

# SELF-MANAGED PROJECT REQUEST GUIDELINES (SMPRG)

- SMPRG was introduced during the 21FEB24 FPM Customer Forum and updated in 31JUL24 FPM Customer Forum.
- This is the Part 1 of SMPRG updates/refresh:
  - ✓ Scope of Work Overview & Lessons Learned.
  - ✓ REQ process w/ WD
  - ✓ Project Initiation in AssetWorks (AW) and the associated fees
  - ✓ Services Matrix - Companion Document
  - ✓ SMPR - Painting and Flooring Checklist update,
- SMPRG is located in myFPM webpage under Project & Building.
- The written process and procedures are in progress.

## Project & Building

[Building List \(VPN Access Required\)](#)

[e-Builder](#)

[Meridian FMS Explorer \(VPN Access Required\)](#)

[Meridian App](#)

[Shakecast](#)

[Electronic Utility Shutdown Form](#)

[Electronic Utility Shutdown Form Instructions](#)

[Fire System Impairment Form](#)

[Hot Work Permit](#)

[Project Request Form \(New Version 28JAN25\)](#)

[FPM Project/Non-Project Services Matrix](#)

[FPM Self-Managed Project Guidelines](#)

[Project and Lease Request and Approval Policy](#)

[Space Request Form](#)

[Major Maintenance/FIF Project Fillable Form](#)

[Major Maintenance/FIF Project Form](#)

[Instructions](#)

# SELF-MANAGED PROJECT REQUEST GUIDELINES (SMPRG) ISSUED 21FEB24

PREVIOUSLY ALLOWED	ALLOWED	ALLOWED with FPM APPROVAL	NOT ALLOWED
<p>Painting or Flooring</p> <ol style="list-style-type: none"> <li>\$25K or less</li> <li>All project coordination by Customer</li> <li>All warranty tracked by Customer</li> </ol>	<p>Finishing Purchase</p> <ol style="list-style-type: none"> <li>Window shades replacement</li> <li>Misc. products</li> <li>Interior signage****</li> </ol>	<p>Painting and/or Flooring*</p> <ol style="list-style-type: none"> <li>\$50K or less per individual task</li> <li>Annual blanket application for painting</li> <li>Coordination and warranty management remain with the Customer</li> <li>With HAZMAT abatement: MOU with budget worksheet*</li> </ol>	<ol style="list-style-type: none"> <li>Capital Improvement Projects</li> <li>CPS Projects</li> <li>Work affecting building systems or infrastructure</li> <li>Work that includes system design or engineering</li> <li>Work that includes on-site construction               <ol style="list-style-type: none"> <li>Excludes product assembly</li> </ol> </li> <li>Projects that impacts               <ol style="list-style-type: none"> <li>DPS</li> <li>EH&amp;S</li> <li>FL&amp;S</li> <li>FMS Engineering</li> <li>ITS</li> <li>Security</li> </ol> </li> </ol>
	<p>Equipment</p> <ol style="list-style-type: none"> <li>Off the Shelf, Plug and Play***</li> </ol>	<p>Furniture Purchase/Layout**</p> <ol style="list-style-type: none"> <li>Furniture layout &amp; system</li> </ol>	
	<p>Moving Services</p>	<p>Equipment Purchase</p> <ol style="list-style-type: none"> <li>Heavy (&gt;400 lbs. )</li> <li>Tall (mid-point&gt; 4'-0")</li> <li>Special MEP</li> </ol>	
		<p>Specialty Construction Services</p> <ol style="list-style-type: none"> <li>Audio Visual</li> <li>Security/intrusion systems</li> </ol>	
		<p>Small and Low Risk Repair Services</p> <ol style="list-style-type: none"> <li>Coliseum, Auxiliary Services-housing, Retail &amp; hospitality; and Offsite Leases           <ol style="list-style-type: none"> <li>Roofing</li> <li>Decking or patio</li> <li>Other Repairs locally or out-of-state leases</li> </ol> </li> </ol>	

**Legend**

\* Hazmat testing & Hazmat abatement managed by FPM but paid for by Customer

\*\* Furniture layout & system without impact on existing facilities to be reviewed and approved by FPM

