UNIVERSITY OF WISCONSIN WHITEWATER

PROJECT EVALUATION AND APPROVAL PROCESS DIAGRAM

SPECIAL CONSIDERATIONS:

- PROJECTS WITH IMMINENT DANGER WILL BE EXPEDITED IMMEDIATELY.
- LIFE SAFETY PROJECTS WILL BE EXPEDITED WITHIN 40 DAYS.
- FURNITURE PURCHASE ONLY WILL BE EXPEDITED WITHIN 40 DAYS.

** ACTUAL PROCESS TIME MAY BE SHORTER OR LONGER. TARGET TIMELINE IS SHOWN.*

ESTIMATED PROCESS TIME*

DAY 1

60 DAYS

90 DAYS

120 DAYS

150 DAYS

TIME TO IMPLEMENT VARIES BY PROJECT

1 **INTAKE**

EVALUATION REQUEST SUBMITTED ONLINE

BY PROJECT OWNER

2 **INTAKE CONFIRMED**

PROJECT OWNER AND SPONSOR RECEIVE AN EMAIL COPY OF SUBMITTAL

3 **DEVELOP PRELIMINARY SCOPE AND BUDGET ESTIMATE**

BY CAMPUS FACILITIES PLANNING TEAM WITH OWNER

4 **VERIFY FUNDING SOURCES**

BY BUDGET OFFICE AND CAMPUS FACILITIES PLANNING TEAM

5 **STRATEGIC PLAN ASSESSMENT**

BY: VC ADMIN. AFFAIRS; VC ACADEMIC AFFAIRS; CIO; FPM DIRECTOR; CAMPUS PLANNER

ENDORSE

DENY

NOTIFY & CLOSE REQUEST

BY CAMPUS FACILITIES PLANNING TEAM

6 **PREPARE PROJECT CHARTER**

BY CAMPUS FACILITIES PLANNING TEAM WITH OWNER, SPONSOR AND BUDGET OFFICE

7 **PROJECT CHARTER FINAL REVIEW**

BY: VC ADMIN. AFFAIRS AND PROVOST

8 **CHANCELLOR REVIEW**

BY: CHANCELLOR AND VC ADMIN. AFFAIRS

DEFERRED

APPROVED

NOTIFY & HOLD

BY CAMPUS FACILITIES PLANNING TEAM

1. NOTIFY OWNER AND SPONSOR USING MEMO OF DECISION (STANDARD)
2. SET REMINDER ON AGREED FOLLOW-UP DATE.

9 **PROJECT IMPLEMENTATION**

BY CAMPUS FACILITIES PLANNING TEAM

PROCESS EDIT:

DUE TO CAMPUS BUDGET CONSTRAINTS AND LIMITED FPM STAFF RESOURCES THE TASK OF FUND VERIFICATION MUST BE CONDUCTED EARLY ON TO ENSURE CAMPUS RESOURCES ARE AVAILABLE TO FUND PROPOSED PROJECTS

STEP 3 INTERNAL TASKS:

1. TRIAGE REQUEST TO ASSESS PROJECT TRACK (CAMPUS VS STATE OR OTHER)
2. SCHEDULE SCOPE MEETING WITH OWNER WITHIN 30 DAYS OF INTAKE.
3. UTILIZE SCOPE CHECKLIST FOR MEETING AND TO DEVELOP BUDGET ESTIMATE (CONFIRM FUNDING SOURCES, ID COST TO SUPPORT PROJECT (IF GPR FUNDED). DEVELOP SCHEMATIC DRAWINGS ONLY IF NEEDED TO DETERMINE COSTS AND FEASIBILITY.
4. MAY REQUIRE FUNDS FOR 3RD PARTY ASSESSMENT TO COMPLETE SCOPE OF WORK AND ESTIMATE (AE ON CALL, SURVEY, ETC). THESE COSTS WILL BE CHARGED BACK TO THE REQUESTOR IF THE PROJECT MOVES FORWARD.
5. CONFIRM WITH ICIT STRATEGIC DIRECTION AND AVAILABILITY OF RESOURCES AS IT RELATES TO PROJECT REQUEST.
6. DEVELOP HIGH LEVEL BUDGET ESTIMATE USING PROJECT BUDGET WORKSHEET (PBW)
7. WRITE SCOPE OF WORK DOCUMENT (SWD) WITH FINDINGS, ISSUES AND RECOMMENDATIONS ON BUDGET, SCHEDULE AND IMPLEMENTATION
8. REVIEW SWD WITH OWNER AND GET SIGN-OFF. PROVIDE COPY TO SPONSOR.

STEP 4 INTERNAL TASKS:

1. VERIFY FUNDING SOURCE(S) ARE FEASIBLE FOR PROJECT AND WILL BE AVAILABLE AT TIME OF PROJECT IMPLEMENTATION
2. DETERMINE ANY ADDITIONAL STEPS REQUIRED TO SECURE FUNDING FOR PROJECT (i.e SEG FEES APPROVALS, FUNDRAISING TARGETS ETC)

STEP 5 INTERNAL TASKS:

1. VERIFY ALIGNMENT WITH ACADEMIC PLAN, BUDGET AND DEBT POLICY, CAPITAL IMPROVEMENT PLAN, CAMPUS MISSION AND STRATEGIC PLAN.
2. IDENTIFY ANY RESOURCE OR SCHEDULING CHALLENGES.
3. INPUT INTO PROJECT PRIORITIZATION TOOL FOR RANKING.
4. IF DENIED, NOTIFY AND CLOSE REQUEST FILE.
5. IF ENDORSED, NOTIFY AND PROCEED WITH PROJECT CHARTER DEVELOPMENT.
6. NOTIFY OWNER AND SPONSOR USING MEMO OF DECISION (STANDARD) FOR EITHER DECISION.

STEP 6 INTERNAL TASKS: MAY REQUIRE FUNDS FOR 3RD PARTY ASSESSMENT TO COMPLETE SCOPE OF WORK AND ESTIMATE (AE ON CALL, SURVEY, ETC). THESE COSTS WILL BE CHARGED BACK TO THE REQUESTOR IF THE PROJECT MOVES FORWARD.

STEP 7 INTERNAL TASKS:

IF ALL PARTIES AGREE, OBTAIN THEIR SIGNATURES ON PROJECT CHARTER.

VC ADMINISTRATIVE AFFAIRS DETERMINES IF AND WHEN TO ADVANCE TO CHANCELLOR FOR REVIEW

STEP 9 INTERNAL TASKS :

1. DISTRIBUTE FULLY SIGNED PROJECT CHARTER TO ALL SIGNEES, FINANCIAL SERVICES, BUDGET OFFICE, OWNER AND SPONSOR.
2. PROCEED WITH APPROPRIATE METHOD OF DELIVERY (CAMPUS vs STATE OR OTHER)
3. ADD TO CAPITAL PROJECT BOOK
4. CREATE TMA PROJECT

10-01-2018