



Document Number	Facilities Project Transition SOP D.22.01
Owner/Contact Information:	Associate Vice Chancellor for Facilities
Effective Date:	5/28/2019
Last Revised/Reviewed:	
Related Policies and Procedures	

1. Purpose/Introduction

The purpose of this policy is to promote stewardship in the transition of the University’s physical environment projects from the Facilities Design and Construction Department to the Facilities Operations Department in order to achieve the following objectives:

- Improve collaboration and communication between Facilities Operations and Facilities Design & Construction during the construction phase,
- Ensure a clear handoff at project turnover,
- Enhance overall customer service for occupants at move-in, and
- Better enable Facilities Operations to properly operate and maintain the facility at optimum efficiency

Scope:

- This policy shall apply to all projects executed by the Facilities Design and Construction Department (FDC) including all Capital Facilities Foundation projects and all Dining Services projects (including those performed by a Contractor under contract to Chartwells/Compass Group or the current food service vendor, or bookstore vendor.

2. Definitions

Beneficial Occupancy is requested by the Owner and is occupancy or partial occupancy of the building after all life safety items have been completed as determined by the State Construction Office. Life safety items include but not limited to fire alarm, sprinkler, egress and exit lighting, fire rated walls, egress paths and security. [SCO OC-15 24th Edition January 2013]

Commissioning is a quality assurance process that verifies and documents that building components and systems operate in accordance to the Owner’s project requirements and the project design documents. [SCO OC-15 24th Edition January 2013]

Designer Final Inspection is the inspection performed by the design team to determine the completeness of the project in accordance with approved plans and specifications. This inspection occurs prior to SCO Final Inspection. [SCO OC-15 24th Edition January 2013]

Measurement & Verification is the methodology, measurements, inspections, and mathematical calculations to determine if actual project utility consumption equals that predicted by the Designer’s Energy Model.

Project is a capital or non-capital construction, renovation, alteration, upfit, etc. endeavor managed by the UNCG Facilities Design & Construction Department (FDC).

Project Acceptance is the official date established by FDC, sometimes in conjunction with the State Construction Office (SCO), on which responsibility is transferred from the Contractor/FDC to Facilities Operations for maintenance, operations, security, insurance, etc.

Punch List is a list of incomplete work or unacceptable work that the Contractor must resolve prior to receiving Final Payment. Facilities Operations prefers that all Punch List work be satisfactorily completed prior to Turnover.

SCO Final Inspection is the inspection performed by the State Construction Office to determine the completeness of the project in accordance with NC Building Codes and approved plans and specifications. [SCO OC-15 24th Edition January 2013]

Turnover is the official date that FDC turns over responsibility of a completed project to Facilities Operations and is usually the same date as Project Acceptance.

3. Procedural Steps

3.1 Policy:

3.1.1 Facilities Design and Construction and Facilities Operations are required to periodically update the Facilities Design and Construction Guidelines and develop and maintain current Standard Operating Practices to achieve a well coordinated transition of projects from construction to maintenance and operations.

At a minimum, the following activities must be documented in the Facilities Design and Construction Guidelines and through Standard Operating Practices:

- A. Project Inspections
- B. Completion of punch list items
- C. Custodial equipment and supplies
- D. Furnishing and installation of soap dispensers and paper towel dispensers
- E. Door finish hardware, cores, and keying
- F. Fire alarm inspections and programming
- G. Signage and room numbers
- H. Irrigation to establish landscaping
- I. Recycling and trash containers
- J. Commissioning planning and execution
- K. Pest control
- L. Final contractor cleaning
- M. Notification of project turn over date
- N. Attic stock
- O. Project energy model
- P. Measurement and verification of utilities
- Q. Training of Facilities Operations staff
- R. Project documentation
- S. Completion of warranty items
- T. Eleven-month warranty inspection
- U. Removal and salvage of existing building content prior to start construction

3.2 Enforcement:

3.2.1 This policy is carried out by both Facilities Design and Construction and Facilities Operations. The Associate Vice Chancellor for Facilities will ensure adherence.

3.3 Review:

3.3.1 This policy shall be reviewed by the Facilities Department every three (3) years or as needed.

4. Revision Table

Revision #	Section #	Summary of Changes	Approval Date