

101.101– PLANNING GUIDELINE**PART 1 - INTRODUCTION****1.01 GENERAL**

- A. The following guideline describes the roles and responsibilities of the Planning group.
- B. In 2016, at the direction of BJC leadership the Planning and Design department was merged to more clearly and effectively support project planning and design activities. The Planning and Design groups will maintain close partnership with Strategic Planning and the Construction Group which includes Real Estate to ensure the delivery of the highest quality projects.
- C. Approval Process. Each project needs to have a clear and defined planning & design approval committee structure and understanding of individual roles and responsibilities not limited to unit directors, unit managers, and staff.

PART 2 - GUIDELINE**2.01 ROLES**

- A. Organization. Organization. The Executive Director of Planning and Design is responsible for the Planning Group and Design Group. The Executive Director reports to the Group President over PDC&R. The roles within this group are as follows:
 - 1. Director of Planning. The director is responsible for all planning elements and leadership approvals of planning.
 - 2. System Planners. The system planner is responsible for the day to day evaluation of the planning elements on projects.

2.02 RESPONSIBILITIES

- A. General. The following chart illustrates in general the involvement of the Planning group as it relates to the typical project phases. Primary responsibility means that the group sits first chair as point of contact. Secondary responsibility means that the group sits second chair and is involved to some degree in the activities of that phase.
- B. Project Phases.

1. **Concept Design/Planning Activities.** The Planning Group is primarily responsible for activities during this early phase. The Design Group will offer support as needed to the Planning Group during this phase.
2. **Pre-Design.** This phase involves development of functional programs, space program, and adjacency diagrams to document the scope of the project. This phase will often require assistance from contracted planning and design teams; however, this phase is completed internally by the Planning Group at times prior to consultant engagement.
3. **Schematic Design.** This phase involves testing and fitting the programmatic requirements to a defined space or area; and finalization of plans and regulatory compliance.

	concept design planning activities	PD	SD	DD	CD	BN Precon	CA	PO	operations
Activation Lead Planning	Operational planning								
Facilities Planning									
Design and Engineering									
Construction									
Facility									

	Primary Responsibility
	Secondary Responsibility

PART 3 - DOCUMENTATION

3.01 DELIVERABLES

- A. **General Deliverables.** General deliverable requirements are listed in Exhibit 2 of the agreement. The exhibit document is designed to be a checklist and quick reference for the project team to use on each project to understand the required deliverables. BJC's expectation is that the entire project team understands and follows the exhibit 2 deliverables for every project.
- B. **Schematic Design Phase.** The deliverable requirements for this phase are as follows:

1. Design Schedule. Prepared by the contracted design professionals and maintained through the completion of contract documents, outlining the necessary steps and associated schedule duration.
2. Exterior Design Review Set. (This shall be issued before completion of the phase
 - a. Contextual
 - b. Contextual/Creative Blend
 - c. Creative
3. MEP/FP Design Review Set. Depicting the three MEP performance levels:
 - a. Code Minimum
 - b. High Performance
 - c. Gold Standard
4. Drawings. Drawings are generally 2 dimensional, non-illustrated depictions of the project. In general, the types of drawings required at this phase include preliminary plans, elevations, and code compliance information. There should be sufficient information to clearly convey the project's major concepts.
 - a. Illustrated Drawings. Illustrated drawings may be selected for several reasons including reviews by leadership or project stakeholders not normally trained to read 2 dimensional drawings. Requirements of drawings will be determined on a project basis.
5. Schematic Design Project Manual. The specifications shall follow MasterFormat 2004 which is the 50 division format. The SD manual is in essence an outline spec. It is important to note that not every technical section needs to be completed and submitted at this phase. PD&C is interested in reviewing those products and materials that represent the greatest cost and biggest risk, those that are most common to construction, and those unique to the specific project. This outline should contain a list of items, organized by product/material describing basic characteristics. For instance, if resilient base is likely planned for a project, and the design team understands the PD&C standards, then the outline spec might look like the following:

096513 Resilient Base and Accessories
Type: TP, rubber
Height: 4"/match existing
Color: Match existing
6. Schematic Cost Opinion. PD&C is interested in the design team's understanding of construction costs from similar past project experiences. This is a typically a cost per square foot analysis and is used for general

purposes only. It is important to emphasize that this is listed as an “opinion of probable construction costs” and not an “estimate”.

7. LEED Documentation. When and as required, LEED documentation may be required on projects pursuing LEED certification. The specific requirements will vary depending upon project-related issues and the submission process should be discussed at the start of the project.
8. Scrubbers/Board Presentations.
9. Structural Engineering Deliverables. When structural engineering professional services are requested, provide deliverables as directed by the PD&C project manager or as is consistent with the list of deliverables requested of the design team.
10. Existing Conditions Verification.

PART 4 - SUPPORTING INFORMATION – Not used.

END OF DOCUMENT

RESPONSIBILITY MATRIX

The following matrix identifies those individuals, roles or departments responsible for maintaining the accuracy of the information and those responsible for providing input. Refer to Preface for detailed explanation.

	BJC HealthCare													Hospital/Entity				
	PD&C						Clinical Asset Management (CAM)	Risk Management	Real Estate	Ergonomics	Infection Prevention (IP)	Info Systems, Data, Telecom (IS)	Other:	Standards Review Committee	Facilities Engineering	Housekeeping	Security	Other:
	Corporate Architect	Corporate Engineer	Director of Planning	Director of Design	Director of Construction	Other:												
Primary Authorship	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secondary Authorship	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DOCUMENT REVISION HISTORY

The following table indicates the date the document originated and any subsequent revisions.

Document 101.101 – Planning Guideline		
Issue	Description of Issue	Prepared by
2012 v1	Original Issue	G. Zipfel
2016 v1	Reorganized and updated multiple sections	G. Zipfel
2018 v1	Minor reorganization	G. Zipfel