

# **Facilities Planning and Management**

## *VCFA Annual Report – 2013*

## Section 1: FP&M Summary Statement

Facilities Planning and Management is a service organization, reporting to the Associate Vice Chancellor, Bill Elvey. The organization consists of seven core departments:

- Business and Staff Services
- Campus Planning and Landscape Architecture
- Capital Planning and Development
- Environment, Health and Safety
- Physical Plant
- Space Management Office
- Transportation Services

Under the guidance of Bill Elvey, Facilities Planning and Management staff developed new mission, vision and core value statements in 2013 which reflect the organization's commitment to excellence, engagement, inclusion and diversity.

**FP&M Mission:** Providing excellence in facilities and services for our university community.

**FP&M Vision:** An inclusive and diverse team, working together to provide exceptional service for our university community.

**FP&M Shared Values:** *Shared values guide how we behave toward our customers, coworkers and stakeholders.*

- We are People Centered by being inclusive, engaged, diverse and customer-focused.
- We promote Stewardship through sustainable, effective and efficient use of resources.
- We promote Integrity by building trust, respect and accountability.
- We support Innovation and Discovery through continuous learning and improvement.
- We promote Safety, ensuring a safe and healthy campus environment.

### **Departments:**

#### **Business and Staff Services**

Business and Staff Services provides support services to all units of FP&M in the areas of budget and financial reporting, business operations and purchasing, human resources, and training and organizational development.

#### **Campus Planning and Landscape Architecture**

Campus Planning and Landscape Architecture works with faculty, staff, students and the surrounding urban community on physical planning issues, including implementation of the Campus Master Plan. Staff assist with the capital budgeting and infrastructure planning processes, assist with facility related ADA issues, design and manage landscape architecture projects, and serve as a liaison with municipal governments and adjacent neighborhoods.

#### **Capital Planning and Development**

The Department is responsible for identifying and developing capital programs and related policies and procedures to address the University's strategic, long-range physical planning needs. Staff oversee development of the biennial capital budget and serve as university representatives and project managers for the design of new facilities, additions, utility improvements and large scale remodeling projects.

### **Environment, Health and Safety**

EHS professionals provide guidance, technical consultation and expertise to the campus community in the areas of biological, chemical, environmental, radiation, lake, fire and life safety, and occupational health.

### **Physical Plant**

Physical Plant is responsible for the maintenance of campus buildings, vehicles, grounds and utilities. Design resources, construction trades and specialized facilities services are available for departmental requests and remodeling projects.

### **Space Management Office**

The Space Management Office collects, maintains and analyzes information about University space use. The office coordinates the allocation and reassignment of existing space and participates in the planning for modified or new space. This includes providing appropriate office, laboratory or support space for research and instruction, as well as classroom environments for effective teaching and learning, and support services for use of multimedia classrooms. The office also provides support for leasing space, manages campus real estate transactions, and assists with space relocation for major remodeling projects.

### **Transportation Services**

The Transportation Services Department is responsible for providing innovative transportation solutions that serve & support the University. The Department's objective is to sustain and strengthen our cutting edge transportation programs.

The goals and objectives listed in this report were identified by Facilities Planning and Management to support, and align with, the strategic priorities established by the Vice Chancellor for Finance and Administration. They reflect critical success factors for FP&M, or are associated with specific initiatives designed to improve the effectiveness and efficiency of FP&M services.

This annual report is organized in three sections:

Section 1: Division Summary

Section 2: VCFA Strategic Priorities

- Engagement, Inclusion and Diversity (EID)
- Student Leadership Development
- Resource Stewardship Through Process Improvement

Section 3: FP&M Strategic and Operational Priorities

Section 4: Summary Chart of FP&M Strategic and Operational Priorities

## **Section 2: VCFA Strategic Priorities – Summary**

### **VCFA Strategic Priority 1: Engagement, Inclusion and Diversity (EID)**

#### ***Baseline measure***

- Baseline measures were drawn from the EID Survey completed in 2012.

#### ***Targets***

- Targets for 2013 included: review and present FP&M EID Survey and Gender/Heritage data to senior management and the FP&M EID Team; identify themes/trends, develop an action plan to leverage diversity and improve inclusion and engagement in the workplace; review and present department level EID survey data to department staff; create department level EID Teams; draft department EID Plans.
- Moving forward, the overall target will be to increase favorable ratings in employee engagement by 5% and ratings related to diversity, inclusion and respect by 2%.

#### ***Performance indicators***

- Although specific performance indicators were not established, activity-based indicators were defined as follows:
  - Data Review
    - FP&M level data shared with directors, associate, assistant directors and FP&M EID Team– 100% complete.
    - Department level data reviewed and presented to department EID Teams – 6 of 7 completed.
  - EID Plan Development
    - Themes, trends, key actions and phase 1 action plan developed for FP&M to respond to areas of weakness identified in the FY12 EID Survey– 100% complete.
    - Department level EID Teams activated for 6 of 7 departments.
    - Draft departmental plans submitted for approval to AVC for 4 of 7 departments.
  - Plan Approval
    - FP&M EID Draft Plan approved by AVC and Leadership Team – 100% complete.
    - FP&M EID Draft Plan reviewed and approved by VCFA – 100% complete.
    - Priorities established and EID Action Plan created – July 1, 2013.

