

Facilities Initiative Funding Requests in the Planning Database (revised February 2006)

Planning thus far...

As you will recall, our Strategic Planning database incorporates both our planning goals and our requests for additional funds to help implement our plans. The database has been restructured to help us track our goals and show the relationships among them.

If you are at the VP level, you were asked to enter your planning Goals. If you are at the Dean or Director level and have multiple departmental units under your supervision, you were asked to enter Strategies (remember, Strategies = college or unit goals). If you are at the Departmental level, you were asked to enter Action Plans (remember, Action Plans = departmental goals).

Departments have their Action Plans reviewed by their VP's or the designee of the VP. If your VP has completed the review of your Departmental Action Plans, you should receive an email notification and be able to access the approval level for each of your Action Plans via the database. Your Action Plans will appear in the same grid as you entered them before, and approved Plans will be highlighted in beige. Plans which did not earn approval, or which have not been reviewed yet, will appear in the standard darker grey highlighting.

Once you have created a plan, you may need to alert our Space Management Council that you are making a Facilities Initiative Request in order to gain approval and/or financial support to implement your plan. Enter facilities requests in the planning database is part of the Space Management Guidelines and is a crucial first step in requesting new space, requesting renovations to existing spaces, or changing the functional usage of a space. In order to enter a facilities initiative request, you begin by selecting an approved Action Plan and scrolling to the bottom of the screen, you will then be able to see the priority level of approval and you will be able to enter an Initiative Funding Request. Go through each individual Action Plan to enter your Initiatives, thus tying your request for additional funding and/or facilities work to your original Goal, Strategy or Action Plan.

About this Guide...

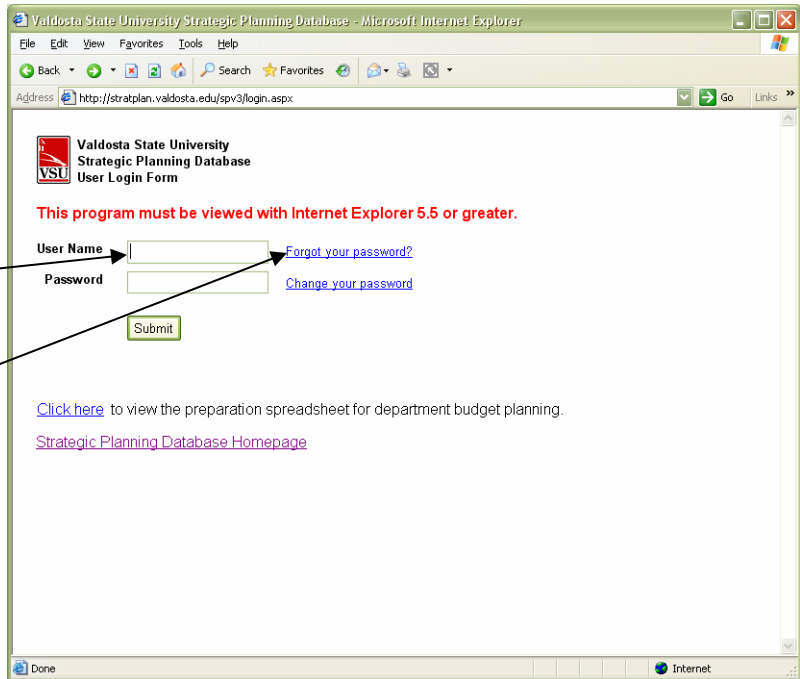
This guide gives step-by-step instructions for how to enter Facilities Initiative requests from the view of the Departmental level user. Notes in **blue font** are extra tips to make the process easier. **One of the most important things to remember** is that Initiative Funding Requests are driven by the Goals, Strategies and/or Action Plans you have entered previously. Each Initiative must be connected to a goal, so you should return to your original Goal, Strategy or Action Plan screens EVERY time you want to create a new Initiative tied to a goal. Pay careful attention to how you navigate these screens!

Regardless of whether you are an experienced planning database user, or a new participant in this process, I recommend that you review this guide and refer to it as you enter your first few Initiative Funding Requests that are facility related. Please don't hesitate to contact me if you have questions. I am also available to do mini-workshops with your colleges or divisions on the technical aspects of using the database or on the concept of the planning process, if you would find that helpful.

Using the VSU website, select “Planning” under Organization in the left-hand column. From the Planning website, select “Planning Database” from the top of the right-hand column.

From the database webpage, select LOGIN NOW.

Use this screen to enter your user name (typically your VSU email ID) and your planning password. If you forget your password, there is a link to the right of the text boxes with instructions for requesting a password reminder.



The next screen will be the main menu of the planning database.

