

Charter Process

Problem Screening

Either a management system owner or an external entity generates a Problem Statement and provides it to Capital Investment Strategy (CIS).

Problem Statements are submitted to the CIS Division as the "gatekeeper" of potential new starts. CIS assesses each Problem Statement for completeness and assigns a unique DB number (database number), and makes an anticipated asset classification. The Problem Statement is entered into the Problem Statement Database managed by CIS for screening analysis and tracking purposes.

CIS completes the initial, or Tier 1, screening ensuring the Problem Statement is a unique request and has not already been addressed by another Problem Statement, proposal or existing project. If possible, CIS determines the resolution or disposition of the item. Problem Statement database updates are made to reflect changes in status until the problem statement is assigned.

There are three likely resolutions following the Tier 1 screening. The Problem Statement can be recycled back into the Problem Statement database; it can be determined to be a work order and is sent to Maintenance; or it can be sent to DPM for Tier 2 screening.

DPM completes Tier 2 screening. The project can also be recycled to the Future Study and Development list, or end in No Further Action.

CIS reviews the results of the DPM screening and updates the Problem Statement database.

The Problem Statement is routed depending on the type of project and on the results of the screening. The Problem Statement can be recycled to the Problem Statement database.

CIS develops the Charter and forwards to DPM for concurrence. During this time, CIS may communicate with DPM, Management Systems Owners or other Subject Matter Experts to develop the Charter.

DPM reviews the Charter and signs indicating concurrence. Any issues should have already been resolved through communication with CIS or Subject Matter Experts.

The Management Systems Owner presents the Charter to the CPSC for recommendation to the CPC.

