**BACKGROUND**

CPMS was developed to streamline capital initiatives requiring project scope, associated timeline, and funding requirements and sources; providing a framework that could be clearly understood by all stakeholders. The Customer (department, organization, and/or Campus Leaders) enters the initiative or request into CPMS, request routes for Organizational Approval and is queued to the FP&A if >$35K for fund source approval then routed to Dispatcher role. Depending on the project and if request is complete including funding, the Dispatcher routes the request to the appropriate Supplier (A&E, CAS, or Physical Plant). At this point CPMS must be queued manually between roles for scope development, additional funding and approvals.

**CURRENT CONDITIONS**

- **Key factors:** no auto routing, system is passive, no prompting unless request is “opened” to specific individuals, huge time lags, unless communication occurs outside of system no awareness to address request occurs, system is not intuitive, and no training/definitive guidance.
- **% Complete & Accurate:** Long Delay Time (D/T) plus amount of Process Time (P/T) = Total Lead Time (L/T) in Capital Programs suggests that requests are not 100% complete and ready for routing, e.g., incomplete scope, budget, funding source not identified, multiple approvals required, etc.
  - Capital Programs: D/T = 91 Days from 10/2014-4/2015
  - Capital Programs: P/T = 1-10 Minutes in CPMS to enter data/add comments.
  - Capital Programs: 10 Minutes P/T + 91 Days D/T = 91 days, 10 minutes L/T
  - Capital Programs Touches: = 26% Touch Time (Greatest share compared to all other Constituencies)

**ROUTES FOR ORGANIZATIONAL APPROVAL**

- Process does not match capabilities of CPMS; further definition, examination, and process mapping should occur for each process, e.g., Major, Minor, Maintenance/Repair, Alteration/Renovation, etc. — then determine system needs (CPMS modification or other?)

- Why doesn’t CPMS work? CPMS designed for specific purpose with a limited scope; current state demands do not match.
  - Why no match? Current state not clear, lacking full customer involvement during scope development.
  - Why no customer involvement? System expectation was to control funding, rather than facilitate project completion.
  - Why did expectations change? Volume of projects, types of projects, and customer needs have evolved.

**TARGET CONDITIONS (GOALS)**

- Customers want communication, need answers and assistance. They are not experts, they are seeking experts.
- Customers want assistance to prepare the “right” documentation in order to make the correct request.
- Requests route from customer for approvals, to Supplier for scope/budget estimation, approvals, budgeting occurs, so that work begins within a reasonable timeframe.

**IMPLEMENT PLAN**

- What exactly needs to be done? Map/define all processes, compare to CPMS or other.
- Who needs to be involved? Stakeholders, Customers, Suppliers, Processors, Dispatchers, etc.
- How will this be attempted at first? TBD
- Where will it be attempted? TBD
- When will it be attempted? TBD
- What preparations must be made? TBD
- How will progress be evaluated? Pilot project examples and compare Current and Future State statistics.
- When will the reviews for follow-up be held? TBD