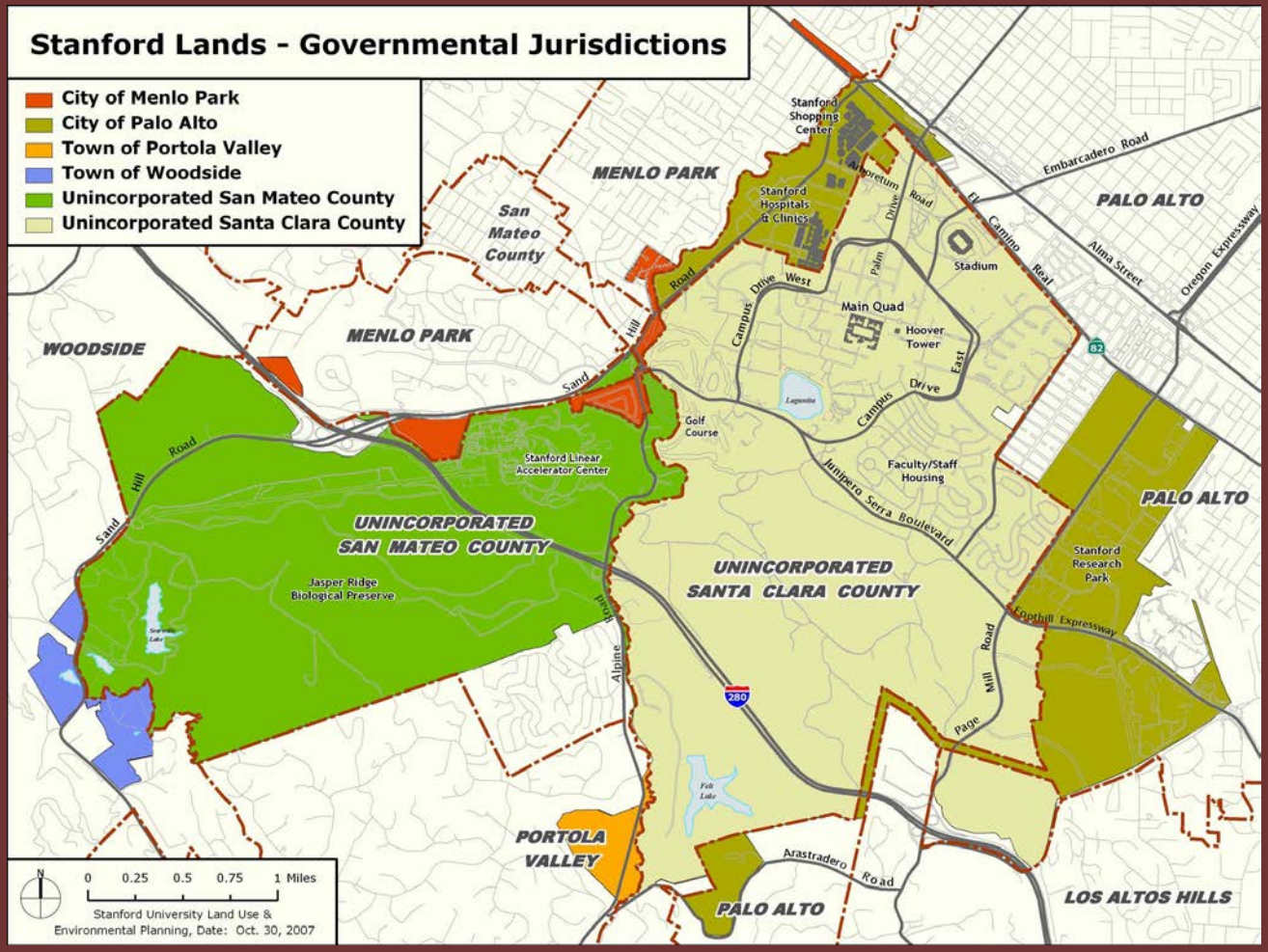
http://lbre.stanford.edu/luep/

Discussion Topics

- Jurisdictions
- Off-Campus Space
- GUP Overview
- Architectural and Site Approval (ASA)
- Cultural Resources
- CTS and Biological Resources

Six Jurisdictions



Off-Campus Space

Off-Campus Space

All off-campus users are required to:

- Confirm the use and construction conforms with local codes
- Comply with local design review and building permit approval process
- Engage their own resources, including leasing agent, to find space, and negotiate and administer the lease

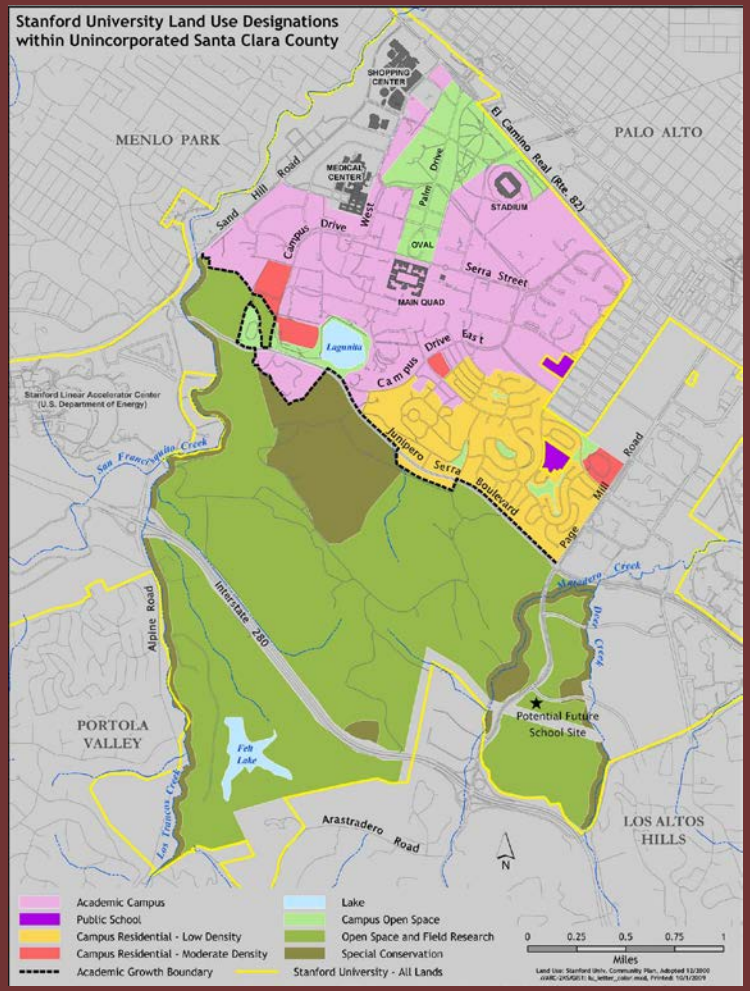
Off-Campus Space

If off-campus location is on Stanford Real Estate (SRE) lands (Stanford Research Park, Welch Road, etc):

- Direct landlord may be SRE's ground lessee. In those cases, SRE as well as the off-campus user are obligated to comply with the terms of the existing ground lease document
- In all cases (whether leasing from SRE or a ground lessee) the off –campus user must obtain SRE approval for all major improvements and exterior changes to land and buildings, as well as any exceptions to jurisdictional zoning regulations
- If SRE is direct owner of the building, obtain SRE approval of all interior improvements, otherwise obtain approval from direct landlord (i.e. SRE's ground lessee)
- Adhere to applicable SRE design guidelines and/or policies (Stanford Research Park Handbook, Stanford Research Park Policy Regarding Medical Clinics, Welch Road Planning Guidelines, etc.)
- Understand that market rents will apply and be charged, even for SRE-owned buildings
- Consult with LBRE before removing property from county property tax rolls

GUP Overview

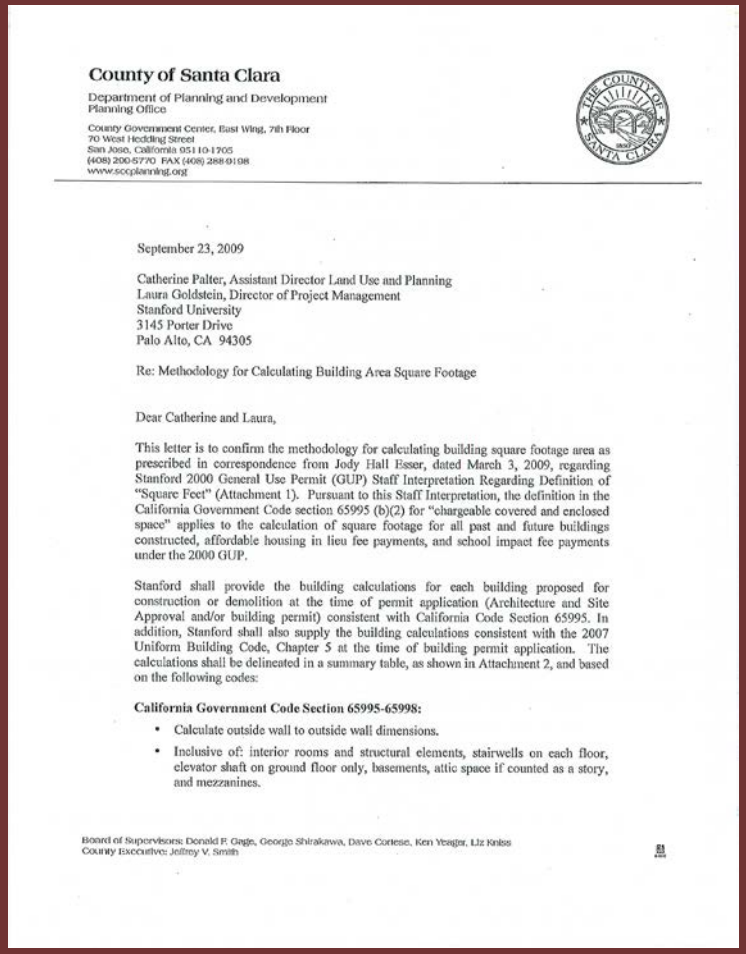
- Approved December 2000 with EIR
- Allows:
  - 2M gsf of academic development
  - 3,018 housing units
  - 2,300 parking spaces
- 100+ Conditions of Approval
- Annual Report for GUP compliance



Architectural and Site Approval (ASA)

- GUP checklist to determine which conditions apply to individual projects
- LUEP must review "GUP checklist" and "Environmental Information Form" before application is submitted to County
- LUEP will prepare "Petition for Use of Prior CEQA Document" for application
- Process described in ASA Procedure Guide (Blue Book)

Counting and Tracking gsf



County of Santa Clara

Department of Planning and Development
Planning Office

County Government Center, East Wing, 7th Floor
70 West Hedding Street
San Jose, California 95110-1705
(408) 299-5770 FAX (408) 288-9198
www.sccplanning.org

September 23, 2009

Catherine Palter, Assistant Director Land Use and Planning
Laura Goldstein, Director of Project Management
Stanford University
3145 Porter Drive
Palo Alto, CA 94305

Re: Methodology for Calculating Building Area Square Footage

Dear Catherine and Laura,

This letter is to confirm the methodology for calculating building square footage area as prescribed in correspondence from Jody Hall Esser, dated March 3, 2009, regarding Stanford 2000 General Use Permit (GUP) Staff Interpretation Regarding Definition of "Square Feet" (Attachment 1). Pursuant to this Staff Interpretation, the definition in the California Government Code section 65995 (b)(2) for "chargeable covered and enclosed space" applies to the calculation of square footage for all past and future buildings constructed, affordable housing in lieu fee payments, and school impact fee payments under the 2000 GUP.

Stanford shall provide the building calculations for each building proposed for construction or demolition at the time of permit application (Architecture and Site Approval and/or building permit) consistent with California Code Section 65995. In addition, Stanford shall also supply the building calculations consistent with the 2007 Uniform Building Code, Chapter 5 at the time of building permit application. The calculations shall be delineated in a summary table, as shown in Attachment 2, and based on the following codes:

California Government Code Section 65995-65998:

- Calculate outside wall to outside wall dimensions.
- Inclusive of: interior rooms and structural elements, stairwells on each floor, elevator shaft on ground floor only, basements, attic space if counted as a story, and mezzanines.

Board of Supervisors: Donald F. Gage, George Shirakawa, Dave Cortese, Ken Yeager, Liz Kniss
County Executive: Jeffrey V. Smith

- Methodology created in 2009
- GUP Allocation: physical changes
- GUP Entitlement Fee: programmatic changes
- Counted at ASA and Building Permit stages

Counting and Tracking Housing

- Changes resulting from construction permits
- Faculty/staff units and student beds – different methodology
- County requires a letter from LUEP documenting changes in units

Cultural Resources

- Archaeological resources – contact Dr. Jones if your project involves grading or trenching

- Historic resources – Dr. Jones may be involved if your project involves exterior changes to a building more than 50 years old

Dr. Laura Jones
Director
Heritage Services

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CTS and Biological Resources

- California tiger salamander (CTS) has local, state, and federal protections
- Any ground-disturbing activities near Lagunita must be reviewed by Dr. Launer

Dr. Alan Launer, Conservation Program Manager

aelauner@stanford.edu

Helpful Links

LUEP website: http://lbre.stanford.edu/luep/LUEP

ASA Procedure Guide (Blue Book)

Stanford Community Plan: http://lbre.stanford.edu/sites/all/lbre-shared/files/docs_public/SCC_SU_GUP.pdf

GUP checklist to determine which conditions apply to individual projects: http://lbre.stanford.edu/sites/all/lbre-shared/files/docs_public/asa_gup_checklist_append_b.pdf

Contacts

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Heritage Services	Dr. Laura Jones	Director	ljones@stanford.edu

End of Part I

Q&A

Break

Part II

Campus Planning and Design

Campus Planning and Design

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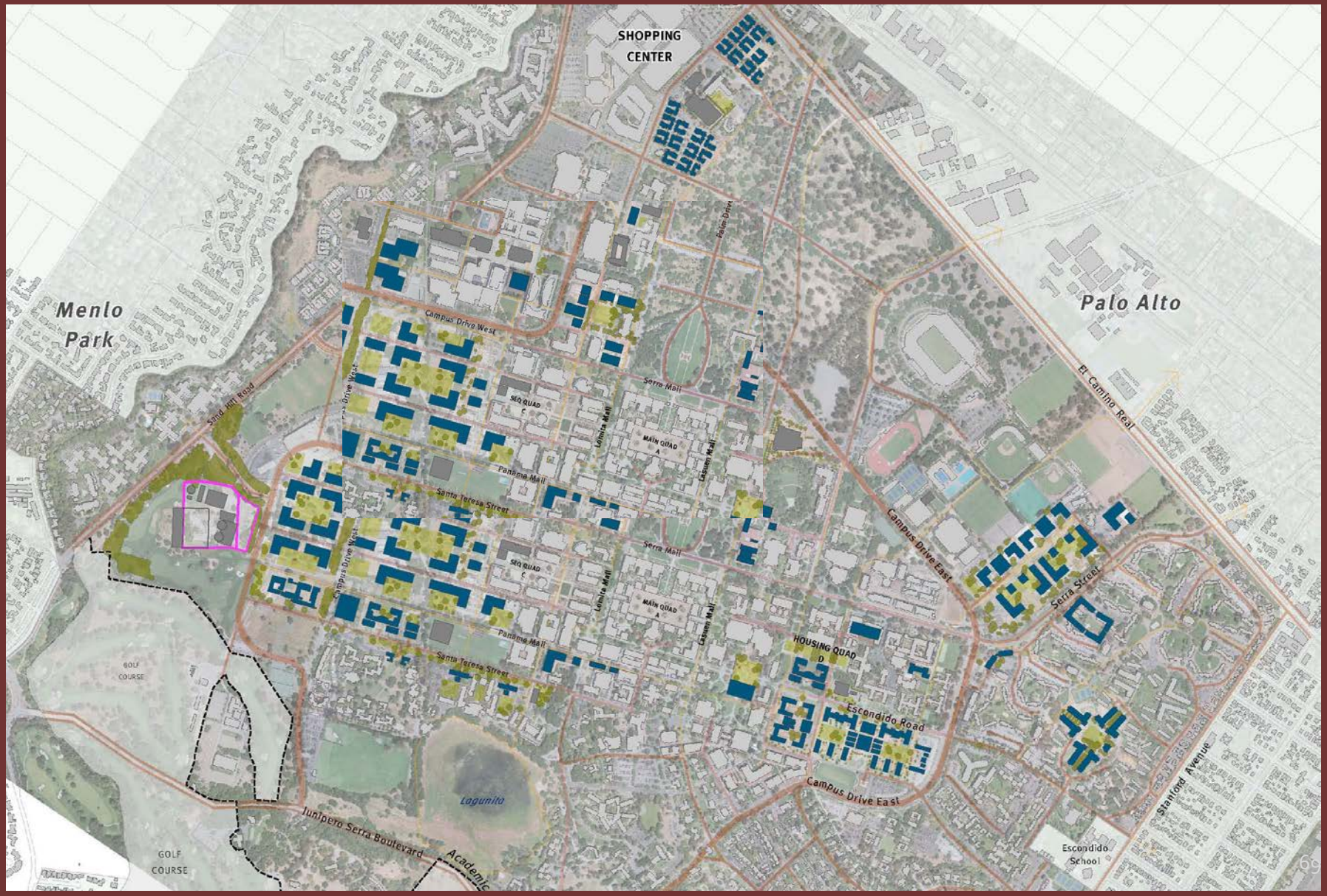
Discussion Topics

- Campus Planning
- Architecture/Landscape Architecture Quality
- Connective Elements
- Historical Stewardship