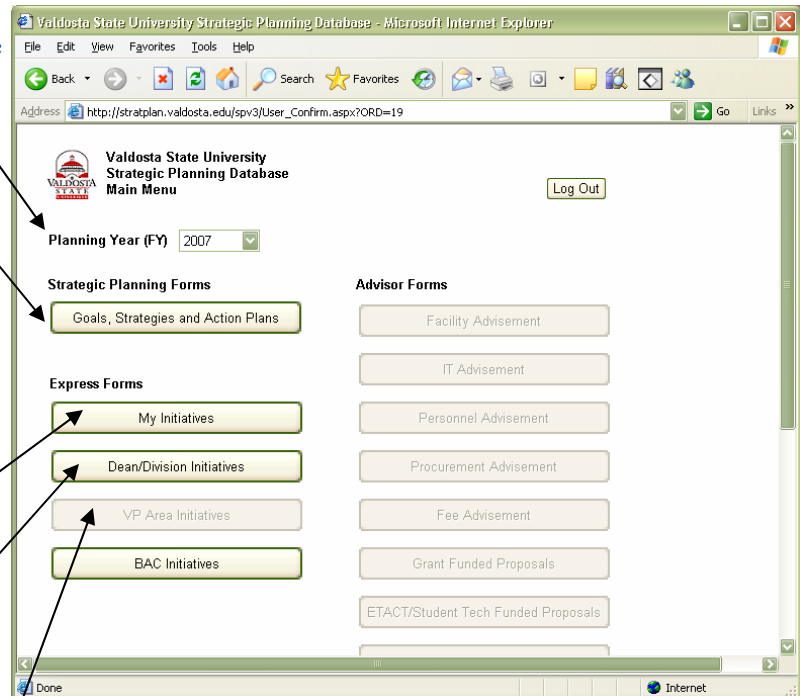
You can leave the Planning Year at its default. You are planning what you hope to accomplish this academic year (05-06) but are requesting permanent (on-going) Initiatives related to the FY07 budget and one-time Initiative from this year’s budget (FY06).

From this page you will need to selected the “Goals, Strategies and Action Plans” button in order to create a new Initiative data.

“My Initiatives” will take you to a sortable grid of the Initiatives you have already created in the database.

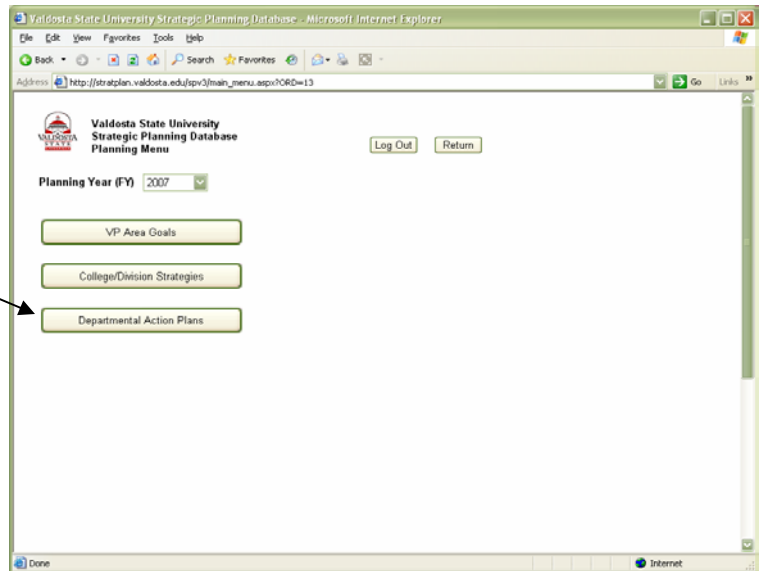
If you are a Dean/Director, this button will show you all of your own initiatives and the initiatives for any department you supervise.

If you are at the VP level, this button will be illuminated and will show you all of your Initiatives combined with those of your directors and their departments.



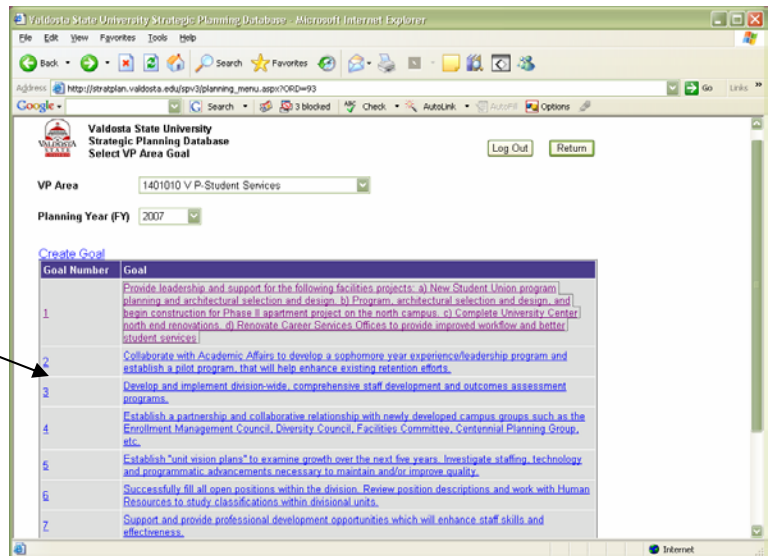
The next window will allow you to navigate to the specific section of the database you need in order to access your VP Goals, Dean's Strategies, or Departmental Action Plans. Once there, you can enter Initiatives for your goals that require extra funding.

For example, if you are at the departmental level, the VP button will give you a report of the VP area's Goals, the Strategies Button will give you a report of your Dean's or Director's Strategies, and the Action Plan button will let you access the departmental goals you created and will link to your Initiative Funding Requests.



In this example, the Department Head has selected the Action Plan button and is taken to the same screen they used to enter their Action Plans.