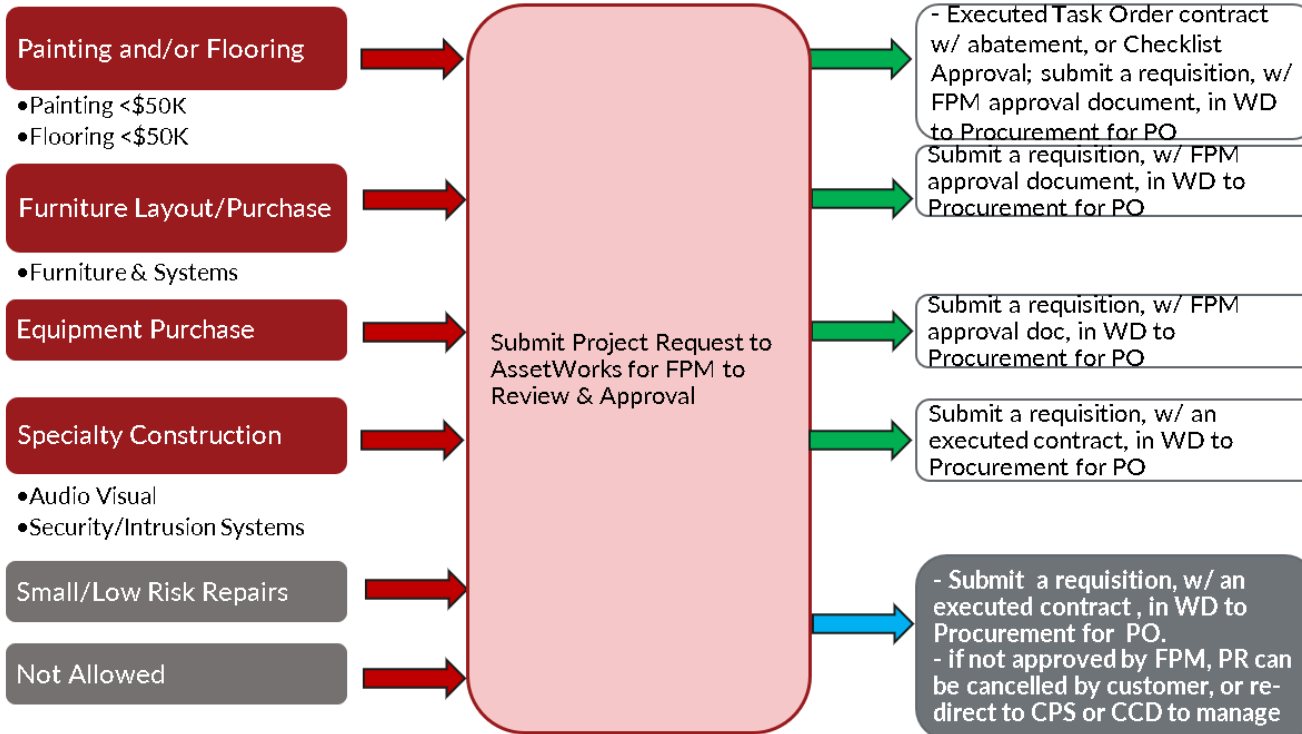
\*\*\* Off-the-Shelf and Plug and play equipment does not require new infrastructure nor impact on existing facilities

\*\*\*\* Interior signage package to be reviewed and approved by USC Signage Committee

## SMPR - LESSONS LEARNED – ALLOWED & NOT ALLOWED

- Customer shall review the SMPRG to avoid the wasted effort and time
  - ✓ “allowed”,
  - ✓ “allowed w/FPM approval”
  - ✓ “not allowed”
- SMPRG, a tool for customer to self-manage single trade minor/simple work in nature.
- Do not piece-meal scopes in the same room, abuse of SMPR.
  - ✓ That is a CCD PM’s job with qualifications and experiences to manage and coordinate various efforts smoothly and efficiently.
- When in doubt, **consult w/** FPM SMPR Lead.
  - After all, he/she will gather the info and make recommendations for SMPR committee to approve or dis-approve.
- **A myth?** approved SMPR does not need a form of construction contract.

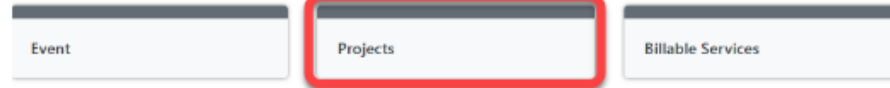
# SELF-MANAGED PROJECT INTAKE



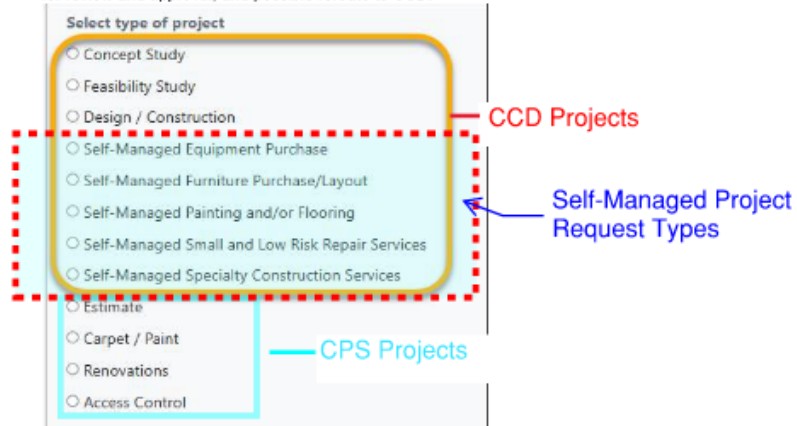
# SMPR - PROJECT TYPES IN ASSETWORKS

The Project Requestor role will provide users with the role access to the "Projects" tile in the bottom, "Projects and Billable Services" section:

