



*City of Edmonton*

*Accommodation Request and Implementation Process*

*(a Supplement to Provision of Office and Special Purpose Accommodation for City Staff Directive & Procedure A1407A)*

*January 2014*

**TABLE OF CONTENTS**

1. Overview
2. Accommodation Request
3. Project Development
4. Post Construction Activities
4. Accommodation Request & Implementation Process

## **1. Overview**

When new accommodations are required, the process starts with the submission for a Request For Accommodations to the SDD, Corporate Properties, Civic Accommodations Planning Section (CAP). The parties involved work through the following steps in balancing the needs of the client and that of the corporation in developing suitable accommodation.

## **2. Accommodation Request**

Upon receipt of a Request For Accommodation or implementation of an accommodation plan project, a senior planner in CAP will be assigned to work with the client to determine a scope of project for their accommodation need. Typical aspects comprising the scope of project include:

1. Function of the client office and/or special purpose (ex. labs, warehouse, public access)
2. Location criteria
3. Internal/external drivers impacting their work environment
4. Opportunities for synergy with other areas or Corporate initiatives

The development of the Scope of Project is generally fostered through an interview process (between client and CAP), and relies heavily on the experience and information on the City's owned/leased building inventory that resides in CAP. Deliverable: a written Scope of Project, generally acceptable to the Client and to SDD.

## **3. Project Development**

Project development stage solidifies the agreed upon scope of project by bringing together these key requirements:

1. Initial funding source (ex. Council approved, grants, operating or Capital budget, and etc.)
2. Consultant appointments as required
3. Development of General Fit Program
4. Formal approval of the General Fit Program by SDD and the Client.
5. Budget allocations or submissions as required.

Funding for the accommodation request is generally the responsibility of the client. This funding will cover the following:

- Detailed Design development, including architectural, mechanical, electrical/data and interior design. (For most City projects, this will be provided either by CMS, Project Management and Maintenance Services (PMMS) or a consultant hired by PMMS. For leased space, this work may be coordinated by Corporate Properties, Leasing and Property Management through the building owner or landlord.
- Construction costs associated with building a new facility or renovation of an existing facility or leased property. Work in City owned space will be estimated and undertaken by PMMS.

- Office furniture for the space requirements will meet the furniture guidelines administered by CAP. CAP will manage these furniture guidelines in attempt to achieve cost savings through purchase agreements and reusability of furniture, whenever possible.
- Moving costs associated with relocation of staff, supplies, and accompanying material.

**Guidelines within the Accommodation Process**

<b>Function</b>	<b>Responsibility</b>	<b>Approval Process</b>	<b>Supporting Documents</b>
Space Planning (SDD)	Corporate Properties Branch CAP Section	CLT / Executive Committee	Accommodation Plan(s) Annual Budget Space Standards (Appendix 1)
Furniture Standards (SDD)	Corporate Properties Branch CAP Section	Materials Management	Purchase Agreement APA1439B Teknion D-890883 ERGO D890322
Space Construction (ISD)	PMMS	Policy A1406	Space Design & Construction and Furniture & Wall Systems Standards (CAP Manual)
Maintenance	Project Management and Maintenance Services	Policy A1403A	Annual Budget
Space Management (SDD)	Corporate Properties Branch Leasing and Property Management Section	CLT / Executive Committee	Annual Budget
Leasing Space (SDD)	Corporate Properties Branch Leasing and Property Management Section	CLT / Executive Committee	Annual Accommodation Plan Annual Budget

**4. Post Construction Activities**

- Warranty follow-up for any defects in materials as workmanship is undertaken through PMMC or through building/manager in leased facilities
- Ongoing operation, custodial and maintenance is undertaken by Sustainable Development Department (Corporate Properties) and Community Services Department (PMMC)
- Space Administration is provided by SDD (Corporate Properties)
- Post Construction evaluation of space and space changes are undertaken by SDD (Corporate Properties)

#### **4. Accommodation Request & Implementation Process**

##### **Tasks Description**

##### **1.0 Accommodation Request:**

- 1.1 Client Department shall submit a Request for Accommodation for Departmental projects.
- 1.2 Civic Accommodation Planning may initiate a Request for Accommodation in response to the Accommodation Plan.
- 1.3 Leasing and Property Management may initiate a Request for Accommodation in response to new lease space or lease expiry.

##### **2.0 Civic Accommodation Planning shall review the Request for Accommodation:**

- 2.1 Review Request from Client/Occupant Group
- 2.2 Identify New Lease/lease Renewal Requirements as required
- 2.3 Develop Project Scope, Viability, Cost Benefit and Funding Sources
- 2.4 Prepare Facilities Program or Accommodation Request Form (ARF) – Detailed
- 2.5 Review Capital Budget Estimate
- 2.6 Review Operating Budget Estimate
- 2.7 Initiate Approvals as Required
- 2.8 Submit project for Council Approval as required

##### **3.0 Leasing and Property Management shall prepare Lease (If Required)**

- 3.1 Prepare Proposal Call & Receive Proposals
- 3.2 Evaluate & Recommend Proposals
- 3.3 Submit documents for Council Approval of Proposal
- 3.4 Prepare lease for execution

##### **4.0 Leasing and Property Management shall initiate Pre Design**

- 4.1 Establish Cost Centre for Design, Construction & Project Management
- 4.2 Finalize Project Scope; Refine Budget and Preliminary Schedule
- 4.3 Brief Client & Review Project Goals

##### **5.0 Project Management and Maintenance Services shall initiate Design**

- 5.1 Prepare Preliminary Design & Review
- 5.2 Review Signage, Telephone, Computer, Security, Special Needs
- 5.3 Refine Budget
- 5.4 Ensure Review and Approval of Preliminary Design by Client Department

##### **6.0 Project Management and Maintenance Services shall prepare Contract Documents**

- 6.1 Prepare Working Drawings, Specifications – Approvals
- 6.2 Prepare Client Move (Telephones, Moves, Data Lines Screens, Furniture Acquisition)
- 6.3 Tender and Award Construction Contracts.
- 6.4 Manage Construction contracts

6.5 Monitor Construction, inspect and correct deficiencies. (Commissioning, O & M Manuals, As-Builts)

**7.0 Leasing and Property Management shall manage the space:**

7.1 Coordinate move details – (Elevators, packing, Workstations, ID, Parking, Keys, Surplus, etc)

7.2 Co-ordinate move-In

**8.0 Post Construction Activities**

8.1 Project Management and Maintenance Services shall follow up Warranty.

8.2 Project Management and Maintenance Services shall provide Custodial, Building Maintenance

8.3 Leasing and Property Management shall provide Space Rent Updates as well as ongoing building operations.

8.4 Civic Accommodation Planning shall provide Post Construction Evaluation