



# CALIFORNIA STATE UNIVERSITY, LONG BEACH

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| Subject: <b>Self Help Procedures</b>          |                                   |
| Department: <b>Facilities Management</b>      | Reference No.:                    |
| Division: <b>Administration &amp; Finance</b> | Issue Date: <b>July 2003</b>      |
| References: <b>NA</b>                         | Revision Date: <b>August 2005</b> |
| Web Links: <b>NA</b>                          | Expiration Date: <b>NA</b>        |

## Purpose

The purpose of the Self-Help procedure is to assist departments in performing minor facility modifications through the use of their qualified faculty or technical staff. This can be accomplished by securing Physical Planning and Facilities Management's review and approval **prior** to the commencement of work.

Projects undertaken through these procedures are required to meet the same building and safety codes and standards required for all other campus projects. The process is analogous to plan check, building permit, and inspection procedures followed by many municipal governments.

The Self-Help process is one of three methods available to departments to accomplish approved facility modifications. The other two methods are the chargeback process through Facilities Management or contracts with outside contractors bid through Physical Planning. Under limited circumstances, it is possible to combine these methods.

Departments are cautioned that all facility modifications are costly. Lower-cost modification alternatives that do not meet code requirements, have long-term cost implications, or are detrimental to campus appearance, will not be approved.

## Exclusions from the Self-Help Policy

The following work is specifically excluded from this policy:

1. Connections or tie-ins of any work into building utility systems including, but not limited to, electrical, plumbing and mechanical systems.
2. Penetrations of exterior walls or roofs.
3. Change door locks or code required door hardware.
4. College or Department contracts directly with contractors or subcontractors for modifications or portions thereof.
5. Deviations from approved plans and specifications.

## Self-Help Procedures

1. Define project nature and scope using a standard work order form for the project. This may be obtained through the PPFM website - <http://ppfmapps.ppfm.csulb.edu> - or by contacting the Customer Service Center at extension 5-4357. Attach drawings as needed to support the project description. Clearly state on the work order that this is a Self-Help project. Include the names of the individual(s) who will work on this project and their qualifications to perform the work.
2. Submit the Work Order Form and attachments electronically to the Customer Service Center. The Customer Service Center will log in the Work Order and route it to the appropriate department in PPFM for review and approval.



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3. The requesting department will be notified if the project concept and Self-Help request are approved. If only the project concept is approved, the department may choose to have the work performed by Facilities Management personnel, an outside contractor, or cancel the work.
4. If both the concept and Self-Help request are approved, the department will be required to develop and submit to Physical Planning for approval complete detailed plans and specifications, including a complete list of materials and parts (manufacturer and part number) to be used on the project. Additionally, the department must submit a schedule for the project including estimated start, inspection, and completion dates. If there are any schedule changes, Construction Management must be informed in writing at least one working day prior to the scheduled inspection.
5. The plan, specification and material/parts submittal will be reviewed by Physical Planning. -Physical Planning will either approve the plans or return them to the requesting department for correction or completion.
6. The requesting department will be notified in writing of the approval of the project plans and parts submittal. **Under no circumstances may a department begin construction without prior written approval.** At this time, the department will be notified of the steps of the project that will require inspection. All communications between the requesting department and Physical Planning must be in writing (email is acceptable). Verbal instructions will not be accepted.
7. The requesting department should order materials for Self-Help projects only after all required approvals are in hand. Materials may be ordered through the Facilities Management\_warehouse or through Purchasing. Only the exact materials listed on the approved material list may be ordered and used on the project. All substitutions must be approved in writing by Physical Planning and Facilities Management.
8. After all required approvals and approved materials are in hand, the department may proceed with the project.
9. Construction Management will inspect the project as required. Work or materials found to be unacceptable must be corrected prior to work proceeding on the project. If there are any schedule changes, Construction Management must be informed in writing at least one working day prior to the scheduled inspection.
10. Construction Management will do a final inspection prior to completion of the job. Departments will be notified in writing about the outcome of this inspection, including any items which need to be corrected or completed. It is the responsibility of the department to correct or complete these items in a timely manner. Under some circumstances, use of the area may be restricted until completion of listed items.

### Self-Help Project Detailed Responsibilities and Procedures

#### *Department's Responsibilities*

1. The requesting department is responsible for developing plans and specifications. These plans must show all work covered by the requested modification including demolition, cross sections, wall details, electrical wiring, lighting plans, plumbing and mechanical details, etc. Incomplete plans will be returned for clarification.

Departments are encouraged to have the project concept approved by the Associate Vice President for Physical Planning and Facilities Management **prior to** the development of their detailed plans. This is done by submitting a work order to Customer Service in Facilities Management.

Departments need to clearly indicate on the form that the project is a Self-Help project. Approval of the project concept does not by itself constitute final approval for a Self-Help project. Departments wishing to see examples of required plans and specifications should visit the Physical Planning office located next door to the Facilities Management/Safety and Risk Management Building on Palo Verde Avenue.

2. The requesting department must demonstrate in writing that its employees have the skills, ability, and knowledge necessary to satisfactorily perform the required work.



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3. To ensure that all materials used in the modification conform with the preceding requirements, departments must either purchase materials from Facilities Management's Warehouse or, for materials purchased off campus, obtain approval from Facilities Management and/or Physical Planning for each individual type of material. The materials list must be submitted with the plans and must include manufacturer, part number, and description.
4. The requesting department must coordinate with Physical Planning all phases of their project, especially those areas identified as requiring inspections by Construction Management and work performed by Facilities Management employees (i.e. utility connection). Departments will be notified what construction items require inspection. In general, an inspection is required before any work is covered up. The construction documents submitted to Construction Management must include complete construction schedules.
5. The requesting department assumes fully responsibility, fiscal and otherwise, for the satisfactory completion of the project. Under various circumstances, departments will be billed for the cost to complete uncompleted projects or for corrections for code compliance or substandard workmanship.
6. Under various circumstances, departments may be required to start and complete projects within specific time frames. Failure to meet these time frames may require completion by Facilities Management and charges to departments for the incurred cost.
7. Failure of departments to meet these requirements may require their exclusion from future Self-Help projects.

### **Physical Planning and Facilities Management (PPFM) Responsibilities**

1. PPFM will review all requests for facility modifications and, after consultation with the parties involved, determine the appropriate course of action.
2. PPFM will review the completed detailed plans and specifications and suggest changes as required.
3. PPFM will be responsible for the inspection of facility modifications as required. These services will be charged to departments at the normal chargeback rates.
4. When possible, Physical Planning will provide planning assistance to departments to ensure the proper design of the facility modifications. However, these services will be limited. If more extensive assistance is required, the department will have the option of having these services provided by private, licensed professional engineers and/or architects or by contracting the work from Physical Planning.

### **Departmental Costs**

Requesting departments will be responsible for the full cost of these modifications. These costs include the following:

1. Labor costs
2. Materials costs
3. Plan and specification development if not done by the requesting department
4. Costs for the following:
  - Plan check cost – Campus Building Official review (hourly rate based on time expended on review) plus external plan check agency in accordance with CSU master agreement - reviews for code compliance; costs vary depending on the scope of the job and involvement; required for all projects that exceed \$25,000
  - Inspection costs – based on actual time required.
  - Standard chargeback costs for utility hook up and other required services.



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## Questions

Questions concerning the Self-Help process should be directed to the Office of Physical Planning and Facilities Management (ext. 5-4131).

Questions pertaining to specific Self-Help work orders should be directed to the Customer Service Center (ext. 5-4357).

**FORMS:**      **Access Request Form for Web Work Request/Inquiry**