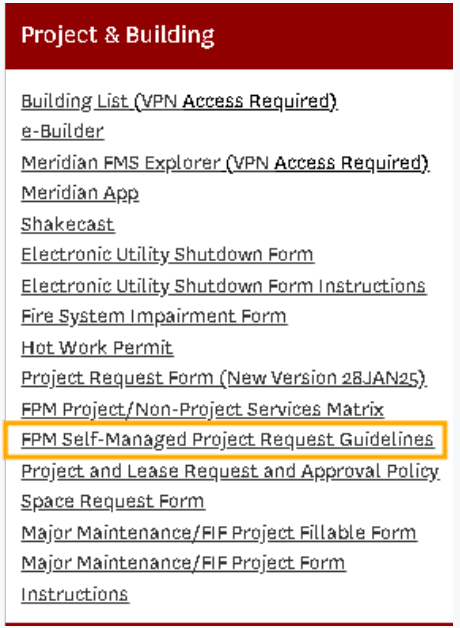
USC FPM
Facilities Planning and Management

SELF-MANAGED PROJECT REQUEST GUIDELINES (SMPRG)

07AUG25 Update

- This is the Part 2 of SMPRG updates:
  - ❖ "Small & Low Risk Repair project request" applies to customers i.e. Coliseum, Auxiliary Services-Housing, Retail & Hospitality with in-house construction management team and the established procedures; and Offsite Leases.
  - ❖ The revised FPM Project/Non-Project Services Matrix, incorporating missing self-managed project types is under final review and approval.
  - ❖ Provide an Internal Service Delivery (ISD) for initiation fee in WD to Acct # ISP-SP-091 while initiating a SMPR in Assetworks. SMPR will be processed upon receipt of the executed ISD.
  - ❖ Reminder- SMPR Approval is on the initial scope request; any follow-on scope and/or cost increase shall be submitted for a separate SMPR review and approval prior to proceed.
  - ❖ The remaining guidelines stay the same as issued on 06FEB25



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

PREVIOUSLY ALLOWED

Painting or Flooring

1. $25K or less
2. All project coordination by Customer
3. All warranty tracked by Customer

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*

ALLOWED

Finishing Purchase

1. Window shades replacement
2. Misc. products
3. Interior signage****

Equipment

1. Off the Shelf, Plug and Play***

Moving Services

ALLOWED with FPM APPROVAL

Painting and/or Flooring*

1. $50K or less per individual task
2. Annual blanket application for painting
3. Coordination and warranty management remain with the Customer
4. With HAZMAT abatement: MOU with budget worksheet*

Furniture Purchase/Layout**

1. Furniture layout & system

Equipment Purchase

1. Heavy (>400 lbs.)
2. Tall (mid-point> 4'-0")
3. Special MEP

Specialty Construction Services

1. Audio Visual
2. Security/intrusion systems

Small and Low Risk Repair Services

1. Coliseum, Auxiliary Services-housing, Retail & hospitality; and Offsite Leases
   a. Roofing
   b. Decking or patio
   c. Other Repairs locally or out-of-state leases

NOT ALLOWED

1. Capital Improvement Projects
2. CPS Projects
3. Work affecting building systems or infrastructure
4. Work that includes system design or engineering
5. Work that includes on-site construction
   a. Excludes product assembly
6. Projects that impacts
   a. DPS
   b. EH&S
   c. FL&S
   d. FMS Engineering
   e. ITS
   f. Security

SMPR & FOLLOW-ON ACTIONS OVERVIEW 06FEB25 Update

SMPR

Magdalen Hron, FPM - CCD
Email: hron@usc.edu
Phone: **213.379.4354**

Activity
- ***SMPR Committee Review & Approval***

APPROVED

NOT APPROVED

If a SMPR is disapproved by SMPR Committee, customer to decide with :
- **CCD PM managed PR; or**
- **CPS managed PR if it fits in its services**

Bidding

Kevin Staub, USC Business Services| Procurement Services
Email: kstaub@usc.edu
Phone: **213.740.3417**
Irene Seatter, AVP of CFA FPM
Email: seatter@usc.edu
Phone: **213.821.1944**

PO Activities
- *Bidding required for ANY purchases > $10k*
- *Engage Procurement to conduct formal bidding/RFP*
- *SSJ Approval (Irene/Kevin)*