UA/CPD Specific Areas of Responsibility

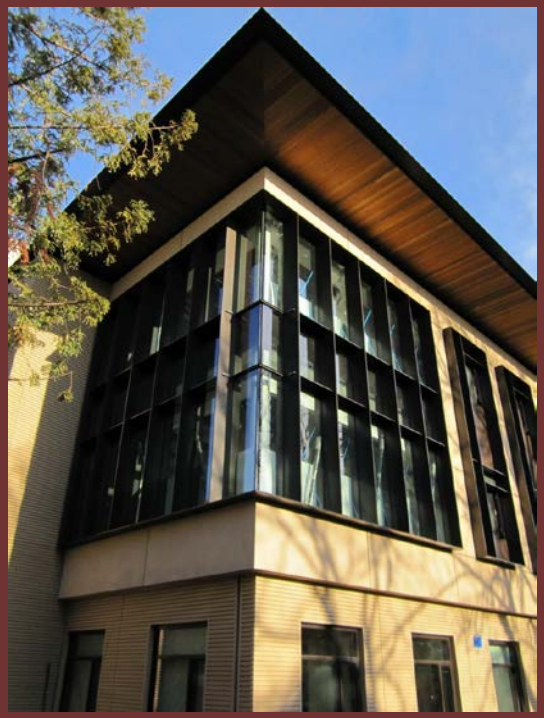
- Use of Stanford land temporary or permanent
- Exterior building colors, materials and character
- Landscape materials, character and design
- Modification to historic buildings or significant architecture, interior or exterior
- buildings; any interior or exterior modifications to historic buildings or significant architecture
- Consistency of site furnishings and light fixtures
- Overall Physical Campus Vision

Campus Long Range Development



Campus Connections

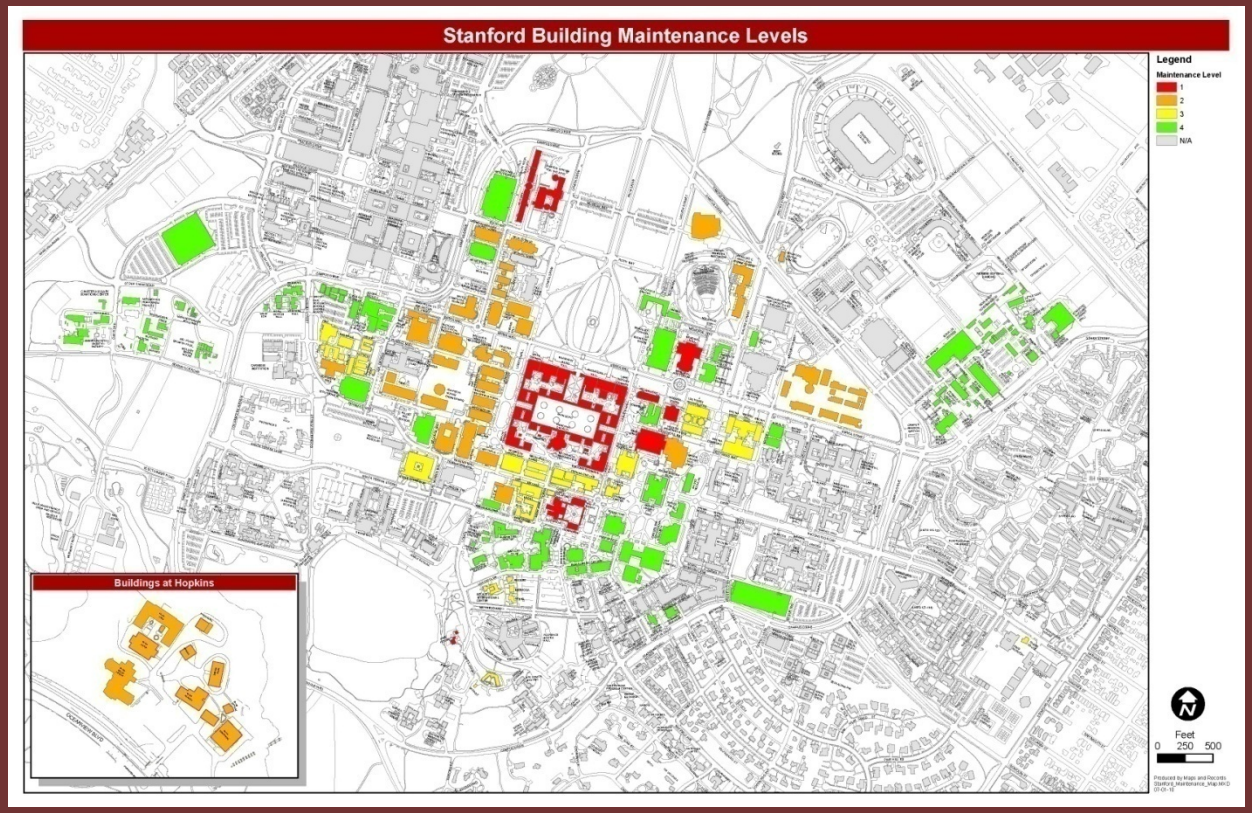
Quality…place, culture, design integrity



Stanford Building Service Levels

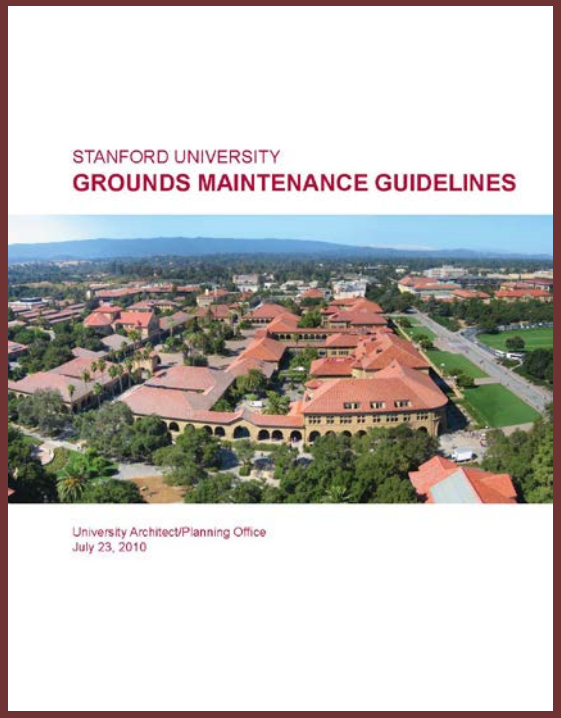
...ne Management's Service Level Assignments					
UILDIN	DESCRIPTION	ZONE	GSF	Service Level 1 - 4	Modified lvl
2-250	CENTER FOR TURBULENCE RESEARCH	A	2,889	2	2
2-500	TERMAN ENGINEERING LABORATORY	A	44,211	2	2
2-520	MECHANICAL ENGINEERING, TSD	A	21,710	3	3
2-524	BUILDING 524	A	15,525	3	3
0-610	MULBERRY HOUSE (CHILD CARE CENTER)	C	8,511	4	4
0-710	VAGEN STUDENT HEALTH CENTER	C	33,020	2	2a
0-105	VAN PATTEN HOUSE	C	3,527	3	3
0-110	BOLIVAR HOUSE (LAT AMER)	C	4,875	3	3
0-130	GOULD HOUSE	C	4,124	4	3
0-135	DEAN OF CHAPEL HOME	C	3,163	4	3
0-320	LOU HENRY HOOVER HOUSE	C	17,202	1	1
0-330	HANNA HOUSE (F.L. WRIGHT)	C	18,962	1	1
0-330A	HANNA HOUSE - GARAGE & CARPORT	C	464	1	1
0-330B	HANNA HOUSE - GUEST HOUSE & SHOP	C	1,500	1	1
0-330C	HANNA HOUSE - STORAGE BUILDING	C	285	1	1
0-330D	HANNA HOUSE - GARDEN HOUSE	C	219	1	1
0-070	STUDENT OBSERVATORY	C	1,490	4	
2-200	BEHAV. SCI. ADVANCE STUDY CENTER	C	7,505	4	3
2-210	BEHAV. SCI. STUDIOS 1-6	C	1,318	4	3
2-220	BEHAV. SCI. STUDIOS 7-12	C	1,318	4	3
2-230	BEHAV. SCI. STUDIOS 13-16	C	946	4	3
2-240	BEHAV. SCI. STUDIOS 17-20	C	946	4	3
2-250	BEHAV. SCI. STUDIOS 21-25	C	1,132	4	3
2-260	BEHAV. SCI. STUDIOS 26-29	C	2,334	3	3
2-270	BEHAV. SCI. STUDIOS 30-37	C	1,690	4	3
2-280	BEHAV. SCI. STUDIOS 38-54	C	3,438	4	3
2-290	BEHAV. SCI. DUPLIC & STORAGE BLDG	C	1,921	4	3
2-291	BEHAV. SCI. SHOWER FACILITY	C	230	4	3
2-295	BEHAV. SCI. CARETAKER'S COTTAGE	C	583	4	3
2-350	30 ALTA ROAD (FORMERLY NBER)	C	7,631	4	3
2-400	SOLAR OBSERVATORY	C	1,538	4	3
2-518T	INTEGRATED RADIO BUILDING KZSU	C	317	4	3
2-525	SOLAR OBSERV EQUIP SHED	C	82	4	3
2-010	MAUSOLEUM	C	829	1	1
2-012	ANGEL OF GRIEF	C	0	1	1
2-100	STANFORD ARBORETUM CHILDREN'S CTR	C	7,307	4	4
1-900	MEYER-BUCK HOUSE	C	10,562	1	1
1-905	BUCK CONFERENCE FACILITY TANK HOUS	C	924	1	1
1-910	BUCK CONFERENCE FACILITY UTILS SHED	C	100	1	1
1-920	BUCK CONFERENCE FACILITY GARAGE	C	981	1	1
0-225	1450 PAGE MILL RD	C	29,979	4	4
0-240	1454 PAGE MILL RD	C	31,025	4	4
0-249R	3330 HILLVIEW AVE	C	30,456	4	4
0-460	NEWARK WAREHOUSE	C	62,557	4	4
109			8888		
1-001	BUILDING 1, MAIN QUAD	D	23,926	1	1
1-010	PRESIDENT'S OFFICE	D	10,232	1	1
1-020	BUILDING 20, MAIN QUAD	D	13,719	1	1
1-030	STANFORD LANGUAGE CENTER	D	4,100	1	1
1-040	BUILDING 40, MAIN QUAD	D	10,331	1	1
1-050	BUILDING 50, MAIN QUAD	D	16,609	1	1
1-060	BUILDING 60, MAIN QUAD	D	16,719	1	1
1-070	HUMANITIES - RELIGIOUS STUDIES	D	10,452	1	1
1-080	BUILDING 80, MAIN QUAD	D	14,232	1	1
1-090	PHILOSOPHY	D	13,952	1	1

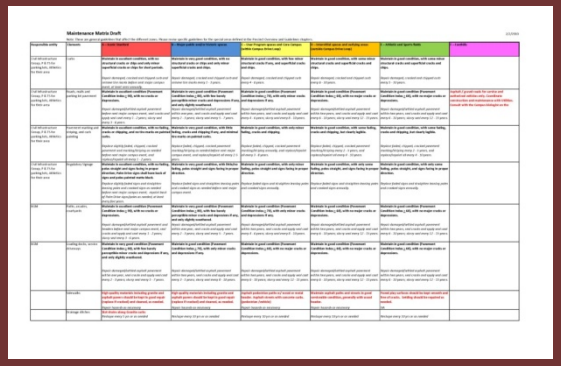
Level 1 - Campus Landmarks
Level 2 - Operations & Research Intensive
Level 3 - Heritage
Level 4 - General Maintenance

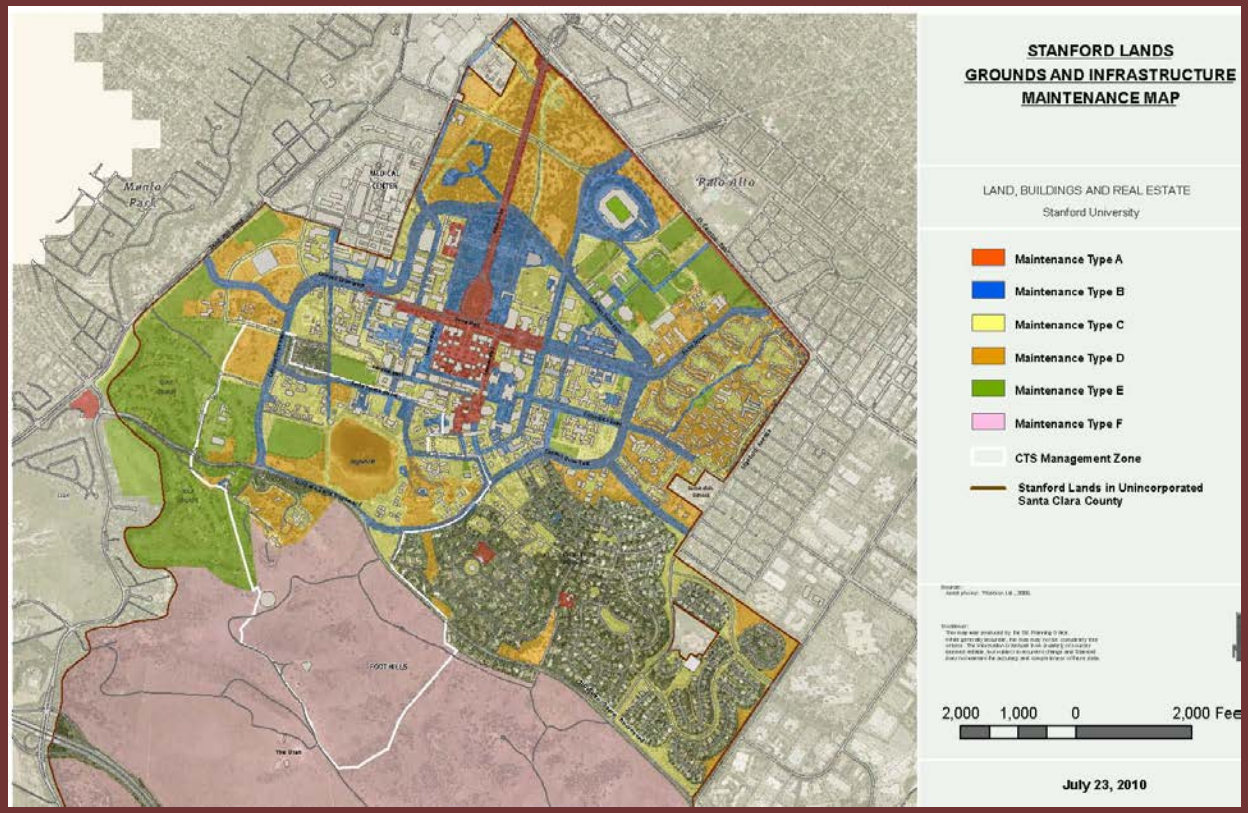


- **Campus Landmarks**
- **Operations and Research Intensive**
- **Heritage**
- **General Maintenance**

Grounds Maintenance Guidelines







- Maintenance Level A
- Maintenance Level B
- Maintenance Level C
- Maintenance Level D
- Maintenance Level E
- Maintenance Level F

http://lbre.stanford.edu/architect/guidelines_standards

Campus Standards

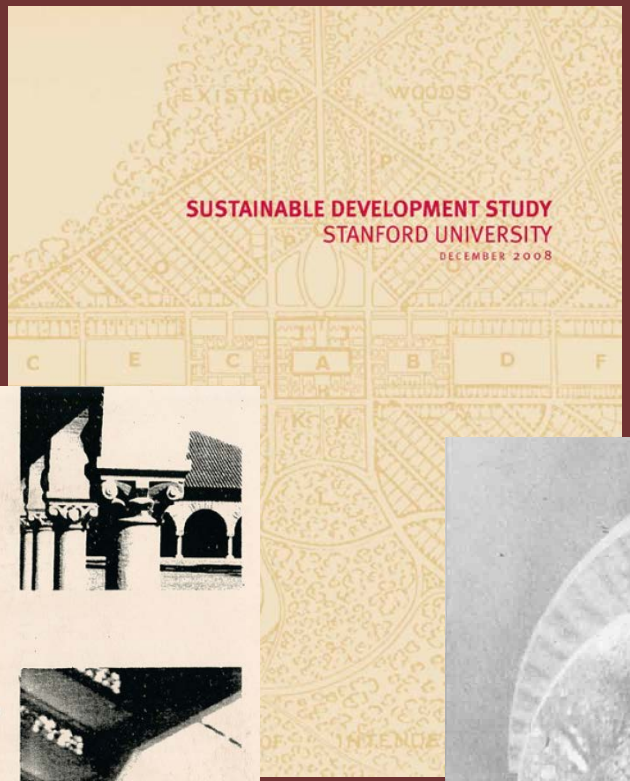
- Architectural character, colors and materials
- Historic resources
- Vegetation management
- Lighting
- Signs
- Cart parking
- Pathways
- Landscape character
- Bike parking
- Bollards/vehicle control
- Site furniture

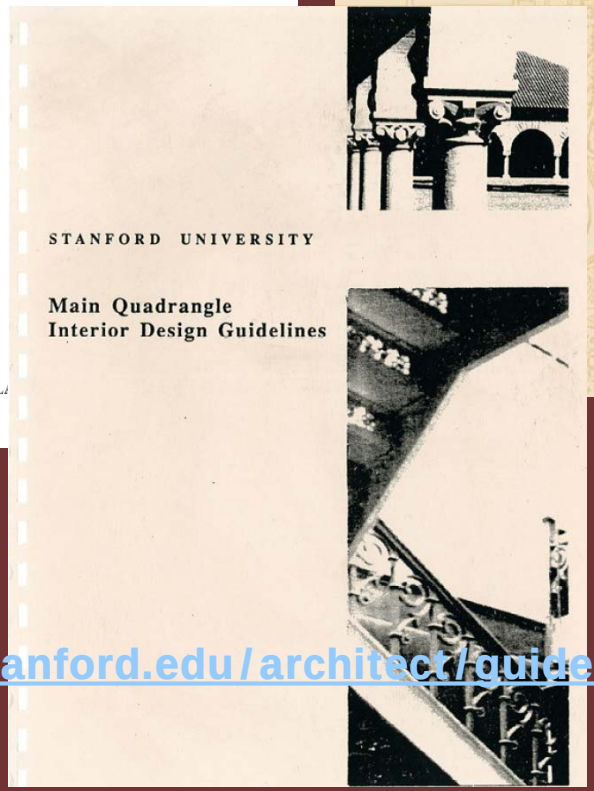
Campus Guidelines

Stanford University

CENTRAL CAMPUS
DESIGN GUIDELINES &
COLOR/MATERIAL PALETTE

UNIVERSITY ARCHITECT/PL
2002





Stanford University Architect/Campus Planning & Design

Architectural Team Selection Process

The process of selecting a design team is a critical component of the project process and, just as an architectural design is a response to the surrounding context, the selection process is typically tailored to the context of the proposed project.

