

SCOPE EVALUATION WORKSHEET FOR RENOVATION PROJECTS

DOCUMENT NUMBER: 00250

APPLICATION: ELEMENTARY, MIDDLE AND HIGH SCHOOL

DATE OF ISSUE:

05-06-15 - **General Revisions**
04-28-15 - General Revisions
06-23-03 - revised to include pre-design phase, revised notes
05-23-03 - revised format
01-29-03 - Issued

NOTES:

- A. The Design Professional is required to submit the Scope Evaluation Worksheet on renovation projects where a Program Verification Phase is scheduled. The Worksheet will be used to prioritize needs and to establish the initial scope of a renovation project.
- B. The Project Coordinator will gather requests from district staff and submit them to the Design Professional for inclusion on the Worksheet. The Design Professional's team will add items based on their own site observations. For more information regarding site observations, see item E below.
- C. Worksheet Instructions:
1. Building Number column: enter "Site", "All", or individual building numbers, as needed.
 2. Requestor column: enter Dept Name (as indicated by the Project Coordinator), or "A/E"
 3. Work Category column: Identify whether the work is needed to address a maintenance need, functional deficiency, code deficiency, aesthetic issue, or the correction of an item cited on the safety report. The category may in some cases affect the item's final priority level.
 - a. Maintenance: examples include the following:
 - 1) Site: fencing replacement, repaving, repair/replacement of walkway canopies, repair of sidewalks, the replacement of landscaping materials.
 - 2) Building Envelope: re-roofing, repainting due to failing paint systems, flashing and roof repairs, tuck pointing, window/door replacement due to deterioration.
 - 3) HVAC: the replacement of insulation, duct cleaning, duct replacement, replacement of obsolete equipment.
 - 4) Plumbing: fixture replacement or repair due to deterioration or other reason not related to code compliance.
 - 5) Electrical Systems, including Lighting: the replacement or repair of panels, wiring, conduit, fixtures, etc. for reasons other than code compliance
 - 6) Low Voltage: the replacement of systems, or repair of panels, wiring, devices, etc., for reasons other than code compliance.
 - 7) Interior Construction, Equipment and Finishes: the replacement of asbestos materials, replacement of deteriorated finishes, replacement or repair of lockers, toilet accessories, instructional aids, cabinets and the like.
 - b. Functional: examples include the following:
 - 1) Site: the addition of parking spaces to resolve a shortage, addition of sidewalks, addition of fencing to resolve a functional problem.
 - 2) Building Envelope: layout modifications needed to adapt a space to current needs.
 - 3) HVAC: addition of exhaust, supply, etc., to adapt a space to current use.
 - 4) Plumbing: addition of fixtures required to adapt a space to its current use.
 - 5) Electrical Systems, including Lighting: the addition of fixtures or devices required to adapt space to current use, such as copier outlets, computer circuits and the like.

Functional (continued):

- 6) Low Voltage: the addition of devices required to adapt to current use, such as data outlets, heat detectors, motion detectors.
 - 7) Interior Construction, Equipment and Finishes: the addition of materials required to adapt the space for the current use, such as interior doors, carpeting, addition of equipment and instructional aids.
- c. Code: examples include the following:
- 1) Site: the addition of handicapped parking, ramps, handrails.
 - 2) Building Envelope: the addition of windows/doors required for exiting, upgrades for accessibility.
 - 3) HVAC: upgrades required to meet current codes.
 - 4) Plumbing: replacement of fixtures as necessary to meet current codes, including accessibility code.
 - 5) Electrical, including Lighting: upgrades to panels, wiring, conduit, fixtures, to meet current codes.
 - 6) Low Voltage: upgrades to panels, wiring, conduit, devices, etc., to meet current codes.
 - 7) Interior Construction, Equipment and Finishes: upgrades to flooring, ceilings, stairs, partitions, doors/frames to meet current codes.
- d. Safety: examples include the following:
- 1) All categories: the correction of items specifically listed on the yearly Safety Report or cited by the District Safety Office during the Program Verification phase, excluding items which are categorized as code deficiencies.
- e. Aesthetics: examples include the following:
- 1) Site: the addition of landscaping, irrigation, decorative fencing to replace chain link fencing, and the like.
 - 2) Building Envelope: repainting, for reasons other than the correction of water intrusion or other issues resulting from coating failure.
 - 3) Interior Construction, Equipment and Finishes: repainting for reasons other than paint failure, replacement of flooring and other finishes for reasons other than deterioration or code compliance.
4. For preliminary review by the Project Coordinator, list the estimated cost for every item in the High Priority column, except for items that may conflict with each other (example: replacement of casework vs repair of casework). In the case of conflicting scope items, establish which item is higher priority and show the conflicting item in the Not Recommended column, so that the cost is not duplicated.
 5. In some cases, a choice must be made between a campus-wide repair and a more limited repair (example: the extent of re-roofing). Discuss with the Project Coordinator the extent of the work to be shown as high priority vs lower priority.
 6. Where the total cost of the high priority column exceeds the budget, a stakeholder meeting will be scheduled by the Owner to adjust the priorities. The end result will be a list of high priority items that are affordable within the budget, and a list of medium priority items that may be readily added to the project scope should the budget allow.
 7. Include appropriate mark-up on the total of each column, so that the bottom line represents the **total** estimated construction cost.
- D. After the initial project scope is established by approval of the final Worksheet, future cost estimates are to be provided in the Owner's standard 16-division format. The Worksheet will serve to document the initial scope decisions and will serve as a guide for future plan reviews. It also serves to establish the medium priority work that may be added into the scope as the budget allows.

E. Design Professional Site Observation:

Scope Evaluation: All observable conditions which affect the work must be accounted for in the Scope Evaluation and on subsequent document submittals, resulting in clear, quantified and biddable documents.

1. Examples of observable conditions include items located underneath temporary and portable buildings, underneath raised decks, inside of manholes and vaults, inside of locked rooms, inside of locked panels, above accessible ceilings, behind or above existing ductwork, inside of cabinets, and the like.
2. Examples of conditions that are not observable are conditions located below ground, above inaccessible ceilings, and inside of walls, to the extent that such conditions can't be inferred from visible evidence.

ATTACHMENTS:

Scope Evaluation Worksheet