

# Scope Study –Template

A Scope Study is required to analyze the viability of a proposed construction or renovation project anticipated to cost \$1,000,000 or less. These studies establish the project scope, concept design, and conceptual cost estimate. Less intensive than a full feasibility study, the Scope Study provides a focus on more minor projects, can inform project prioritization, and identify reasons to proceed or not proceed. When submitting a project request, customers may request a study for a particular project; however, SPACe will determine whether a full feasibility study or scope study is appropriate. Neither a scope nor feasibility study is required for projects anticipated to be \$25,000 or less...or those deemed appropriate for assignment directly to a project manager.

Scope Studies are appropriate to guide decision-making for projects such as laboratory, classroom, or office renovations or smaller-scale new construction projects. In some cases, Scope Studies may serve as an exploratory effort or precursor to a full feasibility study when a rough order of magnitude cost and basic concept design are needed to determine whether a more detailed examination is required.

Any scope study that results in a potential project with a total project cost greater than \$1mm will be reviewed by SPACe and may require completion of a full feasibility study (to be approved by both SPACe and UPAAC) prior to moving to design.

## Required Elements:

The Scope Study should be delivered in a report format and include the following sections:

### 01: Executive Summary

- A. Project Description
- B. Project Goals & Vision
- C. Conceptual Cost & Schedule

### 02: Existing Facilities & Conditions

- A. Investigation of Current Conditions
  - I. Stakeholder / Departmental Assessment
  - II. Health/Safety/Accessibility/Code Issues
  - III. Asbestos and Hazardous Materials Assessment (can be provided by University Facilities)
- B. Building Condition Assessment (if warranted, Data/Support to be provided by University Facilities)
- C. Alignment of potential project with related maintenance programs (MRR, Green Tiger 1, Lab & Classroom Improvements, etc.)
- D. Alignment of potential project with LRFP, CPIP, or existing feasibility study for a capital or proviso project to ensure the proposed project doesn't conflict with any anticipated larger efforts in the next 5 years.



### 03: Proposed Architectural Program (if applicable)

- A. Program Overview / Program Requirements
- B. Program Distribution
  - I. Distribution by Space Type (Instructional, Research, Office, etc.)
  - II. Distribution by Program/Department (for shared facilities)
- C. Program Space List
  - I. Graphic Representation
  - II. Tabular Schedule of Spaces (to also be provided in spreadsheet format)
- D. Identify existing personnel, rooms or groups, building and site items, and permanent or semi-permanent elements that must be relocated – permanently or temporarily. These items must be accounted for in the subsequent schemes, phasing plans and cost estimates.

***The scope study must clearly quantify any swing space necessary during project construction. The study should quantify the number of rooms, room types, square footage, and special equipment needs to be accommodated temporarily. The consultant team engaged for the Scope Study will work with Project Manager/Planner and Space Management staff to identify swing space and its availability during the proposed construction period.***

### 04: Proposed Renovation Plan (if applicable)

- A. Applicable Codes
- B. Architectural and Interiors Narrative
- C. Electrical, Lighting and Audio-Visual Narrative
- D. Mechanical, Electrical, Plumbing and Fire Protection Narrative
- E. Furniture Plan
- F. Equipment Plan.
  - a. Cut sheets are to be provided for any major equipment, and written documentation is to be provided to confirm equipment has been coordinated with building utilities, including building system capacity, as well as review by OES.

### 05: Concept Design

- A. Conceptual Drawings:
  - I. Floorplans
  - II. Reflected Ceiling Plan
  - III. Casework Elevation
  - IV. Demolition Plan (+Reflected Ceiling Demolition Plan)
- B. Conceptual Site Plan (if applicable / if requested)
- C. Concept Images / Renderings (if requested)
- D. Develop and maintain a Risk Register chart outlining items not fully resolved, unknown conditions that require further testing, tie-ins to existing systems based on assumptions or other items outside of the scope of the study that need to be addressed in the implementation of the concept

### 06: Conceptual Cost Estimate & Project Schedule

- A. Construction Cost Summary:
  - I. Assumptions (Construction Start, Construction Mid-Point, Rate of Escalation, etc.)
  - II. Estimate Information: Date of Estimate, Estimator, Construction Cost per Sq. Ft.
- B. Total Project Cost Estimate (to also be provided in spreadsheet format)
- C. Proposed Project Schedule (coordinated with University Facilities – PDC)

## 07: Appendices

- A. Project Cost Estimate – Detailed Estimate
  - a. 3<sup>rd</sup> Party / CM Cost Estimate (if applicable)
- B. Project Directory / Study Participants
- C. Meeting Minutes / Chats from Teams/Zoom Meetings
- D. Photographs of Existing Conditions (if applicable / if requested)