



UNIVERSITY OF WEST FLORIDA
Facilities Management

Pensacola, FL 32514-5750
Effective April 15, 2025

STANDARD OPERATING PROCEDURE # FAC3.030

Subject: Procedures for the **Minor Project Request and Prioritization Process.**

Purpose and Scope:

To establish procedures for the UWF community to request, prioritize, determine the order of magnitude cost estimates, and obtain approval for campus projects. This effort is intended to create an annual process for intake, consideration, alignment with stated campus values and initiatives, prioritization, allocation of funding, and placement on an execution timeline to ensure appropriate stewardship, transparency, and time for planning.

This process proposes that all work, aside from maintenance and repair, be identified as separate project work, based on the definitions found later in this document.

This process provides the University of West Florida with a framework for implementing projects that best support the campus' strategic interests and directions and provide it with the most value. The Project Request and Prioritization process intends to achieve the following results:

- Build consensus among the campus community, with approval from the Cabinet, to determine the most important campus projects.
- Assure project alignment with UWF strategic goals.
- Add transparency to the prioritization of projects.
- Increase collaboration across the University.
- Improve the smooth flow of work for delegated project staff/vendors.
- Educate campus colleagues on the realities of projects, project requests, and budgets.
- Identify and prioritize project requests with appropriate overview, consideration, and levels of transparency.
- Provide a responsive, consistent, and cost-effective delivery system for infrastructure, capital, remodeling, and minor construction projects, as well as other building-related projects that reflect departmental priorities.
- Allow for campus community members with program or departmental needs that require modifications to a building or building system to participate in project alignment and prioritization.
- Exercise sensitivity toward the compatibility of projects with building systems, appropriate usage, and future maintainability.
- Achieve Trustee expectations for accountable and facilities-forward design and construction.
- Compliance with building codes and guidelines and use of trained design and construction professionals as appropriate.
- Improve the performance of campus buildings and maintain the integrity of building systems.
- Reduce the backlog of project requests awaiting Facilities and encourage stakeholder involvement and communications.
- Ensure appropriate planning so projects can be contracted, designed, scheduled, and constructed in a manner that minimizes impact on the budget and campus community.
- This allows maintenance staff to complete preventative maintenance tasks proactively, because projects requested by campus are properly scheduled.
- Effectively counters the "Everything is a priority" mindset, so that contractors and facilities staff can attend to scheduled and prioritized projects, allowing those projects to be completed well and on time.
- Eliminates project requests that lack authorization, sponsorship, and funding.



The goal of the process is the creation of an annual prioritized project portfolio representing the interests of faculty, students, administrators, and staff, and forwarded through a cross-functional Project Prioritization Committee to the Cabinet. This Committee hears request justification presentations, reviews request, recommends project priorities and confirms project budgets for campus ensuring resources are available for the completion of the project.

What is a Project?

Projects with the following characteristics require Facilities approval/administration:

- Modifications that affect structural, mechanical, electrical, architectural, and fire safety (occupant exiting), invoke requirements such as ADA, building code, and life safety considerations including fire and/or security systems of a building.
- Modifications requiring architectural and/or engineering services.
- Change of space usage (i.e., office to lab, classroom to computer lab).
- Modifications requiring significant multiple-trades coordination.
- Modifications that affect exit paths.
- Installation or removal of equipment connected to building systems.
- Installation or removal of walls/partitions and/or doors.
- Modifications to finishes (painting, carpet, fixed furniture, etc.).
- Installation of equipment and furniture.
- Modifications to grade, turf, plantings, or hardscape.
- Special assignments, based on other criteria.
- The minimum expected project dollar threshold for submissions is \$5,000.
- This ensures the prioritization of impactful and significant projects while maintaining efficient use of resources for reviews and approvals.
- Projects below \$5,000 may be submitted only if they meet defined exception criteria.
- Example Exception: Health and Safety concerns (e.g., compliance, mitigation, of immediate risk).
- Justification Requirements: Submissions below \$5,000 must include:
 - A clear explanation of the issue.
 - Supporting documentation demonstrating urgency or risk.
 - Endorsement from a relevant stakeholder or subject matter expert.
- Suggested Definition Framework:
 - Immediate or potential risks to personnel, contractors, or public safety.
 - Non-compliance with legal, regulatory, or industry safety standards.
 - Situations are likely to result in injury, illness, or environmental harm.
 - Examples: Fixing hazardous wiring (\$3,000) or installing emergency lighting (\$4,000).

