|  |  |
| --- | --- |
| **OFPC Project Number:** | *XXX-XXX* |
| **Project Title:** | *Enter Project Title as it will appear in the CIP* |
| **Institution:** | *Enter Name of Institution* |
| **Version Number:** | *001* |
| **Revision Date:** | *Month Day, Year* |

**Section I – *Owner’s Project Requirements* Approval**

* 1. The Office of Facilities Planning and Construction (OFPC) and *Institution Name* are in agreement that the Owner’s Project Requirements (OPR) listed herein adequately identify, describe and document the needs of the project.
	2. Approval of the *OPR* indicates an understanding of the purpose and content described in this document.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| OFPC Project Manager  |  |  |  |  |  |
| *Print Name* | *Signature* | *Date* |
| OFPC Senior Project Manager  |  |  |  |
| *Print Name* | *Signature* | *Date* |
| OFPC Regional Program Manager  |  |  |  |
| *Print Name* | *Signature* | *Date* |
| User’sExecutive |  |  |  |
| *Print Name* | *Signature* | *Date* |
| Institution’s Executive |  |  |  |
| *Print Name* | *Signature* | *Date* |

* 1. Executive Summary

The Owner’s Project Requirements (OPR) documents the users’ needs and requirements for a building project. This document continues to build upon the Statement of Need and other supporting information. The information gathered in the OPR Workshops held from *Month Day, Year* through *Month Day, Year* will be used to generate and confirm the Facility Program and Design documents.

In general, the information gathered at the OPR sessions was agreed to by all stakeholders. This indicates consistency in the needs and requirements for this project. However, there were *No.* items that were categorized as “No-consensus,” as follows:

1. *No-consensus*
2. No-consensus

Additional information about these no-consensus items can be found in the Appendix. These no-consensus items will be discussed further internally with *Enter Parties* with direction to be given during the forthcoming Facility Program develop meetings.

The needs and requirements documented in this OPR clearly indicate that major project stakeholders are at consensus with the direction and requirements for this project with only two items listed above to be resolved as the project moves forward on its timeline. Therefore, it is the recommendation of OFPC to proceed with the Pre-Design Phase, which includes the Basis of Design and the Facility Program using this OPR as a metric to compare and contrast against.

* 1. **OPR Change Control Strategy** – The OPR will be utilized as a “living document” throughout the project’s design and construction. If changes to the OPR are necessary, the following *Change Approval Process* and *OPR Version History* below will help to ensure appropriate deliberation and documentation.
	2. **OPR Change Approval Process** - Any changes to the OPR must be reviewed and signed off through the process indicated below, starting with the Project Manager. (CPFM = Campus Planning and Facilities Management)

|  |  |  |
| --- | --- | --- |
| **Level of Authority** | **Sign-off Date** | **Stakeholder Groups** |
| **OFPC** | **User Officers** | **Institution Facilities Officers** |
| **Senior Executive** |  |  |  |  |
| **Executive** |  |  |  |  |
| **Executive** |  |  |  |  |
| **Senior Project Manager** |  |  |  |  |
| **Project Manager** |  |  |  |  |

* 1. OPR Version History - All changes and versions are to be documented using this chart. “Date Approved” is date of final approval via OPR Change Approval Process, above.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Change No.** | **Original****OPR Requirement** | **New****OPR Requirement** | **Reason****for Change** | **Date Approved** |
| 001 |  |  |  | mm/dd/yyyy |
| 002 |  |  |  | mm/dd/yyyy |
| 003 |  |  |  | mm/dd/yyyy |
| 004 |  |  |  | mm/dd/yyyy |
| 005 |  |  |  | mm/dd/yyyy |

# Section II – Introduction - This section briefly describes the mission and vision of the Institution, and how the project and the *Owner’s Project Requirements* document will ensure success.

2.1 The “Owner’s Project Requirements” (OPR) report documents the needs and functional requirements of a project and the expectations of how the finished building will be used and operated. While the planning process will consider many alternatives, the OPR goal is the development of a specific project plan that will be carried out in the future. The OPR process assumes that:

* the Statement of Need and project objectives are identified in advance of the OPR development.
* the project scope definition, Total Project Cost (TPC), appropriate codes and standards, and overall schedule duration for the project are established as part of the OPR development process prior to submitting a project to the Board of Regents (BOR) for approval and inclusion in the CIP.

In this regard, the OPR is intended to be an extension of the Project Planning Form which U.T. System and the Institutions have historically used for the project submittal during the BOR approval process.

*Additional* *Content…*

2.2 **Mission of the Institution**

2.3 **Mission of the User**

# Section III – General Project Information - This section briefly describes the approach the project will use to address the academic/business/health problem, including assumptions and limitations to the project.

