Institutional Effectiveness & Assessment Council Facilities Subcommittee
Letter of Instruction: Prioritizing, Resourcing and Scheduling Functional Area Projects

Background: Idaho State University (referred to as ISU from here on) has a large number of institutional functional areas with facility projects that require Facilities Services to support their implementation through the utilization of their workflow hours and the potential funding of new projects. Projects can vary significantly in the level of their resource requirements for implementation. However, no matter how much financial support a project has, it takes Facilities Services resources to implement.

New functional area projects have materialized through multiple means and have various levels of resources associated with them. The University’s senior administrative leadership directs projects to improve student services or comply with a statutory or accreditation requirements. Other proposed projects develop out of the functional areas’ desires to streamline their capabilities. Resourcing the implementation of these projects can vary greatly. Some projects have resources approved and budgeted for new facility space redesigns while others have limited or no funding.

No matter how much funding is associated with a project’s implementation, it will require Facilities Services personnel support to accomplish it. Personnel support is a fixed resource based on the number of employees’ available hours and calculated against the other priorities that exist within the Facilities Services workforce. The total number of available workforce hours to support the functional areas projects’ planning and implementations is dependent on the types of projects nominated. Each area working within Facilities Services will identify the total number of available workforce hours and resource requirements. To properly account for the impact of a project and the resources required to implement it, the University will have to develop a list that prioritizes the implementation of the projects and accounts for the limited number of Facilities Services resources available.

Task: After analyzing the project information collected from each of the functional areas and the available resources, the Institutional Effectiveness & Assessment Council (IEAC) Facilities Subcommittee will develop a prioritized project list and an implementation schedule proposal for consideration by IEAC Steering Committee.

Method: Functional units will submit a completed project and space request (PSR) form to Facilities Services by October 1, for evaluation. This form is found on their website at http://www2.isu.edu/facilities/Project-Space-Request-Form-A.pdf. Facilities Services will evaluate the project to determine if it exceeds $30,000 or reallocates space usage. If the project reallocates space and/or exceeds $30,000, Facilities Services will send the project back to the functional area and the project sponsor will complete the Project Ranking Rubric to describe their project and include their project’s scope, resource requirements, and its effect on the University’s mission fulfillment. Facilities Services will evaluate each of the projects to identify what it will take to implement the project and ensure it meets the requirements outlined on Facilities Services Strategic Master Plan.
The Facilities Subcommittee will evaluate each project against the stated criteria in the IEAC Steering Committee’s adopted Project Ranking Rubric and establish a ranking. The Subcommittee will then evaluate the projects’ resource support requirements against Facilities Services existing capabilities to develop a schedule. The Subcommittee will place a red line below the last project on the list that Facility Operations can fully resource at the end of each state fiscal year.

**Standard:** Upon completion of its evaluation, the Facilities Subcommittee will present its recommendations to the Steering Committee. The Steering Committee has the option to change the projects scheduling priority if it determines the adjustment more effectively supports University priorities. If a change occurs, the Facility Subcommittee will recalculate the resource requirements and provide the Steering Committee with an updated priority list and schedule. Projects that sit above the red line will be funded either by the PBFAC (Permanent Building Fund Advisory Council, or other means). The projects that fall below the red line will not be funded and will increase in priority as the functional groups complete the priority projects. The Steering Committee may also examine the capability of increasing resources to accomplish those projects they deem essential. To accomplish this, the Steering Committee will task Facilities Services through the Facility Subcommittee to develop a proposal that it can advance through the budget process and be reviewed with the University President.

**Definitions:**
- **Project:** Any proposal that changes space or space utilization including modifications to finishes (paint, flooring and other), HVAC, plumbing, electrical, structural, use, or design of a space or spaces. Any proposal that makes changes to building equipment or systems that serve building spaces. Any proposal that changes exterior areas, access, grounds, paving, or other features. A project could be entirely maintenance, space repurposing, or a combination of both.
- **Maintenance Projects:** Any project that involves regularly scheduled or non-scheduled maintenance of spaces, systems, or grounds. Any project that affects regular maintenance or remediation, equipment repair, or equipment replacement. Any project that affects the upgrading of systems that are beyond their useable life.
- **Fast-Track Projects:** Any project deemed to have a need to be expedited because of funding from a donor or other stipulated source that has to be spent by a certain date, or projects that are addressing a safety concern, code compliance, emergency, or immediate course needs. These projects will be brought directly to the IEAC Steering Committee if needed to make everyone aware of expedited deadlines. Fast tracked projects will still have to have a rubric for prioritization and go through the approval process, and scheduling to meet the expedited time frames for implementation but may be brought to the IEAC Steering Committee immediately at their next regularly scheduled meeting.
**Timeline:**

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<thead>
<tr>
<th>Requirement</th>
<th>Date</th>
<th>Product</th>
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<tbody>
<tr>
<td>Functional areas provide input on their project requirements</td>
<td>By October 1</td>
<td>Consolidated list of products that provide the basis for analysis</td>
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<tr>
<td>Facilities Services identifies available workforce hours and resources</td>
<td>NLT November 22</td>
<td>Detailed analysis that estimates the number of hours each functional area project will take</td>
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<tr>
<td>Facilities Services returns the project to the functional area if it exceeds $30,000 in order for them to complete the IEAC Rubric</td>
<td>By December 15</td>
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<tr>
<td>IEAC’s Facilities Subcommittee reviews and scores projects for central ISU funding using ISU’s Project Ranking Rubric</td>
<td>NLT January 29</td>
<td>Priority list of functional area projects for central ISU funding based on ISU’s Project Ranking Rubric</td>
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<td>Facilities Subcommittee presentation to IEAC Steering Committee on prioritization of projects funded from ISU central funding</td>
<td>February 6</td>
<td>IEAC Steering Committee receives and either approves or adjusts priorities.</td>
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<tr>
<td>IEAC Facilities Subcommittee reviews and scores projects for PBFAC funding using ISU’s Project Ranking Rubric</td>
<td>NLT March 31</td>
<td>Priority list of functional area projects for PBFAC funding based on ISU’s Project Ranking Rubric</td>
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<tr>
<td>Facilities Subcommittee presentation to IEAC Steering Committee on Prioritization of PBFAC funded projects</td>
<td>NLT April 2</td>
<td>IEAC Steering Committee receives and either approves or adjusts priorities.</td>
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Facilities Rubric Approval Process

Facilities is responsible for coordinating IT based on Facilities priority using a single Rubric.

Customer identifies a Project and submits a PSR

Facilities evaluates the project costs based on PSR

Is the project over $30k

No, Facilities submits the PSR

Facilities pairs up the Rubric and PSR

Facilities Subcommittee receives the Rubric and evaluates it/coordinates with IT

IEAC Reviews the Project Priority based on the Rubric