

## APPROVAL PROCESS FOR FREAS REQUEST FOR SERVICES | FALL 2020

Throughout the past several months, the University's operations have continued to evolve in response to the COVID-19 pandemic. As a result of the budgetary impact on FREAS, requests we receive for various services – non-routine, reimbursable services such as installation of whiteboards and signage and including minor renovations, equipment installations, etc. must be prioritized. This new approval process has been initiated in order to provide a consistent method for assuring the projects with the highest priority are identified.

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 of these steps must be completed in the order listed before any proposal will be accepted by FREAS and forwarded to the senior leadership review committee for final prioritization and approval.

These procedures apply to all University of Delaware sites, including those leased for University use and those located around the state. **These proposals will require high-level review, including that of the President, the Provost and/or Executive Vice President as appropriate.** As a reminder, all RFS work to **Research** laboratories, centers and/or activities must also be reviewed by the **VP for Research, Scholarship and Innovation**.

Requests will be processed as quickly as possible, but to aid the speed in which final decisions are made it is required that all requests are first submitted to the college or administrative unit business officer or designated facilities contact for review and prioritization. While this will expedite a decision please note that no last-minute or urgent requests will be considered, as careful review is required in all cases.

Please note that submitting a RFS in no way guarantees approval will be granted, even if all procedures are followed. FREAS is operating under limited resources and cannot automatically accept and complete all requests submitted.

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

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>A vetting group will be assembled comprised of subject matter experts and appropriate senior leadership to review the plan, according to the direction of the President, Provost, EVP or Research VP.</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: <ul style="list-style-type: none"> <li>President — <a href="mailto:assanis@udel.edu">assanis@udel.edu</a></li> <li>Provost — <a href="mailto:ud-provost@udel.edu">ud-provost@udel.edu</a></li> <li>Executive Vice President — <a href="mailto:jwl@udel.edu">jwl@udel.edu</a></li> <li>VP for Research, Scholarship and Innovation — <a href="mailto:riordan@udel.edu">riordan@udel.edu</a></li> </ul> </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 for**

(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	