#### ***Risks and challenges***

- Risk – Basing actions on survey data weighted toward the majority demographic which is primarily white male.
- Risk – Achieving departmental success at the cost of FP&M success (i.e. initiatives must be coordinated across the organization).
- Risk – Resource allocation and increasing demands results in the potential to overload/stress staff.
- Challenge – Timing of initiative occurs at a time of significant change in FP&M leadership.
- Challenge – Communicating, engaging within a diverse, complex, dispersed workforce of 1200 employees.
- Challenge - Lack of clear, consistent mechanisms for two way communication across FP&M.

### ***Milestones accomplished***

- FP&M EID Team chartered and engaged – January 2013.
- FP&M Mission, Vision and Core Value statements developed and finalized – March 25, 2013.
- EID plan was reviewed and accepted by VCFA Bazzell – April 23, 2013.
- FP&M EID Plan drafted, approved and shared with staff (6 of 7) – June 2013.
- Priorities established and EID Action Plan drafted – July 1, 2013.

### ***Barriers to success***

- Delay of HR Design implementation to July 2015.

### ***Next steps and future opportunities; if target not met, action plan***

- FP&M EID Plan provides a phased approach to implementation:
  - Specific tasks have been identified for the FP&M EID Team.
  - Time has been allocated to the weekly Leadership Team meeting to discuss EID.
- Best practices identified in departmental EID plans will be shared and efforts coordinated to clearly delineate a hierarchy of actions. For example, development/delivery of training will occur at the FP&M level; departments will manage department participation in training and assessment of effectiveness.
- Staff resource will be added during FY14 to lead development of communication tools (e.g. website, newsletter, FP&M ‘marketing’ material).
- Physical Plant at 800 staff is the most diverse department in terms of job types, demographics, work hours and work locations. Rob Lamppa became director in March 2013.
  - Assistance has been requested in structuring a Physical Plant EID Team and developing a plan for communicating about EID:
    - Planning meetings with Elizabeth Fadell (Office of Quality Improvement)
  - Discuss FP&M/ Physical Plant survey data, heritage/gender data and areas of focus with Physical Plant leadership and management teams.
  - Develop charter for Physical Plant EID Team.
  - Identify cross-department membership, chair, timeline, etc.

## **VCFA Strategic Priority 2: Student Leadership Development**

### ***Baseline measure***

- Defined baseline measurements were not established for FY13.

### ***Targets***

- Target included partnering with VCFA units to increase learning opportunities for students and supervisors of students.
  - FP&M (Shoko Miyagi) and the Wisconsin Union (Mary Hoddy) delivered training thru the Office of Human Resource Development, *Sometimes and Aspiring Supervisors*, which focuses on building communication and coaching skills.
  - FP&M piloted *Proactive Communication* with a focus on interviewing skills for Capital Planning and Development and Campus Planning and Landscape Architecture students in January 2013. Based on student evaluations of the course this workshop will be incorporated into FP&M's WI GROW pilot.

### ***Performance indicator***

- Customer satisfaction survey; survey of student participants in *Proactive Communication*.

### ***Risks and challenges***

- Challenge - Scheduling training for students who join FP&M throughout the year and are dispersed across the organization.
- Challenge - Developing action plans to baseline measurements that did not exist.

### ***Milestones accomplished***

- Designed and piloted training modules focusing on Proactive Communication – January 2013.
- FP&M Leadership Team briefed on the WI GROW initiative.

### ***Barriers to success***

NA

### ***Next steps and future opportunities; if target not met, action plan***

- Develop action plan, performance indicators concurrent and aligned with the WI Grow initiative.

## **VCFA Strategic Priority 3: Resource Stewardship Through Process Improvement**

### ***Description***

In order to create a shared understanding of process improvement tools, additional FP&M staff were trained in Lean Six Sigma (LSS) and Kaizen methodologies. A number of staff gained additional experience through their participation on Administrative Excellence (AE) teams or Administrative Process Redesign (APR) teams. FP&M also identified performance metrics and began measuring the outcomes of strategic and operational objectives on a quarterly basis.

### ***Baseline measure***

- Priorities but not baseline measurements were established for FY 13.

### ***Targets***

- Participate on Administrative Excellence teams:
  - Instructional Space Inventory Data (Space Management Office).
  - Instructional Space Utilization Review (Space Management Office).
- Apply the APR methodology to process improvement:
  - Campus Event Preparation (Transportation Services).
  - EHS/UHS Occupational Health and Environmental Health Program alignment.
- Train additional staff in Lean Six Sigma (LSS) and Kaizen methodologies to heighten staff awareness of resource stewardship and codify approach to process improvement.
- Participate in the Facilities and Administration (F&A) Survey process.
- Create an inventory of FP&M process improvement efforts.

### ***Performance Indicators***

- Number of staff trained in LSS and Kaizen.
- Number of staff participating on AE and/or APR teams.
- Number of processes identified for improvement.

### ***Risks and challenges***

- Risk – Initiating process improvement efforts without first coordinating across the organization, developing a charter without clearly defined scope, roles, responsibilities and timeframe.
- Risk - Resource allocation and increasing demands results in the potential to overload and increase stress on staff.
- Challenge - Prevent execution of projects that do not provide strategic value to the FP&M.
- Challenge - Improve processes and provide uninterrupted service while continuing to operate using existing (dysfunctional) processes.