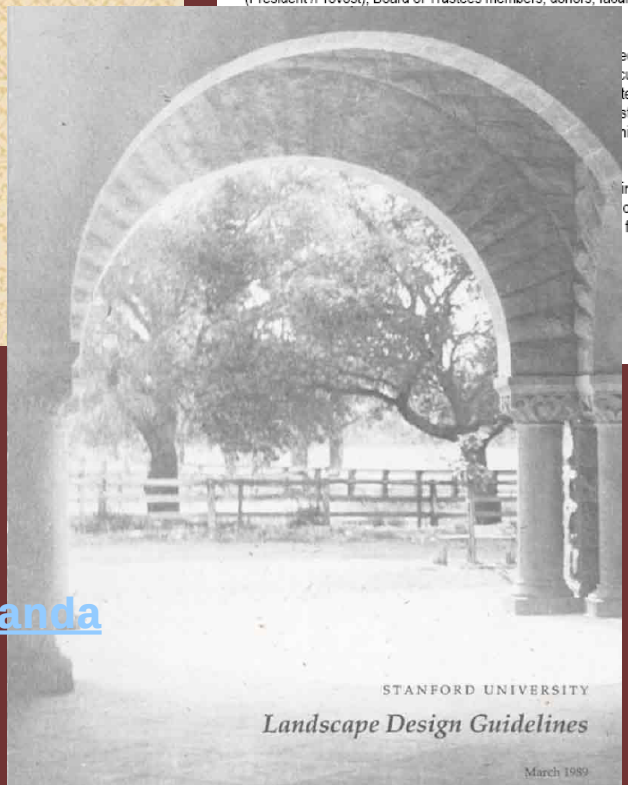
The selection process typically includes a qualifications submittal and one of the following four methods for the design team selection:

- Direct team selection
- Team selection with interview
- Team selection with interview and preliminary concepts
- Design competition

In all cases the selection process is orchestrated by the Project Manager and the University Architect. Participants on the selection committee may also include University leadership (President /Provost), Board of Trustees members, donors, faculty, and individual school

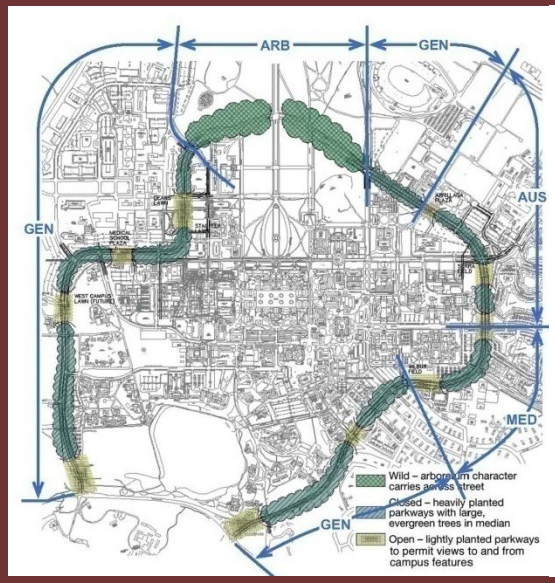
ecords and design firm information
cusing on keeping this information
ted in sending information to our
strate the design firm's relevant
niversity Architect, David Lenox, at

irms, solicit qualification materials,
ort list. An RFP will be sent to those
four processes above will follow.



http://lbre.stanford.edu/architect/guidelines_standards

Campus Guidelines



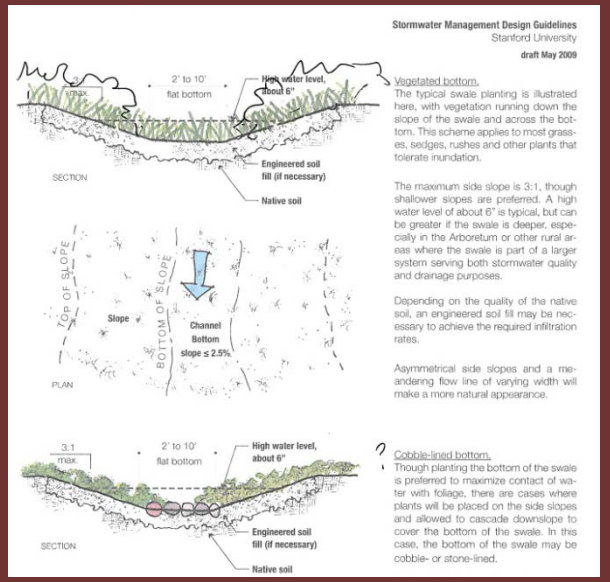

Stanford University | Campus Drive Design Guidelines
Appendix E – Examples

Parkways

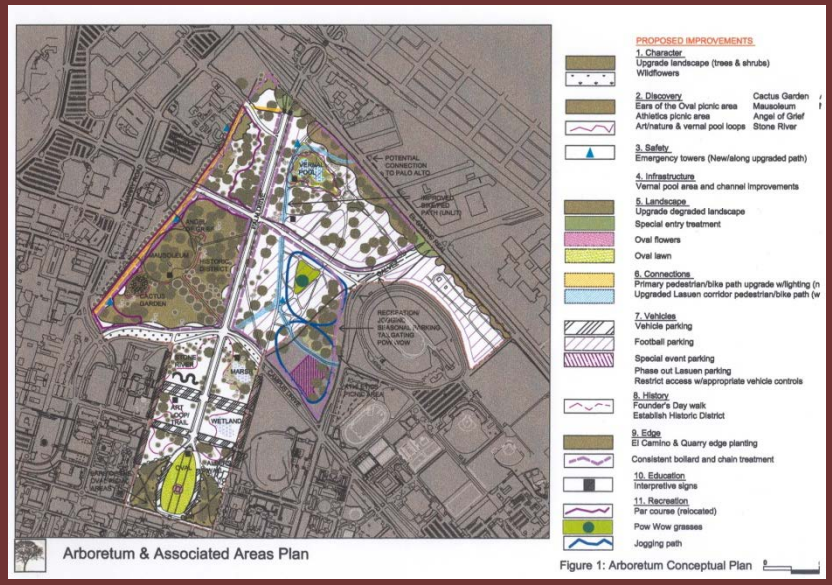
In contrast to the uniformity of the median, the planting of the parkways is to be generally informal, and along most of Campus Drive the landscape character should reflect the older, generally wooded areas of the campus from the era of "the Farm." Because this landscape is varied and hard to characterize in words, we rely here on pictures. Some of these show conditions along existing Campus Drive, and others are taken elsewhere on campus to show how these sorts of landscape look in their maturity. At irregular intervals this continuous and informal landscape will be interrupted to create views into important spaces and of major connectors – see "Special Conditions" below.

Informal Planting of Trees

Campus Drive



Bio-swales



Arboretum

McMurtry Art & Art History Building – Design Guidelines
Stanford University

Maintain existing service program/yard: Service yard and access road for Cantor Museum is along the East edge of the existing Anatomy Building. Cantor requires a service yard in the vicinity of the existing, but the access road can be relocated. Depending on the location of the new building/buildings, the service area can be expanded to serve both the Museum and the new Art building. Note multiple utility lines may have to be relocated along with the service road.

Sustainable Principles
The building and associated landscape shall meet the sustainable performance criteria of Stanford Guidelines for Sustainable Buildings
http://lbre.stanford.edu/sem/sites/all/lbre-shared/files/docs_public/Sustainable_Guidelines.pdf

Design, Landscape & Campus Drive Guidelines
Reference the Stanford Campus Design Guidelines, Stanford Landscape Design Guidelines, Campus Drive Design Guidelines and Addenda, Bioswale Design Guidelines, and Facility Design Guidelines. Reference the following LBRE document library:

http://lbre.stanford.edu/sem/documentsearch

Art School Campus Identity
The foremost project goal is to promote campus integration and strengthen the Art & Art History Department's identity while providing a supportive working, learning, and teaching environment. The building's dynamic program should invite creativity and collaboration among faculty, students, staff, and professionals alike. Specific goals include. Reference the Art Building Vision Program Document.

Project Specific Guidelines

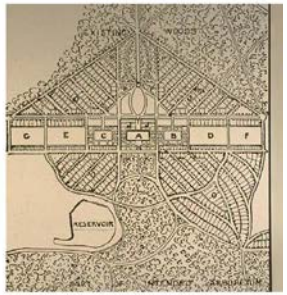
Landscape: White Paper 2009 (most common)

STANFORD UNIVERSITY
LANDSCAPE AND OPEN SPACE C

Introduction

Unique landscape features that have become e
worldwide. Palm Drive, the grassy foothills, c
together have come to symbolize "The Farm".

The preservation of the ambiance of the Stanfi
detail. 'Left over' open areas will not alone pr
identify areas where the rural character is to re
maintenance practices to meet the needs of nat
campus core can preserve a casual character w
areas, from large gathering space to intimate n
elements including cultivated gardens, plazas,
landscapes, oak groves, wildflowers and grass
quality that is a fundamental element of Stanfo
most developed areas, there is still an understa
University, and consistant with the original sp



Landscape Objectives

Within the larger principles, there are also spe
development at Stanford that characterize the

- Careful site planning (the arrangement of f
place. Site planning should identify and st
- Long views create a sense of identity and c
been achieved through an axial plan that sl
- The experience of approaching or leaving
compelling sequence of arrival and parting
community as a whole and orients traveler
- The campus should be linked together thro
consistent outdoor furnishing. By connect
community as well as encourages multidis
- Outdoor spaces should be designed to acc
more versatile and dynamic while supporti
- Buildings should be sited to create spaces
forecourt and allows the activity from eacl
- Art educates, evokes emotion, and enriche
objects placed in existing sites and as worl
design.
- Outdoor spaces can account for a large per
management should be given a high priorit
space including seating and gathering, rec
- Special landscape places have their own in
and should take precedence over immediat
preservation and include such features as I
the Oval, Governor's Avenue, White Plaz
- The campus presents many opportunities f
arboretum of horticultural interest, landsca
development of smaller diverse gardens in
- Trees are the slowest growing, longest last
valuable campus assets which should be pr
- Native California species offer a rich palet
adapted species from other Mediterranean
local environment. Native and adapted sp
ornamental landscapes.
- The landscape should dominate the campu
service and trash areas and above grade ut
paths with plantings and/or enclosures.
- At night, lighting provides the orientation
hierarchical and consistent throughout the
comfortable and sustainable nighttime env

Landscape Principles

Stanford's landscape character can be understood as the expre

1. **Grand Scale** - Stanford lands stretch over 8,000 acres of f
topography encourages openness, freedom and 'thinking b
for land and resource management of the academic reserv
the importance of scale, and by preserving the grandest ele
an essential aspect of the Stanford ambiance.

2. **Response to Climate** - Writing to Governor Stanford in 1
the plan for a great University in California ideals must be
and have been led to regard as appropriate in the outward
we are to look for types of buildings and arrangements suit
rather be in those founded by the wiser men of Syria, Gree
benefit by embracing and responding to California's gentl
open spaces designed to work with natural systems, native
offer long-term sustainability and reduced operating costs
mechanical systems and external power. By their nature t
make the Stanford environment unique, memorable and su

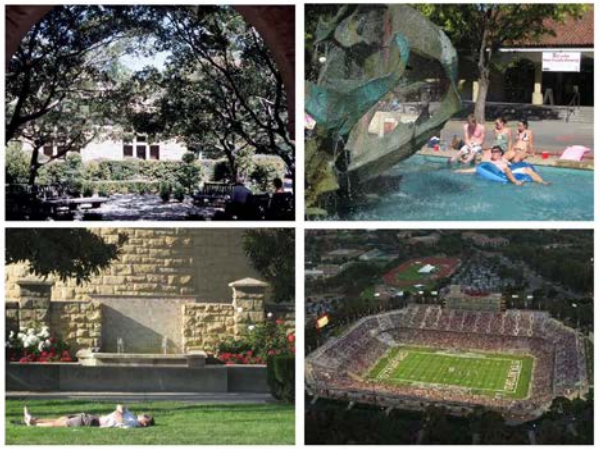
3. **Juxtaposition** - The Stanford landscape derives much of i
opposites. The original stone Quadrangle, representing th
midst of un-manicured fields, established this dramatic ten
stable, only a few minute walk from cutting edge scientific
retreat from the relatively flat, developed campus center.
lies adjacent to rough, non-irrigated 'meadows'. As oppos
made more powerful, providing opportunities for a more d

4. **A Place Apart** - When the Stanfords founded the Universi
established urban centers of San Francisco and San Jose.
the original Quadrangle in the center of the level land on t
established the University as a place apart from everyday l
scholars. The separateness is maintained today by the ope
Creek, Lake Lagunita, the foothills and the oak groves that
surrounding roads and cities. As one passes through the c
everyday world, through a quiet, un-manicured landscape,
combined with continued community development at its e
valuable. As growth and change continue, the challenge is
reinforce the entry experiences that encourage this transiti

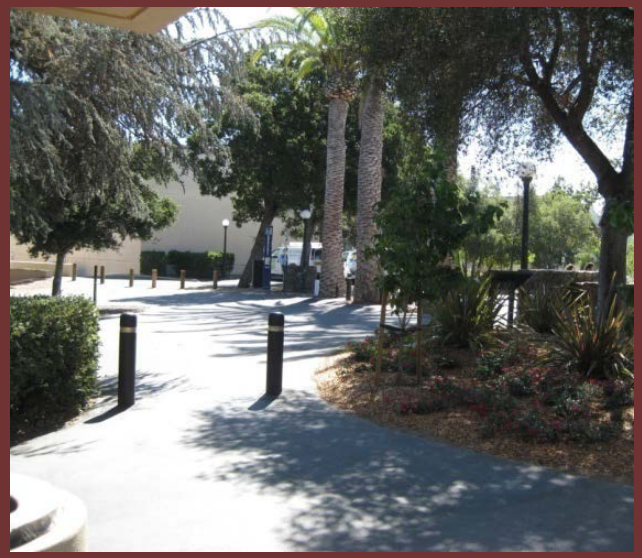
5. **Permanence** - For Jane and Leland Stanford, the building
would serve as a memorial "for ages to come." From the i
construction of the Main Quad, the Stanfords argued for si
materials and a style that results in buildings that express p
sought to achieve a long-lasting design by selecting plant
the local climate. Though some of these, such as the Palm
Olmsted chose permanence over expediency.

6. **Unity** - The University is one place, one community. This is expressed and supported by a unity of materials, forms and colors. The original quadrangle had a single architectural vocabulary. Subsequent buildings reflect the contemporary architecture of their time, but they connect to Stanford through a continuity of key elements including scale, forms, materials, and colors. Standards for site elements such as light fixtures, furniture, paving materials and signage are likewise consistent throughout the Campus.

7. **Memory** – The various landscapes at Stanford have become the places of memory that live in the lore, ritual, and hearts of its students and alumni. Every spring, students and visitors to Stanford can be seen standing in the campus medians photographing the wild flowers. On weekends brides and grooms take photographs on the Main Quad steps. Class after class recounts their first 'Stanford' experience, "Fountain hopping is one of those wacky Stanford traditions that in the aggregate make us who we are…You wouldn't be doing this right now if you were on the East Coast." There is the full moon kissing night in the Main Quad, courting in the Cactus Garden, walking the Dish, cheering at the Stanford Stadium. It is important to understand these special places, preserve that of which the memories are made, and continue to look for opportunities to make new memorable spaces.



