
HIGHER EDUCATION

The Capital Program Owner's **Playbook**

A practical guide to one trusted view of every project.

For facilities, finance, and capital planning leaders who need answers before
a project turns red.

VLogic



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Who this is for

The people who get asked where the capital program stands: facilities and physical plant leaders, finance and administration leaders, and the directors who run planning, design, and construction. Public or private, university or college.

HOW TO READ THIS

Chapters 1–6 cover what inconsistency costs a capital program. Chapter 7 is the owner model that fixes it. Chapters 8–11 cover what changes for each role, the proof, the arithmetic, and a place to start.

The Question Every Program Answers Slowly

Every capital project is different. Leadership still needs one trusted view of the program.

Different teams, contractors, consultants, and scopes are part of the job. A residence hall renovation, a lab fit-out, and a deferred roof replacement should not be run the same way. The problem is not that the projects are different. The problem is that leadership ends up seeing every project differently.

So before a board meeting, a budget review, or a trustee's phone call, someone has to answer a handful of questions:

- ▶ *Which projects need attention right now?*
- ▶ *How much of the approved budget is committed and spent?*
- ▶ *Is that job ahead of or behind its baseline?*
- ▶ *Who approved the last change, and why?*

None of those questions is hard. Answering them is, because the information lives across systems, spreadsheets, reports, and people. Leaders end up rebuilding the picture before they can make a decision. The longer that takes, the later risk shows up, and by the time a project turns red, the options are already shrinking.

High-performing institutions create one consistent management model across every project.

Different projects. One trusted way to manage the portfolio.

Capital Programs Are Under More Pressure

Backlogs are growing while capital funding falls further behind.

Consistency has always been good practice. What changed is the cost of doing without it. Facilities, finance, and capital planning leaders are being asked to defend more need with less money, in front of boards paying closer attention.

\$156

deferred capital renewal backlog per gross sq ft, up 8% year over year

73.5%

of needed reinvestment actually funded, a 26.5% gap

-15.1%

change in state capital appropriations, FY2025

+1.0%

change in state operating support, FY2026

Backlog and reinvestment: Gordian, *State of Facilities in Higher Education*, April 2026 (higher education broadly, public and private). State capital appropriations: SHEEO, July 2026 (FY2025 data). State operating support: SHEEO (FY2026 data). The two state figures cover different fiscal years.

At public institutions

State capital money fell sharply while operating support barely moved. Capital requests compete harder for a smaller pool, and the request that gets funded is the one its owner can defend with a record.

At private institutions

There is no appropriation to fall back on. Capital rides on campaigns, major gifts, and borrowing, and donors, lenders, and trustees ask for the same thing: proof that the money already committed is under control.

WHAT TIGHTENS FIRST

Renewal and deferred maintenance work. It competes against academic and student-facing priorities, and it rarely arrives with its own champion. The facilities leader who can show the history behind the request is the one who gets it funded.

**With less money and more need,
discovering risk late gets more expensive.**

The Same Problems Keep Showing Up

What we've learned from capital project owners.

Across universities, colleges, and systems of every size, the story sounds the same. It isn't a people problem or a tool problem. It is three problems stacked on top of each other.

01

Every project gets managed differently.

Different project managers, consultants, and teams create different processes and ways of working. Each one is reasonable on its own. Together they make the program impossible to read at a glance.

02

Reporting isn't consistent.

Status, budget, schedule, and risk can mean different things depending on the project or who is reporting it. One manager's "on schedule" is another manager's "minor delay."

03

Leadership has to rebuild the picture.

Information lives across systems, spreadsheets, reports, and people. Owners spend their time reconciling information before they can understand the program, let alone manage it.

Every project team knows its project.

The information exists. Each update is accurate on its own terms. But each project is only one piece of the picture.

THE HIDDEN GAP

Most institutions measure how long projects take. Few measure how long it takes to find out where the projects actually stand. That gap is where capital programs lose control.

