The Annual Collaboration Meeting is an event connecting University partners (Purchasing, UAO, EHS, CPF Business Office, and INLOCC) to Architectural and Interior Design consultants and Furniture/Furnishings/ Finishes Vendors for the purpose of information sharing and dialogue. This document contains important information shared during the event, to include a summary of questions asked (either during the event or as follow up) and response to those questions.

IU CONTACT INFORMATION

Purchasing
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Capital Planning & Facilities Business Office
https://www.indiana.edu/~purchase/
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Insurance Loss, Control & Claims (INLOCC)
https://inlocc.iu.edu/
Larry Stephens stephenl@iu.edu

Other Helpful Links…
University Architect’s Office, Request for Service
https://facility.rfs.indiana./rfs.cfm
Space Information
https://www.indiana.edu/~spaceinf/
GENERAL INFORMATION – presented by UAO

BASIC INFORMATION SHARED...

FURNITURE
- **Definition**: Movable articles such as tables, chairs, desks, or cabinets, required for use in an office, education, or living environment.
- **Examples Include (but are not limited to)**: desks, tables, sofas/loveseats, chairs, bookcases, file cabinets, storage cabinets, carts, lecterns, or tablet arm chairs.

FURNISHINGS
- **Definition**: Fittings, apparatus, necessary accessories for use in an office, education, or living environment.
- **Examples Include (but are not limited to)**: lamps, window treatment (ie. draperies), ergonomic supportive items, coat racks and hooks, clocks, literature displays, recycling and waste containers, whiteboards and corkboards.

FINISHES
- **Definition**: Any applied or installed material that provides functional support and/or aesthetic value to a facility interior.
- **Examples Include (but are not limited to)**: floorcoverings (to include area rugs), wallcovering, window treatment (ie. shades), window film, casework or millwork, and signage.

INTERNAL PROJECTS
- These projects are typically designed and specified with in-house Interior Designers, Architects, and Engineers. Construction documents are produced by IU staff. These projects most often include building standard specifications.

CAPITAL PROJECTS
- Capital projects will always be managed by an IU Team Leader with design specifications, construction documents and/or FF&E documents produced by a consulting UAO contracted Architectural, Engineering, and/or Interior Design firm.

IUPUI Rotary Building, Indianapolis
OVERVIEW OF PROJECT PROCESS – presented by UAO

- **General Statements: Contact and Communication**
  - Vendors and Consultants work with UAO Interior Design and end user representatives as directed per project, by UAO
  - Primary contact is with the UAO Interior Designer and all correspondence is to include UAO Interior Designer, as directed per project, by UAO
  - Project number to appear on ALL documentation, including email (ie. Email subject lines)
  - Requests for AutoCAD files
    - **Internal Projects**
      - Floor plans should come from the UAO Space Information Department and may be requested through the following website: [http://www.iu.edu/~vpcpf/consultant-contractor/floor-plans.shtml](http://www.iu.edu/~vpcpf/consultant-contractor/floor-plans.shtml) or through the UAO Interior Designer (remember to reference project #)
    - **Capital Projects**
      - Floor plans should come from the Architectural/ Engineering consultant leading the project

- **General Statements: Design and Specification**
  - Project direction for design and specifications is through UAO Interior Design. Approvals for furniture and finish specifications are with UAO Interior Design.
  - Presentation of furniture and finish specifications to end users follows approvals by UAO Interior Design
  - Quote and Drawing format and who receives final documents
    - **Internal Projects**
      - Includes:
        1) Quote
        2) AutoCAD floor plan
        3) Model view
      - UAO will initiate requisition and Purchasing will generate the purchase order/procure after it routes through IU internal funding approval process
    - **Capital Projects**
      - Vendors and Consultants will work with UAO Interior Design for specifications and design along with IU Purchasing for appropriate procurement and supporting documentation