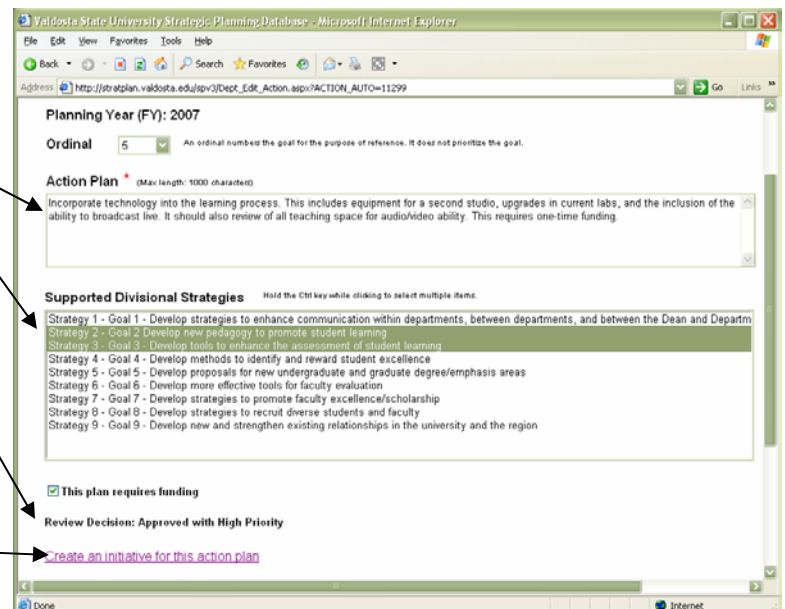
Any Departmental Action Plan that has been through the review process and given an "approved" priority will be highlighted. All of these Action Plans have been approved. Select an Action Plan to see at what level it was approved and enter an Initiative Funding request to help support this departmental goal.



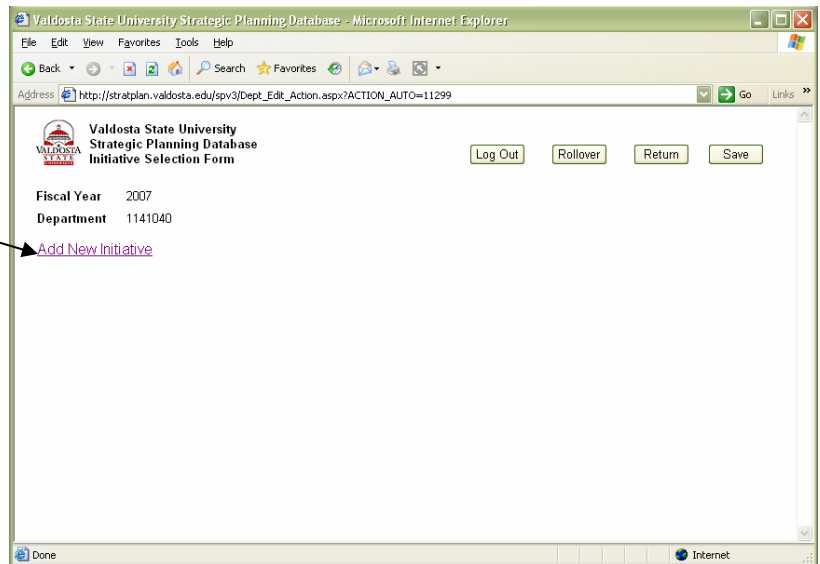
Here you will see your original Action Plan, and the Divisional level Strategies you chose to support.

You will also see at what level your Action Plan has been approved.

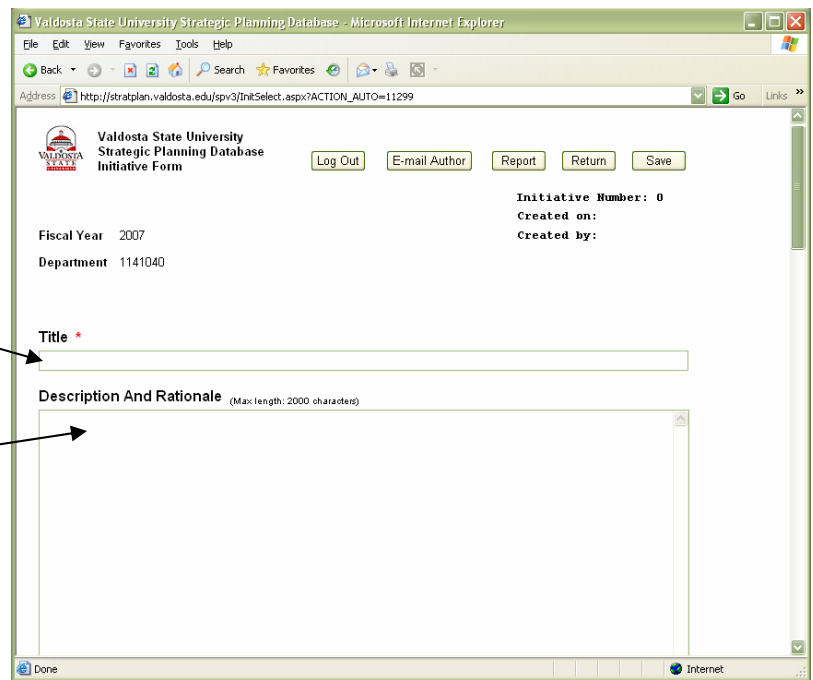
If your Plan was approved at any priority level AND you indicated initially that you needed money beyond your original budget, you will see a link to create an Initiative Funding request for this Action Plan. Select this link to enter your Initiative for this departmental goal.



