

## STEPS AND ENTITIES INVOLVED IN THE CAPITAL PLANNING PROCESS AT UL LAFAYETTE

### Needs Assessment

#### 1. Establish a Planning Structure

Committees, Focus Groups, Consultant

#### 2. Identify Goals, Objectives, Philosophy

Programs/functions related to the project

Facilities, Financing alternatives, Structure, University owned & managed, Completely private

#### 3. Initiate Evaluation, Selection, Approval Process

Evaluate current facilities and finances

##### Facilities

- Age
- Condition
- Sustainability
- Deferred Maintenance
- Occupancy
- Obsolesce
- Sites

##### Financial

- Revenue analysis
- Long-term financial plan
- Current debt obligations

Determine demand, trends and costs

- Market analysis
- Demographic studies

- Student surveys
- Prepare cost-benefit analysis
- Summarize facilities needs including demolition, renovation, new construction, facilities management and maintenance.

#### Select Financing Alternative

- Determine the non-profit corporation for this project.
- Issuance of a RFP (request for proposals) for project, bond counsel or underwriter.

#### Initial Authorization to Proceed

Obtain Board approval to utilize non-traditional financing method.

#### Prepare and Issue RFP

- Include weighted evaluation criteria
- Establish appropriate committees, including ad hoc members from the Board of Regents,
- UL System and Facility Planning and Control
- Document the selection process

#### Obtain Required Approvals

- Board of Supervisors
- Board of Regents
- Division of Administration
- Joint Legislative Committee on the Budget