

Subject: ***Request for Proposal***

Project: **Milwaukee County SRCCY – Preliminary Facility Design and Feasibility Study**

Project No.: **WS12401**

ATTACHMENT 5

OWNER'S PROJECT REQUIREMENTS (OPR) TEMPLATE



DEPARTMENT OF ADMINISTRATIVE SERVICES

Milwaukee County

Project: Milwaukee County SRCCCY – Preliminary Facility Design and Feasibility Study
Project No.: WS12401
Subject: REQUEST FOR PROPOSALS (R.F.P.)

ATTACHMENT 5

Owner's Project Requirements Document for Milwaukee County

Project Name: _____

Project ID#: _____

Version # _____ as of date: _____

Approved: _____
Name Owner's Representative Date

Name Design Agent's Representative Date

Overview and Instructions

The purpose of this document is to provide clear and concise documentation of the Owner's goals, expectations and requirements for the Project, and shall be utilized throughout the project delivery and commissioning process to provide an informed baseline and focus for design development and for validating the Project energy performance, environmental profile, and alignment with overall values and goals.

The intent of the Owner's Project Requirements Document (OPR) is to detail the functional requirements of a project and the expectations of the building's use and operation as it relates to building and systems design. This template contains the basic recommended components and can be adapted as needed to suit the project, remaining reflective of the intent.

The Owner's Project Requirements Document should ideally be completed before the start of design and furnished to the design team. It will be considered complete after review, approval, and sign-off by the Facility Work Group and SRCCCY Steering Committee.

Updates to the Owner's Project Requirements Document throughout the course of project delivery shall be made by the design team based on decisions and agreements coordinated with and agreed to by the Owner.

The Owner's Project Requirements Document shall be included in the project's documentation file.

Owner's Project Requirements Document for Milwaukee County

Table of Contents

1. Owner and User Requirements
 - Primary Purpose, Program and Use
 - Identification of Owner and Project Team
 - General Size and Scope of the Project
 - Pertinent Project History and Reference Documents
2. Broad Goals
3. Environmental and Sustainability Goals
 - Energy Efficiency Goals
 - General
 - Siting
 - Building Façade
 - Building Fenestration
 - Building Envelope
 - Roof
 - Other
4. Detailed Spatial Program and Indoor Environmental Quality Requirements
 - Intended Use / Space program
 - Occupancy Schedule
 - Accommodations for After-Hours Use
 - Lighting, Temperature, Humidity, Air Quality, Ventilation, Filtration
 - Acoustics
 - Occupant Ability to Adjust System Controls
 - Types of Lighting
 - General Levels of Finishes
5. Equipment and Systems Expectations
 - Space Heating
 - Ventilation
 - Air Conditioning
 - Refrigeration
 - HVAC Controls
 - Domestic Hot Water
 - Lighting Controls
 - Daylighting Controls
 - Emergency Power
 - Power Monitoring and Metering
 - Security and Access Controls
 - Data and Communications Systems
 - Vertical Transportation Systems

- Other
6. Commissioning Requirements
 - Objectives
 - Scope
 - Rigor
 - Objectivity
 7. Building Occupant and O&M Personnel Requirements
 - Facility Operation
 - EMCS
 - Occupant Training and Orientation
 - O&M Staff Training and Orientation
 8. Applicable Codes
 9. OPR Document Version Control Record

ATTACHMENTS

- Exhibit 1 Project Values and Goals
TABLE 1 Space Definitions

1. *Owner and User Requirements*

What is the primary purpose, program and use of this project? (example: office building with data center)

Identification of Owner and Project Team

Describe the general size and scope of the Project.

Describe pertinent project history, and list reference documents.

2. *Broad Goals*

What are the Values and Goals of the Project overall?

(Note on separate attachment – Exhibit 1)

What are the broad goals relative to cultural awareness?

What are the broad goals relative to program needs?

What programmatic elements need to be accommodated?

What are the building space and adjacency requirements driven by program needs? (Reference previous work/documents if a Space Program has already been completed. Include additional attachments as needed to show space program, adjacencies, and circulation patterns.)