**Different projects are inevitable.
Different ways of understanding them don't have to be.**

Three Projects. Three Reports. No Shared Definition.

Every project has an update. You still have to build the portfolio view by hand.

SOURCE	STATUS	BUDGET	RISK
Project A Shared spreadsheet, Tuesday	On schedule	52% utilized	Low
Project B Emailed status report, Thursday	Minor delay	48% spent	Medium
Project C PDF report, last month	Behind schedule	61%	High

Three formats, three vocabularies, three reporting dates, reconciled by hand before the meeting. Even the budget column measures three different things: "utilized," "spent," and a bare percentage. Projects A, B, and C are illustrative and used throughout this playbook.

The cost of rebuilding the picture

Project staff spend **35% of the work week** on non-optimal activities, and much of that is looking for project data.

14.1 hrs
per week on non-optimal activities
(35% of a 40-hour week)

5.5 hrs
of those hours spent looking for
project data

**That is time spent
understanding the program
instead of managing it.**

PlanGrid/FMI, *Construction Disconnected*, 2018. Industry-wide construction project staff, not specific to higher education.

"So... where are we really?"
It's the question every capital program answers slowly. The rest of this playbook is about answering it fast.

Six Signs You're Rebuilding the Picture

If every answer requires manual work, you don't have a trusted portfolio view.

Check the ones that sound like your office. Most programs recognize at least two.

- ☐ **1. The board deck gets rebuilt by hand every month.**
Same slides, new numbers, copied in from somewhere else.
- ☐ **2. "On schedule" depends on who's reporting it.**
There's no shared baseline, so status is a judgment call.
- ☐ **3. Budget-to-actual is rekeyed out of finance into a spreadsheet.**
Facilities and finance end up quoting different numbers for the same project.
- ☐ **4. The current portfolio total lives in an email thread.**
Whoever sent the last version is the system of record.
- ☐ **5. Nobody can name the at-risk projects without calling each PM.**
Risk comes to light in conversations, not in a report.
- ☐ **6. A trustee's question takes a week to answer.**
And by the time the answer arrives, it's already out of date.

WHAT EACH SIGN IS REALLY TELLING YOU

Signs 2 and 5 mean status and risk were never defined the same way: a **Consistent Information** problem. Signs 3 and 4 mean the numbers don't come from one system of record, and signs 1 and 6 mean nobody has a single view to read from: both are **Consistent Owner View** problems. If projects also enter and move through the program differently, add **Consistent Process**. Chapter 7 covers all three.

The Risk Extends Beyond Lost Time

Every capital decision needs a defensible approval trail.

Projects carry different funding, procurement, accessibility, and reporting requirements. A bond-funded renovation, a grant-funded lab, and a gift-funded athletics project each answer to someone different. You need one record showing who approved each budget, scope, and schedule change, and why.



Funding source

Which appropriation, grant, bond, gift, or fund paid for it?



Approval trail

Who approved the budget, scope, or change order?



Decision history

What changed, when, and what drove the decision?



Supporting record

Can leadership produce the record without rebuilding it?

When an auditor asks who approved a change, the answer should not live in an email thread.

Where this shows up

Federal grant and award requirements (2 CFR Part 200), prevailing-wage rules on covered construction (Davis-Bacon and Related Acts), and accessibility obligations (ADA Standards). Applicability varies by institution, jurisdiction, funding source, and project.

WHY IT BELONGS IN ONE RECORD

If approvals live in email while budget lives in finance and status lives in a spreadsheet, the audit trail has to be rebuilt the same way the board deck does. One record serves both.

This chapter is general information, not legal or compliance advice. Confirm requirements with your institution's counsel and compliance office.

A Better Owner Model

Owners need more than project visibility.

A dashboard built on top of inconsistent information just shows inconsistent information faster. Owners need a consistent way to understand every project, and that takes three things working together.