LANDSCAPE ELEMENTS:
Bike Parking, Bollards, Lighting, Vegetation



GLOBE

Antique Street Lamps, Inc. SU-II

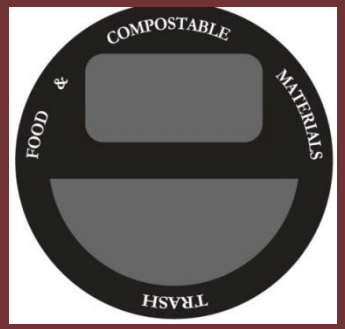
LANTERN

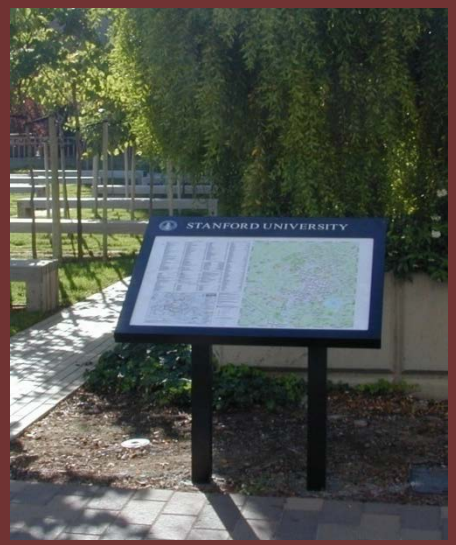
Holophane RSL-350

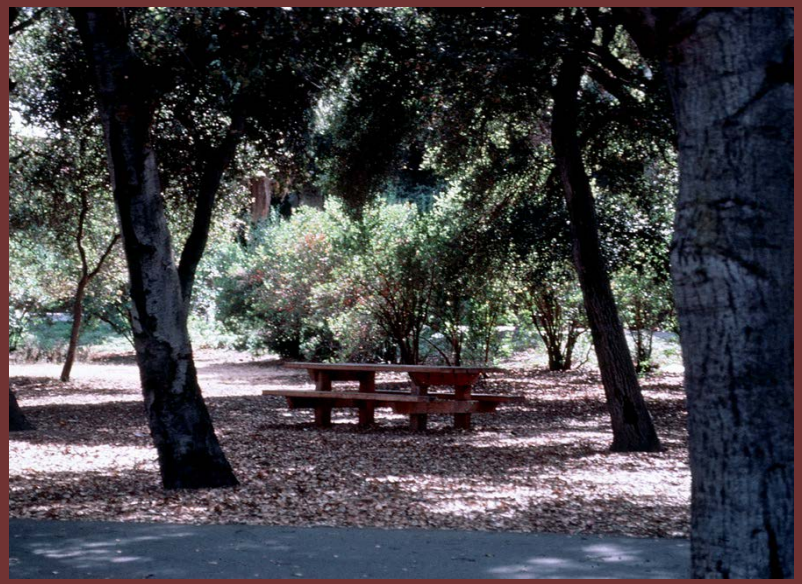
ACORN

Antique Street Lamps, Inc. SU-II

LANDSCAPE ELEMENTS:
Site Furniture

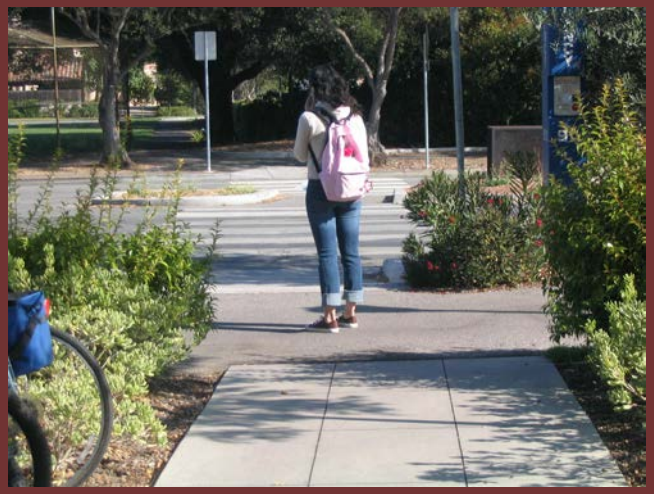


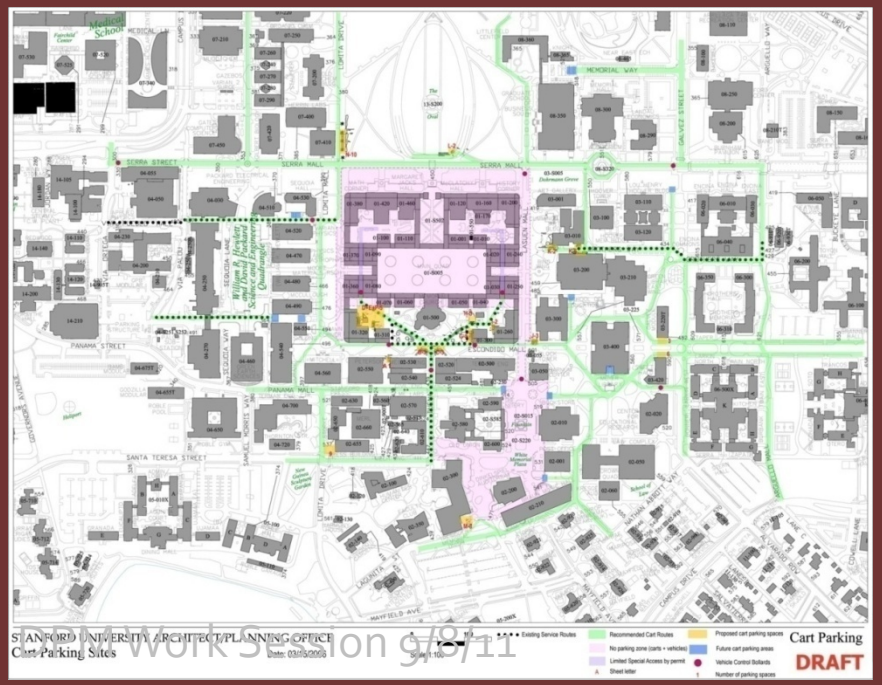




REGIONAL ELEMENTS:

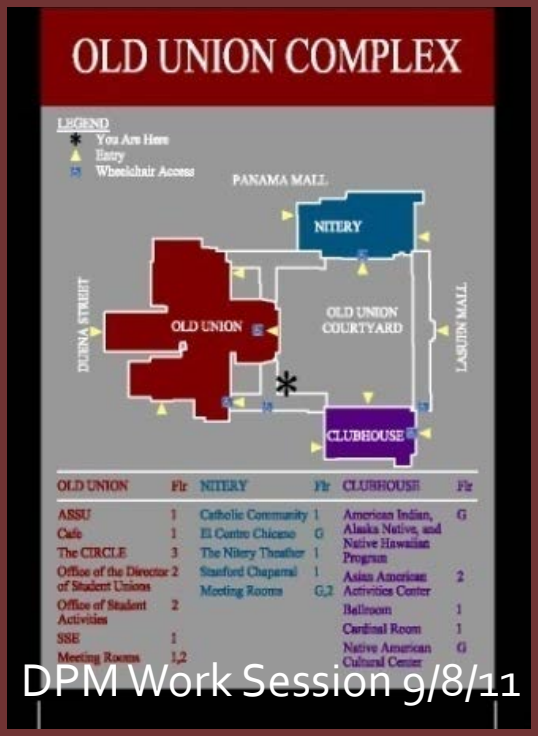
Cart Parking, Blue Towers, Bike Lockers, Pathways





Signs

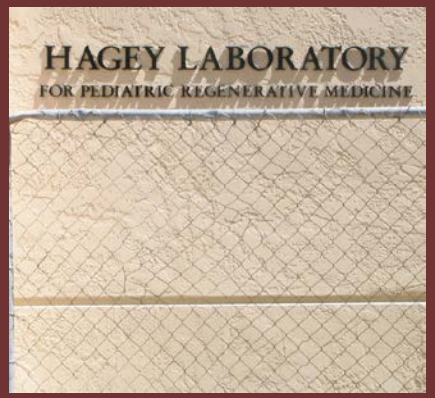

EMERGENCY
ASSEMBLY POINT
14-2


OLD UNION COMPLEX
LEGEND
You Are Here
Entry
Wheelchair Access
PANAMA MALL
NITERY
OLD UNION
OLD UNION COURTYARD
DURRA STREET
LASUEN MALL
CLUBHOUSE
OLD UNION Flr
ASSU 1
Cafe 1
The CIRCLE 3
Office of the Director of Student Unions 2
Office of Student Activities 2
SSE 1
Meeting Rooms 1,2
NITERY Flr
Catholic Community 1
El Centro Chicano G
The Nitery Theather 1
Stanford Chaparral 1
Meeting Rooms G,2
CLUBHOUSE Flr
American Indian, Alaska Native, and Native Hawaiian Program G
Asian American Activities Center 2
Ballroom 1
Cardinal Room 1
Native American Cultural Center G


CAMPUS CENTER
Clubhouse
Bookstore
Post Office
Braun Music Center
Tresidder Union
Dinkelspiel Aud.
Faculty Club

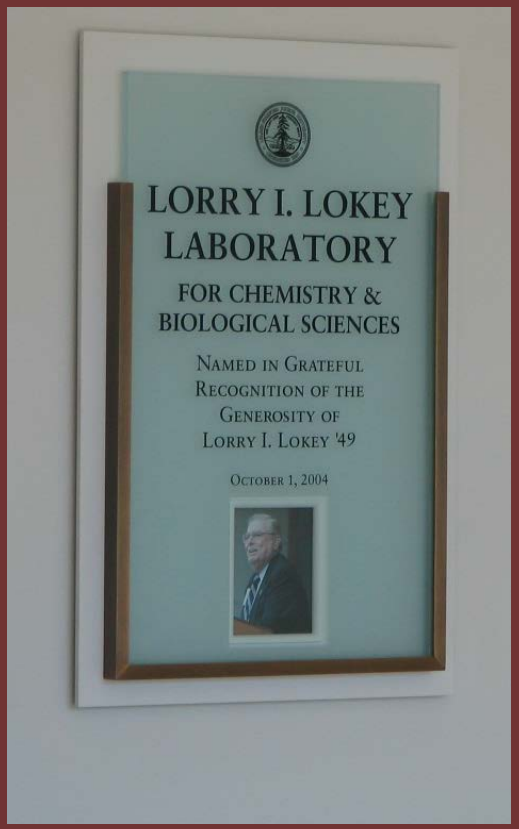

NO BIKES CARTS SKATES IN BUILDINGS

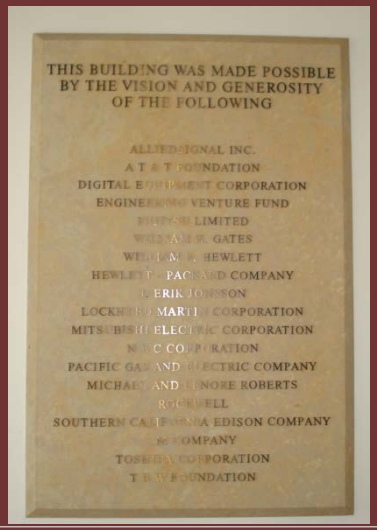

CAUTION: SLOW YOUR WHEELS YIELD TO PEDESTRIANS
NO FRISBEE IN COURTYARDS
NO SMOKING
BIKE, CARTS, SKATES LANE

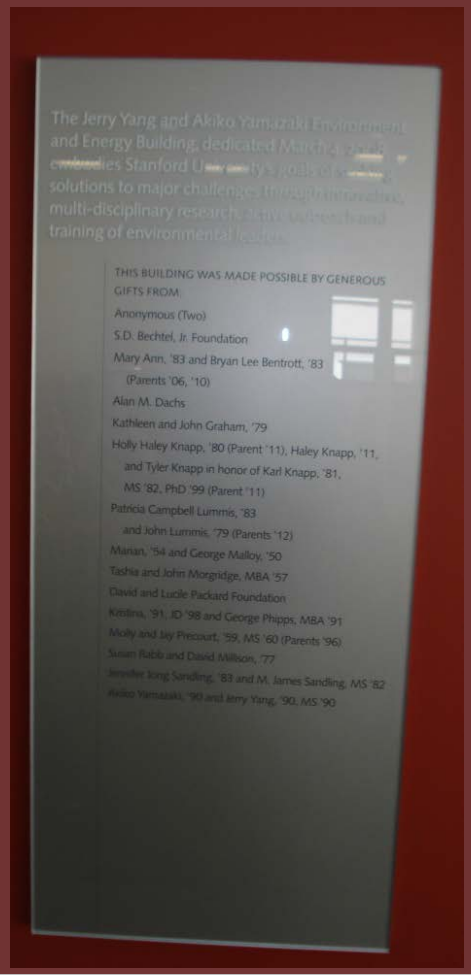

HAGEY LABORATORY
FOR PEDIATRIC REGENERATIVE MEDICINE

Interior: Donor Plaques

Prototypes







Helpful Links

UA / CPD website: http://lbre.stanford.edu/architect/

Guidelines and Standards (exterior finishes, landscape, lighting, site furniture, vegetation, signage, etc.): http://lbre.stanford.edu/architect/guidelines_standards

Contacts

Questions	Contact	email
Items placed on Stanford land – carts, containers, bikes, contractor space, etc.	Eva Rose Leavit	eval@stanford.edu
Landscape design changes, tree removal, paving, lighting, etc.	Debbie Canino Ted Tucholski	dcanino5@stanford.edu tedt@bonair.stanford.edu
Exterior building paint colors, windows, doors, ramps, railings, gutters, signage, light	Sapna Marfatia	marfatia@stanford.edu
Modification to buildings more than 50 years old or new buildings including reroofing, waterproofing, lobby or floor plan changes, exterior repair work, etc.	Sapna Marfatia	marfatia@stanford.edu
Any exterior signage and Main Quad interior signs	Elena Angoloti	angoloti@stanford.edu
Architect/Landscape Architect selection	David Lenox	dlenox@stanford.edu

George E. Sandoval
Director of Zone Management
Buildings & Grounds Maintenance
725-3670
georges@stanford.edu

Bob Fritch
Manager
Engineering Trades
725-3553
bobf@stanford.edu

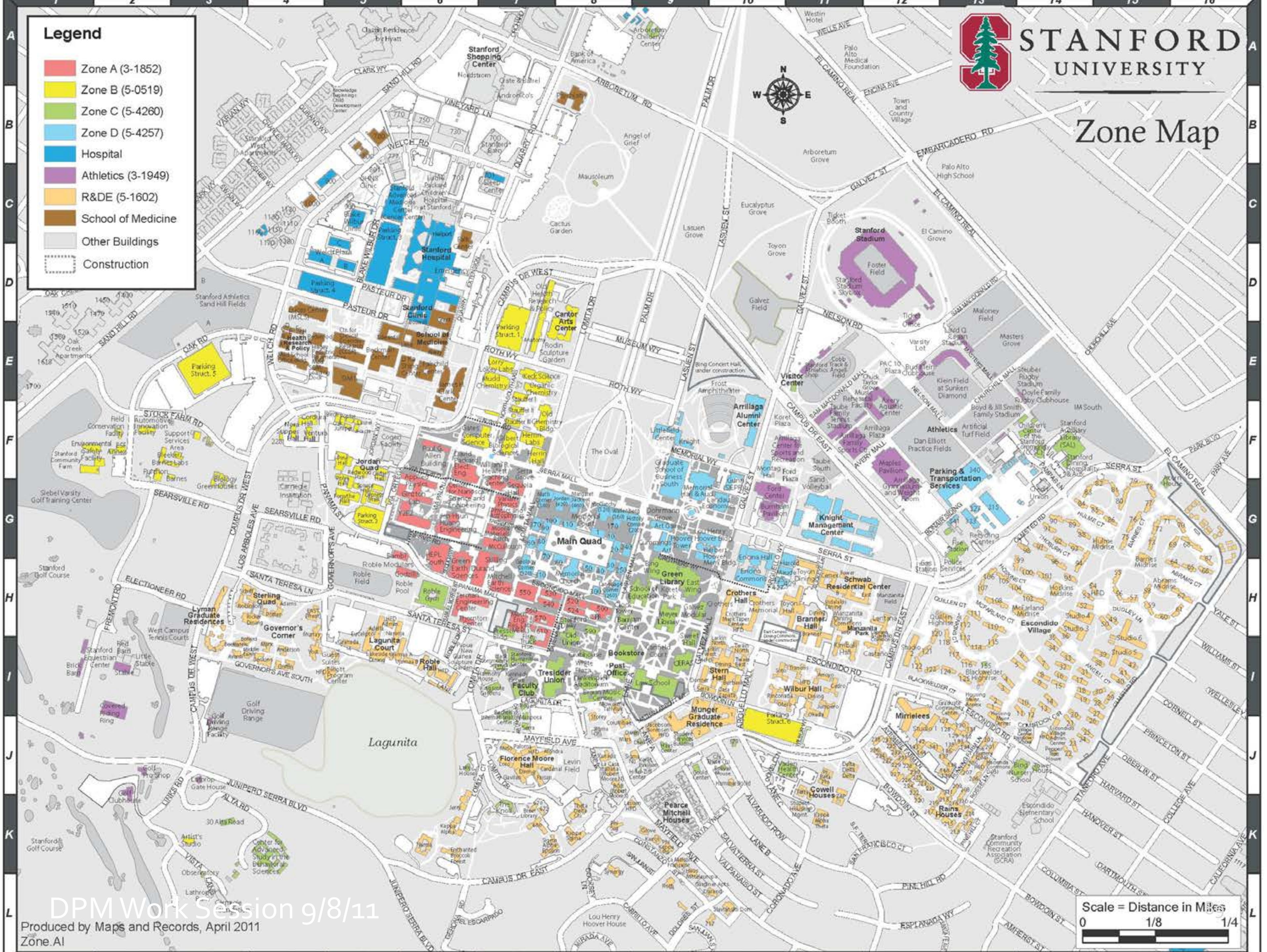
http://bgm.stanford.edu/groups/zones/index

Discussion Topics

- Who does plan reviews?
- Why do… plans review?
- What is impacted by DMP projects?
- Plans review process
- Website resources for PMs and Contractors
- BGM Operational/Maintenance support

Stanford Facilities Organizations

- Land, Buildings and Real Estate (LBRE)
- Residential & Dining Enterprises (R&DE)
- Athletics (DAPER)
- School of Medicine
- Hospital
- Faculty Staff Housing
- SLAC
- EH&S / SUFMO
- ITS
- Others



DPM Work Session 9/8/11

Produced by Maps and Records, April 2011

Zone.AI

Academic Building Contacts

Manager	Name	Phone	email
Zone A	Khoa Hoang	725-9089	khoah@stanford.edu
Zone B	Bob Wheeler	723-0610	wheeler@stanford.edu
Zone C	Kathleen Baldwin	725-8159	kb1@stanford.edu
Zone D	Steve Clarkson	725-5008	sclarkso@stanford.edu

Why Do Plans Review?

