University of Alaska Program Resource Planning
Academic, Budget and Project Planning Process

Potential Source Documents:
- UA System SAF Strategic Plan
- University Strategic and Academic Plans
- University Program Review & Prioritization
- Program Action Request
- Institutional Research Input
- Accreditation Reports
- University Campus Master Plan
- University Housing/Campus Life Strategic Plan
- UA Deferred Maintenance Reduction Plan

Time Frames
- Steps 1-3 may require 1-9 months
- Steps 4-7 may require 1-3 months
- Steps 8-13 generally require 7-8 months
- Step 14 will vary depending on the size of the project (a few weeks to several years.)

Steps
- Step 1
  - University produces a Mission Area Analysis (MAA) & a Statement of Need (SON)
- Step 2
  - Does this directly impact academic, student support and/or research functions/programs?
  - NO
  - President and Board of Regents
- Step 3
  - Is this a Deferred Maintenance and Renewal (DM&R) Plan Project or a Small R&R Project?
  - NO
  - Follow University internal evaluation process
  - President and Board of Regents
  - YES
  - Process Mile Stones
  - MS #
- Step 4
  - University produces a Program Action Request (PAR)
- Step 5
  - 3. University submits PAR to Statewide Academic Council for review and concurrence
  - NO
  - Does it have a facilities cost component?
  - YES
  - Approved
  - NO
  - Does this create a new program or expand an existing program?
  - YES
  - MS 3
  - NO
  - MS 2
- Step 6
  - Financial Plan
  - Faculty/Staff
  - Program Operating Costs
  - Renovation & Reallocation, Second Order Impacts
  - Infrastructure
  - Building Operations and Maintenance
  - New Space, Remodeling
  - YES
  - Statement of Requirements Components
  - NO
  - Approved
  - 5. AVPF&LM or President approves PAA
  - Denied

13. Board of Regents Project Approval Processes

Project Type
- Construction – New or Expansion, Large R&R
- Infrastructure – New or Expansion
- Deferred Maintenance and Small R&R projects

13a. Formal Project Approval
- Schematic Design Approval
- Pre-Bid / Contract Award
- Project Change Requests
- Post Occupancy Report
- Final Project Report

13b. Board Approval of Project Plan via the June Distribution List
- Schematic Design Approval
- Contract Award Report
- Project Change Requests
- Final Distribution Report

Process Ends

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Purpose of the UA Program Resource Planning: Academic, Budget and Project Planning Process is to demonstrate the integration of academic program, institution budgeting, and facilities project planning and development processes. This process flow chart is meant to inform the various institution participants and stakeholders concerning the integration of these processes.

Definitions

MS #1 Mission Area Analysis (MAA): a quantitative and qualitative analysis of a proposed mission area, creation, expansion or substantive change, aligned with appropriate plans and policies.

- Program Proposal (PP): academic analysis for a program of study, including course descriptions, which accompanies the PAR.
- Program Action Request (PAR): Proposal to add, change or delete a program of study.
- Statement of Need (SON): a concise summary of the compelling facts derived from the MAA data and PP, and submitted with the PAR to SAC for review and approval.

MS#2 Preliminary Administrative Approval request (PAA): the first step in the Board Approval Process to fulfill the capital project approval requirements. In part it grants authorization to include a project in the UA capital plan and expend funds identify the facilities and financial impact of a program change.

MS#3 Statement of Requirements (SOR): the detailed solution set (options) that can satisfy the SON. It includes: identification of program personnel requirements; facility needs; furnishings, fixtures and equipment (FF&E) requirements; operations and maintenance (O&M) costs; and second order effects, such as backfill planning, personnel consolidation, opportunity gained or lost. This is the document that identifies all the potential impacts and potential costs associated with a mission change or expansion.

MS#4 Academic and Student Affairs Approval: for projects that have a have a direct impact on academic, student affairs and/or research functions/programs, approval of the Statement of Requirements is required.

MS#5 Long Range Capital Plans, Operating and Capital Budgets: programs and projects that have been reviewed, approved and prioritized by the University are included in the LRP and incorporated into the Operating and Capital Budgets submitted to the State for funding.

- Long Range Capital Plan (LRP): the document required by Board Policy and Governor’s Office of Management and Budget. It projects university capital planning for ten years.

MS#6 Legislative action and Project Funding: based on legislative action, the Board of Regents accepts the appropriations and distributes them accordingly.

MS#7 Formal Project Approval and Schematic Design Approval: upon receipt of funding capital projects complete the project approval requirements as required by Board Policy.