01	Consistent Process One lifecycle every project passes through, from the first request to closeout. The projects stay different. The path they travel does not. Plan · Define · Authorize · Deliver · Close
02	Consistent Information Budget, schedule, risk, and status mean the same thing on every project, with one approval trail behind them, regardless of size, delivery method, or funding source. Budget · Schedule · Risk · Status · Approvals
03	Consistent Owner View One trusted picture of the whole portfolio, fed by the systems of record, that facilities, finance, and leadership all read at the same moment. Portfolio Visibility · Reporting · Decisions

IF THIS SOUNDS FAMILIAR	START WITH
Projects enter the plan through whoever asked loudest	Consistent Process. There's no single intake path.
Two reports disagree and both are defensible	Consistent Information. The words were never settled.
Finance and facilities quote different budget numbers	Consistent Owner View. Somebody is rekeying.

Flexible enough for every project.
Consistent enough for every portfolio.

Consistent Process

A lifecycle is the sequence of stages every project passes through, whatever else about it differs. It is what makes status mean something, because a stage can be observed and a phrase can't.

The owner model has five stages.

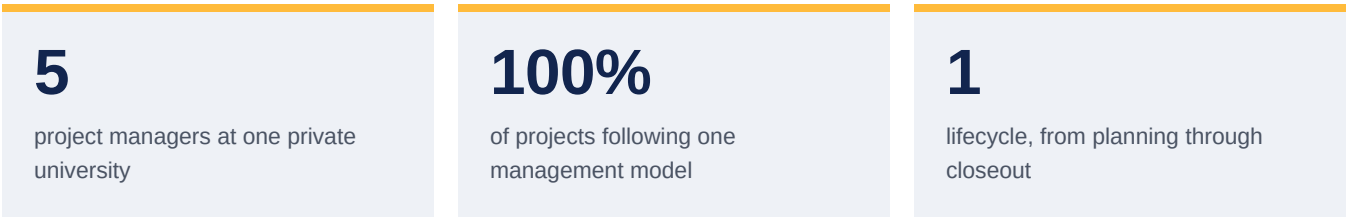


The minimum any institution needs: one intake, one point where scope is fixed, one approval, one delivery phase, one closeout.

Your institution names its own stages inside it.



One private university we work with runs seven. The number doesn't matter. What matters is that every one of its project managers runs the same seven.



They didn't standardize every project. They standardized how projects are managed. The university manages projects of all sizes, from renovations to major construction, and every one follows the same lifecycle. That gives leadership one consistent management model across the program.

THE RESULT

Scope stays aligned with budget and schedule from the first request to closeout, on every project, no matter which project manager runs it.

Consistent Information

Four words do most of the damage. A fifth, approvals, makes them defensible.

Each one is spoken in every capital status meeting, and each means something slightly different depending on who is speaking. Settle them once, record the approvals behind them, and the portfolio view becomes possible.

TERM	WHAT IT USUALLY MEANS	WHAT IT SHOULD MEAN
Status	A phrase the project manager chooses that week	The lifecycle stage the project is in, applied the same way to every project
Schedule	A read on whether the job feels on track	Days ahead of or behind the approved baseline
Budget	Spent to date, sometimes including commitments	Committed plus spent against the approved budget, from the financial system of record
Risk	A judgment call, made project by project	A variance threshold set once and applied portfolio-wide
Approvals	An email, a meeting note, or someone's memory	Who approved each budget, scope, or schedule change, and why, recorded against the project

How to run this

One working session with your project managers and a partner from finance, not a policy memo. The people who report these numbers have to agree on them, or the definitions won't survive contact with a real project.