- Reduce construction change-order costs
- Avoid project delays
- Facilitate regulatory compliance, plans-check, permitting, final inspection, and occupancy
- Ensure that your facility meets and will continue to meet program needs
- Ensure that your project meets Stanford facilities planning and design guidelines and building service levels
- Minimize adverse impact to existing building facilities, programs, activities, and neighbors
- Extend the life and return on investment for your facility
- Ensure safety and security
- Reduce maintenance, operation, and energy costs
- Increase environmental sustainability
- Utilize Stanford's in-house engineering, maintenance, construction, architectural, environmental, planning, safety, and security resources

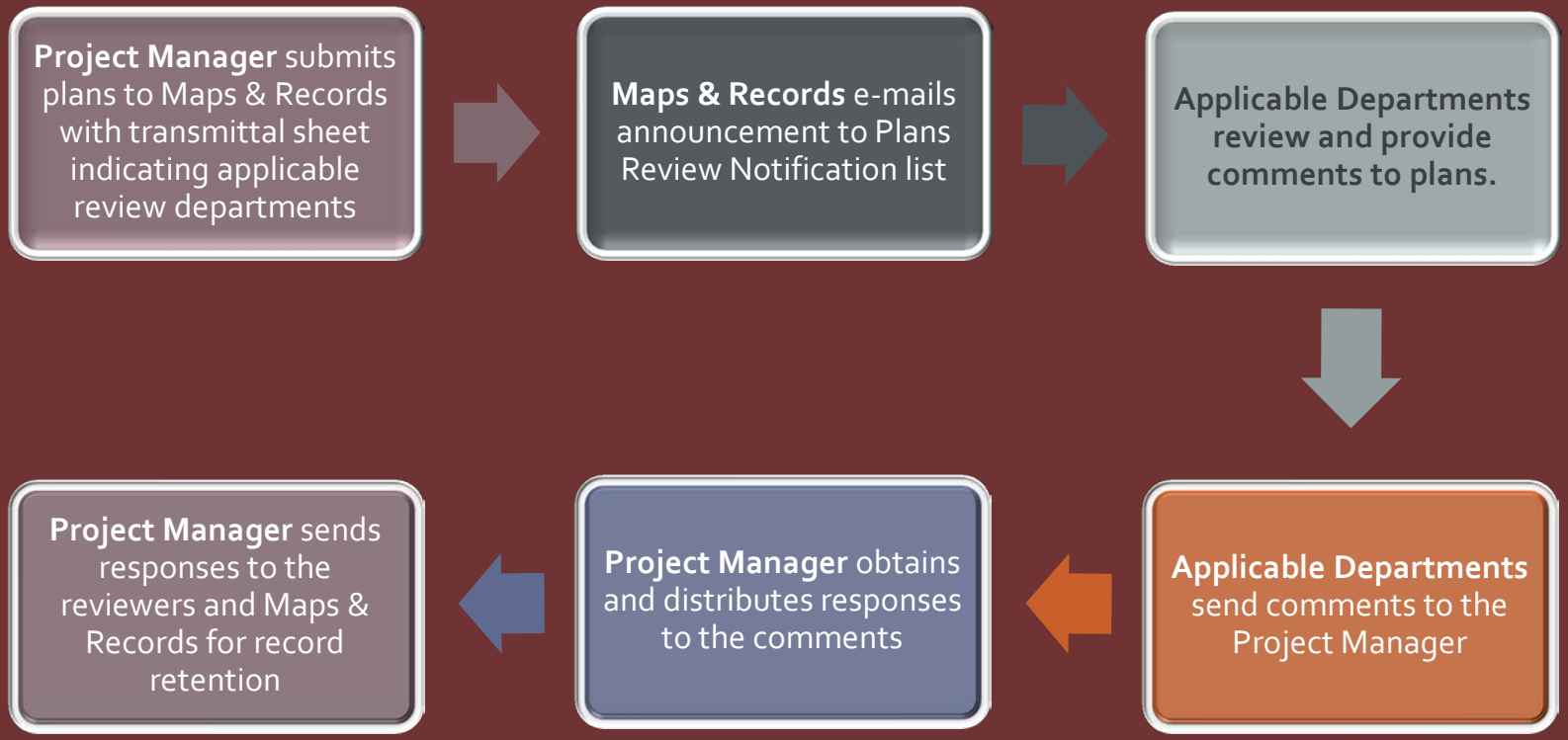
Building System/Facilities Most Commonly Impacted by Projects

- Heating, Ventilation, and Air Conditioning (HVAC) and Controls
- Plumbing
- Electrical
- Fire Alarm, Protection, and Egress
- Telecommunications and Networking
- Process liquids and gases

- Custodial
- Trash and Recycling
- Traffic, Parking, and Delivery
- Energy and Sustainability
- Building and Campus Aesthetics
- Building documentation and signage

Plans Review Process

Phases: Schematic Design / Design Development / Construction Drawings



Plans Review Transmittal Letter Distribution

Groups who review

Buildings and Grounds Maintenance:
❑ Electric ❑ Carpentry ❑ Grounds ❑ HVAC ❑ Locks ❑ Paint & Glass
❑ Plumbing ❑ Trash & Recycling ❑ Janitorial ❑ Elevator

Zones: ❑ Zone A ❑ Zone B ❑ Zone C ❑ Zone D

Sustainability and Energy Management: ❑ Civil Infrastructure ❑ High Volt
❑ Control Systems / Energy ❑ Central Energy Facility ❑ Water Systems
❑ Steam/Heating Hot Water ❑ Parking & Transportation

Others:
❑ Environmental Health and Safety ❑ Fire Marshal ❑ UA Campus Planning/Design
❑ Land Use and Environmental Planning ❑ Capital Planning/Space Management
❑ Communications & Networking ❑ Public Safety ❑ Athletics ❑ Hospital
❑ Residential & Dining Enterprises ❑ School of Medicine ❑ Stanford Real Estate
❑ Risk Management ❑ Property Management

Plans Review Process
Deliverables and Support Phases

Planning/Design

Project Deliverables

* Basis of Design
* Facilities Design Guidelines Deviations
* Design Plans & Specs.
* Commissioning Strategy Plan

Facilities Support

* Assign Zone Representative to the Project
* Provide input on existing conditions & limitations
* Facility Design Guidelines Awareness
* Plans and Submittal Review
* Commissioning Plan Review

Construction

Project Deliverables

* Submittals and RFIs
* Startup and Commissioning Schedule
* Equipment Training Schedule

Facilities Support

* Participate in Coordination Meetings
* Walkthroughs with Maintenance Shop
* Startup and Commissioning Verification
* Equipment System Training
* Develop Equipment List for PM Program

Closeout

Project Deliverables

* Final Permit /Certificate of Occupancy
* Completed Punchlist
* O&M Manuals
* Record As-Built Drawings
* Contact Info/ Warranty Letters
* Commissioning Reports

Facilities Support

* Punchlist and Warranty Issues
* Service Contracts
* Assets in PM program
* Alarms and Graphic Page
* Closeout Document Package
* Equipment and System Training

BGM Home

Information For

- Building/Facilities Management
  - eNewsletter Archive
- Campus Homeowners
- Contractors and Project Managers
- Event Planners
- Faculty and Staff
- Stanford Students

Information About

- Administration
- Building Operations
- Custodial Services
- PSSI/Stanford Recycling
- Event Services
- Grounds Services
- Mailing Services
- Zone Management
  - Zone Project Management
    - Shutdown Requests
  - Contact Zone Management
  - Zones Map
- BGM Internal Resources
- Department Directory

For Contractors and Project Managers

If you are working on or overseeing a construction project on the Stanford campus, this page is for you!

- Get Map and Records
  - Requesting a Custom Mapping Service
  - Plans Review Process
  - Surveying Services
  - How space is named on campus
  - Maps and Records Online Archive
  - Delivering Records to the Maps and Records Group
  - Facilities Information Management System (FIMS)
    FIMS provides useful information about individual buildings, including floor plans, work order histories, and square footage
  - Basemap - online campus map
- View the Facilities Design Guidelines
- Parking Information
- Utilities:
  - Get Underground Utilities Marked
  - Get Utilities Shut down
- Construction:
  - Campus Construction Schedule
  - Construction and Demolition Recycling debris boxes for your project
    - Descriptions and Guidelines
    - Order Form
      - Requires SUNet ID. Contractors: see Stanford's project manager to order.
- Sustainability at Stanford
- EH&S: Fire Protection Services
- Information Technology Services including CSO requests

» Printer-friendly version

LBRE Operations
Who We Are

- Engineering Trades (MEP)
  - Heating Ventilation & Air Conditioning, Electric, Plumbing
- Architectural Trades (Craft)
  - Carpentry, Locks, Paint, Signs, Glass
- Landscape Services (Grounds)
  - Landscape Maintenance & Renewal, Site Cleanup, Tree Pruning, Horticulture Assessment

LBRE Operations
Who We Are

- **Logistics**
  - Processing & Tracking Work Orders, Planning & Scheduling, Materials Acquisition, Service Vendor Management (including Custodial, Waste Removal, Pest Control, Elevator)
- **Fleet Services Machinist Services**
  - Automotive Services, Vehicle Purchase Rental and Leasing, Machinist Services
- **Event Services**
  - Event Planning and Management

LBRE Operations Support

With a Single Work Order We Will:

- Work with your design team to evaluate system capacity and required modifications. Help coordinate required reviews
- Evaluate materials to make sure they are maintainable. Acquire materials via our competitive University Grainger Contract
- Inspect contractor work during and after construction
- Coordinate maintenance services including service vendors
- Evaluate bids including comparing costs with our in-house workforce

Helpful Links

- Zone Management web page: http://bgm.stanford.edu/groups/zones/index
- Operation web page: http://bgm.stanford.edu/groups/build_maint/index
- M&R Plan Review and Forms: http://maps.stanford.edu/plans_review
- USA: http://maps.stanford.edu/mark_utilities
  USA 1-800-227-2600
- BGM Work Requests

Contact

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Kip Fout
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http://www.stanford.edu/dept/EHS/prod/

Discussion Topics

- H&S Risk Management
- Assessment, Control and Mitigation: Pre-Construction Phase
- Assessment, Control and Mitigation: Construction Phase

Health and Safety Risk Management

- Hazardous Materials – What you don't know can harm you and others
- Due Diligence: "Did you know or should have known"
- Duty to warn: Contractors must be informed of hazardous materials or conditions in their workplace. Cal/OSHA asbestos regulation requires notification of asbestos hazards prior to bid
- California Corporate Criminal Liability Act AKA "Be a Manager, Go to Jail" Act
  - Manager means a person having both (1) management authority in or as a business entity and (2) significant responsibility for any aspect of a business which includes actual authority for the safety of a product or business practice or for the conduct of research or testing in connection with a product or business practice

Health and Safety Risk Management

- Cal/OSHA Multiemployer Worksite Regulation: Building owner can be cited and fined for accidents or injuries caused by a contractor
- Hazardous waste "Cradle to Grave" liability: Ownership and liability cannot be transferred to others (contractors)
- Third party lawsuits are common for exposure to hazardous materials such as asbestos

Assessment, Control and Mitigation Pre-Construction Phase

- Design and Contract Documents
  - EH&S Section of the Facilities Design Guide should be included in all project specifications
  - EH&S requirements included in General Conditions section of all contracts. Be sure contract is signed before work begins
  - Uniform Asbestos Abatement Project Specification must be included in all contracts that include asbestos abatement
  - Pollution liability insurance required for all Haz Mat work

Assessment, Control and Mitigation Pre-Construction Phase

- Contractor/Consultant Submittal Reviews
  - Lab Design Plans Review
  - Contractor Site Safety Plans
  - Material Safety Data Sheets (MSDS)
- Haz Mat Contractors and Consultants must be vetted and pre-approved by EH&S

Assessment, Control and Mitigation Pre-Construction Phase

- Regulatory permits and licenses
  - Chemicals - Hazardous Materials Management Plan (HMMP) and Closure Permits
  - Radioactive Materials – Campus-Wide Site License modified for each building
  - Biohazards – BSL3 protocols
  - Environmental Impacts: NEPA, CEQA
- Haz mat survey and clearance required prior to disturbance of any building material, including exploratory work
- Abatement Cost Estimating for asbestos, lead paint, contaminated materials and equipment

Assessment, Control and Mitigation Construction Phase

- EH&S provides management services for all aspects of haz mat work
  - Initial containment set-up inspections and notice to proceed
  - Containment integrity and progress inspections
  - Completion inspections, air monitoring and work area release
- Regulatory agency inspections: Contact EH&S immediately if any regulatory agency shows up at your worksite
- Hazardous Waste Disposal: All haz waste disposal must be coordinated through EH&S and is restricted to approved landfills only
- Recordkeeping: EH&S maintains all pertinent records related to haz mat work. Some records must be kept for 30 years or longer

Helpful Links

- EH&S web site: http://www.stanford.edu/dept/EHS/prod/
- Asbestos/Lead: http://www.stanford.edu/dept/EHS/prod/general/asbestoslead/index.html
- Construction and Maintenance: http://www.stanford.edu/dept/EHS/prod/mainrencon/index.html
- Environmental Programs: http://www.stanford.edu/dept/EHS/prod/enviro/index.html

Contacts

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EH&S main office 723-0448

Remember, no project is too small to have hazardous materials impacts

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University Fire Marshall
jleung@stanford.edu

Aaron McCarthy
Senior Fire Protection Engineer
aaron.mccarthy@stanford.edu

http://www.stanford.edu/dept/EHS/prod/general/fire/index.html

Discussion topics

- Code compliance consultation
- Plans review
- Fire protection system shutdown
- Inspections
- Small Projects Program
- Minor System Modification Program

Code Compliance Consultation and Plans Review

- Stanford University Fire Marshal's Office (SUFMO) provides technical support services during the capital project delivery process
- Code compliance consultation
  - New International Building Code (IBC) and International Fire Code (IFC) have been adopted in the State of California
  - Differ from the previous Uniform Codes in many aspects.
  - Have code changes that may present institutional impact

Code Compliance Consultation and Plans Review

- Conduct plans review (architectural, fire sprinkler, fire alarm) Building and Fire Code compliance
  - Compliance issues can be properly addressed prior to submittal to Santa Clara County (or City of Palo Alto, as appropriate)
- SUFMO coordinates review for all technical groups within EH&S
  - Comments are forwarded to the Project Manager and architect for incorporation into the drawings

Code Compliance Consultation and Plans Review

- SUFMO serves as liaison with County Officials to address code compliance and interpretation issues
- SUFMO staff will negotiate with the County on interpretation of codes requirements
- SUFMO staff participates in internal project meetings and meetings with the County Officials to provide support on technical issues

Code Compliance Consultation and Plans Review

- For projects involving hazardous materials
  - County requires a chemical inventory summary report (AKA - CBC report) to be included with submittal
  - Project Managers should submit a request for CBC report to SUFMO at **sufmo.stanford.edu**
  - The CBC report ensures that hazardous material quantities stored in a Control Area are within the occupancy classification code limits

Fire Protection System Shutdown

- For renovation projects
  - Shutdown of fire protection equipment is needed in order for the contractor to do work in the project area. Project Manager should submit an online work request form at sufmo.stanford.edu

Inspections

- SUFMO conducts fire alarm system pre-test to ensure performance is per code and approved plans prior to final test with County Fire Marshal's Office
- SUFMO conducts joint inspections with County Fire Marshal's Office of fire sprinkler modifications and life safety systems such as exit signs, emergency lights, etc., so that inquiries made by the County can be addressed immediately

Small Projects Program
(est. 1995)

- Applicable to projects that meet specific criteria
- Requires plans review and approval first by SUFMO then followed by County Building Inspection Office
- Plans review not required by County Fire Marshal's Office (expedites permitting)
- Advantage: saves project time and ensures timely occupancy
- Consult with SUFMO to determine if a project qualifies

Minor System Modification Program (est. 2008)

- Supersedes the fire sprinkler and fire alarm portion of the Small Project Program
- Allows the addition, deletion and relocation of a maximum of ten (10) devices to an existing approved automatic fire sprinkler or ten (10) devices to a fire alarm system for a maximum of 20 devices
- SUFMO's approval is required prior to submittal to the County Fire Marshal's Office
- Drawings shall be stamped by SUFMO and submittal must include SUFMO's written comments
- Plans review NOT required by County Fire Marshal's Office although a permit and final inspection are still required

Helpful Links

- SUFMO website: http://www.stanford.edu/dept/EHS/prod/general/fire/index.html
- CBC Request Procedure & Forms: http://www.stanford.edu/dept/EHS/prod/general/fire/CBC/cbcprocedure.html
- Minor System Modification Program: http://www.sccgov.org/sites/fmo/permits/Minor%20System%20Modifications%20Program/Pages/Minor-System-Modifications-Program.aspx
- Fire Protection Work Request form: http://www.stanford.edu/dept/EHS/prod/general/fire/fire_protect_request.html

