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| Property and Facilities  14 March 2025 |  |

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| |  | | --- | | Project Name | | **Gate 0 - Project Initiation Request Document**  **For Routine Projects (>$300K but <$10M) and Major Projects (>$10M)** |   PMO Project Number: |

# Base Project Information

|  |  |
| --- | --- |
| **Project Title** | Title |
| **Project Category** | Choose an item. |
| **Portfolio** | Choose an item. |
| **Organisational Unit** | Choose an item. |
| **Project Sponsor** | Name |
| **Project Owner** | Name |
| **Business Interface Lead** | Name |
| **Decision Sought** | Choose an item. |
| If “Other”, please explain: |

# Budget Details

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Funding Requirements** | | | |
| Project budget in IFG Forecast | $0 | **Year(s)** | **Amount Forecast** |
| [Year] | $0 |
| Total Capital Funding Estimate (TCFE) | $0 (including GST) | IFG Funding: $ | |
| Other Funding: $ | |
| Gate 0 funding request | $ or NIL | | |

# Document Control

|  |  |  |
| --- | --- | --- |
| **Authorisation** | **Name** | **Position** |
| Prepared by | Name | Role |
| Endorsed by | Project Owner  Name | Role |
| Confirmation that the Project Sponsor is supportive of the project? | Project Sponsor Name: Name  Support Confirmed: Yes/No  Date Confirmed: DAY.MONTH.YEAR | |

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1. Project Overview

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| --- | --- |
| Business Need | *What problem or opportunity is this project solving?*   * *Provide context / set the scene.* * *What is being proposed (motivation, rationale, objectives and key attributes)?* * *What are the principle activities to be undertaken and who are the primary stakeholders?*   *What are the consequences (if any) if we don’t pursue/action this proposal?* |
| Project History | *Provide any background / historic context regarding the proposed project that enables the PRB and IFG to understand any previous work, conversation or agreement that has formed the basis of the Gate 0 submission.* |
| Project Scope |  |
| Options for Consideration |  |

* 1. Impacts and/or Requirements

|  |  |
| --- | --- |
| Potential Impacts and/or Requirements | |
| Health & Safety impacts and/or requirements | *Outline any H&S impacts which need to be considered if the project is not completed, for consideration during construction and any post completion H&S considerations* |
| Infrastructure and Sustainability impacts | *e.g. Upgrade to chiller or air conditioning requirements, or project will require more power brought to a building to allow for new 3 phase equipment etc*  *e.g. Environmental risks or impacts* |
| Campus Planning impacts | *Are there any specific planning and/or occupancy requirements?*  *For example: Are you looking to modify a heritage listed building?*   * *Are you planning to build/alter something in a heritage listed area?* * *The UQ Aboriginal and Torres Strait Islander (ATSI) Design Principles and Campuses on Countries*   *Design Framework apply to all built environment and landscape projects that UQ undertakes, unless there is a clear demonstration that doing so would add no value to the project. Has a response to the Framework been considered or planned for this Proposal? (Note: this will be further assessed by the P&F Project Review Board).  If none, state NIL.* |
| Commercial Business impacts | *If known, please specify any impact this proposal has on existing leasing, licencing agreements, or commercial contracts.*  *For example:*   * *Retail tenants will be impacted via potential loss of business or access interrupted via road closures etc* * *Changes to parking spaces are required* * *Are new leasing or licencing requirements proposed in the project proposal?* * *Are other stakeholders impacted and is a stakeholder engagement and/or change plan required?* * *Does the project transfer any additional risks or liabilities to UQ?* * *Will the project require a detailed business case or feasibility study?*   *If none, state NIL.* |
| Campus Operations impacts | *If known, please specify if there are there any known impacts on existing campus operations?*  *For example:*   * *Security need to be informed of planned activities* * *Any user funded requests to be incorporated into this proposed project?* * *Any Health & Safety considerations?*   *If none, state NIL.* |
| IT impacts | *If known, please specify what IT deliverables your proposed project requires.*   * *System / Applications, Voice, Networks, Audio Visual, Other*   *If none, state NIL.* |
| Other stakeholder requirements |  |

1. Budget Estimation

|  |  |  |  |
| --- | --- | --- | --- |
| Estimated Project Costs |  | | |
| Current funding approved to date | $0 | | |
| Date previous funding was approved by IFG | DATE.MONTH.YEAR *[Note: IFG Meeting Date]* | | |
| Expenditure to date | $0 *[Note: Delete if $0 current funding approval]* | | |
| Remaining approved funding | $0 *[Note: Delete if $0 current funding approval]* | | |
| Funding source(s) | [IFG] | | |
| Project budget in IFG forecast | $0 | **Year(s)** | **Amount Forecast** |
| [Year] | $0 |
| Total Capital Funding Estimate (TCFE)   * Design and Construction Budget to include any additional UQ development costs * A 4% P&F Project and Program Management should be assumed for all CapEx projects. Do not include for OpEx projects. * Contingency allowance should be +15% to +30% * Project Reserve to be managed by the Project Manager and topped up through the life of the project by approval by the PCG or Director, Development and Project Delivery. * Project Contingency to be PCG managed * TCFE accuracy range is +100% to -50% | Design and Construction Budget | | $0 |
| P&F Project and Program Management Levy (4%) | | TBC |
| Project Reserve (XX%) | | $0 |
| Project Contingency (XX%) | | $0 |
| **Total Capital Funding Estimate** | | **$0** (including GST) |
| TCFE variance to IFG forecast | + $XX,XXX (+X.X%) | | |
| Seed funding required for Stage 1 | $0.00 | | |