Y/N?*

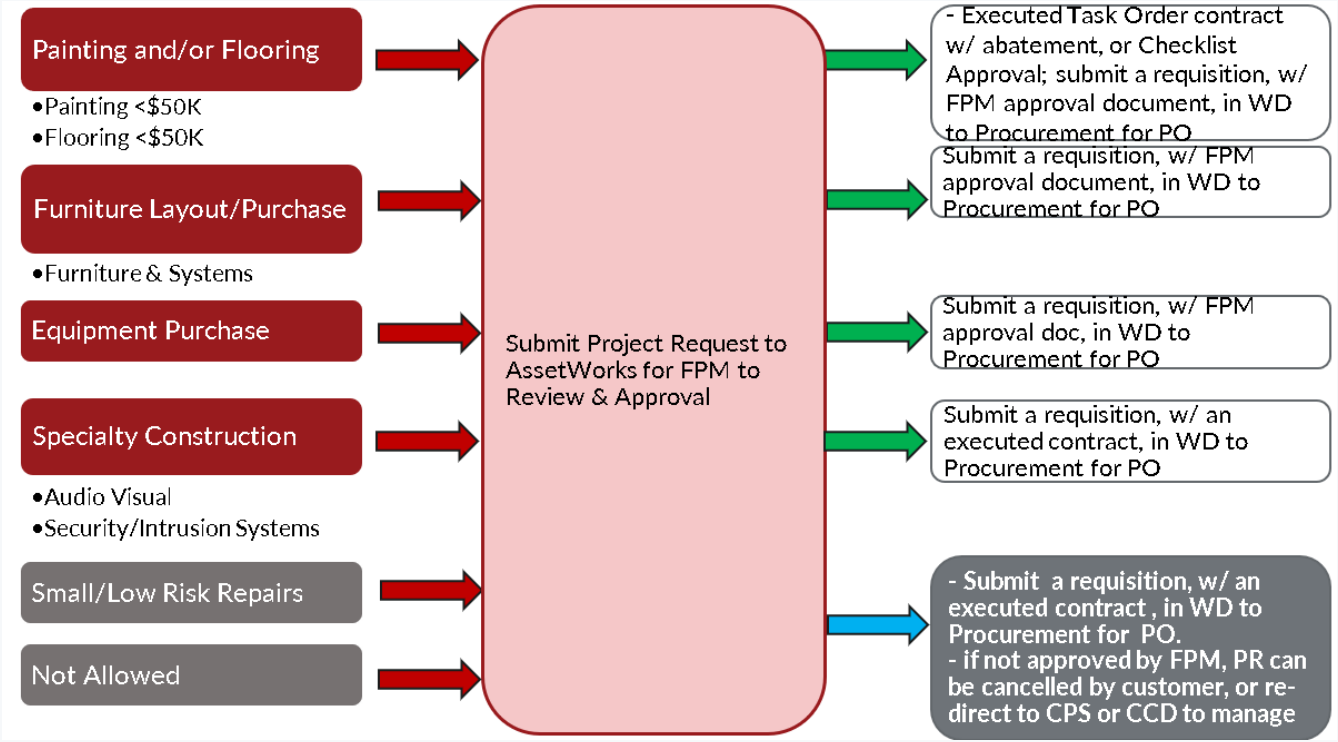
Contract*

Helen Ferraro, FPM - CFA
Email: hferraro@usc.edu
Phone: **213.821.6914**

Contract Activities
- *Review PR case by case*
- *Decide if a Construction Contract is required*
- *Determine Types of Construction Contracts*
- ***Deborah Gonzalez**, POC for SMPR - contract request process*
  Email: deborah.gonzalez@usc.edu
  Phone: **213.821.9598**

***Regardless of whether a project requires bidding, a contract may still be required.**

SELF-MANAGED PROJECT INITIATION 06FEB25 Update



Key Points:

1. All SMPR items listed here will require FPM review & approval.
2. For types of "Equip purchase", "Specialty Construction", "Small /Low Risk Repairs", SMPR Committee will decide to approve or disapprove.
3. Customer shall initiate a SMPR in AW and an ISD to WD ACCT: ISP-SP-091 per FPM Services Matrix
4. After initiation is completed, a PM will be assigned.
5. Customer shall attach FPM approval and/or executed contract (if applicable) as supporting document with REQ in WD for Procurement's PO process

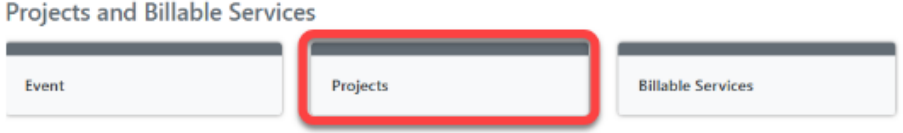
SMPR - LESSONS LEARNED – ALLOWED & NOT ALLOWED

