



Project Evaluation Request Practice Directive

Division: Administrative Affairs
Department: Facilities, Planning, and Management / Campus Facilities Planning / Information Technology
Contact Information: http://uww.edu/adminaffairs/fpm/campus-planning
Effective Date: July 1, 2018
Revised Date:

Authority:

Regent Policy Document(s): [Regent Policy Document 19-4 \(formerly 85-6\): Delegation of Authority for Small Project Requests](#) , [Regent Policy Document 19-8 \(formerly 90-3\): Funding of University Facilities Capital Costs](#) , [Regent Policy Document 19-12 \(formerly 92-10\): Oversight of Facilities Constructed for University Purposes](#) , [Regent Policy Document 19-15 \(formerly 99-1\): Physical Development Principles](#) , [Regent Policy Document 19-16: Building Program Planning and Approval](#)

State of Wisconsin Building Commission: [Policy and Procedure Manual Ch. IV: Minor Project Approval, Sections D-F](#)

Wisconsin State Legislature: [Wisconsin State Statute 13.48: Long-range public building program](#) , [Wisconsin State Statute 13.48\(29\): Simplified Policies and Procedures for Construction Projects](#) , [Wisconsin State Statute 16.85\(12\): Subchapter V, Engineering](#) , [Wisconsin State Statute 20.924: Subchapter X, Building Program Execution](#) , [Wisconsin State Statute 36.09 Responsibilities \(1\)\(f\)](#) , [Wisconsin State Statute 36.09 Responsibilities \(2\)\(a\)](#) , [Wisconsin State Statute 36.09 Responsibilities \(3\)\(a\)](#) , [Wisconsin State Statute 36.11 \(1\)\(a\)](#) , [Wisconsin State Statute 36.11 \(1\)\(b\)](#) , [Wisconsin State Statute 36.29\(7\)](#)

Objective:

The purpose of this Practice Directive is to comply with policies listed above, in addition to describing the procedures that support their compliance. By adhering to these policies and procedures, UW-Whitewater can better serve its campus and community.

Statement:

Please review the following information *before* initiating a project:

- Each project has an “owner”: The project “owner” is typically the department that initiates the project. The Dean, Associate Vice Chancellor, Auxiliary Director, or equivalent must initiate the request.
- Each project needs a sponsor: Your department’s Provost or Vice Chancellor is your sponsor. Support from the project sponsor is required for the Chancellor’s review, and/or other campus senior leadership’s review.
- Requests for funding of projects will be considered during the budget process.
- Requests for funding of emergency-related projects will be considered at any time, with project sponsor’s endorsement.
- Requests for self-funded projects will also be considered at any time, with the appropriate project sponsor's endorsement.
- All proposals will be examined and evaluated with attention to long-term financial viability.

Procedures:

[Project Evaluation Request Procedure](#)

[Project Evaluation Request and Approval Process Diagram](#)

[Fiscal Practice Directive](#)

[Fiscal Procedure](#)

[Fiscal Request for Project Code and Revenue Transfer to Commit Cash Balances](#)

[Fiscal Funding Charter Form](#)

Searchable Words: Project Review, Project Evaluation, Project Policy, Project Request.



Project Evaluation Request Procedure

Intent:

Campus units, departments, colleges, divisions, and individuals have ideas about improving the existing campus environment by 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 environment in a comprehensive manner.

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Procedure:

1. [Intake](#)
Submit a [Project Evaluation Request](#) through the [UW-W Campus Facilities Planning Website](#).
2. [Intake Confirmed](#)
Project Owner and Sponsor will receive an email copy of submittal.
3. [Develop Preliminary Scope and Budget Statement](#)
The Campus Facilities Planning Team will schedule a meeting with the Project Owner and ICIT to assist in developing a preliminary scope of work, and a high level preliminary budget for your project(s). 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, then the Campus Facilities Planning Team will provide further assistance.
4. [Verifying Funding Sources](#)
The proposal will move forward to the Budget Office for review and verification of a funding source and strategy. Any additional steps that may be required to secure funding should also be identified at this time. Upon completion of review, proposal will route back to the Campus Facilities Planning Team for preparation of Step 5.
5. [Strategic Plan Assessment](#)
Proposals will be reviewed by leadership of Administrative Affairs (Vice Chancellor, FPM Director and Campus Planner), Academic Affairs (Provost and/or Associate Vice Chancellor) and the Chief Information Officer (CIO) to ensure that the project is consistent with strategic campus goals. This step to include verification of the project's alignment with the Academic Plan, Budget Policies, and Facilities Long Range Plan. This group will recommend denial or endorsement of the proposal and set a priority order for it among other projects presented.

6. Preparation of Project Charter

Upon agreement that the project aligns with the strategic plans, the Campus Facilities Planning 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.

7. Project Charter Final Review

The Provost and Vice Chancellor of Administrative Affairs will review the Project Charter and determine whether or not to forward the Project Request to the Chancellor for final approval.

8. Chancellor Review

The Chancellor and Vice Chancellor of Administrative Affairs will review the Project Charter and make a determination 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.

9. Project Implementation

If the Chancellor approves the Project Charter, then Administrative Affairs and the Campus Facilities Planning Team will implement the project according to the Project Charter and the appropriate method of delivery.

Resources:

[Project Evaluation Request Practice Directive](#)

[Project Evaluation Request and Approval Process Diagram](#)

[Fiscal Practice Directive](#)

[Fiscal Procedure](#)

[Fiscal Request for Project Code and Revenue Transfer to Commit Cash Balances](#)

[Fiscal Funding Charter Form](#)

Administration:

Approval Details

Approval Authority:	<p>Regent Policy Document(s): Regent Policy Document 19-4 (formerly 85-6): Delegation of Authority for Small Project Requests , Regent Policy Document 19-8 (formerly 90-3): Funding of University Facilities Capital Costs , Regent Policy Document 19-12 (formerly 92-10): Oversight of Facilities Constructed for University Purposes , Regent Policy Document 19-15 (formerly 99-1): Physical Development Principles , Regent Policy Document 19-16: Building Program Planning and Approval</p> <p>State of Wisconsin Building Commission: Policy and Procedure Manual Ch. IV: Minor Project Approval, Sections D-F</p> <p>Wisconsin State Legislature: Wisconsin State Statute 13.48: Long-range public building program , Wisconsin State Statute 13.48(29): Simplified Policies and Procedures for Construction Projects , Wisconsin State Statute 16.85(12): Subchapter V, Engineering , Wisconsin State Statute 20.924: Subchapter X, Building Program Execution , Wisconsin State Statute 36.09 Responsibilities (1)(f) , Wisconsin State Statute 36.09</p>
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	<u>Responsibilities (2)(a) , Wisconsin State Statute 36.09 Responsibilities (3)(a) , Wisconsin State Statute 36.11 (1)(a) , Wisconsin State Statute 36.11 (1)(b) , Wisconsin State Statute 36.29(7)</u>
Approval date:	July 1, 2018
Version no:	V1.0
Date for next review:	July 1, 2021

Revision History

Version	Revision date	Description of changes	Author
1.0	07/01/2021	Procedure established	Campus Facilities Planner

Contact Person/Unit

Contact Person/Unit:	http://uww.edu/adminaffairs/fpm/campus-planning
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Keywords

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