DIRECTIONS AND INFORMATION FOR CONTRACTORS ENGAGED IN ALL FACILITIES MANAGEMENT PROJECTS

CONTACTING THE PLANNING OFFICE:  

District Equipment Liaisons/Planners:  

Contact the FM Call Center (FMCC) to get in touch with the appropriate planner for the building or buildings where construction is taking place.  

– FMCC (612) 624-2900  

Or, you can send an email to the Central Planning office at centplan@umn.edu to identify the planner for your project. Allow one week for a response.  

(Sample information)  

<table>
<thead>
<tr>
<th>Project Name:</th>
<th>Pioneer Hall Renovation and Expansion</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPM Project Manager:</td>
<td>Kevin Ross <a href="mailto:kmr@umn.edu">kmr@umn.edu</a> 612-626-8283</td>
</tr>
<tr>
<td>District Project Coordinator:</td>
<td>John Stoffel <a href="mailto:stof003@umn.edu">stof003@umn.edu</a> 612-290-4992</td>
</tr>
<tr>
<td>District Planner:</td>
<td>Steen Erikson <a href="mailto:erik0046@umn.edu">erik0046@umn.edu</a> 612-624-7378</td>
</tr>
</tbody>
</table>

The University of Minnesota is committed to the policy that all persons shall have equal access to its programs, facilities, and employment without regard to race, color, creed, religion, national origin, sex, age, marital status, disability, public assistance status, veteran status, or sexual orientation.
The equipment data collection process is for gathering information about removed, relocated, and newly installed equipment for the University of Minnesota Facilities Management department’s asset management system. This information is used to develop preventive maintenance programs, budgets, and to monitor lifecycle costs.

Steps to achieve a successful collection of equipment data:

1. The CPM project manager should set up a meeting with the contractor to review the data collection process. The planner from the district should be part of this meeting. Generally, it is better to have this meeting at the front end of the project. This allows the contractor time to gather the information. Much of the data needed is nameplate data that is easier to obtain when the equipment is being installed.

2. At this meeting, the University’s equipment naming and numbering system will be introduced and the project scope will be reviewed.

   In a renovation project, this review will help identify any equipment that is being removed or relocated. The district planner will provide equipment inventory reports that are used to identify the major systems and equipment within a building. New equipment numbers shall start sequentially from existing numbers. Numbers may be re-used when equipment is replaced with similar equipment.

   For new construction projects, equipment numbering can start when the equipment schedule is defined and equipment locations and areas served are identified. Work with the district planner to identify UMN equipment numbers.

3. The A/E shall use the UMN equipment naming and numbering standards for all equipment on projects. Review the naming and numbering with the planner early in the project so the drawings can match the University’s asset management standards. UMN equipment numbers will be assigned by the UMN district planner.

4. The next step is to begin preparing the equipment data forms for each piece of equipment to be entered into the asset management system. The University provides electronic access to the equipment data dorms. Hard copies can be requested from the planner. Forms are located at:
   https://facilities.umn.edu/architect-vendor-resources/equipment-specifications-forms

5. The University understands that a majority of the data collection occurs on site and that the forms will be filled out by hand. It is the contractor’s responsibility to ensure the information on the forms is accurate and legible. It is not necessary or expected for the contractor to enter the information onto the form electronically.
6. When equipment is removed for disposal/recycling, the contractor shall coordinate with the district project coordinator or planner for all renovation and demolition projects. The UMN asset number labels need to tracked so the asset management system can be updated. The UMN equipment label will generally be white lettering on red, either an adhesive sticker or a plastic tag attached with double-stick tape.

7. The equipment data forms must be given to the district project coordinator or planner as they are completed. Copies should also be included under separate cover in the project close-out documentation.

INSTRUCTIONS FOR EQUIPMENT DATA FORM

The U of M equipment data form is easy to follow. If you have any questions regarding the use of these forms, please contact the planner in the district you are working in.

Some data are more important than others. Make, model and serial number along with location information are always required along with information about what the equipment serves and if it’s interlocked with another piece of equipment. For example, supply and return fans are often interlocked, and pumps may alternate. If the installer or the person who is completing the forms doesn’t know what the equipment serves, consult with the architect or engineer so accurate information can be provided. The contractor is expected to make good faith effort to provide as much equipment information as possible.

Exceptions to this include:
- When there is no technical data listed for the equipment, for example when the nameplate is missing (write “MISSING”).
- The mandatory data is not applicable to that equipment type (write “N/A”).
- If gathering data requires significant disassembly of the equipment (write “INACCESSIBLE”).

In each case, the reason for the missing data should be noted on the data form.
Appendix I - Equipment Data Collection

U of M EQUIPMENT DATA FORM for  
Supply / Return Fan  
Data entry completed _______  
Data entry by _______

U of M Equipment Number 110-SUP002  
(To be provided by U of M Planner)  
Above section for University of Minnesota use only

All fields below this line to be completed by knowledgeable equipment supplier, contractor, architect, engineer or FM Maintenance staff and returned to the designated University of MN Project Manager or FM Planner

Type: ___Booster Fan ___Fan Coil ___Return Fan ___Supply/Makeup Air Fan

Architecture Eqpt No: ___AHUS2 ___(from construction drawings)

Manufacturer: Mfr Name ___XETEX ___

Model No: ___XAH-24000-CW-HTP ___Serial No: ___124050617___

Location: Building ___FRONTIER HALL___

Floor: ___01___ Room #: ___104___

Equipment Serves: (Identify building area(s) i.e. floors or rooms, and interlocked equipment)

SERVES HALLWAYS, MAKE UP AIR FOR BLDG EXHAUST, DUAL TEMP COILS

Warranty Information:
Vendor ___MECHANICAL CONTRACTOR___

Warranty Start Date ___AUGUST 2017___ Warranty Expiration Date ___AUGUST 18, 2018___

Vendor Contact: Name ___CONTACT NAME___ Phone ___CONTACT PHONE___

EQUIPMENT SPECIFICATIONS

<table>
<thead>
<tr>
<th>LINE</th>
<th>SPEC. TYPE</th>
<th>DATA</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>UNIT-DIRECT OR BELT?</td>
<td>DIRECT</td>
</tr>
<tr>
<td>2</td>
<td>IF BELT (QTY &amp; SIZES)</td>
<td>N/A</td>
</tr>
<tr>
<td>3</td>
<td>IF AIR FILTER QTY / SIZE</td>
<td>QTY 1x-20 X 24 X 2, 40%</td>
</tr>
<tr>
<td>4</td>
<td>MOTOR HP &gt; 1 HP</td>
<td>QTY 4 - 15 HP</td>
</tr>
<tr>
<td>5</td>
<td>MOTOR NOMINAL EFFICIENCY</td>
<td>94.5%</td>
</tr>
<tr>
<td>6</td>
<td>FAN LUBE, SEALED / GREASE / OIL</td>
<td>SB</td>
</tr>
<tr>
<td>7</td>
<td>MOTOR LUBE SEALED / GREASE / OIL</td>
<td>SB</td>
</tr>
</tbody>
</table>

Form Completed by:  
Name ___NAME___ Phone ___PHONE___  
Company ___COMPANY___ Date ___DATE___

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