

UWEC 1115.A, Requesting Project Evaluation for a Space Reallocation or Renovation

Last Modified on 09/29/2023 9:54 am CDT

Procedure #: UWEC 1115.A

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. This procedure supports practice directive [UWEC 1115, Project Evaluation](#).

Scope

This procedure applies to all projects related to existing space reallocation and/or renovation on any UW-Eau Claire campus.

Definitions

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

Project Owner: Typically the department that initiates the project; the head of the department is the project owner and initiates the request.

Project Sponsor: The division's Vice Chancellor; support from the project sponsor is required to proceed to project evaluation.

Project evaluation: The process of reviewing all proposals with attention to long-term campus strategic goals, financial viability, scope and schedule.

Procedures

- [Request Evaluation of a Project](#)

Request Evaluation of a Project

Step	Action
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	StepAction
1. Intake	Complete and submit a Project Evaluation Request eform through Facilities Planning & Construction.
2. Intake Confirmation	The Project Owner and Project Sponsor will receive an email copy of the submitted eform.
3. Develop Preliminary Scope and Budget Statement	<p>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.</p> <p><i>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.</i></p>
4. Strategic Plan Assessment	Proposals will be reviewed by a team consisting of leadership of the Division 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.
Document Preparation	<p>If the preliminary budget is:</p> <ul style="list-style-type: none"> \$5,000 or less: proceed to step #7 \$5,000 - \$25,000: proceed to step #6 <p>5. \$25,000+: prepare a 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>
Executive Staff Review	<p>6. 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>

Step	Action
	<p>Project Implementation</p> <p>7. If approved, the Facilities Planning & Construction Team will implement the project according to the Project Charter and the appropriate method of delivery.</p>

Resources

[Practice Directive UWEC 1115, Project Evaluation](#)

[Project Evaluation Request eform](#)

[Facilities Planning & Construction webpage](#)

Procedure Administration

Version Number	V1.1
Approval Authority	Vice Chancellor for Finance & Administration
Approval Date	August 30, 2021
Next Review Date	August 30, 2023
Division	Finance & Administration
Department	Facilities
Contact	Deputy Chief Facilities Officer facmgt68@uwec.edu

Revision History

Version	Revision Date	Description of Change	Author(s)
1.0	August 30, 2021	Initial issuance	Renee Strehlau
1.1	January 24, 2023	Updated to new format, added definitions & minor formatting changes	Kyran Hamill