1. Budget Cashflow

|  |  |  |
| --- | --- | --- |
| Expenditure Year | IFG Funding | Other Funding Sources |
| 2025 | $0.00 | $0.00 |
| 2026 | $0.00 | $0.00 |
| 2027 | $0.00 | $0.00 |
| 2028 | $0.00 | $0.00 |
| Total | $0.00 | $0.00 |

1. Procurement Methodology

|  |  |
| --- | --- |
| **Procurement Approach** | |
| Identify the proposed procurement methodology | *Examples (select one):*   1. *Scope is to be fully documented prior to a fixed price construct only tender (may or may not include pre-order of plant/materials by UQ, free issued to the successful contractor)* 2. *70% Detailed Design prior to D&C tender (may or may not include pre-order of plant/materials by UQ, free issued to the successful contractor)* 3. *Two-stage procurement (ECI or Managing Contractor Models)* 4. *Another procurement method not mentioned above* |
| Justify the above procurement methodology given the context of the project | *Explain why the procurement method outlined above is deemed the best outcome for the project.*  *[Please advised the PMO if you need assistance in assessing these options for your project]* |
| Does this project require Project Management support from P&F | *Yes/No* |
| Will this project be supported by the UQ Procurement team to ensure alignment with procurement requirements? | *Yes/No* |

1. Timeline

|  |  |  |
| --- | --- | --- |
| Gated Capex Endorsement/Approval Milestones | Milestone Date | Status |
| **Gate 0 – Project Initiation Request (Approval)** | Click or tap to enter a date. | Choose an item. |
| **Gate 1 – Seed Funding Request (Approval)** | Click or tap to enter a date. | Choose an item. |
| **Gate 2 – Planning Approval (if applicable)** | Click or tap to enter a date. | Choose an item. |
| **Gate 3 – Project Funding Request (Approval)** | Click or tap to enter a date. | Choose an item. |
| **Gate 4 – Contract Execution (Noting)** | Click or tap to enter a date. | Choose an item. |
| **Gate 5a – Practical Completion (Noting)** | Click or tap to enter a date. | Choose an item. |
| **Gate 5b – End of Defect Liability Period (Noting)** | Click or tap to enter a date. | Choose an item. |

1. Strategic Alignment

Refer to UQ’s Strategic Plan (<https://about-us.uq.edu.au/strategic-plan>).

|  |  |  |
| --- | --- | --- |
| Focus Area | Strategies | Primary Investment Justification? |
| Domains | | |
| Choose an item. | Choose an item. | Choose an item. |
| Choose an item. | Choose an item. | Choose an item. |
| Choose an item. | Choose an item. | Choose an item. |
| Enablers | | |
| Choose an item. | Choose an item. | Choose an item. |
| Choose an item. | Choose an item. | Choose an item. |
| Choose an item. | Choose an item. | Choose an item. |

1. Risks and Opportunities

Identify the applicable UQ Risk Appetite Statements (RAS) for the project, as per the UQ RAS guidance document ([UQ RAS Summary](https://governance-risk.uq.edu.au/files/7293/Risk%20Appetite%20Statement%20-%20Senate%20approved%2022%20June%202021.pdf)). Note: It is common that more than one RAS is applicable to capital projects. Please consult with the P&F PMO if assistance is required in assessing the applicable RAS for your project.

|  |  |  |  |
| --- | --- | --- | --- |
| Alignment with UQ Risk Appetite Statements | | | |
| No. | **Risk Category** | **Sub-Category** | **UQ Risk Appetite Statement** |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

Identify any project risks, opportunities or dependencies below. Please refer to Enterprise Risk for Risk forms and templates when doing so ([Enterprise Risk - Governance and Risk - University of Queensland](https://governance-risk.uq.edu.au/enterprise-risk)).

|  |  |
| --- | --- |
| Risks and Opportunities | |
| Risks, issues and/or assumptions |  |
| Potential opportunities arising from this project |  |
| Project dependencies |  |
| Other projects that interface with this project |  |
| Project constraints |  |

# Gate 0 Checklist

|  |  |  |
| --- | --- | --- |
| **Task** | **Details** | **Check** |
| Review Statement of Need | Review purpose of the investment |  |
| Understand the business need complexities by consulting with:   * PMO * Project Managers * I&S * Campus Ops * Commercial Business * Campus Planning * Space Management * ITS * Subject Matter Experts (as required) |  |
| Investment criteria linked against University Objectives / Strategy and any identified benefits |  |
| Any alternate solutions to meet SoN investigated |  |
| Funding strategy investigated |  |
| Categorise project | Project category is determined to be either minor, routine or major |  |

# Approvals

|  |  |  |
| --- | --- | --- |
| Project Role | Name | Date of Approval / Support Confirmed |
| **Project Manager and/or Business Interface Manager** |  | Click or tap to enter a date. |
| **Project Owner approval of this submission** |  | Click or tap to enter a date. |
| **Project Sponsor is supportive of project idea** |  | Click or tap to enter a date. |

1. **Contact details**
2. **Program Management Office (PMO)**  
     
   E pmo@pf.edu.au[**pmo**@pf.uq.edu.au](mailto:pmo@pf.uq.edu.au)  
   W [uq.edu.au](http://www.uq.edu.au/)

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