- **General Statements: Project Close-Out**
  - **Internal Projects**
    - Building representative or end user contact will sign off on delivery/installation
  - **Capital Projects**
    - Follow up from Installations
      - Punch List and Maintenance Information
      - Post-Occupancy Follow-Up
  - **Deliverables**
    - Final Furniture Plan in AutoCAD
      - Vendors to supply to consultants
      - Consultants will provide UAO Interior Design with one, consolidated plan
      - Finish Binder
        - UPDATED Information Templates are available through UAO Interior Design (soon to be available online)
        - Includes doors, toilet partitions, casework, window sills, window treatments
OVERVIEW OF PROJECT INFORMATION – presented by UAO

- **IU Space Guidelines**
  - **Modular/Demountable Walls**
    - Space Guidelines established by IU Space Planning and endorsed by the VP for Capital Planning & Facilities and the Board of Trustees
    - Contractor responsibility when part of a capital project
  - "Levels" of furniture types expected to align with space types
    - Work with the UAO Interior Design representative to determine the appropriate level types
    - Level types include variation in furniture footprint, finishes and components
  - **ADA/ Accessibility and Code Compliance**
    - As a reminder, we expect all design to be compliant with current codes and guidelines

- **Product Requirements**
  - Overseas products are NOT preferred
  - Wall mounting – prohibited (special exceptions by UAO approval)
  - NEW: No work surface attached overhead storage units
  - Custom products and "Specials" – NOT preferred but are recognized as necessary in some applications

- **Product Recommendations**
  - Sustainability Practices for Furniture and Finishes (LEED)
  - Durable and Safe
  - Fiscally responsible
  - Ergonomically Appropriate

- **Ergonomics**
  - UAO Interior Design, Purchasing, and Environmental Health & Safety work together to determine the best products for IU faculty and staff as needed.
    - Internal Process in place for working with faculty and staff requiring assistance with ergonomic issues
    - Contracts are in place for products that are acceptable standards
  - Environmental Health & Safety covers all IU campuses
    - Chris Mahalek
    - Lisa Gooch

Education & Arts Building, South Bend
• General Information
  o 6 ergonomists
  o Conduct approx. 600 workstation evaluations per year.
  o Ergonomic product display rooms on IUPUI and IU Bloomington campuses.
  o Standardized on 10 chairs
    ■ Body Built – E2506, E2507
    ■ Haworth – Zody
    ■ Hon – Ignition
    ■ Humanscale – World
    ■ Sit-on-it – Focus Amplify
    ■ Steelcase – Leap, Amia, Reply
    ■ Knoll – RPM
  o Chair selection
    ■ During design phase of large projects
  o Furniture installation on large projects
    ■ Collaboration to welcome users to workstation
  o Communications with EHS
    ■ Contact EHS with any ergonomic related questions
    ■ Direct users to contact EHS and UAO for out-of-the ordinary product requests
  o EHS will evaluate and recommend fully adjustable chairs for use on all campuses.
  o Each August EHS will re-evaluate existing chairs and new chairs to determine which chairs will be recommended for use on all campuses.
  o Vendors should contact EHS during June or July with potential chairs they would like evaluated.
  o EHS will request a demo chair to evaluate and determine if it will be in the top 10 list of chairs.

REQUIRED DOCUMENTATION FROM VENDORS FOR ALL COMPETITIVE BIDS – presented by Purchasing

• Sustainability Questionnaire
• Supplier Diversity Information Form
• Non-Collusive Certificate
• Insurance Requirements
• Sample Furniture Specification Spreadsheet
• Warranty Information & Cleaning Instructions

Please reference the Purchasing website for additional information or contact the Purchasing department.
http://www.indiana.edu/~purchase/

IU North West Cedar Hall, Gary
• Insurance requirements can be found at:
  o http://inlocc.iu.edu/
  o Procedures: Vendor Certificates

• Guidelines:
  o You must have the required insurance before beginning work.
  o You (your insurance agent) must provide us with a certificate of insurance that shows you have the required coverages.
  o The certificate should be sent to the Purchasing Department.

• We regularly see issues with the certificate holder.
  o This is not the name of a department, it’s not a campus designation.
  o The certificate holder is: The Trustees of Indiana University
  o The address should be the same address used for the PO. Please include the PO number in the Description of Operations.

