

## APPROVAL PROCESS FOR FREAS REQUEST FOR SERVICES

This document outlines the steps needed to have a submitted [Request For Service](#) (RFS) approved for action. The steps to the process are described below.

***All Requests for Services (RFS) must include prior approval by the VP/Dean or Business Officer with an assigned purpose code. Please note: RFS work cannot be funded by the following purpose codes: xxxx11xxxx; xxxx21xxxx; xxxx3xxxx.***

Once an RFS is received, FREAS staff will determine the best path to completion.

RFS projects that are limited in scope, complexity, duration of work, and which can be completed by UD trades staff, or via term contractors shall be managed by Maintenance and Operations (M&O) on a first in, first out basis.

RFS projects that entail construction of new capital assets, require design, extensive documents and specifications, and/or are significant in scope or scale, shall be assigned to Planning and Project Delivery (PPD). **These projects will require review, approval and prioritization by senior leadership to assure that project management resources are utilized in accordance with the University's strategic priorities.**

Requests will be processed as quickly as possible, but to aid the speed at which final decisions are made it is required that all requests are first submitted to the college or administrative unit business officer for review and approval.

A template is provided at the bottom of this document. **This template must be completed when submitting a RFS to ensure a format consistent across all requests.** Additional supporting information may be included, with the completed template serving as a cover document and referencing, by page numbers, where the required information can be found.

## Process Form DIRECTIONS

STEP	PHASE	DETAILS TO ADDRESS
1	<u>Necessity and Feasibility</u>	<ul style="list-style-type: none"> <li>Assess the necessity for the RFS, including its contribution to the University's mission, revenue generation, inability to continue remote operations, and service to constituents.</li> <li>Identify risks of not completing the RFS.</li> <li>Identify any feasibility studies that must be completed as part of the request.</li> </ul>
2	<u>Requirements Definition</u>	<ul style="list-style-type: none"> <li>Describe the Goal to be achieved by approval and completion of the request</li> <li>Gather supporting documentation for the need of the RFS</li> <li>Identify any special considerations that may be applicable – impact on a research grant, for example.</li> <li>Gather supporting documentation where appropriate, e.g. guidelines from accrediting bodies and outside agencies.</li> <li>Identify questions to which you need answers in order to complete the RFS; attempt to get as many answers in advance. For those remaining, add a Question section to your proposal.</li> </ul>
3	<u>Plan Assessment</u> Unit review of project scope/ source of funds	<ul style="list-style-type: none"> <li>Identify the scope of work</li> <li>Provide funding sources and the amount of funds planned for this request</li> <li>Articulate alignment with UD mission and the justification for discontinuing work from home.</li> <li>Submit your proposal to your unit head (Dean or VP) for review and written endorsement of the plan.</li> </ul>
4	<u>Preliminary Approval</u> Do you have support of your dean/vice president to pursue the RFS? How does it rank among their priorities?	<ul style="list-style-type: none"> <li>Submit this proposal including an email indicating approval from your Dean or VP via the RFS webform.</li> </ul>
5	FREAS review of project scope/cost	<ul style="list-style-type: none"> <li>To be completed by FREAS after receipt of the RFS webform and this document.</li> </ul>
6	Approval	<ul style="list-style-type: none"> <li>RFS submissions will be reviewed by a group of subject matter experts and appropriate senior leadership.</li> <li>The vetting group may include various individuals. Additional input can be sought from other individuals depending on the situation. This round of review will gather questions, offer responses to open questions, and provide additional feedback on the proposal for potential re-drafting.</li> <li>If feedback is received, the Unit should address the Reviewers' comments and submit a revised plan to their Senior Leader's Office:</li> <li>Once reviewed, the Senior Leader or their designee will notify the submitter of the decision and any additional directions, with the appropriate UD offices being notified of the decision (FREAS, UDPD, EHS, SHS, etc.)</li> <li>Upon approval the request will be added to the project queue. Requests in the queue will be reviewed by senior leadership for potential reprioritization as new requests come in. After each review an updated project queue will be shared with all Deans/VPs, college or administrative unit business officer and designed facilities contacts.</li> </ul>

**Request for Service Supplemental Information**  (College/Unit)

Submitted Date

Contact Name

Contact email

STEP	PHASE	DETAILS
1	<u>Necessity and Feasibility</u>	
2	<u>Requirements Definition</u>	
3	<u>Plan Assessment</u> Unit review of project scope/ source of funds	
4	<u>Preliminary Approval</u> Do you have support of your dean/vice president to pursue the RFS? How does it rank among their priorities?	
5	FREAS review of project scope/cost	To be completed by FREAS. Is there an IT component? Can IT provide appropriate resources?
6	Approval	