The next screen will allow you to add a new Facilities Initiative Funding Request related to the Action Plan you selected from the previous screens. Select Add New Initiative to do this.



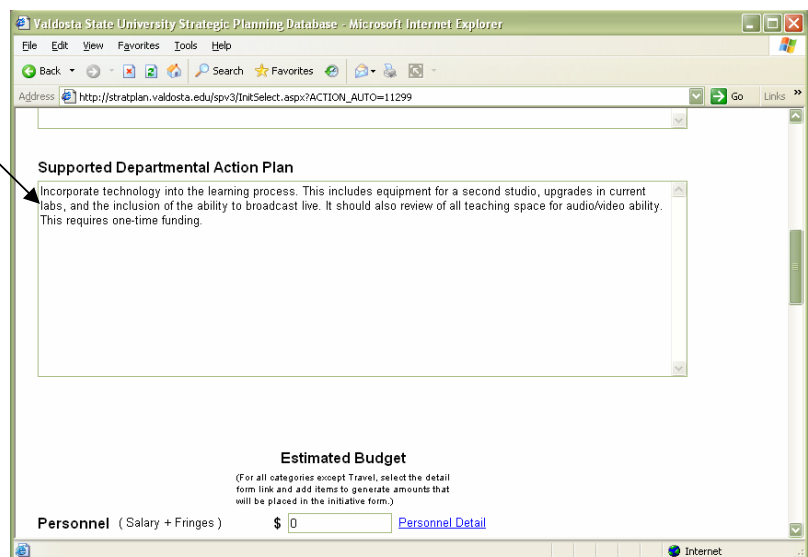
The screen that will open is very similar to our previous years' Initiative Funding request processes. It is a long form that you will need to scroll down and complete in sections. The next several screen captures will walk you step-by-step through this process.



First, you will be asked to enter a title for your Initiative. Be as brief, but as descriptive as possible.

Next, you should provide a description of the Facilities request and a rationale for why any funding is needed, how funding will be used, and how the initiative relates to the goal it is connected to.

Scrolling down this same screen, you will see a box that is already filled in for you. This is the Action Plan, Strategy, or Goal that you are requesting a facility change in order to implement. Make sure that the Initiative you are entering is for this goal. You do not need to enter any information here, it has been completed based on your initial entries.



Continue to scroll down this same screen to the budget section...

This part of the Initiative Funding request Screen will allow you to specify the costs associated with different aspects of this Initiative.

You can specify employees you will need to hire to complete your action plan, travel expenses, technology expenses, equipment other than technology, operating expenses for your action plan, and/or facility costs.

Since you want to create a Facility Request, you will need to use the Facilities Related Expenditures section. See the directions below for how to get information to appear in this budget box.

Estimated Budget		
(For all categories except Travel, select the detail form link and add items to generate amounts that will be placed in the initiative form.)		
Personnel (Salary + Fringes)	\$ 0	Personnel Detail
Travel	\$ 0	
IT-Related Expenditures	\$ 0	IT Detail
Equipment (Single item > \$5,000)	\$ 0	Equipment Detail
Other Operating Expenditures	\$ 0	Other Detail
Facility Related Expenditures	\$ 0	Facility Detail
Total Initiative Budget Request	\$ 0	
New Or Increased Fee Request	\$ 0	Fee Detail

Initiative Duration:

Most of the budget areas have separate worksheets to assist you in completing the details needed for each box. The information from the worksheets will automatically be placed in the appropriate boxes.

In order to create your facility request, click on the blue Facility Detail worksheet link to the right of the budget box.

In order to complete this worksheet, you will temporarily leave the Initiative Request page. The only time you will leave this long screen during the Initiative creation is to complete the worksheets. After filling out the details on the worksheets, you will be returned to this page to continue completing your request.

Estimated Budget		
(For all categories except Travel, select the detail form link and add items to generate amounts that will be placed in the initiative form.)		
Personnel (Salary + Fringes)	\$ 0	Personnel Detail
Travel	\$ 0	
IT-Related Expenditures	\$ 0	IT Detail
Equipment (Single item > \$5,000)	\$ 0	Equipment Detail
Other Operating Expenditures	\$ 0	Other Detail
Facility Related Expenditures	\$ 0	Facility Detail
Total Initiative Budget Request	\$ 0	
New Or Increased Fee Request	\$ 0	Fee Detail