* 1. *Statement of Need*
	2. *Project description*
	3. *Historical significance (e.g., Archeologically or historically significant site? Does project scope include alteration, renovation, or demolition of a building 50 years or older that has not been designated as a historic landmark?)*
	4. *Site selection (e.g., identification of possible site(s) for the facility along with factors influencing their selection; including ownership, existing easements and other title issues, adjacencies, accessibility to utility connections, and similar information). The site ultimately selected for the project must be subjected to a Category 1A land title survey submitted to the UT System Real Estate Office for review and approval, in addition to boundary survey, topographic survey, and other site information needed by the project team.*

**Section IV - Investment Metrics** - This section briefly lists the metrics provided by the Institution to determine if the completed project is a good investment decision (i.e., a success). This information is required as part of the Board of Regents’ Design Development Approval process. *Metrics may include:*

* 1. *Utilization of hospital beds*
	2. *Number of research grants*
	3. *Classroom utilization*
	4. *Utilization of parking garage spaces*
	5. *Efficiency of office space*

**Section V – Capital Expenditures** - This section lists the capital expenditure information required by the UT System Office of Business Affairs in order for a project to be submitted and approved by the Board of Regents in the Capital Improvement Program (CIP). Expenditure information shall include:

* 1. **Funding Sources**
	2. **Total Project Cost** **(TPC)**
	3. **Projected Expenditure Timeline**, including how much of the Total Project Cost (TPC) will be spent in each fiscal year per funding source, following its addition to the CIP. All fiscal years must sum to the TPC.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Funding** **Source** | **FY 2011** | **FY 2012** | **FY 2013** | **FY 2014** | **FY 2015** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

* Unless there are unusual circumstances, funding sources shall be spent in the following priority order: PUF Debt, TRB Debt, RFS Debt, and then Institutional Funds.
* If/when a Project returns to the BOR for additional approvals, projected expenditure timeline must be updated.
	1. **Pro Forma** - To be used for projects that are fully or partially self-supporting with forecasts that match the length of the debt (e.g., 20 years, 30 years, etc.)
* Forecast all operating revenue and expenses associated with the project.
	+ *Content Area*
* Arrive at a “net income” for the Project in each forecasted year.
	+ *Content Area*
* Forecast debt service on the Project using approved debt assumptions.
	+ *Content Area*
* Divide “net income” by debt service in each forecasted year.
	+ *Content Area*
	1. **Updated Six Year Forecast -** To be used for projects that are not self-supporting.
* Add the new Project and its incremental debt into the Future Debt tab.
	+ *Content Area*
* Build in incremental revenues and expenses associated with the project into the Statement of Revenues, Expenses, and Changes in Net Assets (SRECNA).
	+ *Content Area*
* Estimate all capital costs and forecast all operating expenses associated with the project.
	+ *Content Area*
	1. **Budget Requirements**
* *Content Area*

**Section VI - Codes and Regulations -**- This section briefly lists the federal, state and local codes that constrain/guide the project must comply with.

* 1. Owner’s Design Guidelines
	2. Institution’s Design and Construction Standards
	3. International Building Code *(refer to Owner’s Design Guidelines for which edition applies)*
	4. International Mechanical Code *(refer to Owner’s Design Guidelines for which edition applies)*
	5. International Plumbing Code *(refer to Owner’s Design Guidelines for which edition applies)*
	6. National Electrical Code *(refer to Owner’s Design Guidelines for which edition applies)*
	7. National Fire Protection Association (NFPA) 101 Life Safety Code *(refer to Owner’s Design Guidelines for which edition applies)*
	8. ASHRAE 90.1-2004
	9. ASHRAE 62.1-2004
	10. International Energy Conservation Code-2004
	11. Texas Accessibility Standards (TAS)
	12. For new elevators: ASME 17.1 codes for elevators and escalators (2007 edition)
	13. International Fire Code (coordination with City of Austin Fire Department) *(refer to Owner’s Design Guidelines for which edition applies)*
	14. SECO submittal
	15. Institution’s Stormwater Management Plan

**Section VII - Preliminary Project Milestone Dates**

* Institution Approves Facility Program *Month Day, Year*
* Board of Regents Approval of Design Development Documents *Month Day, Year*
* Texas Higher Education Coordinating Board Approval *Month Day, Year*
* OFPC Issues Notice to Proceed for Construction *Month Day, Year*
* OFPC Issues Certificate of Substantial Completion *Month Day, Year*
* User Achieves Operational Occupancy *Month Day, Year*

# Section VIII – Requirements for Project Success – *Refer to the Appendix for the workshop processes used to generate the requirements. Refer to the Appendix for Discussion Notes regarding the following requirement categories.*

Requirements were identified from all participating stakeholders in response to open ended questions. After each workshop the responses were sorted, grouped and labeled into categories, which represented requirements relating to the same general topic or area of interest.