### ***Milestones accomplished***

- Seventeen additional staff members participated in Lean Six Sigma training and six participated in Kaizen training.
- Two staff from the Space Management Office participated on the recently completed Administrative Excellence projects.
- Ten staff members were involved on the Campus Event Preparation project in Transportation Services.
- Three staff members participated on the EHS/UHS Occupational Health and Environmental Health Program project which resulted in a proposal to re-align functions to better serve the campus community.

- Two staff from FP&M Business Operations participated on the APR Cash Management Team.
- Created an inventory of complete (49), in process (53) and future (60) process improvement efforts.
- Transitioned to online completion of the F&A space survey in support of the university's indirect cost rate proposal.

***Barriers to success***

NA

***Next steps and future opportunities; if target not met, action plan***

- Process Improvement Inventory will be maintained and updated quarterly.
- Process improvement proposals will be chartered, resourced and approved by Leadership Team before moving to implementation. Team membership will consist of those trained in LSS.
- Once evaluation of F&A data is completed, access to data will be provided to schools/colleges for management and analytical purposes.



## **Section 3: FP&M Strategic and Operational Priorities – Summary**

The goals/objectives presented in this section of the annual report represent the goals/objectives that the Division identified as having the greatest potential to improve the services FP&M provides in support of the mission and vision of UW-Madison. All of these goals are also aligned with, and intended to advance, the Vice Chancellor for Finance and Administration's Strategic Plan 2009-2014.

### **Goal/Objective 1: Provide project management services for capital projects.**

#### ***Description***

FP&M staff serve as the liaison between campus customers (Schools and Colleges), project managers assigned by the Division of Facilities Development (DFD) and the architectural/engineering design firms. This goal is intended to highlight the importance of managing the quality, schedule and budget for capital projects to ensure support of the academic, research and outreach mission of the university.

#### ***Baseline measure***

- Baseline measures exist for the completion of capital projects (8 scheduled and completed in FY13).

#### ***Targets***

- Complete projects on time, within budget to the specified level of quality.

#### ***Performance indicators***

- Quality, schedule and budget established by construction documents and bids; tracked and managed at the project level.

#### ***Risks and challenges***

- Challenge – Process and schedule are determined by UWSA and DFD.
- Challenge – DFD holds the planning, design and construction contracts for all capital projects.
- Challenge – Ensuring targeted funds are raised in a timely fashion for those projects funded, in part or entirely, by gifts (e.g. Wisconsin Energy Institute).

#### ***Milestones accomplished***

- Wisconsin Energy Institute was completed, commissioned and occupied on schedule. Project was within the latest budget.
- LaBahn Arena was completed, commissioned and occupied on schedule and on budget.
- All Season Golf Practice Facility was completed, commissioned and occupied on schedule and on budget.
- Lake Mendota Shoreline Restoration and Goodspeed Pier are on schedule and on budget.
- Integrated Dairy (Phase III) completed after a three month delay due to site work issues with the City and sanitary line complications with the civil engineering firm. An increase to the budget was required to address change orders.
- Student Athletic Performance Center (Phase I & II) was completed and occupied on schedule and on budget. Phase III is currently on track to be completed December 2013.
- Carson Gulley was completed on budget; the schedule was delayed due to weather.
- All Season Softball Facility was completed on schedule and on budget.

- Tandem Press was relocated to newly leased space to meet DOA directive to vacate previous space.
- Family Medicine Wingra Clinic was relocated into newly leased space that meets required standards for accreditation.

***Barriers to success***

- Several projects were delayed due to weather or site conditions.

***Next steps and future opportunities; if target not met, action plan***

- Projects under construction will be detailed in the FP&M Annual Plan for FY14.

**Goal/Objective 2: Complete the Design Guidelines and Update the 2005 Campus Master Plan for presentation to the City of Madison Plan Commission**

***Description***

This goal/objective has been on-going over the past year as the City of Madison has developed and approved a new zoning code. In the new zoning code, a new “Campus-Institutional” (CI) zoning district was identified. In order for it to go into effect, the UW needs to have a City of Madison approved campus master plan and requirements for design review. Completing this goal will allow UW to effectively utilize the new zoning district and reduce the overall time for the review process through the City of Madison on all major capital improvement projects.

***Baseline measure***

- Baseline measures were not established for FY13

***Targets***

**Design Guidelines**

- Draft Design Guidelines and present for review and approval by FP&M staff.
- Present draft Design Guidelines to City of Madison staff, neighborhoods and the City’s Urban Design Commission for review and approval.
- Review and approval by the City of Madison Plan Commission.

**2005 Campus Master Plan Update**

- Update the detailed technical report documentation, including the Long Range Transportation Plan, to reflect new requirements as outlined in the City of Madison zoning code.
- Update Master Plan graphic to identify projects completed since 2005.
- Present full documentation and graphics to City of Madison staff, neighborhoods and the City of Madison Plan Commission.

***Performance indicator***

- Approval by all stakeholders, culminating in approval by the City of Madison Plan Commission.

### ***Risks and challenges***

- Risk – Resource allocation and increasing demands results in the potential to overload/stress staff.

### ***Milestones accomplished***

- An initial draft of the design guidelines (format, photographs, and graphics) has been completed. Text is 75% complete.
- Internal draft of updated Master Plan graphic has been completed for review.
- Long Range Transportation Plan has been revised for inclusion in the overall report.