## Projects and Billable Services



In the 'Project Type' section of the request form, the first eight options will prompt an automation which creates a project request record in Trimble (formerly eBuilder) for FPM CCD review and approval; note that some of these will require a Project Request form and ISD to cover the project initiation fee. The remaining four Project Types will route through FMS Construction Project Services for review and approval, and possible reroute to CCD.



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# SMPR – PAINTING & FLOORING - BY ROOM(S)

USC FPM  
Facilities Planning and Management

Authorization No.: \_\_\_\_\_

**SELF-MANAGED PROJECT REQUEST FOR PAINTING & FLOORING CHECKLIST**

Project Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Date: \_\_\_\_\_  
 Requester: (Name) & (Title) \_\_\_\_\_

Item No. \_\_\_\_\_

01 **Basic Description of Work**  
 (Identify the surface(s) to be painted, existing flooring descriptions, when was the most recent work performed on these surfaces, etc.)  
 Do any doors need to be undercut?  
 Are any doors to be undercut fire rated?  
 Note: If HAZMAT testing or abatement may be required fill out Section 02 below.

02 **HAZMAT Testing / Abatement**  
 Testing is required (Y/N)   
 Testing is not required (Y/N)   
 Hazardous materials  ARE  ARE NOT present.  
 Following items may be hazardous:  FLOORING  
 FLOOR MASTIC  
 LEAD PAINT (with peeling paint & openings other than nail holes)  
 OTHER (Explain) \_\_\_\_\_  
 OTHER: \_\_\_\_\_

03 **Site Access**  
 Access has been explained and acknowledged by representative of the Academic Unit.  
 Academic Unit Representative is responsible to coordinate Contractor access (including parking see below), as well as coordinate with Transportation Services, Student Affairs, Special Events, Orientation and possible other restrictions such as working in or around residence halls, work during study and final weeks (late start times), student orientation sessions and buildings with night classes. Please use the following contact information:  
 o Transportation Services: Anthony (Tony) Mazza (213) 740-0175 [tmazza@usc.edu](mailto:tmazza@usc.edu)

FPM Paint & Carpet Checklist 01-31-2025

USC FPM  
Facilities Planning and Management

Authorization No.: \_\_\_\_\_

**SELF-MANAGED PROJECT REQUEST FOR PAINTING & FLOORING CHECKLIST**

o Trojan Event Services: (213) 764-4943 [scserv@usc.edu](mailto:scserv@usc.edu)  
 o Student Affairs: (213) 821-6239 [jsstaff@usc.edu](mailto:jsstaff@usc.edu)  
 o Orientation: (213) 740-7767 [orien@usc.edu](mailto:orien@usc.edu)

04 **Parking and Access**  
 Vehicles parked on campus must have valid USC Transportation permits.  
 Contractor is not to block fire lanes or park in areas where parking is not allowed by the University. Parking is only allowed in designated areas, parking structures with daily or monthly permits. Vehicles parked on Trousdale, Bloom Walk, Hahn Plaza, etc. are not legally parked and subject to fines or towing. Vehicles engaged in loading and unloading activities may be allowed for short periods of time but must have their hazard lights on. Vehicles unattended or not engaged in deliveries will be cited or towed.

05 **Cleanup and Protection**  
 Academic Unit is responsible for making sure the Contractor provides cleanup and protection during the entire progress of the project.  
 Items to be protected: carpets, ceilings, walls, doors, railings, stair steps, elevators, etc.

06 **Toilet Facilities**  
 The Academic Unit Representative will be responsible for addressing the need for toilet facilities for the workmen involved in the installation.

07 **Insurance**  
 Current insurance Certificate shall be issued by Contractor for the project prior to start of work.

