Unfunded Needs (UFN) Process Outline
Updated 08/03/09

SAND2010-3374C

Reference: AP-242 Facilities Deficiency Tracking Process

Requester	• Complete UFN form
	  - Obtain Maximo number
	  - Requester information
	  - Project Location and Description
	    > Short description
	    > Interior/exterior system
	    > Long description
	  - Justification
	    > Prioritization
	    > Optimal FY
	    > Urgency
	    > Estimated construction cost (unloaded)
	    > % of construction cost by type of need (repair or replace-in-kind, upgrade, compliance, etc.)
	    > Basis of estimate
	• Send to Operations Lead

Operations Lead	• Validate request • E-mail electronic Word doc to UFN Tactical Planner • Workflow the Maximo request and change status of request to closed

UFN Tactical Planner	• Review UFN for completeness – return to evaluator if form is incomplete
	• Accept/enter into Planning database
	• Prepare for Capital Investment Plan (CIP) review
	  - Compile list of new UFNs
	  - Identify related projects
	  - Review open action items

Capital Investment Plan Review	• Review each UFN and any related projects • Determine any conflicts/issues (e.g., conflict with planned projects, conflict with SNL policy) • Review justification and urgency • Discuss priority • Identify appropriate Program and possible funding type (e.g., FIRP, IESO, RTBF, etc.) • Assign action if appropriate (e.g., more information required, conflict resolution, etc.)

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UFN Tactical Planner	• Update database to reflect Program assignment • Prepare report with Program assignment or identify "rejects", distribute report (current UFN meeting distribution)
Strategic Planner - Investments	• Accept UFN as new or existing project • Identify probability of funding by required date • Identify UFN priority • Enter space impact data • Calculate and enter total project cost • Calculate and enter total project cost by type of need breakout

Capital Investment Advisory Committee (CIAC)	• Review UFNs by Program
	  - Program Manager presents
	    · Probability of funding UFN by required date
	    · Priority of UFN within Program
	    · Other related issues (e.g., constraints or opportunities associated with addressing the need)
	  - Operations questions or comments
	• Present Planning Updates (e.g., planning strategy, programmatic impacts, new policies and policy impacts, etc.)

Note:
- UFNs are managed in the Planning Database. Maximo is used to generate a unique number. Changing status of a UFN in Maximo will not impact the UFN in the Planning Database. When obtaining a Maximo Number start the Summary Description with the word "UFN." The Operations Engineer will enter the "Requestor Information" and "Service Request Details." Enter "other" as type of work and classify as "site planning".

- When naming the Word doc for submittal to the UFN Team Leader, follow this format:

    Maximo Number (Underscore) Bldg (Building Number) or Utility (Underscore) Abbreviated Description Name
        Example: 316007_Bldg840_Elev.doc

- [UFN Form](#)
- [UFN Prioritization Scoring Document](#)