### ***Barriers to success***

- Other work priorities, namely active capital improvement projects, are taking time away from completing the draft documents to present for review and approval.
- The public review process for this project will be very time consuming and potentially divisive among the various stakeholders.

### ***Next steps and future opportunities; if target not met, action plan***

- Complete final internal review drafts of the design guidelines and design review process, the campus master plan graphic, the long range campus transportation plan, and the updated technical document for the overall comprehensive campus master plan by September 1, 2013.
- Share the review draft with city planning staff; complete by October 1, 2013.
- Share the Design Guidelines and Master Plan Update with neighborhoods through Joint West and Joint Southeast Campus Area Committees by November 1, 2013.
- Present the draft documents to the Urban Design Commission for review and approval.
- Present the final draft documents to the City of Madison Plan Commission for review and approval By January 1, 2014.
- Make any subsequent changes based on city staff, neighborhoods, and UDC/Plan Commission review.
- This will continue as a goal/objective in FY14.

## **Goal/Objective 3: Implement programs/changes in Transportation Services**

### **Goal/Objective 3A: Complete the installation of the Access and Revenue Control (ARC) system in parking structures**

#### ***Description***

This is the third year of a three year program to install a gate access and control system to manage the permits and visitors in each of the campus's 15 parking garages. This phase focused on the last five facilities. The system is being put into place to increase the effectiveness of managing parking on the campus and provide options to meet the various visitor parking needs of the campus.

#### ***Baseline Measure***

- Initial year of program, no ARC systems in 15 garages. Ten systems installed as of FY13.

**Target**

- Install new gate access and control system in five remaining campus parking structures.

**Performance indicator**

- Schedule and budget for completing installation.

**Risks and Challenges**

- Challenge - Installation of the first high-speed high-security garage doors on campus.
- Challenge - Infrastructure changes to occupied buildings to accommodate the new ARC systems.
- Challenge - Negotiating interdepartmental agreements on roles and responsibilities for changes in access methods.
- Challenge - Coordinating entrance/exit installations with vendors, campus Physical Plant shops, building stakeholders and parking customers.

**Milestones Accomplished**

- Completed the installation at two locations.
- Designs, pre-installation construction completed at 2 locations and in progress at the third.
- All new equipment ordered.

**Barriers to Success**

- Relocating fire control sprinklers, routing fiber optic and copper network cables to new telecom rooms.
- Negotiating interdepartmental agreements on live video feeds.
- Unanticipated utility relocations.

**Next Steps and Future Opportunities; if target not met, action plan**

- Install Microbial Science on July 29, 2013.
- Install Observatory Drive Ramp by August 15, 2013.
- Install Health Sciences Learning Center Garage by August 30, 2013.
- This goal/objective will be closed. The new system will provide future opportunities for more effectively managing parking in the structures which will be monitored through performance indicators at the departmental level.

**Goal/Objective 3B: Complete design and gain approval for construction of the Hospital parking structure expansion.****Description**

The expansion of the Hospital parking structure will be used to replace parking on the west campus that was lost to construction and provide for additional visitor parking capacity to meet the needs of the hospital. The hospital garage expansion is being managed and funded by FP&M Transportation Services and is a critical project to the department's ability to meet their customer's needs for access to the campus.

**Baseline Measure**

- Current parking structure at 95% capacity prior to loss of 400 spaces in area.

**Target**

- Target was to add 700 spaces to existing facility at a cost of \$29,085,000.

- FY13 – complete design concept report and cost estimate.

***Performance indicator***

- Cost, schedule and quality of construction project.
- Final number of spaces gained.

***Risks and Challenges***

- Challenge - Maintaining parking in one of Wisconsin's busiest parking facilities while the facility capacity is doubled.
- Risks - Include an area transportation study of street and road capacities, heavy construction adjacent to an advanced high-risk surgery center, patient and pedestrian access through an active construction site, staging and construction in very limited space, and managing construction over the full range of seasonal climatic conditions.
- Challenges include collaborating with Hospital operations and administration, providing adequate parking for patients and visitors while the facility operates at near capacity, and doubling the capacity of the parking structure within what is already a very small footprint.

***Milestones Accomplished***

- 10% Design Concept report was completed on February 15, 2013.
- The total estimated project cost is \$29,085,000 which is within budget.
- Construction staging has been developed and presented to Hospital administration without any obvious problems foreseen at this early stage.
- The project duration is estimated to be 57 weeks.

***Barriers to Success***

- Approval by the Board of Regents and State Building Commission in December 2013.
- Approval by the City based on the results of the area traffic study and neighborhood feedback.

***Next Steps and Future Opportunities; If target not met, action plan.***

- Release Environmental Impact Study– August 9, 2013
- 35% Preliminary Design submittal– August 12, 2013
- Agency Request– September 27, 2013
- Board of Regents approval – December 2013
- State Building Commission approval – December 2013
- 100% Final Design submittal – March 2014
- Construction Start – June 2014
- Substantial Completion – August 2015
- Final Project Closeout – July 2016

**Goal/Objective 3C: Complete a study of the campus bus system and implement changes to improve effectiveness and efficiency of the system.**

***Description***

Based on feedback from customers and in cooperation with Associate Students of Madison (ASM), a study of the campus transit system was commissioned to determine what the optimal bus route configuration would be to serve the needs of the campus. The study also reviewed options for

paratransit programs that would help the campus serve the access need for individuals with disabilities.