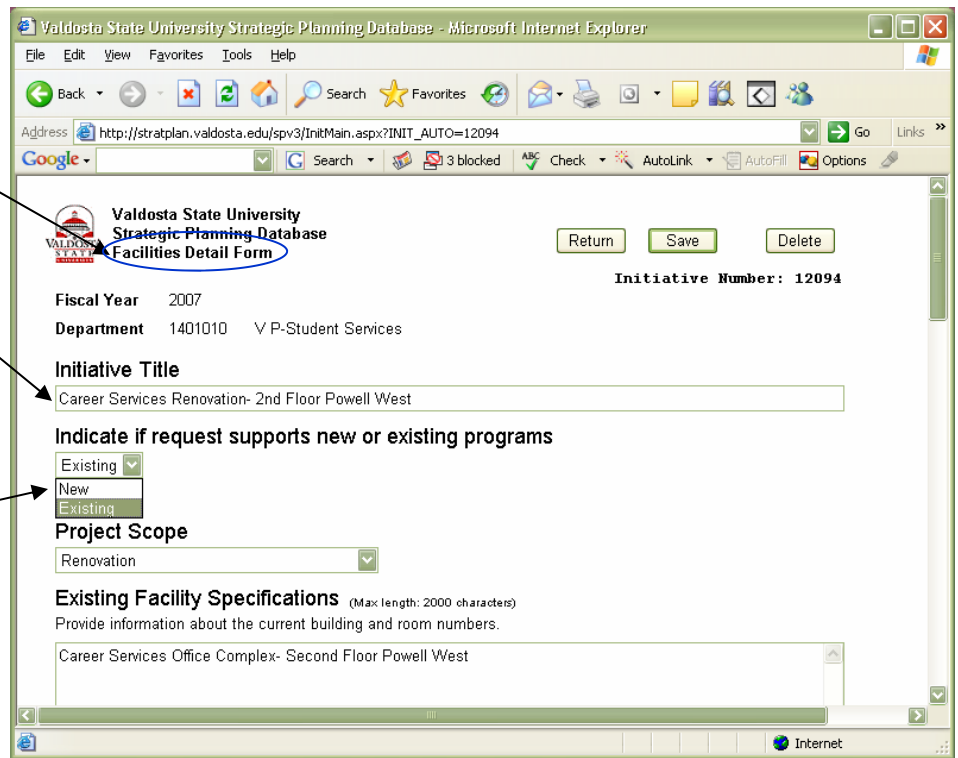
Initiative Duration:

The Facility Detail Worksheet will now open...

Notice that the top of the screen let's you know you are working within the Facility Detail Sheet.

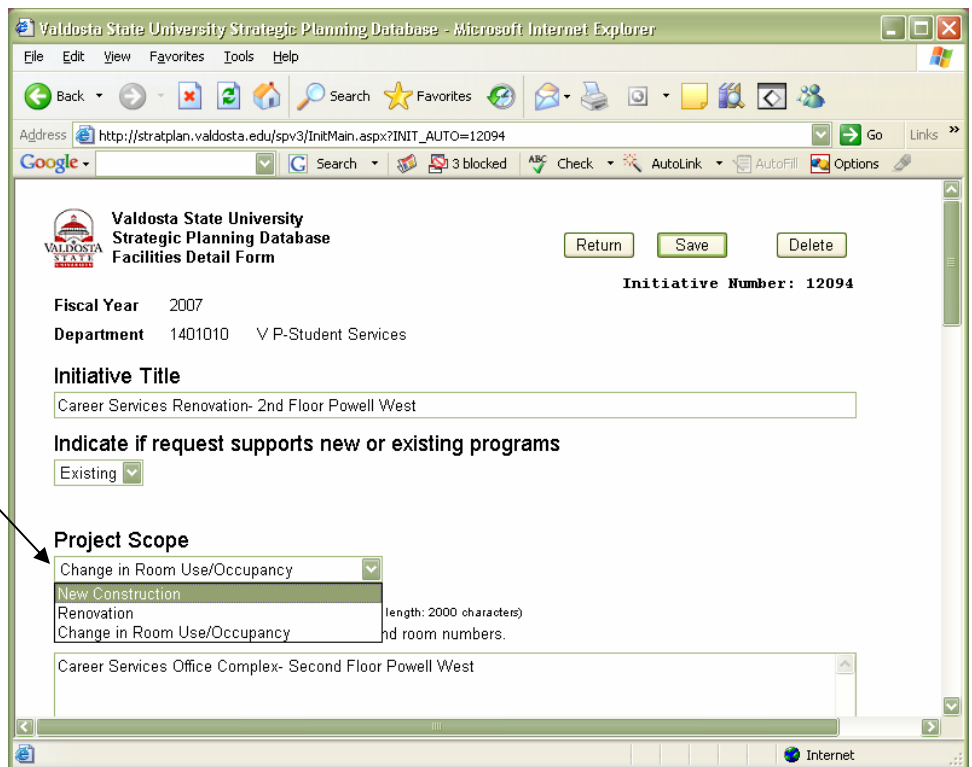
First, enter a brief, but description title for your Facility Request. Including Room numbers are helpful (if they exist).

Indicate if your request is tied to a currently existing program or a new program. For example, if a department created a new minor and needed a lab for students within that discipline, you would select NEW. If you wanted a new lab to support an existing minor the department already offered, you would select EXISTING.



Indicate the scope of your project. This is the essence of what you are trying to accomplish. Is your project entirely new construction, the creation of physical space that didn't exist before? Is it a renovation of an existing space? Or do you need to change the function of a room's usage (for example, turning a small office into a storage room or a classroom into a lab)?

Descriptions about each type of facility request can be found in the Space Management Guidelines. The Flow chart from that document is included at the end of this user's Guide for your reference.



Complete the narrative portion and describe what currently exists, where the space is located, etc.

Complete the narrative portion and describe the reason you are requesting a change in your facilities usage. Be sure to relate your needs to your planning goals.