What are the broad goals relative to future expansion?

What are the broad goals relative to flexibility?

What are the broad goals relative to building aesthetics (exterior/interior)?

What are the broad goals relative to quality of materials?

What are the broad goals relative to construction costs?

What are the broad goals relative to operational costs?

What are the broad goals relative to life cycle of the equipment?

What standards for space allocation and furniture apply?

Are there any special considerations with regards to safety?

Other broad goals: *(Insert as applicable)*

3. *Environmental and Sustainability Goals*

What are the project goals relative to sustainability and environmental issues? (example: LEED Silver rating)

What are the project goals relative to energy efficiency? (example: Meet EPACT)

What are the project goals and requirements for building siting that will impact energy use?

What are the project goals and requirements for building facade that will impact energy use?

What are the project goals and requirements for building fenestration that will impact energy use?

What are the project goals and requirements for building envelope that will impact energy use?

What are the project goals and requirements for building roof that will impact energy use?

Other: *(Insert as applicable)*

4. Detailed Spatial Program and Indoor Environmental Quality Requirements

Provide an overview of the general intended use for all spaces. Provide detailed information for individual spaces in Table 1 (table may be modified as needed for particular project requirements).

What is the general anticipated occupancy schedule (numbers of occupants and time frames) for the building(s)? Indicate the default occupancy schedule below and for all spaces that have an occupancy schedule that differs from the default, provide this information in Table 1.

What accommodations for after-hours use are required? (example: access control, lighting controls, HVAC controls) Indicate general accommodations required below and for all spaces that have special requirements, provide this information in Table 1.

What are the lighting, temperature, humidity, air quality, ventilation and filtration requirements for all spaces? Indicate the default requirements below and for all spaces that have a requirement that differs from the default, provide this information in Table 1.

Lighting: _____

Daylighting: _____

Temperature: _____

Humidity: _____

Air Quality: _____

Ventilation: _____

Filtration: _____

What are the acoustical requirements for all spaces? Indicate the default acoustical requirements below and for all spaces that have a requirement that differs from the default, provide this information in Table 1.

What is the desired level of occupant ability to adjust systems controls? Indicate the default desired levels below and for all spaces that have a desired level that differs from the default, provide this information in Table 1.

Lighting: _____

Temperature: _____

Humidity: _____

Air Quality: _____

Ventilation: _____

What, if any, specific types of lighting are desired? (example: fluorescent in 2x2 grid, accent lighting, particular lamps)

What are the general level of finishes required by space type?

5. *Equipment and System Expectations*

(Complete for each category as applicable or indicate “none identified” or “N/A”. Add desired features information for other anticipated commissioned systems as applicable)

Indicate desired features for the following system: **Space Heating**

Overall objective and general requirements:

Desired Type: _____

Quality: _____

Preferred Manufacturer: _____

Reliability: _____

Automation: _____

Flexibility: _____

Maintenance Requirements: _____

Efficiency Target: _____

Desired Technologies: _____

Indicate desired features for the following system: **Ventilation**

Overall objective and general requirements:

Desired Type: _____

Quality: _____

Preferred Manufacturer: _____

Reliability: _____

Automation: _____

Flexibility: _____

Maintenance Requirements: _____

Efficiency Target: _____

Desired Technologies: _____

Indicate desired features for the following building system: **Air Conditioning**

Overall objective and general requirements:

Desired Type: _____
Quality: _____
Preferred Manufacturer: _____
Reliability: _____
Automation: _____
Flexibility: _____
Maintenance Requirements: _____
Efficiency Target: _____
Desired Technologies: _____

Indicate desired features for the following building system: **Refrigeration**

Overall objective and general requirements:

Desired Type: _____
Quality: _____
Preferred Manufacturer: _____
Reliability: _____
Automation: _____
Flexibility: _____
Maintenance Requirements: _____
Efficiency Target: _____
Desired Technologies: _____

Indicate desired features for the following building system: **HVAC Controls**

Overall objective and general requirements:

