



Capital Project Approval Process

Facilities Planning - Capital Program

June 2023

Capital Project Approval Thresholds

Project Type	Project Review Committee (PRC)	Capital Review Committee (CRC)	Campus Approval via CCCPD Chancellor	UCOP Review	Regents Approval Health Services Committee	Regents Approval P-Funding	Regents Approval Design + Budget
Minor Cap Projects <\$1M	In-take and project charter developed by Project Development	N/A	NA	NA	NA	NA	NA
Major Cap Projects \$1 - \$10M	In-take and project charter developed by Project Development	Approved By Governance Committee & Leadership	P-Funding Approval Design+Budget Approval delegated to Chancellor	NA	NA	NA	NA
Major Cap Projects \$10 - \$70M	In-take and project charter developed by Project Development	Approved By Governance Committee & Leadership	P-Funding Approval Design+Budget Approval delegated to Chancellor	Check in to ensure compliance with CFP. Scope, Schedule Budget Approval by UCOP	NA	NA	NA
Major Cap Projects >\$70M	In-take and project charter developed by Project Development	Approved By Governance Committee & Leadership		Scope, Schedule Budget Approval by UCOP in advance of Regents	If applicable to the scope of the project	Finance & Capital Strategy Committee	Finance & Capital Strategy Committee

Project Review Committee (PRC)

Who: FP&D Directors & Exec Directors (Support by SOM & Finance, Others)

When: Monthly

Where: UC Davis Health (Led by Project Development)

What: The purpose of this committee is to in-take new requests, develop project charters, and submit new projects for funding.

- Facilities Service Request (FSR) is submitted in Compass
- Project Development in-takes and reviews the request
- Requests are reviewed by the PRC
- Project Development develops the Project Charter
- Project Charter includes the following:
 - Investigation, Research and Site Visit
 - Project Scope
 - Estimates/Budget
 - Schedule
 - Signed Completed Charter
- Project Charter goes back to PRC for review
- Project Development submits project to CapFi for funding

Capital Review Committee (CRC)

Who: UC Davis Health (C-Suite Leadership, FP&D, Finance, Strategy, IT & PO&M)

When: Monthly

Where: UC Davis Health (Led by Finance & Facilities Planning)

What: The purpose of this committee is to review and approve capital projects, recommend priorities, provide strategic direction, and oversight, and make recommendations to matters pertaining to capital budget requests, land use and planning decisions, capital investments, leases and new project ideas and suggestions.

- Approve major capital projects >\$1M
- Approve project feasibility studies, project preliminary fundings, full project budgets, and augmentations.
- Guide and make recommendations for new project ideas, suggestions, and improvements.

Chancellor's Committee on Campus Planning & Design (CCCPD)

Who: Main Campus (Capital Planning, DCM, Environmental), UC Davis Health (FP&D, Capital Planning)

When: Monthly

Where: Main Campus

What: The purpose of this committee is to review capital projects both on the Main campus and Sacramento campus for endorsement by the Chancellor.

- Major capital projects >\$1M
- Approve project preliminary fundings, full project budgets, and augmentations.
- After projects are presented to CCCPD and endorsed, approval documents can be sent down to campus for processing.

Capital Project Approval: Required Documents

Responsible Party Listed Within the Parentheses () : CP - Capital Planning; PM - Project Manager; Campus - UC Davis Campus

	Project Cost: \$1M - \$10M	Project Cost: \$10M - \$70M	Augmentation (Chancellor Approval)	Augmentation (UCOP EVP-CFO Approval)
CRC Brochure (Feasibility)	X (PM)	X (PM)		
CRC Brochure (P-Funding)	X (PM)	X (PM)		
CRC Brochure (Full Funding)	X (PM)	X (PM)		
CRC Brochure (Augmentation)			X (PM)	X (PM)
Project Planning Guide (PPG)	X (CP)	X (CP)		
Capital Improvement Budget (CIB)	X (PM)	X (PM)		
Action Item	X (CP)	X (CP)	X (CP)	
Admin Item		X (CP)		X (CP)
PPG Project Schedule	X (PM)	X (PM)		
Environmental Impact Classification (EIC)	X (Campus)	X (Campus)	X (Campus)	X (Campus)
Delegated Checklist		X (CP)		X (CP)
Project Site Map, Floor Plan, Design Drawing (Rendering)	X (PM)	X (PM)		
PPG Amendment			X (CP)	X (CP)
Transmittal Letter			X (PM)	X (PM)
Updated CIB			X (PM)	X (PM)
Updated PPG Project Schedule			X (PM)	X (PM)
Updated Project Site Map, Floor Plan, Design Drawing (Rendering)			X (PM)	X (PM)

Reminders & Announcements

- Monthly office hours held on the first Tuesday of each month (7:00am & 1:00pm)
- Reach out to us at hs-capitalplanning@ucdavis.edu
- Updated CIB template and training – Coming Soon
- We're here to help! Reach out early and often!
- Capital Planning Unit
 - Rowena Reyes (rereyes@ucdavis.edu)
 - Zenobia Bradford (zbradford@ucdavis.edu)
 - Hong (Anna) Doan (htodoan@ucdavis.edu)