• Three coverages are required:
  o General Liability
  o Auto Liability
  o Workers Compensation

• Please reference information on the indicated web page concerning these coverages.
  o Give the URL to your agent and tell them to go there to determine what we require.

  o The problems we most often see seem to arise because...
    ▪ You are not providing the necessary information to your agent, or
    ▪ Your agent is not doing their job to see what we require.

  o Your contract will include language something like:
    Vendor shall indemnify and save harmless IU from any and all losses, costs, damages, liability and expenses, including reasonable attorney fees, arising out of or in conjunction with claims or suits for damage to any property and/or injury to persons, including Vendor’s employees, including death, alleged or claimed to have been caused by or through the performance of the contract or operations incidental to the contract by the Vendor, its agents or employees, whether through negligence or willful act; and Vendor shall, at the request of IU, undertake to investigate and defend any and all such claims or suits against IU.

• Workers Compensation
  o We require Indiana State Form 41321 (Certificate of Compliance Worker’s Compensation and Occupational Diseases) to be filed with us before any work is done. Merely showing you have work comp coverage on the COI is not proof that you are covered in Indiana.

  o If you are a small shop and the state does not require you to have work comp insurance, then you must file a Certificate of Exception with us. This can be obtained from the state.

  o See the links on our web page.
CAPITAL PROJECTS – A/E CONTRACT OVERVIEW – presented by CPF Business Office

- Reference the following site: [http://www.iu.edu/~vpcpf/consultant-contractor/contracts.shtml](http://www.iu.edu/~vpcpf/consultant-contractor/contracts.shtml)

- IU Consultant Contract Request Form
  - Type of Contract – Architect / Engineer / Under/Over $500K
  - Project Name
  - I.U. Project #
  - Scope of work

### INDIANA UNIVERSITY

Consultant Contract Request Form

<table>
<thead>
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<th>Type of Contract:</th>
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<tbody>
<tr>
<td>Firm Name:</td>
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<tr>
<td>Consultant of Record:</td>
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<tr>
<td>Address:</td>
<td></td>
</tr>
<tr>
<td>Project Name:</td>
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<td>I.U. Project #:</td>
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<td>Scope of work:</td>
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Attach separate page if more room is needed.
### Indiana University Project Cost Model

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<th>IU PROJECT NUMBER</th>
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#### GROSS SQUARE FEET (GSF):

**PRELIMINARY PROJECT COST ESTIMATE**

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<th>Component Costs (include fixed equipment)</th>
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<td>1</td>
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<td>2</td>
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<tr>
<td>Total Components</td>
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<table>
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<th>Construction Cost Factors</th>
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<td>1. Infringement</td>
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<tr>
<td>2. Complexity</td>
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<td>(Renovation Projects)</td>
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<td>3. Escalation</td>
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<tr>
<td>4. Infection Control</td>
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<td>(Hospital Projects)</td>
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<tr>
<td>5. Design Contingency</td>
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<td>Factors Cost</td>
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#### Probable Construction Costs

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#### Miscellaneous Costs

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<td>2. Asbestos (inc. abatement, monitoring, remediation)</td>
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<tr>
<td>3. General Miscellaneous Costs</td>
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<td>4. Campus Physical Plant Costs</td>
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<td>Total Miscellaneous Costs</td>
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#### Professional Fees

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<td>1. A/E Fee</td>
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<tr>
<td>(includes all design meetings and bi-weekly site inspection meetings through construction completion)</td>
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<tr>
<td>2. Reimbursables</td>
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<td>Total Professional Fees</td>
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#### Schedule

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#### Total Fee

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<tr>
<th>Phase</th>
<th>% of Total Fee</th>
<th>Phase Fee</th>
<th>% Complete</th>
<th>Fee Earned</th>
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<tr>
<td>Schematic Design</td>
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<tr>
<td>Design Development</td>
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<td>0%</td>
<td>0.00</td>
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<tr>
<td>Construction Doc’s</td>
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<td>0%</td>
<td>0.00</td>
</tr>
<tr>
<td>Bidding/Negotiation</td>
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<td>$0</td>
<td>0%</td>
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<tr>
<td>Construction Admin.</td>
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<td>0%</td>
<td>0.00</td>
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<tr>
<td>Project Closeout</td>
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<td>$0</td>
<td>0%</td>
<td>0.00</td>
</tr>
</tbody>
</table>

| Total Fee Earned        | 0.00          |
| Prior Fee Billing       |               |
| Current Fee Total       | 0.00          |