Contacts

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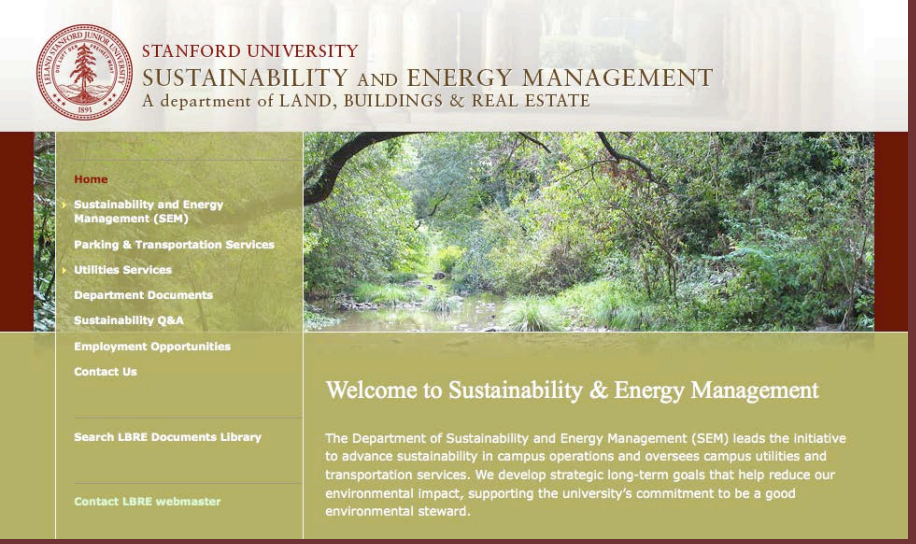
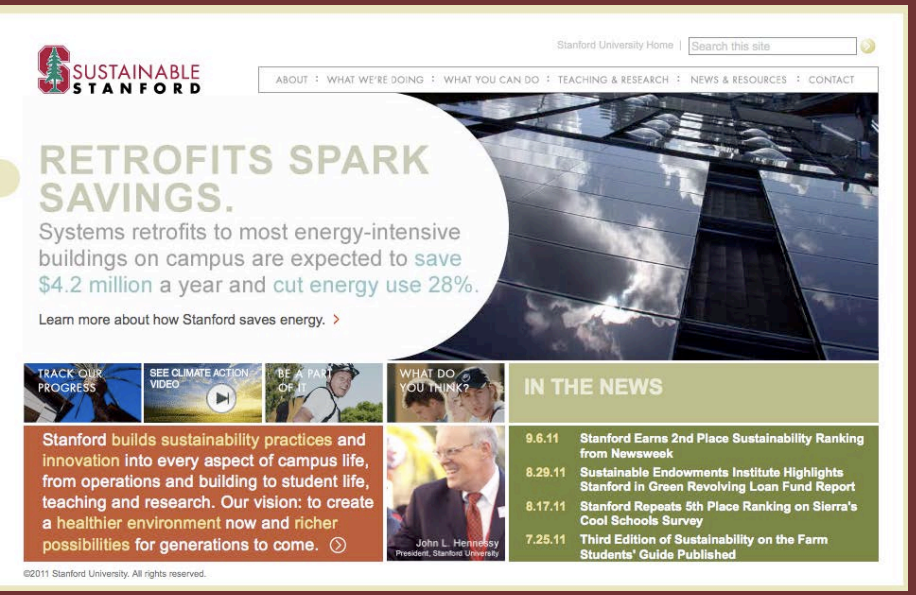
jleung@stanford.edu

Get SUFMO/EH&S involved !



http://sustainable.stanford.edu/

Sustainability and Energy Management (SEM)



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http://sustainable.stanford.edu/

Discussion Topics

- Utility and Road Service request form
- Major Considerations
- Incorporating Sustainability

Utility & Road Services Request

Just one form with checklist including utilities, energy, water and IT considerations


SUSTAINABLE STANFORD
Sustainability and Energy Management
327 Bonair Siding
Stanford, CA 94305

pancy:_____

Page 1 of 4

http://lbre.stanford.edu/sites/all/lbre-shared/files/docs_public/sem_new_utility_service_application.pdf

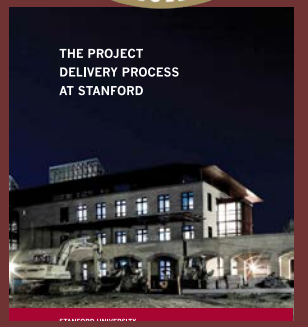
Advance notice will ensure service

Major Considerations

- Investigating and assuring **utility capacity** to serve proposed projects
- Environmental protection and hazardous wastes
- Facilities Design Guide (FDG) http://maps.stanford.edu/fdg_main for utility infrastructure exist and must be followed
- Start/stop of utility metering and billing for new accounts

Incorporating Sustainability

- All projects impact the university's sustainability rating
- New building energy and water performance guidelines
  - Lifecycle cost assessment as a tool
  - Materials reuse and selection
  - Construction material and recycling
- Operational considerations
  - Behavioral programs (recycling, energy, water)
  - Food systems considerations (if there is kitchen or café)
  - Communications to occupants related to the programs
- Office of Sustainability is a resource. Visit us at http://sustainable.stanford.edu



Helpful Links

- **Sustainability and Energy Management (SEM)**
  http://lbre.stanford.edu/sem/
- **Sustainable Stanford**
  http://sustainable.stanford.edu/
- Facilities Design Guide (FDG)**http://maps.stanford.edu/fdg_main**

Contacts

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http://www.stanford.edu/dept/govcr/

End of Part II

Q&A

Break

Part III

Permitting, Construction and Closeout

Julie Hardin-Stauter, Director
Project Management Resources
jhardin@stanford.edu

http://lbre.stanford.edu

Discussion Topics

- When is a permit required
- Plan Check and Permit Process
- Timeline
- Recommendations
- Resources

Building Permit – When it is Required

A building permit must be obtained before you erect, construct, enlarge, alter, move, repair, improve, convert or demolish any building or structure or portion thereof.

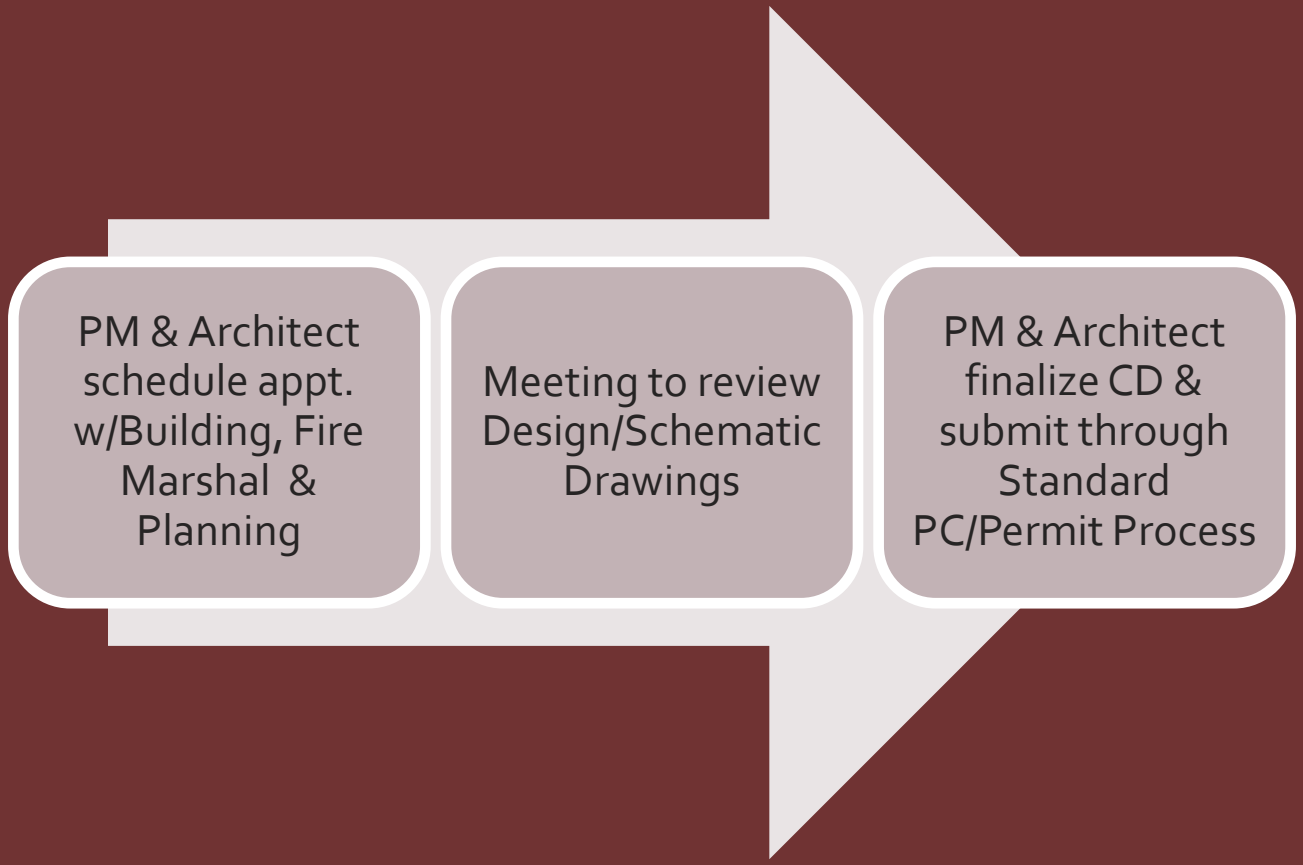
Primary examples include:

- New construction, including temporary buildings, installation of modulars, trailers and storage containers
- Building and/or interior space demolitions, including changes in the configuration of building interiors including wall demolitions and/or alterations, new doors, etc.
- Building renovations - including mechanical or electrical alterations, code related changes, “in kind” system replacements and/or air conditioning requests

Pre-Submittal Consultation

- Meeting to familiarize SCCO plan checkers and receive input for an upcoming project
- This is NOT a permit meeting
- Call Building Inspection Office for scheduling

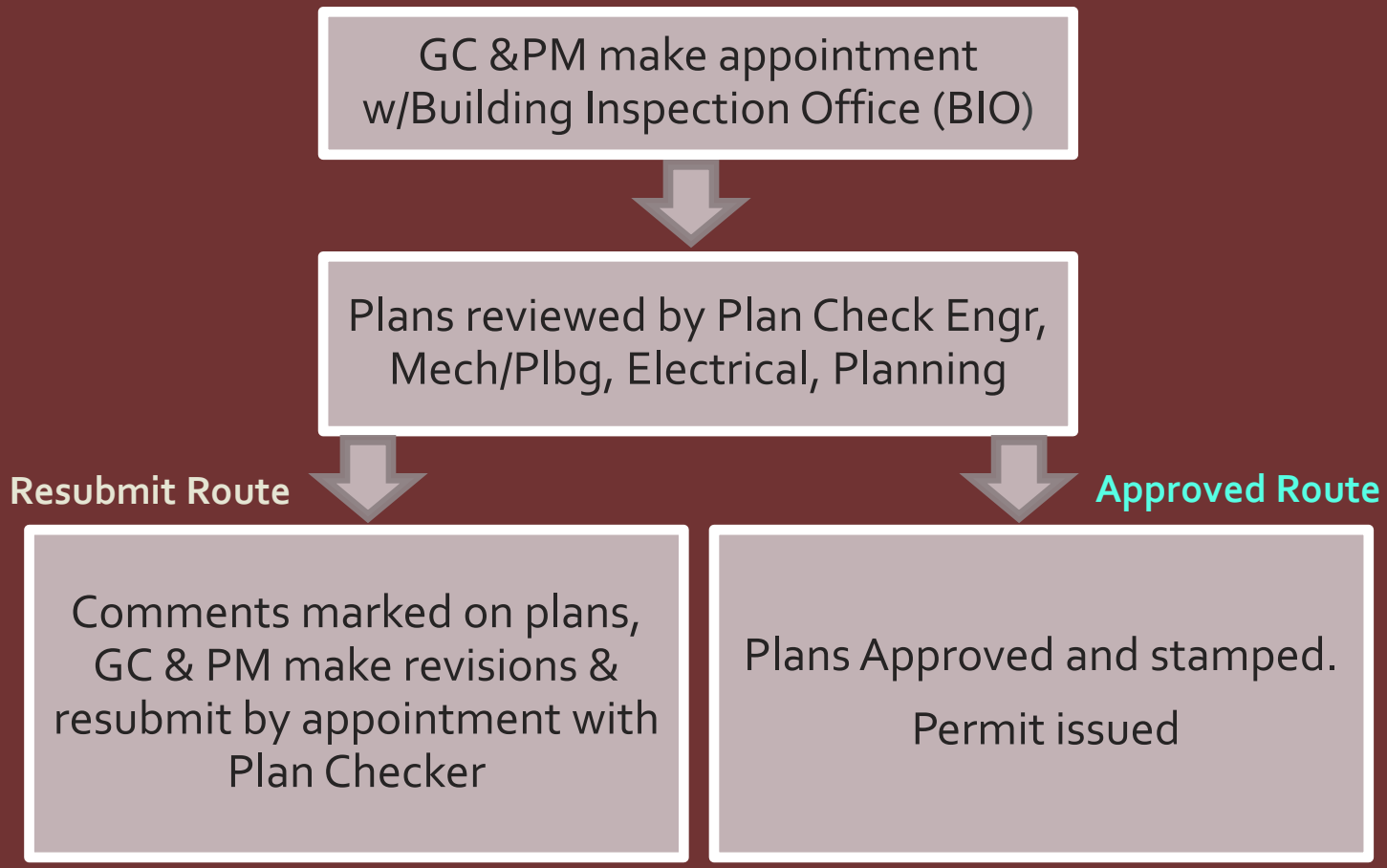
Pre-Submittal Consultation



Express Plan Check/Permit Process

- Scheduled meeting with SCCO Building Inspection Office with the goal of receiving permit pending no plan check comments
- Applicable to small projects with no complexity in scope:
  - Door installation
  - Small renovation within a building
  - Moving of walls involving minor mechanical/electrical
- Requires SUFMO review and stamp on plans prior to submitting to County
- Submit 3 complete sets of plans
- Call Building Inspection Office to schedule appointment
- If permit is not granted, average review time is 1-2 weeks

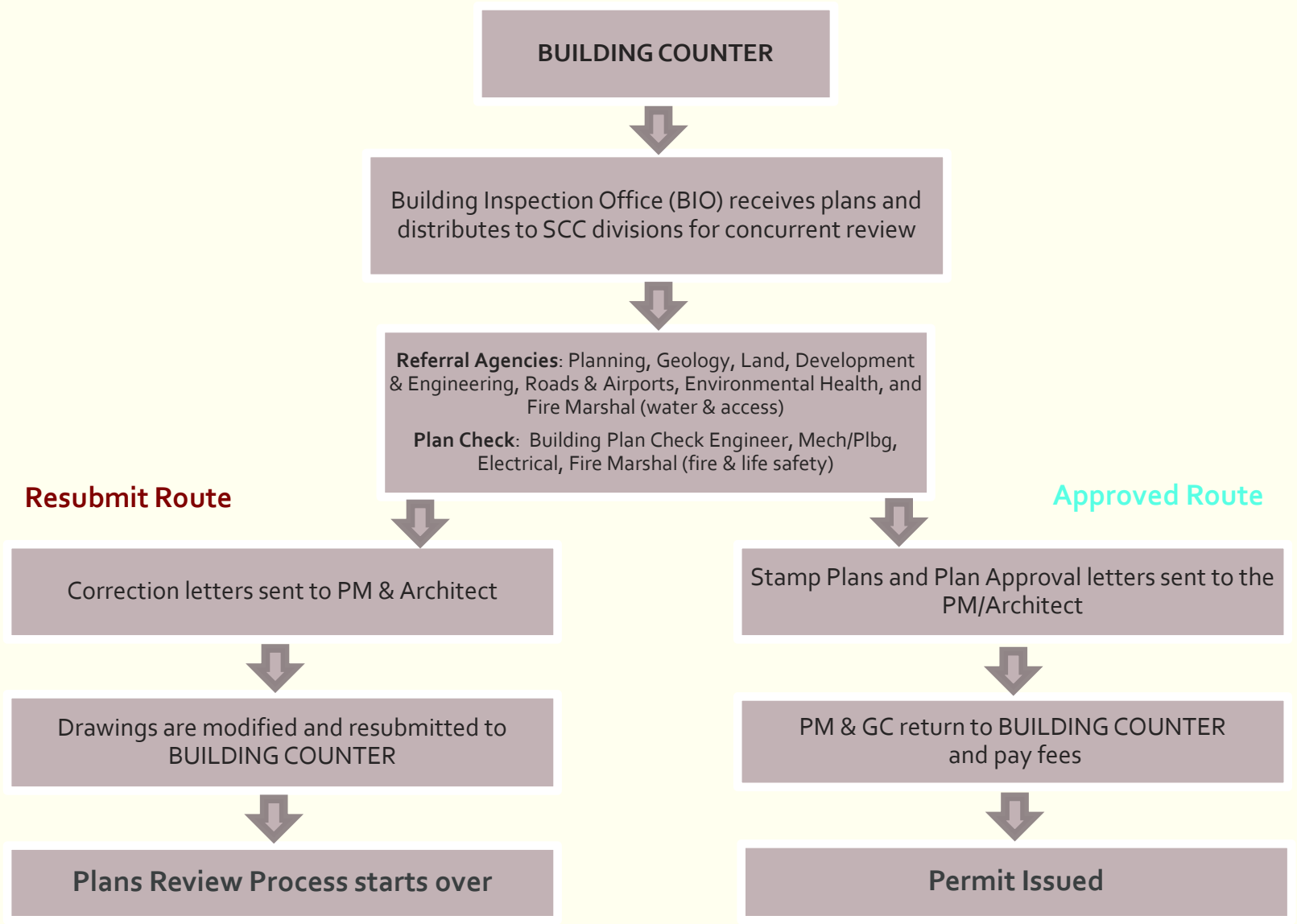
Express Plan Check/Permit Process



Standard Plan Check/Permit Process

- Onsite visit to SCCO Building Counter in San Jose required
- Requires SUFMO review and stamp on plans prior to submitting to County
- Submit 5 complete sets of plans
- Average review time is 6-8 weeks for first comments; 2-4 weeks for each resubmittal
- Complex projects require longer review time
- Other Permits that may be required prior to issuing Building Permit:
  - Grading/Drainage (LDE)
  - Food Service (DEH)
  - Haz Mat Clearance (DEH)
  - Fire Sprinkler/Systems (FMO) – can be obtained after Building Permit
- Reference Plan Check # when resubmitting plans. Stanford PM or responsible party must submit in person

