GUIDELINES:
Issued: December 2, 2013
Revised: November 21, 2014

PURPOSE:
To instruct departments on how to fill in and submit the Planning & Project Request Form.

DEFINITIONS:
Describe any acronyms or terms that are used in the policy or procedure.

PROCESS:

Requester Information:
Submission Date: Enter the date that you are sending in the request, this field is auto-filled.
First Name: Enter the last name of the person who is sending in the request, this field is auto-filled.
Last Name: Enter the last name of the person who is sending in the request, this field is auto-filled.
Department: Enter the Department of the person who is sending in the request, this field is auto-filled.
Phone Number: Enter the phone number of the person who is sending in the request, this field is auto-filled.
Fax: Enter the fax number of the person who is sending in the request.
E-Mail: Enter the e-mail address of the person who is sending in the request, this field is auto-filled.
Title: Enter the title of the person who is sending in the request, this field is auto-filled.
Manager: Enter the Manager’s name of the person who is sending in the request, this field is auto-filled.
Office: Enter the office location of the person who is sending in the request, this field is auto-filled.

Existing Location Information
Existing Location: Enter the building and floor of the group that is responsible for the request.
Program: Enter the name of the program (if applicable).
Chair: Enter the name of the chairperson.
Individual in the department who will be a contact
Check here if the contact person is the same as the requester above: Check the box and the fields will be auto-filled.

Contact Name: Enter the name of the person who will be the contact.

Contact Phone: Enter the phone number of the person who will be the contact.

What are you requesting?
Building Envelope Improvements: Check if you are requesting an improvement to the outer structure of a building.

Common Space Improvements: Check if you are requesting an improvement to common areas of a building shared by tenants (i.e. restrooms, elevator lobby, etc).

Conceptual Estimate: Check if you are requesting a conceptual estimate; conceptual estimating describes the practice of figuring an approximate cost or time-schedule estimate for a particular project before all details are known.

Conceptual Planning (pre-project): Check if you are requesting conceptual planning; a conceptual plan is a scaled drawing to help provide a concept of what will fit.

Efficiency Study: Check if you are requesting an efficiency study.

Layout and Fit Test: Check if you are requesting a layout and fit test.

Move / Relocation: Check if you are requesting a move or relocation.

Mechanical, Electrical or Plumbing Improvements: Check if you are requesting mechanical, electrical or plumbing improvements.

Needs Assessment: Check if you are requesting a needs assessment; a needs assessment is a systematic process for determining and addressing needs, or "gaps" between current conditions and desired conditions or "wants".

Physical / Space Requests / Intake: Check if you are requesting physical space.

Post Occupancy Review: Check if you are requesting a post occupancy review; a post occupancy review involves an evaluation about buildings in use from the perspective of the people who use them; it assesses how well buildings match users' needs, and identifies ways to improve building design, performance and fitness for purpose.
Process management for planning requests and studies: *Check if you are requesting process management for planning requests and studies.*

Programming: *Check if you are requesting programming.*

Return of Space: *Check if you are requesting return of space.*

Space Renovation: *Check if you are requesting a space renovation.*

Please provide a description of need: *Enter a description of the need you are requesting.*

**What space is to be renovated?**

Renovation Building(s): *Enter the building name in which the renovation will be taking place.*

Renovation Room(s): *Fill in the room numbers to be renovated.*

**Please indicate what is driving this need**

New Program: *Check if a new program is driving this need.*

Research Grant: *Check if a research grant is driving this need.*

Inadequate Space: *Check if inadequate space is driving this need.*

New Hire: *Check if a new hire is driving this need.*

New Equipment: *Check if new equipment is driving this need.*

Other & Other Description: *Check and provide description if something else other than listed above is driving this need.*

Who is this work to be performed for? *Enter the department, division, person who this work is to be performed for.*

Anticipated occupancy / start date: *Enter the date that the space is needed.*

If temporary need, please provide an end date: *If this is a short term need, enter the date that the space is no longer needed.*
Have you been in contact with anyone in senior administration (Departmental or Dean’s Office) regarding this request? *Check yes or no on whether you have had discussions about this request with your department’s senior admin or anyone in the Dean’s office.*

If yes, who have you been in contact with Central Administration? *If you have had discussions about this request with your department’s senior admin or anyone in the Dean’s office, please indicate who you have spoken to.*

If yes, when were you in contact with Central Administration? *If you have had discussions about this request with your department’s senior admin or anyone in the Dean’s office, please indicate when you spoke with someone.*

Has any work been done on this request as a result of that contact to date? If yes, provide detail and current status of that work. *If anyone has done any work on this request, please provide the information and status of the work.*

If assistance is needed in filing out this request or understanding space type, please contact Cheryl Kilwin, Space Information, at 362-8317.

Check the box if your business manager has approved of this request (this form cannot be submitted if this box is not checked).

Check the box to “sign” this request (this form cannot be submitted if this box is not checked).