Procedures:

Requesting a Project

Projects can be received during each quarter throughout the year, but unless they are life safety or property emergencies, they will be gathered, held, and managed through the campus project prioritization process. This framework is used to select the projects that best support campus strategic plans, master plan, goals, and current priorities, as well as provide the greatest value to the campus. All projects must be submitted through this process for review and priority assessment.

After obtaining approval from their divisional Director/Dean and Vice President/Provost, employees submit projects to the Campus Project Prioritization Process by completing the Project Request Form. The Project Request Form gives Facilities a general scope and definition of the proposed project. Preliminary impressions of feasibility, anticipated cost range, timing constraints, and other information must be provided by the initial requestor. Requestor to provide anticipated budgeting information upfront with submission and indicate availability of any proposed funding source(s). Architectural and engineering analysis is not provided at this stage.

A staff member from Facilities will contact the project requestor to schedule an initial site visit.

Facilities will forward projects to the Campus Project Prioritization Committee at the end of each quarterly cycle.

Important Note: Submission of the Request for Project form does not guarantee approval of the project request. A variety of factors will be considered in the evaluation of a project for approval. These factors include: the estimated dollar amount of the project, scope of work requested, funding source, funds and cash available, maintenance/aesthetic renewal, campus priorities, the project's impact on operations, and timeframe.

Timeframe of Steps for Submission, Review, and Approval of a Project



When making Project Request submissions, requestors shall give advance consideration of the required quarterly approval timeframe process as outlined in the bullet points below.

Due consideration shall be given to the timing and coordination of Project Request submissions involving grant funding, which may have outside submission deadlines.

Project Requests for estimates for proposed Green Fee funded projects and proposed minor CITF (Capital Improvement Trust Fund) projects shall clearly indicate the request is for a Rough Order of Magnitude estimate only.

This Minor Project Request and Prioritization Process is for minor projects and does not apply to major Capital Improvement projects, such as major PECO (Public Education Capital Outlay) requests.

Critical Dates to Remember for the Quarterly Cycle: July 1st, Oct. 1st, Jan. 1st, April 1st

- By the first day of each fiscal year quarter – Employees submit projects to the Campus Project Prioritization Process after obtaining approval to do so from their divisional Director/Dean and Vice President/Provost by completing the Project Request Form (link at the end of document).
- Note: Projects must be submitted using the form to allow for proper tracking through the process.
- Facilities Management obtains clarification on the scope for submitted projects from the requestor and establishes Rough Order of Magnitude (ROM) Pricing.
- Facilities Management identifies high-priority deferred maintenance projects and establishes Rough Order of Magnitude (ROM) Pricing for requestors.
- The VP of Finance and Administration establishes a budget for campus projects.
- Facilities Management provides to the Campus Project Prioritization Committee the Rough Order of Magnitude (ROM) Pricing for requested projects and deferred maintenance projects.
- Campus Project Prioritization Committee meets quarterly.
- Campus Project Prioritization Committee reviews and discusses project requests, and utilizes criteria/rubric to prioritize projects.
- Campus Project Prioritization Committee provides recommendations to the Cabinet for approval of the delegated project priority list.
- The Cabinet directs Facilities Management to seek investment grade scoped costing estimates for the priority recommended projects.
- Project list is compiled and completed with estimates and funding sources.
- Requestors notified of approved projects.
- Facilities completes appropriate Requests for Proposals (RFPs) as may be needed for final design services and contracts, so that design documents may be prepared for construction pricing. Construction bid pricing can then be obtained and construction contracts established / Purchase Orders issued. Construction undertaken of project work.
- The planned timeline schedule for project delivery is established. Due to the time required for effective planning, design, bidding, and construction, and with consideration of: equipment and material lead times, any space scheduling restrictions requiring summer work, size of project, total number of projects to be undertaken, etc., the timeline for project delivery must be effectively coordinated with vendors and requestor / campus user groups. With consideration of all factors, the initially planned schedule may need to be adjusted.

Reference accompanying listing of planned new Fiscal Year quarterly dates for the above noted Timeframe Steps, as attached to this document.

Project Prioritization Committee

The membership of the Project Prioritization Committee is as follows:

- Vice President, Finance and Administration/CFO
- Assistant Vice President Facilities Management
- Executive Director, Facilities Management
- Associate Vice President of Finance/Controller
- Vice Provost
- Dean of Libraries
- Deputy Director, Intercollegiate Athletics
- Director of Information Technology Operations
- ADA Coordinator



The Project Prioritization Committee utilizes the following criteria when assessing and prioritizing all project requests:

- Does the project address a life safety issue?
- What is the impact on, or improvement of instruction/operations?
- How well does the request align with university priorities?
- How well does the align with the department's strategy and financial plan?
- How well does the request align with the financial position of the University?
- What is the proposed composition of funding sources (i.e., across department and University)?
- Does the project address a potential impact on the building structure or limit potential damage to the facility?
- Does the project address a significant impact on customers (such as the ADA path of travel issue)?