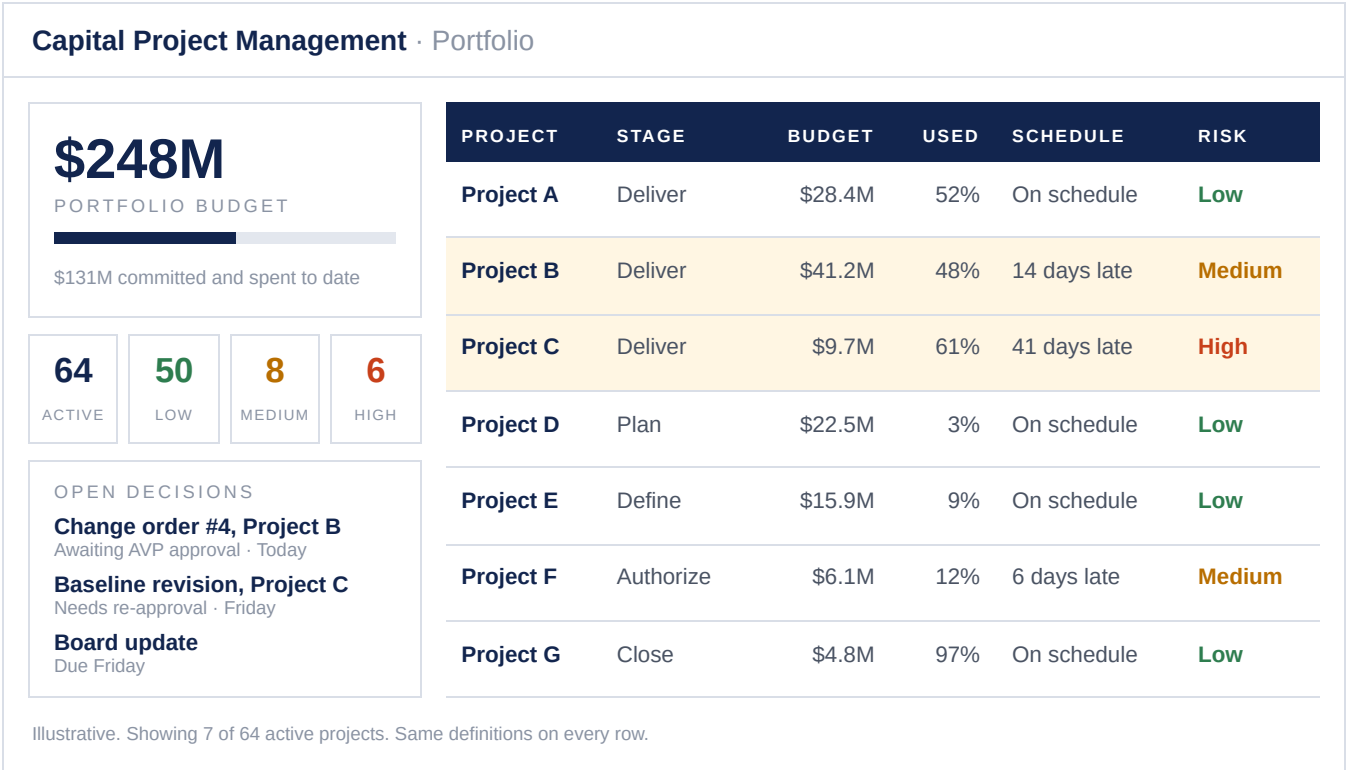
WHAT THIS IS NOT

This is not standardizing projects. Scope, architect, delivery method, and funding all stay as varied as they are today. Only the way you understand them becomes consistent.

**Consistency does not fix a project.
It stops the program from hiding one.**

Consistent Owner View

Once the process and the information agree, the portfolio view stops being something anyone assembles. Budget, stage, schedule, and risk for the whole program sit in one place, and facilities, finance, and leadership see the same figures at the same moment.



What Every Seat at the Table Gets

A capital program is never one person's problem. Facilities, finance, capital planning, and leadership each ask a different version of the same question. One consistent model answers all of them from the same record.

FACILITIES & PHYSICAL PLANT

Stop answering the same status question three different ways.

- One lifecycle and one set of definitions across every renovation, renewal, and new build
- Renewal and deferred maintenance requests backed by the project history
- Your team keeps its own way of running jobs

FINANCE & ADMINISTRATION

One budget number, and it's yours.