06FEB25 Update

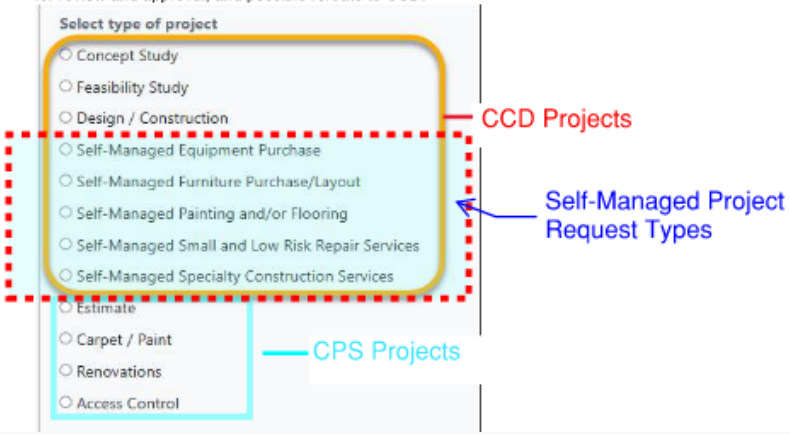
- Customer shall review the SMPRG to avoid the wasted effort and time
  - ❖ "allowed",
  - ❖ "allowed w/FPM approval"
  - ❖ "not allowed"
- SMPRG, a tool for customer to self-manage single trade minor/simple work in nature.
- Do not piece-meal scopes for different in-house services within the same space
  - ❖ That is a CCD PM's job with qualifications and experiences to manage and coordinate various efforts smoothly and efficiently.
- When in doubt, consult with FPM SMPR Point-of-contact (POC).
- A myth? Does an approved SMPR still need a form of FPM contract?
  - ❖ A form of FPM Contract may still be needed for an approved SMPR.

SMPR - PROJECT TYPES IN ASSETWORKS 06FEB25 Update

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



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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Office: (213) 740-2412 Fax: (213) 740-1401 | paulf@usc.edu

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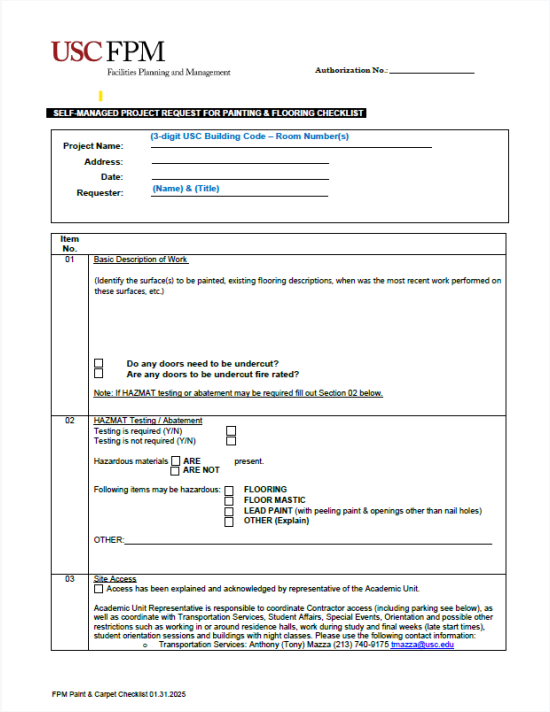
SMPR – PAINTING & FLOORING - BY ROOM(S) 06FEB25 Update



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Authorization No.: _____

SELF-MANAGED PROJECT REQUEST FOR PAINTING & FLOORING CHECKLIST

(3-digit USC Building Code – Room Number(s))

Project Name: _____

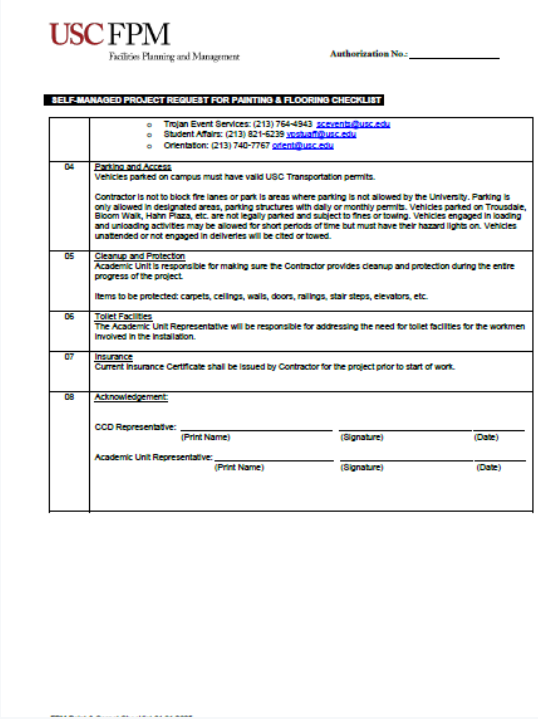
Address: _____

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: ○ Transportation Services: Anthony (Tony) Mazza (213) 740-9175 tmazza@usc.edu