Desired Type: _____
Quality: _____
Preferred Manufacturer: _____
Reliability: _____
Automation: _____

Flexibility: _____
Maintenance Requirements: _____
Efficiency Target: _____
Desired Technologies: _____

Indicate desired features for the following building system: **Domestic Hot Water**

Overall objective and general requirements:

Desired Type: _____

Quality: _____

Preferred Manufacturer: _____

Reliability: _____

Automation: _____

Flexibility: _____

Maintenance Requirements: _____

Efficiency Target: _____

Desired Technologies: _____

Indicate desired features for the following building system: **Lighting Controls**

Overall objective and general requirements:

Desired Type: _____

Quality: _____

Preferred Manufacturer: _____

Reliability: _____

Automation: _____

Flexibility: _____

Maintenance Requirements: _____

Efficiency Target: _____

Desired Technologies: _____

Indicate desired features for the following building system: **Daylighting Controls**

Overall objective and general requirements:

Desired Type: _____

Quality: _____

Preferred Manufacturer: _____

Reliability: _____

Automation: _____

Flexibility: _____

Maintenance Requirements: _____

Efficiency Target: _____

Desired Technologies: _____

Indicate desired features for the following building system: **Emergency Power**

Overall objective and general requirements:

Desired Type: _____

Quality: _____

Preferred Manufacturer: _____

Reliability: _____

Automation: _____

Flexibility: _____

Maintenance Requirements: _____

Efficiency Target: _____

Desired Technologies: _____

Indicate desired features for the following building system: **Power Monitoring & Metering**

Overall objective and general requirements:

Desired Type: _____

Quality: _____

Preferred Manufacturer: _____

Reliability: _____

Automation: _____

Flexibility: _____
Maintenance Requirements: _____
Efficiency Target: _____
Desired Technologies: _____

Indicate desired features for the following building system: **Security and Access Controls** _____

Overall objective and general requirements:

Desired Type: _____

Quality: _____

Preferred Manufacturer: _____

Reliability: _____

Automation: _____

Flexibility: _____

Maintenance Requirements: _____

Efficiency Target: _____

Desired Technologies: _____

Indicate desired features for the following building system: **Data and Communication Systems**

Overall objective and general requirements:

Desired Type: _____

Quality: _____

Preferred Manufacturer: _____

Reliability: _____

Automation: _____

Flexibility: _____

Maintenance Requirements: _____

Efficiency Target: _____

Desired Technologies: _____

Indicate desired features for the following building system: **Vertical Transportation** _____

Overall objective and general requirements:

Desired Type: _____

Quality: _____

Preferred Manufacturer: _____

Reliability: _____

Automation: _____

Flexibility: _____

Maintenance Requirements: _____

Efficiency Target: _____

Desired Technologies: _____

Indicate desired features for the following building system: **Other -** _____

Overall objective and general requirements:

Desired Type: _____

Quality: _____

Preferred Manufacturer: _____

Reliability: _____

Automation: _____

Flexibility: _____

Maintenance Requirements: _____

Efficiency Target: _____

Desired Technologies: _____

6. Commissioning Requirements

Describe the general objectives for Commissioning

What building systems are desired to be commissioned?

What level of rigor shall be applied in commissioning?

How should objectivity be maintained in commissioning?

7. Building Occupant and O&M Personnel Requirements

How will the facility be operated? Who will operate the facility?

Will the facility be connected to an EMCS? If so, what are the interface requirements? (example: monitoring points, control points, scheduling)

What is the desired level of training and orientation for building occupants to understand and use the building systems?

What is the desired level of training and orientation for O&M staff to understand and maintain the building systems?

8. Applicable Codes

List all applicable codes and any special State regulations and County Ordinances that must be complied with in the design, construction and operation of this facility.

Code ID	Name	Applicable version

9. Owner's Project Requirements Version History

The following is a summary of the changes made to the Owner's Project Requirement document throughout Pre-Design, Design, Construction, and Occupancy and Operations. This information is critical to understand and document the trade-offs made and the resulting impact on the project.

Rev. No.	Date	Project Stage/Description of Revisions
1		