Be as specific as possible regarding your reasons for wanting the change. Occasionally, the Space Management Council's review of your Initiative Request will generate alternative solutions that might be more suitable, based on your description of your needs and the reasons you require a change.

The screenshot shows a web browser window titled "Valdosta State University Strategic Planning Database - Microsoft Internet Explorer". The address bar shows "http://stratplan.valdosta.edu/spv3/InitMain.aspx?INIT_AUTO=12094". The form contains the following sections:

- Project Scope**: A dropdown menu with "Change in Room Use/Occupancy" selected.
- Existing Facility Specifications** (Max length: 2000 characters): A text area containing "Career Services Office Complex- Second Floor Powell West".
- Reason For Change** (Max length: 2000 characters): A text area containing "The carpet is stained and ripping, the paint is peeling and all the furniture is mis-matched. The traffic patterns of the office negatively impact student use, employer interview, and confidential advisement."
- Funding Information** (Max length: 2000 characters): A text area containing "Key initiative for coming fiscal year of end or year funds."

Indicate in this narrative portion if there are funds available in your existing budget for this facility initiative, or if you are requesting funding for the project outside of your original budget allocation.

If you are requesting NEW space, not renovation or change in room function, click the blue Add New Space link to enter more detailed information regarding the new space you'd like to acquire.

OR

If you are requesting a renovation that does not involve expanding square footage, or you are requesting to move into an existing space, you are ready to add any final comments and select SAVE.

The screenshot shows the same web browser window, but the form is scrolled down to show the following sections:

- Funding Information** (Max length: 2000 characters): A text area containing "Key initiative for coming fiscal year of end or year funds."
- Please indicate the spaces needed**: A blue link labeled "Add New Space".
- Comments/Recommendations/Approvals** (VP signature required for all requests): A text area containing "This facility is outdated, poorly organized and difficult to conduct multiple uses."
- VP Approval**: A checkbox labeled "VP Approval" which is checked.
- Buttons: "Return", "Save", and "Delete".

If you selected the Add New Space link, the following window will open...

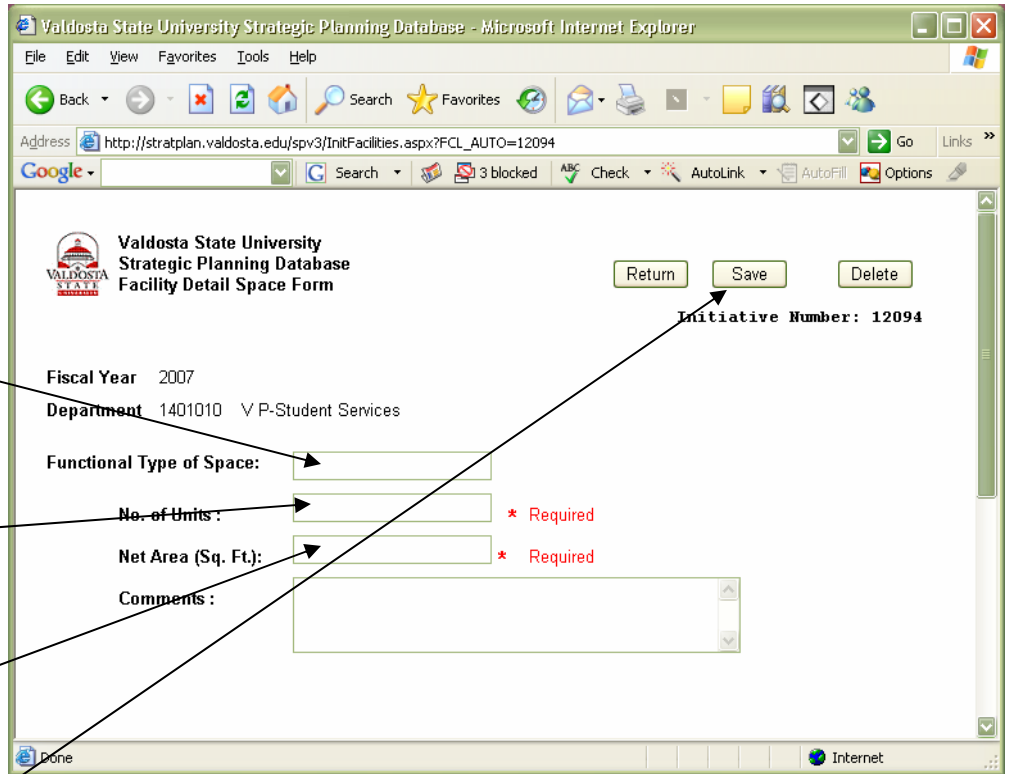
A new window will open (you're now 3 windows into the same initiative... but don't worry, the initiative module will make sure you get back to your original place as long as you select SAVE after completing each screen).

Indicate the type of space (classroom, office, storage, lab, etc).

Indicate the number of units (for example, if you were renovating a space to create 3 offices of equal size, you would enter "3").

Indicate the square footage. (for example, if each office was going to be 100 square feet, you'd enter 100 rather than 300).