FPM Paint & Carpet Checklist 01.31.2025



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Authorization No.: _____

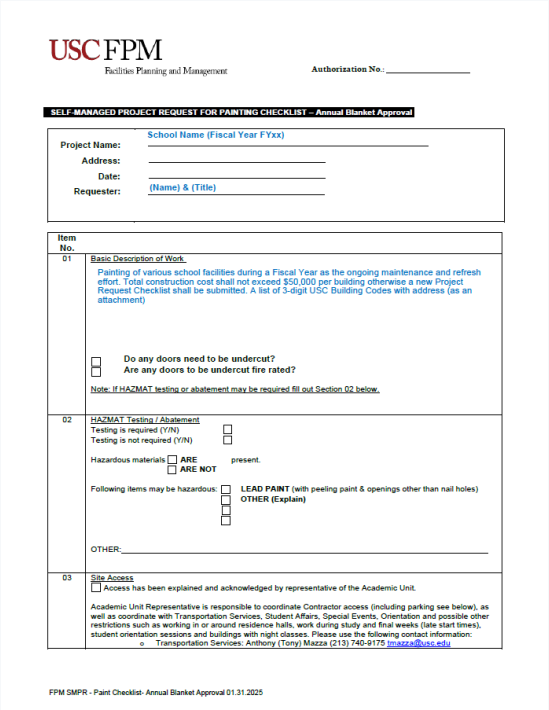
SELF-MANAGED PROJECT REQUEST FOR PAINTING & FLOORING CHECKLIST

	○ Trojan Event Services: (213) 764-4943 scevents@usc.edu ○ Student Affairs: (213) 821-6239 vrostaff@usc.edu ○ Orientation: (213) 740-7767 orient@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 is 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: CCD 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) 06FEB25 Update



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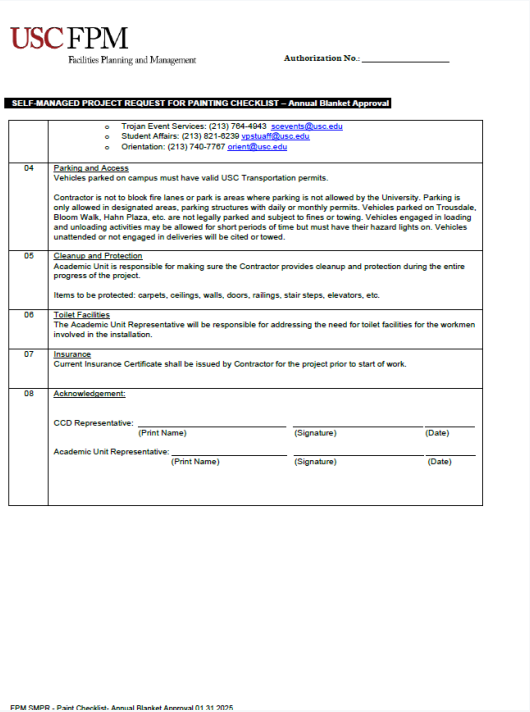
Authorization No.: _____

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

Project Name: School Name (Fiscal Year FYxx)
Address: _____
Date: _____
Requester: (Name) & (Title)

Item No.	
01	Basic Description of Work 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) ☐ 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: ☐ 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) 740-9175 tmazza@usc.edu

FPM SMPR - Paint Checklist- Annual Blanket Approval 01.31.2025



USC FPM
Facilities Planning and Management

Authorization No.: _____

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

	o Trojan Event Services: (213) 764-4943 scevents@usc.edu o Student Affairs: (213) 821-8239 vpstuaff@usc.edu o Orientation: (213) 740-7787 orient@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 is 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.
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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: CCD Representative: _____ (Print Name) _____ (Signature) _____ (Date) Academic Unit Representative: _____ (Print Name) _____ (Signature) _____ (Date)

FPM SMPR - Paint Checklist- Annual Blanket Approval 01.31.2025

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.