Introduction

WMU requires that all projects go through a request and authorization process. Once a project is requested, the scope is defined and an estimate developed, the project approval form is generated by facilities management. Depending upon a number of factors, the project will be classified and tracked for accounting purposes. To ensure that projects are appropriately approved, communicated and classified, this project authorization protocol for Student Affairs has been developed.

The project approval form is used for all projects. Capital projects are generally long-term investments that build upon, add to or improve upon a capital asset and require a large commitment of resources, in terms of planning, labor and finances. Capital improvements can be smaller in scale and result in an improvement to or the restoration of some aspect of a property that will either enhance the property's overall value or increases its useful life.

Projects frequently cross organizational boundaries, may last for anything from a few days or weeks to a number of years, during which time budgets may be revised. They may also be one of a number of projects taking place in that space.

At WMU, these projects either encourage a strong learning environment, correct previous inadequacies or improve student life. Each capital project must be representative of the University and its goals. Capital projects are investments in Western Michigan University's future, and are therefore planned and executed with care.

Authorization

Once you have worked with Facilities Management to define or change the scope of the project, they should provide a project estimate, including a detailed budget, and a project authorization form.

Once the project authorization form has been received, the following protocol should be followed:

1. The appropriate individuals from the department (as outlined below), should sign the authorization and forward it to Nicole Kalmbach. If the department is fund 41 in nature, the appropriate cover sheet should be completed and included when the information is forwarded to Nicole.
   a. Nicole will verify the funding source and determine if capital project requirements are met.

2. If additional signatures are needed (as outlined below), Nicole will obtain those signatures.

3. Upon securing all pertinent signatures, Nicole will forward the project authorization to Facilities Management, per typical procedures. Anyone who has signed the project authorization will be CC’d on this communication.
   a. This process is contained within in the purple Student Affairs Approval diamond (with red lettering) in the flowchart below.
4. Nicole will reconcile all Student Affairs fund 63 and all fund 41 associated fund 64 accounts on a regular basis.

The project authorization form needs to be approved as follows:

<table>
<thead>
<tr>
<th>Project Budget Amount</th>
<th>Department Head</th>
<th>Immediate Supervisor</th>
<th>N. Kalmbach</th>
<th>J. Quakenbush</th>
<th>VPSA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $5,000</td>
<td></td>
<td></td>
<td>N. Kalmbach</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$5,000 - $24,999</td>
<td>Department Head</td>
<td>Immediate Supervisor</td>
<td>N. Kalmbach</td>
<td>J. Quakenbush</td>
<td></td>
</tr>
<tr>
<td>$25,000 - $74,999</td>
<td>Department Head</td>
<td>Immediate Supervisor</td>
<td>N. Kalmbach</td>
<td>J. Quakenbush</td>
<td></td>
</tr>
<tr>
<td>$75,000+</td>
<td>Department Head</td>
<td>All Supervisor(s)</td>
<td>N. Kalmbach</td>
<td>J. Quakenbush</td>
<td>VPSA</td>
</tr>
</tbody>
</table>

**Project Authorization Workflow**

[Diagram of project authorization workflow]

*Note: For purposes of this flowchart, the general title of Facilities Management includes: Physical Plant, Construction Services, Maintenance, and Landscape.*

* = The Student Affairs Business Manager will copy all appropriate parties on this communication. From this point until the project setup is complete, all individuals copied on the initial email should be copied on all communications.