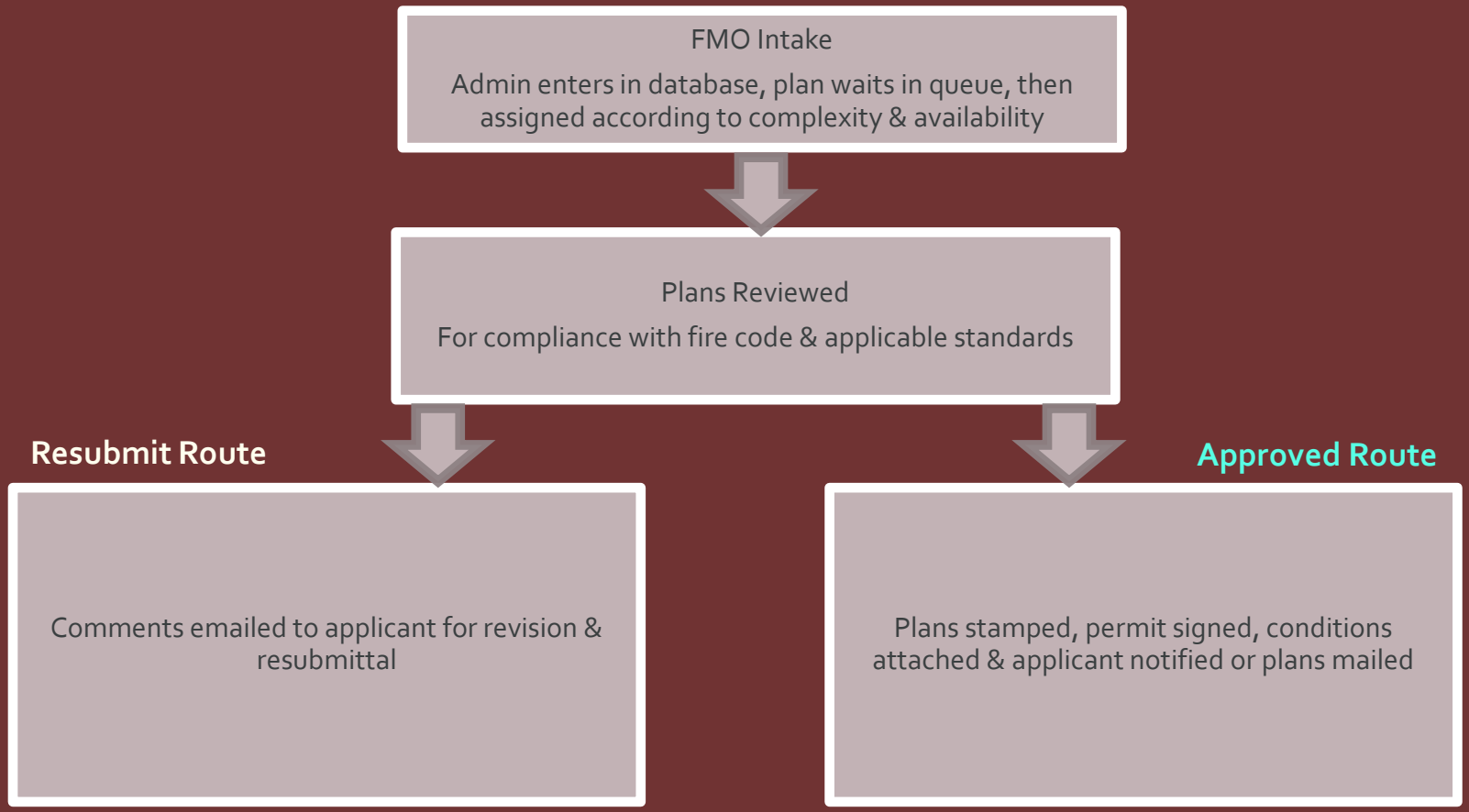
Standard Plan Check/Permit Process



Fire Plan Check/Permit Process

- Onsite visit to SCCO Fire Marshal Office in San Jose required
- Applicable to the following types of projects:
  - Fire sprinkler/alarm system upgrade and alteration
  - Access control systems
- Requires SUFMO review and stamp on plans prior to submitting to County
- Submit 2 complete sets of plans, maximum of 3 sets
- Average review time is 30 days for first comments; 2 weeks for each resubmittal
- Complex projects require longer review time
- Reference Plan Check # when resubmitting plans. Stanford PM or responsible party can submit in person or via US Post Office

Fire Plan Check/Permit Process



Timeline

- Average time for a building permit is up to 4 ½ months, factoring in plan check, resubmittals and issuance of permit
- Complete Plans must be submitted in order to avoid multiple back-check revisions which can take longer than the initial review
- Summer construction - submit plans by January
- Winter Break construction - submit by early August

Recommendations

- Applications to the county should be made by the Stanford project manager and include their name and phone number on plans and permit card
- The Stanford project manager should attend county meetings and be the main point of contact with county representatives for their project
- A complete and thorough submittal is the best way to expedite plan check and permit process
- PMR acts as liaison and point of contact for jurisdictions (County) - PMs continue to work directly with County for plan review and permitting

Recommendations

- Expediting permits
  - Utilize "over the counter" permit option when possible
    - 340 Bonair SCC office is open Tuesdays 11a – noon and 1-2:30p
  - Utilize Pre-Submittal Consultation
    - Could shorten plan review time based upon advanced knowledge of project scope and reduce back-check revisions
    - There is a fee for this service
  - Limited overtime review is available (Fire Marshal only) and requires approval from PMR when OT requests significantly impact other projects in SCCO Permit Queue

SCCO Resources

- General questions: Building Inspection Office (408) 299-5700
- Plan Check questions:

  Scott Johnson, SE, Architect, LEED AP

  Senior Plan Check Engineer

  Building Inspection Office

  scott.johnson@pln.sccgov.org
- Project specific questions should be directed to assigned Plan Checker
- SCC Fire Marshal Office
  - Sharon King – sharon.king@pln.sccgov.org

Helpful Links

- Santa Clara County Office (SCCO) of Planning & Development contacts and org chart: http://www.sccgov.org/sites/planning/Pages/contact.aspx
- SCCO Building Inspection www.sccbuilding.org
- SCCO Fire Marshall Office http://firemarshal.sccgov.org
- LBRE org chart: http://lbre.stanford.edu/org_chart
- PMR website is under construction. Look for us on the LBRE website in January 2013!

Contacts

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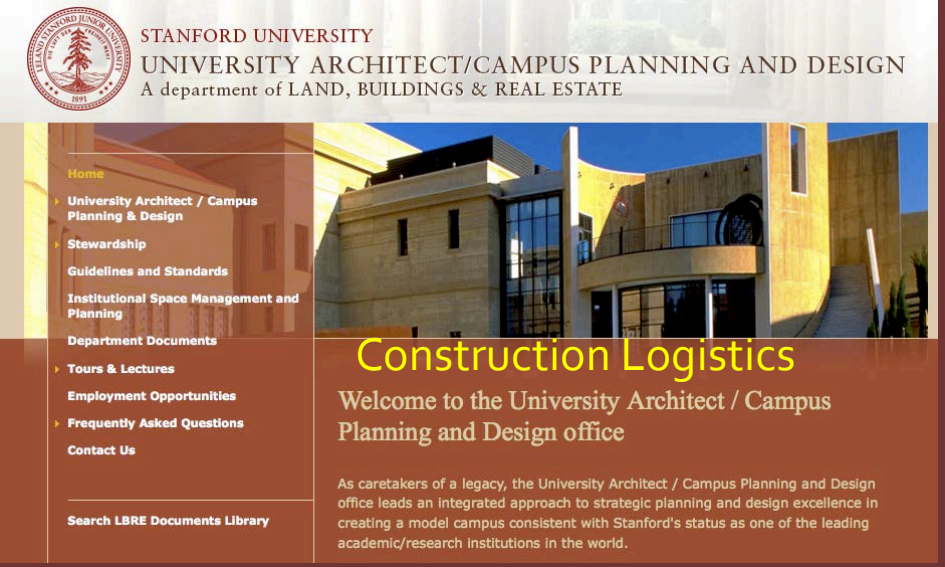
Joe Leung	Stanford University Fire Marshal Office (SUFMO)		jleung@stanford.edu

Project Management Resources (PMR)

- SCCO plan check permit process questions
- SCCO permit queue
- Scheduling appointments with SCCO at 340 Bonair



Stanford University
Architecture and Landscape

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UA/CPD
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http://lbre.stanford.edu/architect/

Discussion Topics

- Policy
- Land Allocation
- Circulation
- Construction Signs/Fencing

PROGRAMS: Construction Logistics Policy

CONSTRUCTION PROJECT TEMPORARY FACILITIES SITING POLICY
February 19, 2003

Authority: This policy has been approved by the Vice-Provost for Lands and Buildings.

Summary: This policy outlines a procedure for obtaining approval needed for any Stanford University (SU) land to be used temporarily for construction related purposes. It also references the Santa Clara County General Use Permit (GUP) conditions of approval for construction traffic. It does not cover the use of SU utilities or other SU facilities.

DEFINITIONS:

A) A **construction site** is any land disturbed by construction including land that is needed for project trailers, equipment and material storage, surplus dirt and construction equipment. An **ancillary** site is one that is not contiguous with the actual project site.

B) A **construction project trailer** is any enclosed structure that requires land and access that is used for storage or office space, with or without utilities. It is to be used to construct a Land and Buildings approved project.

C) **Contractor parking** is land or accommodations requested for the purposes of providing parking for construction workers.

D) **Small projects** are those that have a duration of less than one week, do not require ASA or Board approval, do not require special access into the central campus pedestrian zone, involve no contractors outside of Stanford personnel or use only a single outside contractor with no subcontractors, need to park fewer than five vehicles, involve no closures of campus access routes and have no need for exterior laydown areas.

GUIDELINES:

The Stanford University Architect/Planning Office (UA/PO), through the procedure outlined in this policy, must approve any use of Stanford land for construction and/or construction related activities. This includes any need for land that is not contiguous with the actual project site. Requests for contractor parking and use of sites that effect existing university parking should be submitted directly to Parking and Transportation Services (P&TS). (See also: Guidelines for Contractor Parking for Construction Projects.) Such requests must outline the duration, purpose and size, and be submitted in writing. Any ancillary site will be chosen to be as convenient to the actual project site as possible; to minimize impacts on adjacent permanent sites; and to minimize impact on vehicle, bicycle, shuttle and pedestrian circulation and existing university uses.

Once construction project sites have been identified and approved, proposed details for temporary construction sites for laydown, parking, trailers and/or office space and access routes shall be submitted as a part of a construction logistics plan for each project by the SU Project Manager for input and approval by the UA/PO, P&TS and Public Safety.

(See Construction Logistics Plan template at http://www.stanford.edu/dept/archplng/). Sites located within assigned Stanford auxiliary program areas including the Department of Athletics, Physical Education and Recreation (DAPER), Residential and Dining Enterprises (R&DE), and/or the Stanford University Hospital and Clinics (SHC) or the Stanford Management Company (SMC) leaseholds (must also be coordinated with and approved by the appropriate entity. The logistics plan will satisfy criteria for access, fencing, tree protection, site preparation, temporary detours and site restoration, and must have a deadline for completion and removal no longer than the actual project completion. Access into campus and to the site must be compatible with the University truck, service and delivery routes identified on maps at (http://transportation.stanford.edu/maps_forms_apps/MapsForms.shtml); minimize impacts to the campus; and provide an efficient route that can accommodate the type and size of vehicles authorized to access the site.

The primary Stanford Project Manager shall be responsible for contractor compliance with all conditions of this policy, and any specific site approval conditions. There will be no approvals granted to individual contractors and/or vendors outside of this process.

Small projects may be exempted from submitting a logistics plan, but the project manager is still responsible for addressing all of the site logistics and details described above and for coordinating with the appropriate departments. Project managers must receive approval from their immediate supervisors to designate a small project as exempt.

PROCEDURE:

The primary Stanford Project Manager associated with the approved construction project must submit one comprehensive request in writing for space to the UA/PO and for contractor parking to P&TS. Requests shall contain the following information:

Official project name and project number
Primary project manager name
Construction company name, job superintendent, phone number and email address
Project start date and estimated duration
Estimated size of construction site and size and preferred location of ancillary sites
Size and numbers of trailers and proposed utility needs
Quantity of materials to be stored
Type and size of equipment or vehicles to be stored
Access requirements – times, quantity, special requirements
Number of contractor parking spaces anticipated, by phase of construction

LOGISTICS PLAN:

After initial site identification and approval and prior to ASA submittal, a preliminary construction logistics plan shall be developed and submitted to the UA/PO and P&TS as a drawing that clearly describes the following for both on- and off-site construction areas:

http://lbre.stanford.edu/architect/sites/all/lbre-shared/files/docs_public/UA_CPD_Const_Policy_Logistics_V1.pdf


Menlo Park
LEGEND
DPM CONSTRUCTION SITE
DPM PARKING / LAYDOWN
SMC CONSTRUCTION SITE
SMC PARKING / LAYDOWN

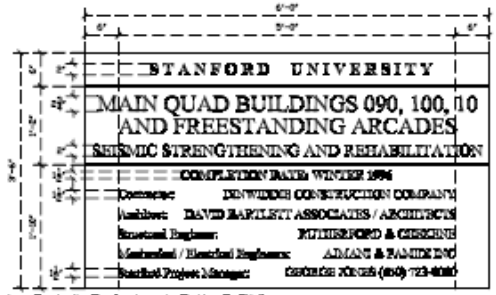
Programs: Outdoor Art
(Policy in Progress)

- Includes any project or site that:
  - Impacts the current location of outdoor sculpture in the University art collection.
  - Construction logistics will fence or otherwise be within 100’ of any outdoor sculpture.
  - Sculpture is adjacent to and within the fenced area of construction activity which could potentially damage the work.
- Contact the Cantor Arts Center as soon as any of the above are identified. The process to move/protect the pieces could take months due to donor, artist and construction issues.

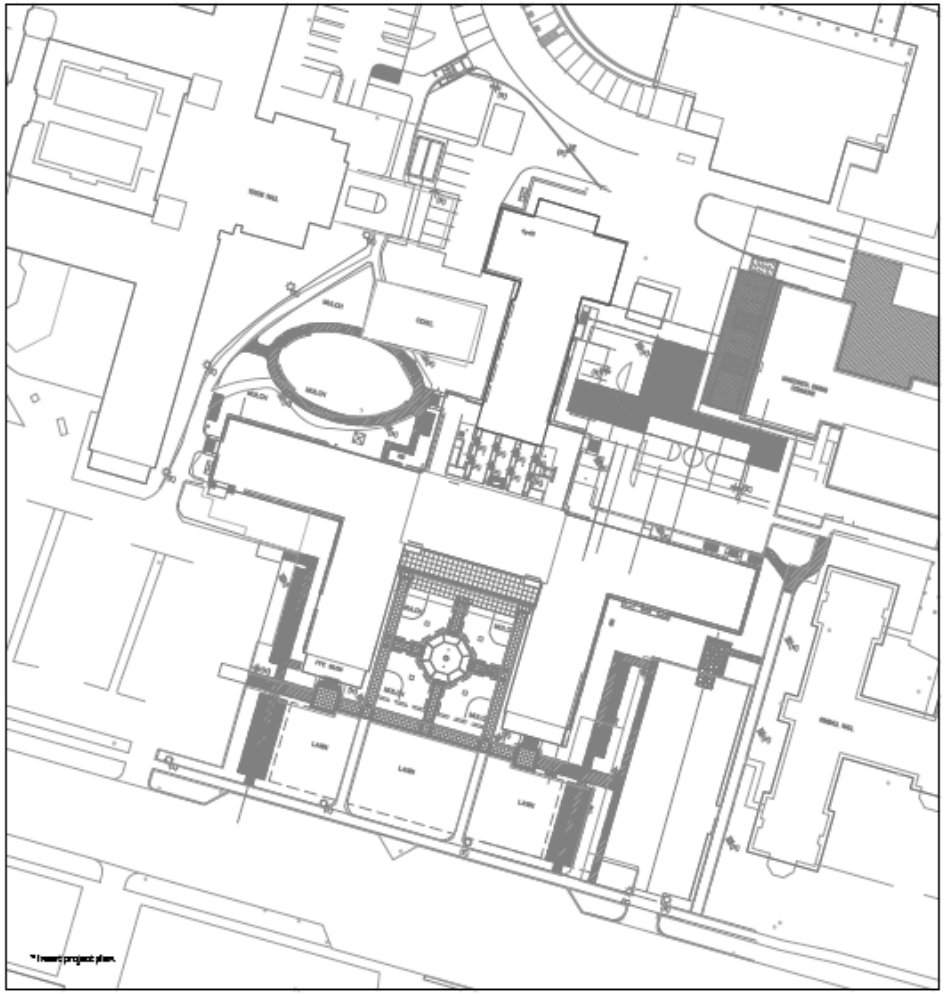
PROGRAMS: Construction Project Sign Template

