



A-11 - DESIGNER PROCUREMENT

A-11.1 - Designer Selection Process

Advertisement for Designer

The University through Facilities Planning and Design project managers, places a notice for solicitation of design services on two web sites, one for the University of North Carolina- Chapel Hill thru the State-wide University System, and one for the State of North Carolina Interactive Purchasing System.

Current web addresses for these sites are:

<http://www.northcarolina.edu/info/vendors/opportunities.htm>

<https://www.ips.state.nc.us/IPS/Default.aspx>

The Facilities Planning and Design Project Manager prepares a Request for Qualifications (RFQ) of additional information about the project to forward to all Design Teams upon request. A pre-proposal meeting shall be scheduled (contingent on project scope) and facilitated by the Project Manager either via web conference OR in-person at the project site in order for the design community to become familiar with the project intent, submittal protocols, and owner and end user needs prior to the RFP submittal date. The pre-proposal meeting typically occurs 14 days after advertisement and before submittal date.

Selection Process

Upon receipt of letters of interest, a Selection Committee will convene to review the Design Team's proposals. The Selection Committee will select a short list of Design Teams to invite to campus for an interview session.

The Selection Committee will then conduct the interviews either via Web Conference or in-person. Following the interviews and the Selection Committee convenes to rank order the designers and then issues a recommendation, with the priority order, for the selection of the Project Designer. This list is presented to the Chancellor's Building and Grounds Committee who in turn issue a recommendation to the University's Board of Trustees for final selection.

Upon final selection, the University's Project Manager will notify the selected Designer and schedule the Initial Planning Conference.

University as Client

Project planning and design for the University involves many persons within the University, the North Carolina State Construction Office, and other reviewing agencies. Nevertheless, the Designer should understand that the University is the project's owner and client.

Project Manager

A Project Manager is assigned as the single University representative for each project. The Designer is required to work through the Project Manager and must turn to this person for authoritative information on all matters



and questions involving the University. The University representative is the sole point of contact for the Designer and all project correspondence and decisions shall be coordinated through this representative. The nature of that representative will shift according to the design phase.

The University's Project Manager is the Designer's contact person from the project's advertisement through bidding. The Project Manager is an employee of the University's Facilities Planning Department.

After the construction contract is awarded, the Designer's contact person becomes the Construction Manager, an employee of the University's Department of Construction Management.

Designers' Representative

The Designer shall designate an individual within the Designer's firm who is directly responsible for the project, and who can be contacted directly on any matter pertaining to the project.

Payment Approval

Payments to Designer: The Designer shall submit invoices for approval to the University's Project Manager through the Bidding Phase and to the Construction Manager through the Construction Phase.

Initial Planning Conference

The University's Project Manager will schedule an initial planning conference with the Designer to discuss requirements for facilitating the Designer's work. This conference is held as soon as possible after a Designer is selected for the project.

Design Contract Negotiation

The University's Project Manager will request the selected Designer to submit a preliminary design proposal and project schedule to the Project Manager for review.

Upon review and comment, the Project Manager sends the design proposal to the State Construction Office to review the design contract for approval. For projects under the budget limits noted in the SCO Manual, the Project Manager shall prepare the design contract Letter of Agreement. The document will be forwarded to the UNC General Administration for execution.



A-11.2 - Capital Project Types

All UNC Chapel Hill capital improvement projects are classified into one of the following three categories, each with distinct designer and contractor procurement requirements as well as FPD & SCO review requirements:

1. Study and Advance Planning Efforts

An effort that examines and/or analyzes a situation that may or may not lead directly to a design and construction project.

Studies may include, but are not limited to: Programming, Space Planning, Schematic Design, Design Development, Construction Documents, Construction Cost Estimation, and/or Life-cycle Cost Analysis. The total cost on any study shall not exceed fifty-thousand dollars (<= \$50,000.00).

No construction work is expected or authorized as part of this project type.

Designers may be directly selected from the Open-Ended Designer Agreement (OEDA) List. Designer Agreements are negotiated directly with Facilities, Planning & Design (FPD). FPD Approves Designer Agreements.

2. Customer Funded Project (CFP)

Also called Informal, includes Open Ended Design Agreements (OEDA). Any Project (New or Renovation) with a total project cost (design, construction, & contingencies) that is less than three-hundred thousand-dollars (<= \$300,00.00).

Designers are directly selected from the Open-Ended Designer Agreement (OEDA) List. Designer Agreements are negotiated directly with Facilities, Planning & Design (FPD).

Contractors may be direct selected if the cost of the work is less than thirty-thousand dollars (<\$30,000.00). Contractor selection is performed through the Informal (ICC) Contractor Bidding Pool (<= \$500,000.00).

FPD Approves Designer Agreements. FPD Approves Construction Contracts. SCO reviews design documentation for Code & Life Safety Compliance.

3. Code Item Project (CIP)

Also called Formal, includes Download & Full SCO Oversight. There are two types:

Download Project

Any Project (New or Renovation) with a total project cost (design, construction, & contingencies) that is greater than or equal to three-hundred thousand-dollars (>= \$300,00.00) AND less than two-million dollars (< \$2,000,000.00).

If the project cost is greater than \$300,000 and less than \$500,000, Designer are directly selected from the Open-Ended Designer Agreement (OEDA) List. If the total project cost is greater than or equal to \$500,000, Designers are selected through the State required Public Advertisement and Interview Process.

Designer Contracts are with UNC Chapel Hill and are negotiated with FPD.



SCO Full Oversight Project

Any Project (New or Renovation) with a total project cost (design, construction, & contingencies) that is greater than or equal to two-million dollars ($\geq \$2,000,000.00$)

Designers are selected through the State required public Advertisement and Interview Process.

Designer Contracts are with SCO, are negotiated with FPD and the assistance of SCO. SCO has ratios for specific percentages of construction cost for design contract values which must be met.

Contractor selection for Code Item Projects is performed through the State required Public Bidding process. For select projects of significant value (greater than \$10,000,000), Facilities will make a determination whether the use of a Construction Manager at Risk (CMaR) delivery method is to the benefit of the University.

If the total project cost is less than \$2,000,000, then the System Office Approves Designer Agreements & Amendments, as well as the Construction Contract & Change Orders. If the Total project cost is greater than \$2,000,000, then the SCO Approves Designer Agreements & Amendments, as well as the Construction Contract & Change Orders.