- Committed plus spent pulled from Workday, Oracle, PeopleSoft, or SAP, not rekeyed
- Funding source and approval trail recorded against every project
- Facilities and finance quote the same figure

PLANNING, DESIGN & CONSTRUCTION

Scope, budget, and schedule that stay aligned from start to finish.

- One intake path and one approval workflow for new requests
- Change orders recorded with who approved them and why
- At-risk projects visible without a round of phone calls

LEADERSHIP & BOARD

A number you can quote without asking anyone to confirm it.

- Portfolio visibility across every project and stage
- Risk surfaced the week it happens, not the month after
- A trustee's question answered the same day

**Less time reconciling information.
More time making decisions.**

Two Institutions. One Trusted View.

Both started where most capital offices start: the information existed, but it lived in too many places to be useful. One fixed how projects are managed. The other fixed where the numbers come from.

100%

PROJECTS ON ONE MANAGEMENT MODEL

A Private University

Five project managers. One consistent way to manage projects.

The capital team manages projects of all sizes, from renovations to major construction. Rather than standardize the projects, they standardized the management model: every project follows the same seven stages, from planning through closeout.

PROJECT MANAGERS

5, one shared model

LIFECYCLE

1 lifecycle, 7 stages, plan through close out

**Different projects.
One trusted way to manage them.**

~4 hrs

SAVED EVERY MONTH

Carleton College

Carleton stopped rebuilding the financial picture every month.

About one million square feet. Budget-to-actual used to be rebuilt in Excel every month. Now recurring Workday data arrives attached to each project, alongside its tasks and timelines, and the team self-serves the same figures.

BEFORE

Monthly GL exports and spreadsheet rekeying

TODAY

Recurring Workday data, project detail, team self-service

**Workday holds the numbers.
VLogic makes them useful.**

**Two institutions. Two starting points.
The same result: one place to find the answer.**

What Rebuilding the Picture Costs You

"It takes a while" doesn't survive a budget conversation. A number does. Two examples follow, one for a larger program and one sized like Carleton College. Use whichever is closer and fill in your own.

INPUT	LARGER PROGRAM	SMALLER PROGRAM	YOUR PROGRAM
People who spend real time assembling the portfolio picture	3	2	
Hours each, per monthly reporting cycle	40	12	
Reporting cycles per year	12	12	
Hours per year (people × hours × cycles)	1,440	288	
Fully loaded cost per hour	\$85	\$85	
Annual cost of rebuilding the picture	\$122,400	\$24,480	

Larger: 50+ active projects, a team of PMs, monthly board reporting. Smaller: about 1M sq ft, one or two people holding the numbers. Illustrations, not benchmarks: the arithmetic is the point, not our assumptions. Carleton's ~4 hours a month came from one task, the budget-to-actual rebuild; the smaller example counts all portfolio reporting. For comparison, industry research puts time spent looking for project data at 5.5 hours per person per week (PlanGrid/FMI, 2018). VLogic's ROI calculator runs the same math with your institution's inputs.

THE PART THAT DOESN'T APPEAR IN THE NUMBER

This counts only labor. It doesn't count the change order caught a month late, the at-risk project nobody escalated, the audit question answered from an email thread, or the capital request that went unfunded because its owner couldn't show the history behind it when asked.

By the time a capital project turns red,
your options are already shrinking.

What Consistency Would Change for Your Program

Every institution manages projects differently. Before you look at any tool, answer three questions with your team.

- 1 Where do you see the most variation in how projects are managed today?**
By project manager, by delivery method, by funding source, or by building type?
- 2 How much effort does it take to create one reliable view across projects?**
Run the Chapter 10 worksheet. Count the people, the hours, and the spreadsheets.
- 3 Where would greater consistency make the biggest difference for leadership?**
Board reporting, capital requests, audit readiness, or catching risk while there's still time to act?

See how VLogic brings it into one view.

Budget, schedule, risk, status, and approvals across every project in one consistent capital project view. Bring your three answers. We'll show you which part of the owner model to start with.

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