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| Property and Facilities14 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

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| --- |
| **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

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| --- | --- | --- |
| **Authorisation** | **Name** | **Position** |
| Prepared by | Name | Role |
| Endorsed by | Project OwnerName | Role |
| Confirmation that the Project Sponsor is supportive of the project? | Project Sponsor Name: NameSupport Confirmed: Yes/NoDate Confirmed: DAY.MONTH.YEAR |

Contents

[Base Project Information 2](#_Toc190092677)

[Budget Details 2](#_Toc190092678)

[Document Control 2](#_Toc190092679)

[Contents 3](#_Toc190092680)

[1. Project Overview 4](#_Toc190092681)

[1.1 Impacts and/or Requirements 4](#_Toc190092682)

[2. Budget Estimation 6](#_Toc190092683)

[3. Budget Cashflow 6](#_Toc190092684)

[4. Timeline 7](#_Toc190092685)

[5. Strategic Alignment 7](#_Toc190092686)

[6. Risks and Opportunities 8](#_Toc190092687)

[Gate 0 Checklist 9](#_Toc190092688)

[Approvals 9](#_Toc190092689)

[Appendices 10](#_Toc190092690)

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

|  |
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| **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.

|  |
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| 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)).

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| --- |
| 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
W [uq.edu.au](http://www.uq.edu.au/)

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