#### Reimbursable Expenses

<table>
<thead>
<tr>
<th>Reimbursable Expenses</th>
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<tbody>
<tr>
<td>1.</td>
<td>$</td>
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<tr>
<td>2.</td>
<td>$</td>
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<tr>
<td>3.</td>
<td>$</td>
</tr>
<tr>
<td>Total Reimbursable Expenses</td>
<td>$0.00</td>
</tr>
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</table>
- Certificate of Insurance
  - Project Name and Project Number must be provided
QUESTION AND ANSWER SESSION

• QUESTION FOR CAPITAL PLANNING & FACILITIES BUSINESS OFFICE:
  - QUESTION: When a project is limited to a study, does a consultant need to include a cost model with their Contact Request Form?
  
  ANSWER: No. It is not required for a study.

• QUESTIONS FOR UAO:
  - QUESTION: Based upon the UAO policy that does not allow wall mounting or work surface attached overhead storage units, is the university going towards freestanding furniture?
  
  ANSWER: No. Only overhead units are being limited, even panel hung, primarily to minimize conflicts with monitor screens and to encourage the trend towards less storage/less paper.

  - QUESTION: Are overheads allowed over credenzas?
  
  ANSWER: In general, design without overhead storage units. Exceptions should be discussed with the UAO designer.

  - QUESTION: When is furniture maintenance information required and how should it be submitted?
  
  ANSWER: Consultants contracted on university projects should submit furniture maintenance information with the deliverables at the end of the project. On any project, finishes that require special maintenance need to be brought to the attention of the UAO for approval prior to specification. If deliverables are not required, maintenance information should be submitted to either the designated department representative, the building manager or the Physical Plant/CFS as determined for that project.

• QUESTIONS FOR UAO & PURCHASING:
  - QUESTION: How can manufacturer representatives support the work of the UAO?
  
  ANSWER: Manufacturer representatives can keep the UAO libraries up to date. There is an open door policy that allows you to stop by to update, however the preference is to call ahead to set up a time. The Bloomington updates can be scheduled, preferably on Thursdays, through Molly and Christine. IUPUI updates can be scheduled through Cathy. If you stop by to update, please leave your card and the date you were in on the library table. Due to limited library space, new or additional binders or books need to be approved before adding to the library. Price increases should be emailed to Pam in advance so that this information is available for projects that are scheduled to bid.

  UAO will be less likely to look at product that is represented in the library, if the vendor/supplier is not up to date with Purchasing. You must maintain current records and contact with the Purchasing Department.
- **QUESTION:** Is drop shipping of some items allowed?

**ANSWER:** Due to no central receiving docks on our campuses, quotes should always include delivery and installation unless approval for drop shipping has been authorized by the campus facilities staff or a building manager who will coordinate the receipt of the item. Note: On East, Southeast and Columbus campuses, drop shipping of small quantity orders is the only exception.

- **QUESTIONS FOR UAO & EHS:**

  - **QUESTION:** If an end user requests that a keyboard be installed in a different location than the plan shows should the vendor install it where the end user wants it?

  **ANSWER:** No. If a keyboard is not installed in an approved location, the vendor will be asked to return to re-install it. It is better to wait, get the change of location approved and come back to install.

  - **QUESTION:** What is the university’s position on height adjustable worksurfaces?

  **ANSWER:** Employees are first encouraged to get up from their workstations every 40 minutes to move around. They are also encouraged to consider several other options on display at the EHS offices such as surface mounted monitor arms and keyboard trays that allow work to be done while standing. Funding for any of these items requires departmental approval. New workstations should be designed with enough flexibility to accommodate adjustable height worksurfaces if needed.

IU Bloomington and IUPUI Classrooms