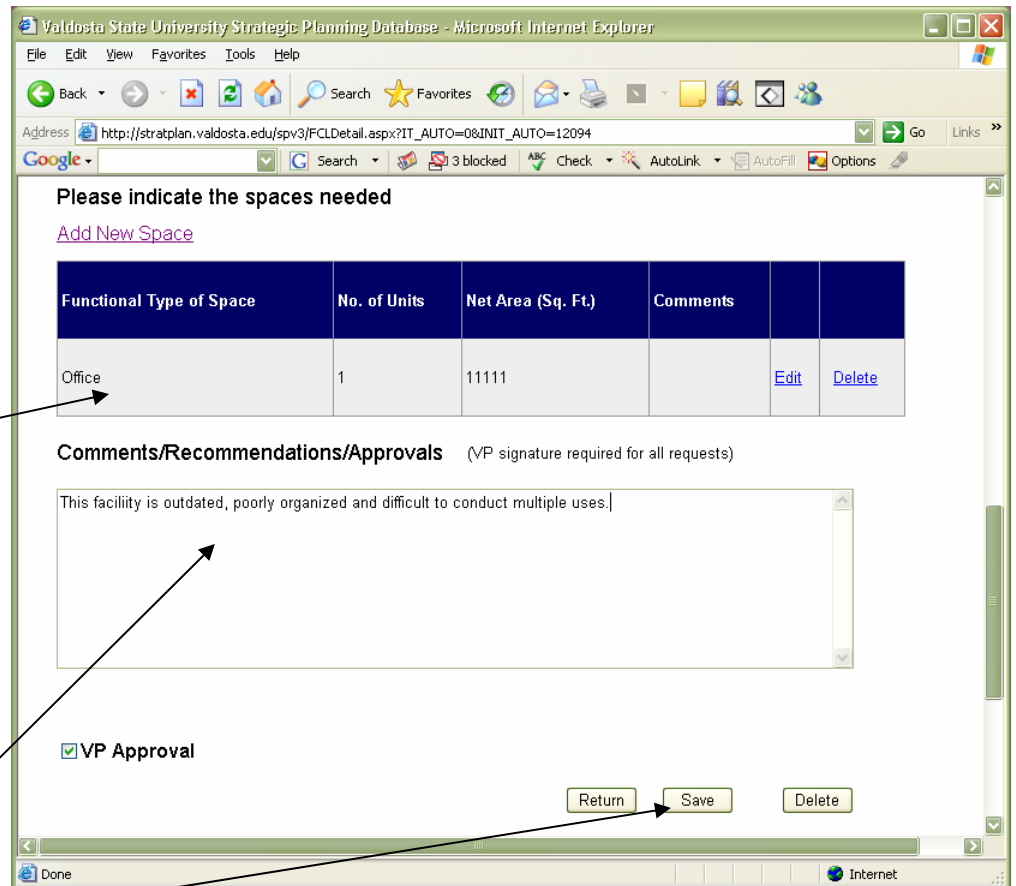
Select SAVE.



Once you have completed the Add New Space screen, and selected SAVE, you will be returned to the original Facility Detail Worksheet, where you will see a new grid indicating your space request.

If you wanted to do one project, but remove walls and create 4 offices, you can indicate all this within one facility initiative, instead of 4 separate ones. You would click the Add New Space button gain and enter details for the second office. Each new space would appear on the grid, within your one initiative.

If you are finished requesting space related to this one initiative, then you may add any final comments and select SAVE to return to your original Facility Request.



Once your worksheets are finished, scroll further down this same Initiative Screen, and highlight from a drop-down menu to indicate whether you need this funding one-time for a special project, or whether you are requesting on-going funds that will be added to your budget every year.

You can then indicate that your Initiative Funding request is ready to be reviewed by your supervisor(s) and/or the Budget Advisory Council (BAC). Do this only when you have edited your description and rationale, completed all the budget detail worksheets you need to, and feel confident your Initiative Request is complete.

Next, you should assign a priority level for this Initiative Request. This is a numerical ranking. So if you have 5 requests, you'd indicate if this is the top priority (1) or your lowest priority (5) for funding in your department.

The ranking you give is the priority of this Initiative Funding request, not the goal that has been previously approved.

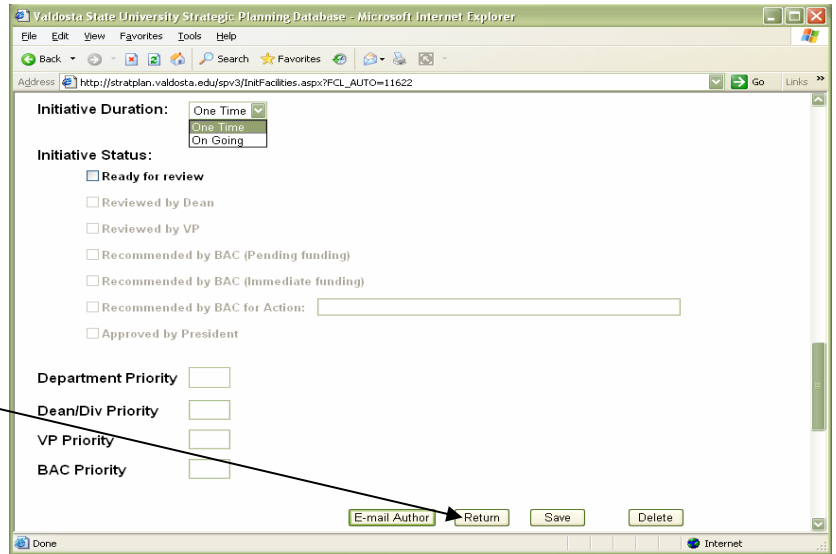
Most importantly, click SAVE !