Framework

The campus Project Prioritization Committee measures projects against campus objectives as well as the campus' capability to undertake projects.

The project prioritization process includes:

- **Project Scoring** – An overall weighted score is generated that represents the project's value to the campus. The higher the score, the more value. The scoring is performed by UWF's Project Prioritization Committee and recommended to the President and Cabinet for approval and final disposition.
- **Funding availability** – Identify available funds to carry out the project, and location of those funds.
- **Resource capacity evaluation** – Identify which Facilities and/or other staff resources are available to work on the project.
- **Project scheduling** – A project is scheduled based on its scoring, including funding, and resource capacity. A high-scoring project may not be able to start immediately if resources and/or funding are not available. Similarly, lower-scoring projects with available resources may start ahead of a higher-scoring project. Projects with a future start date can be scheduled based on the future availability of resources and funding.

Definitions

Maintenance and Repair – The recurrent, day-to-day, periodic, or scheduled actions required to preserve a building system, equipment, or device to functional operating status and/or to compensate for wear and tear rather than to improve the building system, equipment, or device. Examples: light bulb replacement, floor tile replacement, belt replacement, or heating unit adjustments. These items are most appropriately managed via the work order process.

Renovation – The total or partial upgrading of an existing facility or facility system to higher standards of quality or efficiency. Under certain conditions, renovation can also be classified as an improvement. Examples: installation of air conditioning, installation of grid ceilings to facilitate the replacement of incandescent lighting with more efficient lighting.

Remodeling – The changing of internal arrangements or other physical characteristics of an existing facility so that it may be effectively used for a new designated purpose. Interior partitions can be arranged to provide a specific space for a certain function, or space can be converted to a different use with the installation of new equipment. For example: a classroom can be converted into a lab or a series of office suites.

Improvement – The addition of quality features – the upgrading of mechanical or electrical systems or architectural finishes – to existing space. Example: Installation of carpeting on floors that are not worn or otherwise unsatisfactory, the installation of blinds that previously did not exist or do not need to be replaced due to age or function, painting outside of cyclical maintenance requirements, or the installation of new or different lighting for aesthetic purposes.

New Construction – The erection of a new facility or the addition or expansion of the exterior of an existing facility that adds to the building's overall dimensions. New construction creates a requirement for additional ongoing expenditures for operation, maintenance, custodial, and future renewal.

Equipment Installation – The installation of equipment required by an academic or departmental program and not necessary for the proper operation of the physical facility itself. Examples: fume hood installations, computer labs, specialized program air conditioning, or ventilation requirements.

Facilities Planning Requirements

- Fire/Life Safety
- Imminent failure, increasing compromise to facility integrity



- Americans with Disabilities Act (ADA)
- Impact on instruction
- Sustainable design and construction
- Architectural finishes and interior design
- Abatement of Hazardous Containing Materials (Asbestos, Lead, etc.)
- Electrical systems
- Mechanical Systems
- Access systems
- Monitoring/Security systems
- Structural systems
- Tele-data communications
- Emergency alarm systems
- Energy conservation
- Grounds, landscape, hardscape
- Space Management and Utilization
- Project Permitting

Requirements for All Projects that Affect Campus Facilities

Approval from campus Facilities, regardless of the origin of the project's funding, is required for any work that affects campus facilities. This includes the acquisition and installation of equipment that affects the architectural, structural, mechanical, electrical, fire safety, or security system of a campus building or results in a change in space utilization. This approval is required to ensure that the proposed work is a feasible project that complies with campus standards, applicable building codes and life safety codes, Americans with Disabilities Act (ADA) guidelines, and that existing systems can support any new equipment or remodeling.

All project requests must be submitted through this process for review and approval to ensure proper design, code compliance, and construction, including the preparation of specifications, the issuance of purchase orders, coordination with tradespeople, and technical oversight through the course of the project.