***Baseline Measures***

- Cost of service.
- Headway, ridership.

***Target***

- Improve efficiency of bus service to campus.
- Develop transit option to improve accessibility for those with disabilities.

***Performance Indicators***

- Cost per passenger.
- Total hours of service.

***Risks and challenges***

- Challenge - Obtaining input from the various stakeholders and users.
- Risk - Designing a system that would only meet the needs of a small portion of users.
- Challenge - Limited funding to expand the transit service to meet additional campus needs.

***Milestones accomplished***

- The study was completed and shared with campus governance groups.
- Accessible transit focus group formed to assist in developing a specific paratransit option for the campus.

***Barriers to success***

- Inability to reach a consensus from all stakeholders on route designs and priorities.

***Next steps and future opportunities; if target not met, action plan***

- Implementation of the accessibility portion of the report.
- Discussion with ASM and other governance groups and stakeholders on the potential changes to the system.
- This will be developed into a new goal/objective for FY14.

**Goal/Objective 3D: Implement a bicycle way finding program, installing signage to direct cyclists through the campus bike path system.**

**Description**

The intent of the program was to assist campus users and visitors in commuting across the campus on bicycle. The program would provide directional arrows and mileage to popular campus destinations. This system was intended to become a potential model for a similar connected system in the City of Madison. Due to the potential for sign clutter and that the program would only serve one user group, the program is being redeveloped to focus on directing cyclists to the campus network of bicycle paths and lanes.

***Baseline Measure***

- No baseline measures were identified.

**Target**

- Plan to target all bicycle users (approximately 15,000) on the campus.

**Performance indicator**

- Increase the usage of dedicated bicycle routes and paths.

**Risks and challenges**

- Risk - Signage network would only benefit a small percentage of users.
- Challenge - Dedication of additional staff time to develop the plan.
- Challenge - Determining the most effective sign placement while minimizing the number of signs.

**Milestones accomplished**

- Met with user groups and stakeholders to refine project scope.
- Began preliminary planning on new concept.

**Barriers to success**

- Original plan was not in line with campus goals relating to sign clutter.
- Stakeholder approval of signage location.

**Next steps and future opportunities; if target not met, action plan**

- Complete planning in fall 2013.
- Implement in spring 2014.
- This goal/objective will continue in FY14.

**Goal/Objective 3E: Complete redesign of the parking permit renewal process to allow for annual renewal in lieu of the current priority ranking system****Description**

The current parking permit renewal system requires departments to reprioritize their employees each year to allocate parking. Departments dedicate hundreds of hours to this process while 80% of employees elect to park in the same lot each year. A parking renewal system would allow employees to keep their same permit each year and Transportation Services would only need to actively manage the 20% of employees who need to change their parking assignment.

**Baseline Measures**

- Employee parking requests are prioritized, offered, approved and accepted annually.

**Targets**

- Reduce the time needed for individuals and departments to obtain parking.
- Reduce departmental costs by eliminating Unit Transportation Coordinator (UTC) functions.
- Improve customer satisfaction.

**Performance indicators**

- Cycle time for permit process.
- Customer satisfaction survey/feedback.

### ***Risks and challenges***

- Challenge - Transfer of decision making – a renewal policy will take decision making authority away from Department management and shift it to Transportation Services.
- Challenge - Need for an exceptions policy to manage replacement of key personnel, departmental moves, loss of space due to construction and sabbaticals.
- Challenge - Convince Departments of the benefit of most of their staff using a faster, more efficient process.
- Challenge - Communicating a changed role for the UTC's -- more of a communication liaison with a reduced commitment of resources.
- Challenge - Integration of new process into software programs and processes.
- Challenge - Time frame.

### ***Milestones accomplished***

- Implemented T2 Flex software and Access Revenue and Control (ARC) system.
- Identified data needs and developed draft outreach process.

### ***Barriers to success***

- Progress was delayed until T2 and the ARC system were implemented.

### ***Next steps and future opportunities; if target not met, action plan***

- Summer 2013 -- Begin data collection and identification of software needs.
- Fall 2013 -- Begin development of policy options.
- Winter 2013/2014 -- Develop policy options and share with stakeholders.
- Winter 2014 – Obtain approval to implement new process.
- Spring/Summer 2014 – Implement new process.



**Goal/Objective 3F: Develop and maintain a network of campus resources to better communicate messages to the student population.**

**Description**

Since Transportation Services does not sell parking to students or manage the student bus pass program it has been a challenge ensuring students are kept aware of construction and programs that could impact them. By developing and maintaining a communication network we are better positioned to proactively communicate changes to the student population.

**Baseline Measures**

- Baseline measures have been calculated on Twitter and Facebook followers.

**Targets**

- Increase followers by 50%.
- Partner with ASM and other student groups to increase message reach.

**Performance indicators**

- Track usage of accounts (Twitter, Facebook).

**Risks and challenges**

- Challenge - Finding appropriate contacts and verifying desire to participate in disseminating information to students.
- Challenging - Finding a variety of ways to communicate with students, i.e. e-mail, signage, social media, etc.