To continue entering facility requests or other Initiative Funding Requests see the remaining instructions...

After saving your first Initiative Funding request, you may add another Initiative request to support the SAME Action Plan, or write a new Initiative to support a different Action Plan. Please see the underlined directions below for how to do each of these.

To add more Initiative Funding Requests, select return.

(If you are finished adding Initiatives for now, you can scroll to the top of this page and select LOGOUT.)

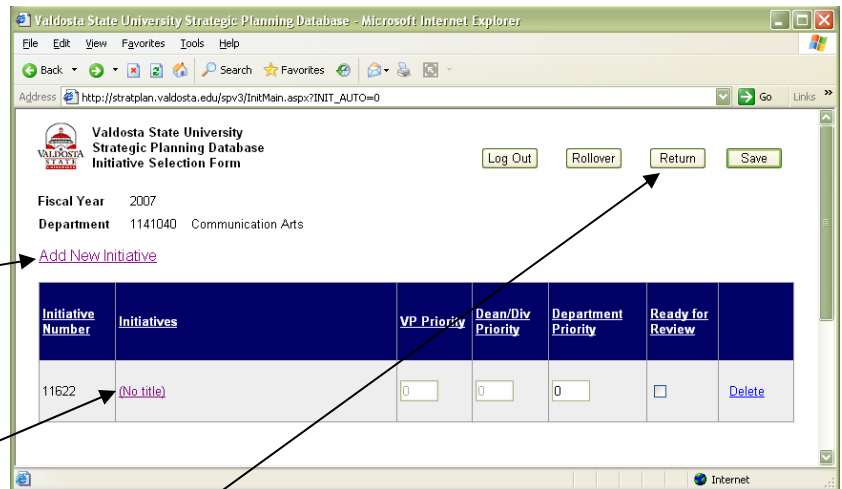


Selecting return will take you back to a screen that lists the Initiative you just entered and allows you to enter a second Initiative to support the SAME Action Plan you originally selected.

You do this by selecting Add New Initiative and repeating the previous directions.

You may also select Initiatives off this list to open them and make edits/corrections (this works just like the process for entering your goals worked!).

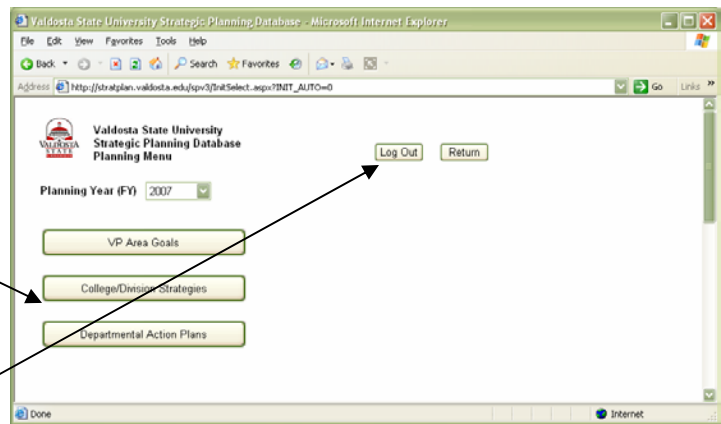
If you want to enter an Initiative Funding Request to support a DIFFERENT Action Plan than the last one, select RETURN again.



Selecting return will take you back to the screen where you can access your Action Plans.

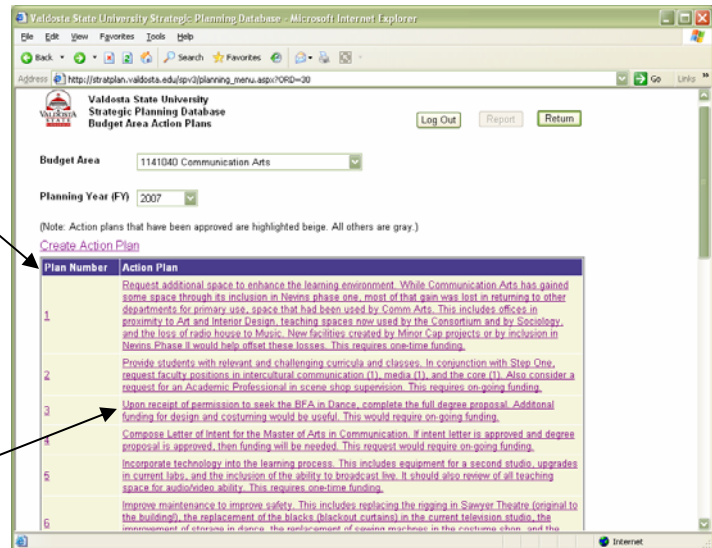
Remember that your Initiatives Requests are built from your Action Plans, so you must go back to this screen, and select Departmental Action Plans (or the appropriate planning level for you) in order to enter a new initiative.

You may also exit now using the LOG OUT button in the upper right.



Now you will find yourself back to your original grid of all your Action Plans, Strategies, or Goals.

Select one you would like to enter an Initiative Funding Request for.



Scroll to the bottom of that new screen and select Create an Initiative for this Action Plan. Then just follow the same steps as outlined previously in this guide.

