

Space Reallocation or Renovation: Project Evaluation Request Procedure

Intent:

Campus units, departments, colleges, divisions, and individuals have ideas about improving the existing campus environment by reallocating space or providing new, improved space for university activities of all types. The project intake and approval process helps campus leadership set priorities for improvements and manage the campus physical environment in a comprehensive manner.

Definitions:

Any request that modifies a physical space through changes in signage, occupancy, primary use, equipment, or physical infrastructure.

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Procedure:

| Step | Action |
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| 1. | Intake Submit a Project Evaluation Request eForm through Facilities Planning & Construction |
| 2. | Intake Confirmed Project Owner and Sponsor will receive an email copy of submittal. |
| 3. | Develop Preliminary Scope and Budget Statement The Facilities Planning and Construction Team will schedule a meeting with the Project Owner to assist with developing a preliminary scope of work and a high-level preliminary budget for your project. The scope and preliminary budget will be reviewed with the project owner and sponsor prior to the project moving forward. Note: This step will also identify projects that cannot move forward (for example, they are inconsistent with campus, UW System, or State of Wisconsin policy and/or regulations). If it has been determined that your project cannot move forward, the Facilities Planning & Construction Team will provide further assistance. |

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| 4. | <p>Strategic Plan Assessment</p> <p>Proposals will be reviewed by a team consisting of leadership of Finance and Administration (Vice Chancellor and Facilities Campus Planner), Academic Affairs (Associate Vice Chancellor) and the Chief Information Officer (CIO) to ensure that the project is consistent with strategic campus plans and goals. This step will include verification of the project’s alignment with University and Academic Strategic Plans, Budget Policies, and Facilities Long Range Plan. This team will provide a recommendation to the Executive Staff with the Project Charter and set a priority order for the project among other projects presented.</p> |
| 5. | <p>Document Preparation</p> <p>If the preliminary budget is:</p> <p>5a. \$5,000 or less ⇒ proceed to step #7</p> <p>5b. \$5,000 - \$25,000 ⇒ proceed to step #6</p> <p>5c. \$25,000+ ⇒ Preparation of Project Charter and proceed to step #6</p> <p>The Facilities Planning & Construction Team will identify and summarize key issues and prepare a Project Charter. (There may be a cost for this work if technical information, such as architectural or engineering review or survey, is needed to move forward. The cost for these services will be charged back to the requesting unit if the project moves forward.)</p> |
| 6. | <p>Executive Staff Review</p> <p>The Executive Staff will review the recommendation and Project Charter if applicable and decide to approve, deny, or defer the request. If the project request is deferred, a follow-up date will be established, and the Project Owner and Sponsor will be notified of decision.</p> |
| 7. | <p>Project Implementation</p> <p>If approved, the Facilities Planning & Construction Team will implement the project according to the Project Charter and the appropriate method of delivery.</p> |

Resources:

- [Project Evaluation Request Practice Directive](#)
- [Project Evaluation Request eForm](#)

Administration:

Approval Details

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| Approval Authority: | UW-Eau Claire Executive Team |
| Approval date: | 08/30/2021 |
| Version no: | V1.0 |
| Date for next review: | 08/30/2024 |

Revision History

| Version | Revision date | Description of changes | Author |
|---------|---------------|------------------------|---------------------------|
| 1.0 | 8/6/21 | Procedure established | Campus Facilities Planner |

Contact Person/Unit

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| Contact Person/Unit: | Renee Strehlau / Facilities |
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Keywords

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