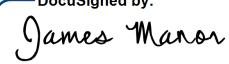
As a general rule, projects in motion will not be stopped and re-started just because their relative priority has changed. However, the department to which the project is delegated retains responsibility for overall project portfolio management. From time to time, this will require adjustment of project activities based on the best interests of the institution. Some examples of reasons to halt a project are:

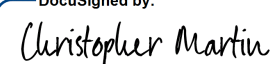
- Organizational hardship (no money)
- Project feasibility, cost-benefit
- Business case no longer applies
- Overruns are extreme (budget and time)
- Equipment and material lead times
- Contractor availability (lack of availability)

Link to Project Request Form: <https://projects.facilities.uwf.edu/#/customer>

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SOP #FAC3.030 - ATTACHMENT 1

SCHEDULE FOR PROJECT REQUEST PRIORITIZATION PROCESS

TIMEFRAME OF STEPS FOR SUBMISSION, REVIEW, AND APPROVAL, WITH LISTING OF PLANNED NEW FISCAL YEAR QUARTERLY DATES

FY26 Schedule March 11, 2025						
Activity	Responsible Entity	Duration (Days)	FY Quarter 1 Start / Finish Tuesday, July 1, 2025 April 2nd through July 1st	FY Quarter 2 Start / Finish Wednesday, October 1, 2025 July 2nd through October 1st	FY Quarter 3 Start / Finish Thursday, January 1, 2026 October 2nd through January 1st	FY Quarter 4 Start / Finish Wednesday, April 1, 2026 January 2nd through April 1st
<p>Start of FY Quarters for FY26 Submission Period for Requests</p> <p>-Submission Deadline – first day of each fiscal year quarter</p>			Tuesday, July 1, 2025	Wednesday, October 1, 2025	Thursday, January 1, 2026	Wednesday, April 1, 2026
<ul style="list-style-type: none"> Facilities Management obtains clarification on the scope for submitted projects and establishes Rough Order of Magnitude (ROM) Pricing Facilities Management identifies high-priority deferred maintenance projects and establishes ROM Pricing for requesters <p>Note: Facilities will begin initial completion of ROM pricing as Project Requests are received, continuing through the quarterly period.</p> <ul style="list-style-type: none"> The VP of Finance and Administration establishes a budget for campus projects. Facilities Management provides to the Campus Project Prioritization Committee the ROM pricing for requested projects and deferred maintenance projects. 	Facilities Management	30	Wednesday, July 2, 2025 through Friday August 1, 2025	Thursday, October 2, 2025 through Monday November 3, 2025	Monday January 5, 2026 through Wednesday, February 4, 2026	Thursday, April 2, 2026 through Monday May 4, 2026
<ul style="list-style-type: none"> Campus Project Prioritization Committee meets quarterly 	VP F&A Office	ongoing	ongoing	ongoing	ongoing	ongoing
<ul style="list-style-type: none"> Campus Project Prioritization Committee reviews and discusses project requests, utilizes criteria/rubric to prioritize projects. 	Facilities Management	1	Monday, August 4, 2025	Tuesday, November 4, 2025	Thursday, February 5, 2026	Tuesday, May 5, 2026
<ul style="list-style-type: none"> The Cabinet directs Facilities Management to seek investment grade scoped costing estimates for the priority recommended projects. 	Campus Project Prioritization Committee	1	Wednesday, August 13, 2025	Wednesday, November 12, 2025	Wednesday, February 11, 2026	Wednesday, May 13, 2026
<ul style="list-style-type: none"> Project list completed with estimates and funding sources. 	Campus Project Prioritization Committee	1	Wednesday, August 13, 2025	Wednesday, November 12, 2025	Wednesday, February 11, 2026	Wednesday, May 13, 2026
<ul style="list-style-type: none"> Requestors notified of approved projects 	Campus Project Prioritization Committee	5	Monday, August 18, 2025	Monday, November 17, 2025	Wednesday, February 18, 2026	Monday, May 18, 2026
<ul style="list-style-type: none"> Requestors notified of approved projects 	President's Cabinet	7	Monday, August 25, 2025	Monday, November 24, 2025	Wednesday, February 25, 2026	Tuesday, May 26, 2026
<ul style="list-style-type: none"> Requestors notified of approved projects 	Facilities Management and VP F&A Office	30	Wednesday, September 24, 2025	Monday, January 5, 2026	Friday, March 27, 2026	Thursday, June 25, 2026
<ul style="list-style-type: none"> Requestors notified of approved projects 	Facilities Management and VP F&A Office	0	Wednesday, September 24, 2025	Monday, January 5, 2026	Friday, March 27, 2026	Thursday, June 25, 2026
<ul style="list-style-type: none"> Facilities Management For Projects requiring Design Services: Facilities completes appropriate Requests for Proposals (RFPs) as may be needed for final design services and contracts. Design Documents prepared for construction pricing. Bidding and Contract execution: Construction bid pricing obtained and construction contracts established / Purchase Orders issued. Planned timeline schedule for project delivery established. Construction undertaken of project work. 	Facilities Management and Vendor(s)	TBD	(varies on project by project basis)			