**Milestones accomplished**

- Compiled comprehensive list of University contacts that communicate directly with students who have agreed to assist in disseminating information to students.
- Actively utilize University contacts as needed to disseminate pertinent information to students.
- Communication channels include Twitter, Facebook and e-mail accounts of various University departments as well as newsletters and e-mail accounts used to communicate directly with parents.
- Obtained ability to include information in new weekly student-focused email newsletter published by UW Communications.

**Barriers to success**

- N/A

**Next steps and future opportunities**

- Maintain and continue to utilize list of University contacts to communicate with students.
- Consider use of additional Transportation Services Twitter and Facebook accounts specifically targeted at students.
- This will remain a goal tracked at the Department level, not reported in the FP&M goals/objectives.

## **Goal/Objective 4: Implement programs/changes in Environment, Health and Safety (EHS)**

### **Goal/Objective 4a: Complete beta test of biosafety's ARROW project initiative and develop training tools for PIs**

#### ***Description***

The Application Review for Research Oversight at Wisconsin (ARROW) project is a comprehensive campus-wide effort, managed by the Graduate School, to streamline the process of animal, human and biosafety protocol registrations. The EH&S contribution to the project has been in the development of smart forms for the initial review, annual update and modification of portions of the work flow for animal and biosafety protocols. Once completed, ARROW will be the single point source for protocols allowing principal investigators to enter background information once rather than the current process of re-entering information for each protocol.

#### ***Baseline measures***

- Baseline measurements were not established for FY13.
- A status report was created to track progress.

#### ***Target***

- Create a single process for the submittal and review of protocols.

#### ***Performance indicator***

- Scope and schedule were identified for each step of the implementation.

#### ***Risks and challenges***

- Risk – Server migration/upgrades may impact performance.
- Risk – Limited IT resources to provide ongoing support for the applications.

#### ***Milestones accomplished***

- A monthly status report was created to track progress.

#### ***Barriers to success***

- A key programmer for the ARROW project retired from the Graduate School IT program June 28<sup>th</sup>. This has left a major gap in our ability to meet the ARROW biosafety project deadline go live in date of October 2013.

#### ***Next steps and future opportunities; if target not met, action plan***

- EH&S IT and biosafety staff will continue to work on ARROW biosafety and interact with Graduate School IT to finish the project in timely manner.
- A new IT Graduate School ARROW project manager has been appointed. EH&S will work with the new project manager to coordinate reporting, resources and support.
- The original project timeline is no long valid. The limitation on project resources and recent personnel changes will require a revision to the timeline. This will be completed in August 2013.

## **Goal/Objective 4b: Improve Chemical Waste Management Disposal, Recycling and Management of Controlled Substances**

### ***Description***

EH&S is responsible for collecting all surplus and waste chemicals for redistribution and disposal. The goal of this project was to streamline the process for handling, sorting and labeling waste chemicals and ensure they are sorted appropriately according to the U.S. Department of Transportation (DOT) Hazard Classifications. This will reduce the time Veolia (the state hazardous waste disposal contractor) will require to sort, package and load hazardous waste containers, and therefore will decrease the cost to the university. The use of this classification system also aligns the University with the Emergency Response Guidebook for first responders in the initial phase of a dangerous goods, hazardous materials transportation incident.

### ***Baseline measure***

- Quarterly pickup by Veolia requires on average 5 days.

### ***Target***

- Reduce time required by Veolia to sort, package and load hazardous waste containers.

### ***Performance indicators***

- Length of time to process hazardous chemical waste.
- Program inspection citations and recommendations.

### ***Risks and challenges***

- Challenge: Changing from a well-established process to a new system of hazardous waste classification.
- Challenge: Retraining of staff to classify hazardous waste based on DOT's Hazard Class system.
- Challenge: Retraining Veolia on the re-organization and classification of hazardous waste.
- Challenge: Chemical inventory database upgrades (spreadsheets and databases) and hazardous waste labeling system.
- Risk - Mismanagement of hazardous waste by research or University staff resulting in improper disposal, environmental contamination and/or injury.

### ***Milestones accomplished***

- The improvements have reduced the average quarterly visits from 5 to 4 days.
- Reduction in time required for hazardous waste pickup has resulted in an annual average savings in disposal costs of about \$7,000.

### ***Barriers to success***

NA

### ***Next steps and future opportunities; if target not met, action plan***

- This goal/objective has been completed successfully. This will be built on through implementation of a time and materials tracking system to monitor resources associated with hazardous waste management.

## **Goal/Objective 5: Sustainability**

### **Goal/Objective 5a: Advance UW Builds Green program**

#### ***Description***

To benchmark our commitment to sustainability, campus is pursuing Leadership in Energy and Environmental Design (LEED) certification on most of its new and renovated major projects. By following this commitment, LEED Silver certification level is obtainable and is the minimum level pursued on campus projects. LEED is used as a guideline and a way to measure the sustainability elements of a project; it is not used as a checklist of items required to be included. An effort is made to pursue points which are truly sustainable and have a strong return on investment.

#### ***Baseline measures***

- Advance the UW Builds Green programs
- Divest UW of surplus property thereby avoiding maintenance and other costs.

#### ***Targets***

- Leadership in Energy and Environmental Design (LEED) – Silver certification.

#### ***Performance Indicators***

- Successful LEED certification.
- Adherence to the principles of sustainability included in the Division of Facilities Development (DFD) Sustainability Guidelines.