08 **Acknowledgement:**  
 COO Representative: \_\_\_\_\_  
 (Print Name) (Signature) (Date)  
 Academic Unit Representative: \_\_\_\_\_  
 (Print Name) (Signature) (Date)

## SMPR-Painting & Flooring Updates:

1. An initiation fee, ISD of \$600 to ISD-SP-091 shall **accompany** the PR before a PR will be assigned to a PM.
2. The initiation fee will be credited towards the PM flat fees of \$2100 if budget estimate < \$21,000; or 10% of the abatement budget estimate > \$21,000.
3. If the customer adds scope after a MOU is in progress. The added scope will be treated as a 2nd project though both projects may be executed concurrently if the schedule allows.
4. A PR will be closed and the initiation fees will be applied for FPM staff's effort after 4 weeks without receipt of customer's communications.
5. Duplicated PRs will be treated as 2 PRs though one maybe cancelled after further investigation.
6. A fire system impairment fees of \$264 = \$240 + 10% markup per day are added to the project budget estimate.
7. Customer shall attach FPM's approved checklist to WD REQ for Procurement PO as supporting documentation

# SMPR – PAINTING (ANNUAL BLANKET APPROVAL)

Authorization No. \_\_\_\_\_

**SELF-MANAGED PROJECT REQUEST FOR PAINTING CHECKLIST – Annual Blanket Approval**

Project Name: School Name (Fiscal Year FYYY)  
 Address: \_\_\_\_\_  
 Date: \_\_\_\_\_  
 Requester: (Name) & (Title)

Item No.	<p><b>01 Basic Description of Work.</b>                  Painting of various school facilities during a Fiscal Year as the ongoing maintenance and refresh effort. Total construction cost shall not exceed \$50,000 per building otherwise a new Project Request Checklist shall be submitted. A list of 3-digit USC Building Codes with address (as an attachment)</p> <p><input type="checkbox"/> Do any doors need to be undercut?                  Are any doors to be undercut fire rated?                  Note: If HAZMAT testing or abatement may be required fill out Section 02 below.</p> <p><b>02 HAZMAT Testing / Abatement</b>                  Testing is required (Y/N) <input type="checkbox"/>                  Testing is not required (Y/N) <input type="checkbox"/>                  Hazardous materials <input type="checkbox"/> ARE present.  <input type="checkbox"/> ARE NOT present.                  Following items may be hazardous: <input type="checkbox"/> LEAD PAINT (with peeling paint &amp; openings other than nail holes)  <input type="checkbox"/> OTHER (Explain) _____                  OTHER: _____</p>
03	<p><b>Site Access</b>  <input type="checkbox"/> Access has been explained and acknowledged by representative of the Academic Unit.                  Academic Unit Representative is responsible to coordinate Contractor access (including parking see below), as well as coordinate with Transportation Services, Student Affairs, Special Events, Orientation and possible other restrictions such as working in or around residence halls, work during study and final weeks (late start times), student orientation sessions and buildings with night classes. Please use the following contact information:                  o Transportation Services: Anthony (Tony) Mazza (213) 746-9175 <a href="mailto:tmazza@usc.edu">tmazza@usc.edu</a></p>

Authorization No. \_\_\_\_\_

**SELF-MANAGED PROJECT REQUEST FOR PAINTING CHECKLIST – Annual Blanket Approval**

	<ul style="list-style-type: none"> <li>o Trojan Event Services: (213) 764-4043 <a href="mailto:spevents@usc.edu">spevents@usc.edu</a></li> <li>o Student Affairs: (213) 821-6239 <a href="mailto:spatual@usc.edu">spatual@usc.edu</a></li> <li>o Orientation: (213) 746-7797 <a href="mailto:orien@usc.edu">orien@usc.edu</a></li> </ul>
04	<p><b>Parking and Access</b>                  Vehicles parked on campus must have valid USC Transportation permits.                  Contractor is not to block fire lanes or park in areas where parking is not allowed by the University. Parking is only allowed in designated areas, parking structures with daily or monthly permits. Vehicles parked on Trousdale, Bloom Walk, Hahn Plaza, etc. are not legally parked and subject to fines or towing. Vehicles engaged in loading and unloading activities may be allowed for short periods of time but must have their hazard lights on. Vehicles unattended or not engaged in deliveries will be cited or towed.</p>
05	<p><b>Cleanup and Protection</b>                  Academic Unit is responsible for making sure the Contractor provides cleanup and protection during the entire progress of the project.                  Items to be protected: carpets, ceilings, walls, doors, railings, stair steps, elevators, etc.</p>
06	<p><b>Toilet Facilities</b>                  The Academic Unit Representative will be responsible for addressing the need for toilet facilities for the workmen involved in the installation.</p>
07	<p><b>Insurance</b>                  Current Insurance Certificate shall be issued by Contractor for the project prior to start of work.</p>
08	<p><b>Acknowledgement:</b></p> <p>CCD Representative: _____ (Print Name) _____ (Signature) _____ (Date)                  Academic Unit Representative: _____ (Print Name) _____ (Signature) _____ (Date)</p>

## SMPR-Painting –Annual Blanket Updates:

1. An initiation fee, ISD of \$600 to ISD-SP-091 shall **accompany** the PR before a PR will be assigned to a PM.
2. Customer shall attach FPM's approved checklist to WD REQ for Procurement PO as supporting documentation
3. Under this blanket approval, the customer will maintain a running log of the painting expenses of each building on an annual basis and will submit it along the WD REQ for Procurement PO.