**Requirement Categories**

1. **Community**
2. **Institution**
3. **Maintenance & Operations**
4. **Occupants / User**

**8.1 Community Requirements** *- This section briefly describes how the facility will interact with the neighboring community during construction and operation.*

# *1. Aesthetics (Interior, Exterior Design, & Landscaping)*

# *2. Audio / Visual*

# *3. Codes, Accessibility, and Energy Efficiency*

# *4. Commissioning*

# *5. Communication / Information Technology*

# *6. Constructability*

# *7. Energy Efficiency*

# *8. Environmental Health and Safety*

# *9. Environmental & Sustainability*

# *10. Equipment & Systems*

# *11. Fire & Life Safety*

# *12. Indoor Environment Quality*

# *13. Operations and Maintenance*

# *14. Parking, Transportation, & Accessibility*

# *15. Restrictions and Limitations*

# *16. Security*

# *17. Structural, Vibration, & Seismic*

# *18. Utilities*

# 8.2 Institution Requirements *- This section briefly describes the primary purpose, program and use of the project for the Institution. It may also describe future expansion needs, flexibility, quality of materials, construction, and operation costs.*

# *1. Aesthetics (Interior, Exterior Design, & Landscaping)*

# *2. Audio / Visual*

# *3. Codes, Accessibility, and Energy Efficiency*

# *4. Commissioning*

# *5. Communication / Information Technology*

# *6. Constructability*

# *7. Energy Efficiency*

# *8. Environmental Health and Safety*

# *9. Environmental & Sustainability (also refer to UT System policy UTS169 (Sustainability Practices)).*

# *10. Equipment & Systems*

# *11. Fire & Life Safety*

# *12. Indoor Environment Quality*

# *13. Operations and Maintenance*

# *14. Parking, Transportation, & Accessibility*

# *15. Restrictions and Limitations*

# *16. Security*

# *17. Structural, Vibration, & Seismic*

# *18. Utilities, including evaluating existing easements and the need for obtaining new easements for utility connections for each of the potential site(s) under consideration for the project*

# 8.3 Maintenance & Operation Requirements *- This section briefly describes the primary maintenance requirements for operation and maintenance staff assigned to the completed facility. It may also describe future expansion needs, flexibility, quality of materials, construction, and operation costs.*

# *1. Aesthetics (Interior, Exterior Design, & Landscaping)*

# *2. Audio / Visual*

# *3. Codes, Accessibility, and Energy Efficiency*

# *4. Commissioning*

# *5. Communication / Information Technology*

# *6. Constructability*

# *7. Energy Efficiency*

# *8. Environmental Health and Safety*

# *9. Environmental & Sustainability*

# *10. Equipment & Systems*

# *11. Fire & Life Safety*

# *12. Indoor Environment Quality*

# *13. Operations and Maintenance*

# *14. Parking, Transportation, & Accessibility*

# *15. Restrictions and Limitations*

# *16. Security*

# *17. Structural, Vibration, & Seismic*

# *18. Utilities*

# 8.4 Occupant / User Requirements *- This section briefly describes the primary purpose, program and use of the project for the users of the completed facility. It may also describe future expansion needs, flexibility, quality of materials, construction, and operation costs.*

# *1. Aesthetics (Interior, Exterior Design, & Landscaping)*

# *2. Audio / Visual*

# *3. Codes, Accessibility, and Energy Efficiency*

# *4. Commissioning*

# *5. Communication / Information Technology*

# *6. Constructability*

# *7. Energy Efficiency*

# *8. Environmental Health and Safety*

# *9. Environmental & Sustainability*

# *10. Equipment & Systems*

# *11. Fire & Life Safety*

# *12. Indoor Environment Quality*

# *13. Operations and Maintenance*

# *14. Parking, Transportation, & Accessibility*

# *15. Restrictions and Limitations*

# *16. Security*

# *17. Structural, Vibration, & Seismic*

# *18. Utilities*

**APPENDIX** - This section includes attachments documenting theOPR Workshop and everyone’s input, including a summary of the questions asked, requirements provided, comments made, rankings, and workshop other workshop notes.

*A.1 Workshop Agenda*

*A.2 Attendees*

*A.3 Project Directory*

*A.4 Flip Charts and Notes*

*A.5 OPR Feedback*