#### ***Risks and challenges***

- Risks-The ability to implement processes or procedures that are not truly sustainable. Points may still be received through the LEED point system, but the item is not sustainable for the particular project.
- Challenges- The entire project team – the architects, engineers, owners, and contractors need to be committed. Collaborative efforts from the very beginning of the project are needed to ensure success.
- Challenge – Follow through on measurement and verification of the building’s actual energy use compared to the model to ensure it is performing as designed.
- Risk - The LEED process starts at the very beginning of the project and can continue for a year or more past the point when construction is complete. During this time, members of the project team can change, and information isn’t always passed on. This can result in delays and inadequate information for completing the credits.

#### ***Milestones accomplished***

LEED Program:

- Union South – LEED Gold Certified in October 2012 (4<sup>th</sup> project to be certified).
- Nancy Nicholas Hall – LEED Gold Certified in June 2013 (5<sup>th</sup> project to be certified).
- Dejope Residence Hall – Occupied August 2012 (Green but certification was not sought).
- Gordon Commons – Occupied August 2012 (Green but certification was not sought).
- LaBahn Arena – Tracking LEED Silver (not yet certified).
- Student Athlete Performance Center, McClain Center – Tracking LEED Silver (not yet certified).
- Wisconsin Energy Institute - Tracking LEED Gold (not yet certified).

Management of surplus property:

- Wisconsin Veterinary Diagnostic Laboratory (WVDL) – In the process of being sold to University Research Park who will be responsible for re-development of the site.
- Knapp House – Program relocated, contents removed, property secured and property lines adjusted.

***Barriers to success***

NA

***Next steps and future opportunities; if target not met, action plan***

- Currently targets are being met.
- Incorporate LEED/Sustainability into all project construction meetings. It is during this phase in a project when a majority of the LEED work is completed and teamwork is required. Some projects currently do this and it encourages dialogue between all team members and offers a chance for all to discuss and share information relating to sustainability. It fosters better understanding and cooperation when face-to-face meetings occur.
- Highlight achievements through social media, websites. Making people aware of sustainability achievements encourages others to play a role.

**Goal/Objective 5b: Advance WE CONSERVE**

***Baseline measure***

- Energy consumption/costs for specific buildings.

***Targets***

- Seek an additional \$2 million for energy projects to reach our \$30 million biennium funding goal from the State.
- Complete energy audit and modeling activities for Waisman Center, WIMR Phase I, McArdle Lab, and Russell Laboratory Buildings.
- Complete construction phase of the energy retrofit projects in Biotech-Genetics, Engineering Centers, and Microbial Sciences, and the phase III funding of lighting upgrade projects.
- Substantially complete the construction phase of the energy retrofit project at Biotron building.
- Complete Phase I of the TURN (Tunnel Upgrade and Refurbishment Now) program to eliminate deferred maintenance, safety, and energy deficiencies of the steam tunnels.
- Complete the design phase of the energy retrofit projects for Vet Med and Bock Lab.
- Start a recycling program for Styrofoam packaging materials.
- Install at least one refillable bottle filling station in all major campus buildings
- Expand post-consumer food composting program in the campus and experiment with compost drop off sites in pilot buildings for the occupants.

***Performance indicators***

- Comparison of energy costs (post retrofit costs compared to baseline).
- Payback period for each project must meet minimum payback of 16 years as established by the Division of Facilities Development (DFD).

### ***Risks and challenges***

- Challenge - Working with the structure, restrictions, and timeframe established by UWSA and DFD.

### ***Milestones accomplished***

- Completed energy audit and modeling activities for Waisman Center, WIMR Phase I, McArdle Lab, and Russell Laboratory Buildings.
- Completed the construction phase of energy retrofit projects:
  - Biotech-Genetics - annual savings of \$591,000 with a 3.8 year payback.
  - Engineering Centers – annual savings of \$326,000 with a 7.4 year payback.
  - Microbial Sciences – annual savings of \$225,000 with a 3.2 year payback.
  - Phase III funding of lighting upgrade projects – annual savings of \$654,000 with a 12.5 year payback.
- Substantially completed the construction phase of the energy retrofit project at Biotron building.
- Completed Phase I of the TURN (Tunnel Upgrade and Refurbishment Now) program to eliminate deferred maintenance, safety, and energy deficiencies of the steam tunnels – annual savings of \$330,000 with a 17 year payback.
- Completed the design phase of the energy retrofit projects for Vet Med and Bock Lab.
- Started a recycling program for Styrofoam packaging materials.
- Installed at least one refillable bottle filling station in all major campus buildings.
- Expanded post-consumer food composting program in the campus and experimented with compost drop-off sites in pilot buildings for the occupants.

### ***Barriers to success***

- Unexpected delays with DFD and UWSA on timely approval and funding of projects.

### ***Next steps and future opportunities; if target not met, action plan***

- The approval of the \$2 million additional funding was delayed and will be addressed during the State Building Commission's August meeting.
- Complete construction the Biotron building, Phase IV of the lighting retrofit, and Phase II of the TURN projects.
- Start construction for the Vet Med and Bock Labs energy retrofit projects.
- Await DFD funding decisions for WIMR and Waisman Center and be prepared to start construction.
- Complete cost estimating for the McArdle Lab and Russell Laboratories and engage DFD in scope and funding discussions.