Detour Sign Template

Construction Context Plan



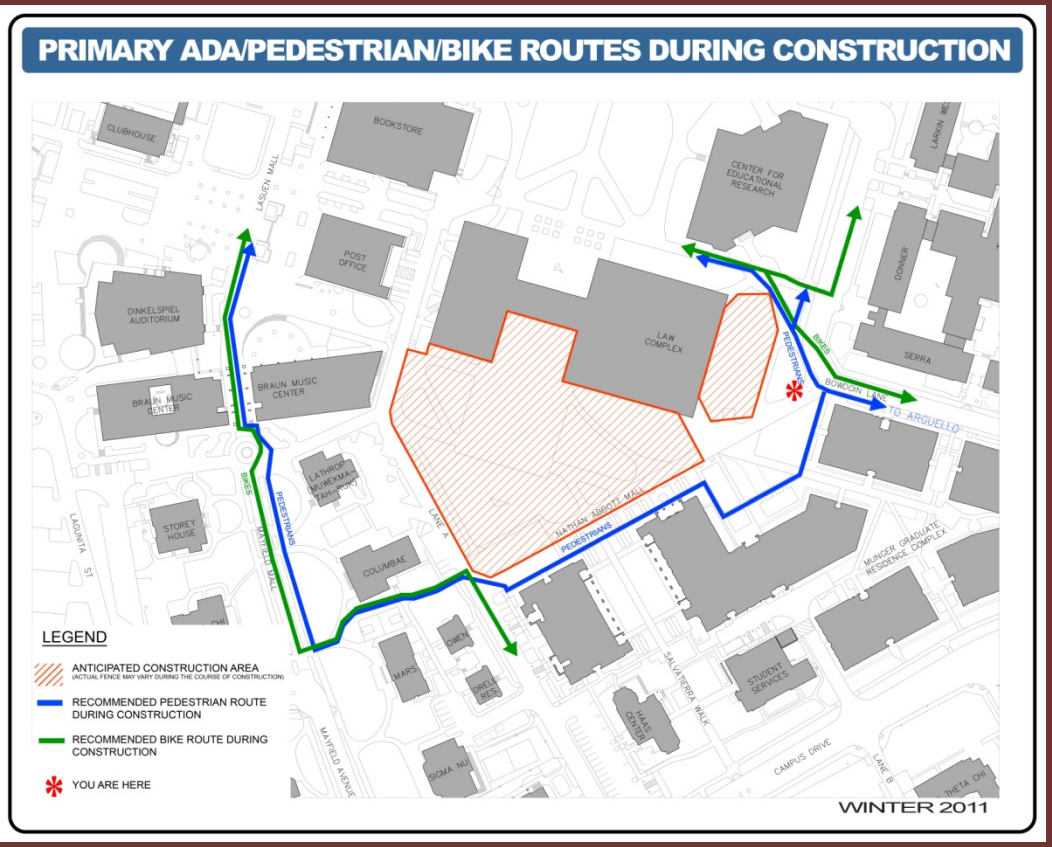
Construction Sign Template



Construction Project Site Plan

http://lbre.stanford.edu/architect/sites/all/lbre-shared/files/docs_public/UA_CPD_Const_Policy_Logistics_V1.pdf

Construction Detours/Circulation



PROGRAMS: Construction Fencing

http://lbre.stanford.edu/architect/sites/all/lbre-shared/files/docs_public/UA-CPD_Constructionsignage_V1.pdf

Helpful Links

UA/CPD website: http://lbre.stanford.edu/architect/

Guidelines and Standards: (construction logistics, major construction project fencing/signage, etc.): http://lbre.stanford.edu/architect/guidelines_standards

Contacts

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STANFORD UNIVERSITY
P&TS
Parking & Transportation Services

Search

Parking and Transportation Services (P&TS)

Parking Information | Alternative Transportation | Payment Options | Marguerite Shuttle | Charter Services

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Parking & Transportation
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http://transportation.stanford.edu/parking_info/ParkingInformation.shtml

Discussion Topics

- Construction impacts to parking and circulation
- Contractor parking / service and delivery
- Pedestrian zone (PZ) access protocol

Review Construction Impacts and Contractor Parking Requests

- Everyone needs a permit to park on campus. As good neighbors, Stanford discourages contractor parking in nearby residential areas
- All contractor parking arrangements need to be made by the primary SU Project Manager with P&TS
- Submit construction logistics plan to P&TS (and UA/CPD office if any land is disturbed by construction)
- Make every effort to minimize impacts to parking and circulation (including bike and bus routes)
- P&TS may approve campus parking facilities for use for contractor parking if space is available AND such use allows other campus parking demands (commuter, residential, special events, delivery, etc.) to be met
- If appropriate, Service Vehicle permits may be sold to specific and limited members of the construction project management team that need to move around campus

STANFORD UNIVERSITY PARKING & TRANSPORTATION SERVICES

2011-12 CONTRACTOR PARKING PERMIT SPONSORSHIP/APPLICATION

CONTRACTOR PARKING PERMIT

Revised 9/11

SPONSOR OR DEPARTMENT INFORMATION (this section should be completed by sponsoring department)

Sponsoring SU department	SU Project Manager	Campus phone (required) ( )
I am sponsoring applicant through Month _____ Day _____ Year _____	Email	

CONTRACTOR INFORMATION (this section must be completed by sponsoring department)

Name of contractor	Name of person responsible for permit(s)	Daytime phone (required) ( )
Business address [street, city, state, zip] (required)		
Driver's license #	Vehicle license plate #	

PROJECT DESCRIPTION (include project name, location, start and end dates)

Project name _____ Start date _____ End date _____

TYPE OF PERMIT

- ☐ Vendor service vehicle (annual) Quantity _____
- ☐ Vendor service vehicle (short-term)

Start date _____ Number of months _____ Quantity _____

OFFICE USE ONLY

- ☐ Parking identifiers

Quantity _____ Start date _____ End date _____

Valid (**P&TS approved**) location _____

PAYMENT METHOD

- ☐ **Cash** (do not mail)
- ☐ **Check** (make payable to "Transportation")
- ☐ **Credit Card** (Visa/MasterCard ONLY) Do NOT fax or mail credit card information. Submit the application, and P&TS will call you for the information.

DEPARTMENT ONLY

- ☐ SU13 (attach form)
- ☐ P-Card

PLEASE READ AND SIGN:

I certify the above information is true. I agree to the terms stated in the Leland Stanford Junior University Parking & Transportation rules and regulations and Contractor Parking Policy. I understand that transferring, falsifying, or any misuse of the permit may result in revocation of my parking privileges. I also understand that if my permit is lost or stolen, I will be charged a replacement fee, and may be responsible for paying for the full value of the permit. (There is no charge for replacement with a police report.)

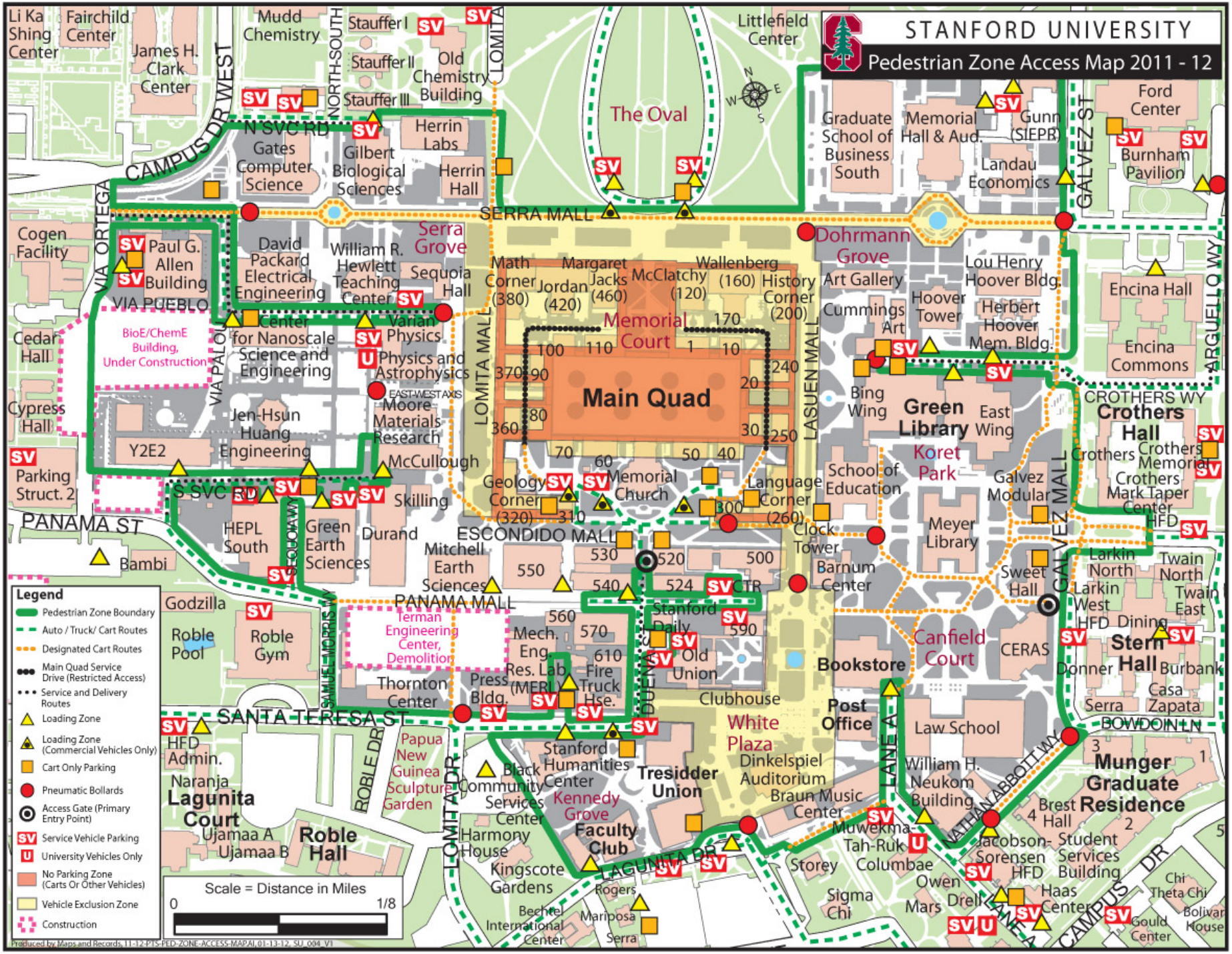
X _____ PRIMARY PROJECT CONTRACTOR _____ PRINT NAME _____ DATE

X _____ PRIMARY SU PROJECT MANAGER _____ PRINT NAME _____ DATE

X _____ P&TS APPROVAL _____ DATE

Mail: 340 Bonair Siding, Stanford CA 94305-7255 MC: 7255 Email: parkingoperations@stanford.edu Phone: 650.723.9362 Fax: 650.724.8676

transportation.stanford.edu


STANFORD UNIVERSITY
Pedestrian Zone Access Map 2011 - 12
Li Ka Shing Center
Fairchild Center
James H. Clark Center
Mudd Chemistry
Stauffer I
Stauffer II
Stauffer III
Old Chemistry Building
Littlefield Center
The Oval
Graduate School of Business South
Memorial Hall & Aud.
Gunn (SIEPR)
Landau Economics
Ford Center
Burnham Pavilion
CAMPUS DR WEST
NORTH-SOUTH
LOMITA
GALVEZ ST
N SVC RD
Gates Computer Science
Gilbert Biological Sciences
Herrin Labs
Herrin Hall
SERRA MALL
Cogen Facility
VIA ORTEGA
Paul G. Allen Building
VIA PUEBLO
David Packard Electrical Engineering
William R. Hewlett Teaching Center
Sequoia Hall
Serra Grove
Dohrmann Grove
Art Gallery
Lou Henry Hoover Bldg.
Cummings Art
Hoover Tower
Herbert Hoover Mem. Bldg.
Encina Hall
Encina Commons
ARGUELLO WY
Cedar Hall
BioE/ChemE Building, Under Construction
Center for Nanoscale Science and Engineering
Varian Physics
Physics and Astrophysics
EAST-WEST AXIS
Moore Materials Research
Math Corner (380)
Jordan (420)
Margaret Jacks (460)
McClatchy (120)
Wallenberg (160)
History Corner (200)
Memorial Court
Main Quad
LOMITA MALL
LASUEN MALL
Cypress Hall
Jen-Hsun Huang Engineering
Y2E2
Parking Struct. 2
S SVC RD
PANAMA ST
Bambi
HEPL South
Green Earth Sciences
Durand
McCullough
Skilling
Mitchell Earth Sciences
PANAMA MALL
ESCONDIDO MALL
Geology Corner (320)
Memorial Church
Language Corner (260)
Bing Wing
Green Library
East Wing
Koret Park
School of Education
Galvez Modular
Meyer Library
Clock Tower
Barnum Center
Sweet Hall
GALVEZ MALL
CROTHERS WY
Crothers Hall
Crothers Memorial
Crothers
Mark Taper
Larkin North
Larkin West
Twain North
Twain East
HFD Dining
Stern Hall
Burbank
Casa Zapata
Serra
BOWDOIN LN
Terman Engineering Center, Demolition
Mech. Eng. Res. Lab. (MERL)
Fire Truck Hse.
Thornton Center
Press Bldg.
Stanford Daily
Old Union
CTR
Canfield Court
CERAS
Bookstore
Post Office
Clubhouse
White Plaza
Dinkelspiel Auditorium
Braun Music Center
Law School
William H. Neukom Building
Munger Graduate Residence
Brest Hall
Jacobson-Sorensen Building
Student Services
HFD
Haas Center
Gould Center
Chi Theta Chi
Bolivar House
Godzilla
Roble Pool
Roble Gym
SAMUEL MORRIS WY
SANTA TERESA ST
HFD Admin.
Naranja
Lagunita Court
Ujamaa A
Ujamaa B
Roble Hall
ROBLE DR
Papua New Guinea Sculpture Garden
LOMITA DR
Black Community Services Center
Harmony House
Kingscote Gardens
Kennedy Grove
Faculty Club
Stanford Humanities Center
Tresidder Union
LAGUNITA DR
Rogers
Mariposa
Serra
Bechtel International Center
Storey
Sigma Chi
Owen
Mars
Drell
Muwekma-Tah-Ruk
Columbae
NATHAN ABBOTT WY
CAMPUS DR
Legend
Pedestrian Zone Boundary
Auto / Truck/ Cart Routes
Designated Cart Routes
Main Quad Service Drive (Restricted Access)
Service and Delivery Routes
Loading Zone
Loading Zone (Commercial Vehicles Only)
Cart Only Parking
Pneumatic Bollards
Access Gate (Primary Entry Point)
Service Vehicle Parking
University Vehicles Only
No Parking Zone (Carts Or Other Vehicles)
Vehicle Exclusion Zone
Construction
Scale = Distance in Miles
0
1/8
Produced by Maps and Records, T1-12-PTS-PED-ZONE-ACCESS-MAP.AI, 01-13-12, SU_004_V1

Helpful Links

Parking Info / Maps / Forms
parking.stanford.edu

- **Vehicle policies**
  - **Service and Delivery Vehicles**
    - **Special services for contractors**
- **Maps**

transportation.stanford.edu/parkinginfo/ServiceDelivery.shtml

transportation.stanford.edu/pdf/conparkipol.pdf

transportation.stanford.edu /maps

Ped Zone Access Protocol
transportation.stanford.edu/parking_info/pedzone.shtml

Contacts

Questions	Contact	Title	Phone	Email address
Parking & Transportation Services	Phillip Garcia	Associate Director	725-6898	phil.garcia@stanford.edu
Parking Operations	Jared Roberts	Parking Operations Supervisor	725-6897	jaredr@stanford.edu
Parking Operations	Brian Canada	Parking Operations Coordinator	725-1778	bcanada@stanford.edu
Parking Operations	Jeff Patheal	Parking Operations Representative	725-1631	jpatheal@stanford.edu
Ped Zone Access / Parking	P&TS main line		723-9362	parkingoperations@stanford.edu

Suman Chaube
Maps and Records
725-8472
schaube@stanford.edu

http://maps.stanford.edu/

Discussion Topics

- Document Management
- Maps and Records Deliverables
- Project Document Turnover

Document Management

- Purpose: to provide the university with construction related information for institutional usage in a single repository to assist in areas such as:
  - Emergency preparedness and planning
  - Space management (floor plans, space utilization, reporting)
  - Campus planning
  - Project planning
  - Building maintenance support

Project Document Turnover

- Deliverables are important (permits, operation and maintenance manuals, specifications and record drawings)
- Project deliverables are submitted using our As-Built transmittal form (downloadable from our website)
- Document submittals are accepted in hardcopy format with corresponding CAD and PDF files
- Turn over documents are typically available on-line in pdf format within 3 months of receipt

Helpful Links

Plans Review Process: Maps and Records receives project records for construction projects campus-wide during review phases: http://maps/plans_review

Plans Review Transmittal Template: http://maps/sites/all/lbre-shared/files/maps/files/shared/file/maps_records/maps_PR_Transmittal_Letter_2011.pdf

Plans Review Comment Form: http://maps/sites/all/lbre-shared/files/maps/files/shared/file/maps_records/maps_PR_Comment_Form.xls

Turn Over Process: Maps and Records provides the University with a permanent record of construction and renovations, in order to facilitate troubleshooting and provide information for future building alterations: http://maps/delivering

As-Built Transmittal Template: http://maps/sites/all/lbre-shared/files/maps/files/shared/file/maps_records/As-Built-template_2010.doc

Project Archives: Tool to search for listings of documents archived at Maps and Records:
http://maps-archives.stanford.edu

Contacts

Services	Name	Phone	email
Client and Office Service Coordinator	Suman Chaube	725-8472	schaube@stanford.edu
Document Control Coordinator	Violet Subia	724-5301	vsubia@stanford.edu
Send email requests to:			maps-requests@mailman.stanford.edu

Concluding Remarks

Q&A