## **Goal/Objective 6: Budget Allocation and Tracking**

For a period of several years, the initial budget allocation underfunded certain departments and initiatives in FP&M. This exercise realigned budgets within FP&M to fully fund all departments. This lays the groundwork for more informed management of budgets by directors and managers.

### ***Baseline measure***

- Although the overall budget for FP&M balanced, several individual departments were not adequately funded given FTE commitments.

**Targets**

- Re-allocate budgets internally to provide appropriate/realistic support for FP&M departments.
- Develop funding support for projects and initiatives.
- Provide operational support for Lakeshore Nature Preserve and the Design Review Board.
- Develop process for review and approval of IT projects to ensure division priorities are met, funds are managed, and duplication of effort is eliminated.

**Performance indicators**

- Re-allocation of \$30,000 for the Design Review Board and \$52,000 for the Lakeshore Nature Preserve to cover budget shortfall.

**Risks and challenges**

- Challenge is to determine proper priorities, evaluate the expected needs to determine if costs are appropriate and to correctly identify on-going needs versus one time costs.

**Milestones accomplished**

- Budget re-allocation completed for FY14.

**Barriers to success**

N/A

**Next steps and future opportunities; if target not met, action plan**

- Completed. Responsibility for management resides with Directors.

**Goal/Objective 7: Identify and implement key indicators to measure services.****Description**

FP&M identified the need to establish standard performance metrics to measure services and the outcomes of strategic and operational objectives at the beginning of FY13.

**Baseline measure**

- Baseline measures were not identified for FY13.

**Target**

- Identify key indicators to measure services and goals in each department.

**Performance indicators**

- Over 200 individual operational performance metrics have been identified and routinely populated with data at the department level.
- Reporting metrics is now incorporated into processes, rather than existing as an isolated activity.

**Risks and challenges**

- Challenge - Identify meaningful indicators for which data was readily available.
- Challenge - Difficulty setting goals/metrics when service standards are not clearly articulated.

### ***Milestones accomplished***

- Key indicators established for 7 of 7 departments – March 2013.
- 32 metrics established and shared with the VCFA.
- Key indicators populated with data for Third Quarter of FY13.
- Key indicators will be populated with Fourth Quarter data in August 2013.

### ***Barriers to success***

NA

### ***Next steps and future opportunities; if target not met, action plan***

- The FP&M Leadership Team will continue to monitor performance metrics and adjust as necessary.
- Directors may share department metrics at Leadership Team meetings in FY 14.
- Selected directors may be asked to present metrics at the VCFA staff meetings in FY14.
- Metrics will continue to be refined as necessary to inform decision-making in the organization.

## **Goal/Objective 8: Attract and retain an outstanding and diverse staff**

### ***Description***

FP&M is committed to improving recruitment efforts and to creating a workplace that is engaged, inclusive, and leverages diversity. We recognize that the greatest diversity is in custodial services, and, therefore, continue to provide support and access to services for staff for whom English is not a native language. Increasing diversity throughout the organization, with an emphasis on management and professional positions, is a priority for the organization.

### ***Baseline measure***

- Demographic (heritage/gender data) provided by the Office of Human Resources.

### ***Targets***

- Develop and implement strategies to increase diversity.
- Assist with the on-boarding of the new Associate Vice Chancellor.
- Recruit, hire and on-board a new Director of Physical Plant.
- Recruit, hire and provide orientation for new employees.

### ***Performance indicators***

- Recruitment plan includes focus on diversity.
- Composition of search and screen committees and interview panels is diverse.
- Participation in New Employee Orientation and other training.
- Demographic reports.

### ***Risks and challenges***

- Challenge- It is difficult to measure whether recruitment strategies are resulting in increasing diversity in applicant pools, since demographic information is not available to the organization; and responses to specific job postings are not tracked.
- Challenge- The employment pool for facilities positions remains predominately white male.
- Challenge- Salaries are below market for positions.



### ***Milestones accomplished***

Associate Vice Chancellor:

- FP&M staff invited to engage in question/answer sessions with three finalists for the AVC position.
- Bill Elvey joined FP&M as the Associate Vice Chancellor for Facilities Planning and Management – September 1, 2012.
- On-boarding completed – March 27, 2013.

Physical Plant Director:

- Search and screen committee formed to be inclusive and diverse. Membership included representatives from across FP&M, stakeholders from UWSA and DFD, and campus customers.
- Committee developed questions and benchmarks, recognizing need to create an objective process as free from bias as possible.
- Advertisement of position included professional publications focusing on diverse populations.
- Rob Lamppa joined FP&M as Director of Physical Plant – March 2013.

FP&M Staff:

- New Employee Orientation sessions were offered quarterly. Six sessions held for a total of 72 participants on first shift; five sessions conducted for 77 second/third shift employees with assistance from Cultural Linguistic Services (offered in Spanish, Hmong and English).
- FP&M worked with HR Design project leaders to ensure sessions were accessible to staff on all shifts and in multiple languages in order to hear and address employees' concerns.

### ***Barriers to success***

- Delayed implementation of HR Design to July 2015.

### ***Next steps and future opportunities; if target not met, action plan***

- This goal will continue to be included and addressed through the FP&M EID initiative. A phased action plan has been drafted which includes programs that, through partnerships with community organizations and institutions, will provide opportunities for a diverse population to obtain employment/training in FP&M.

**Section 4: FP&M Strategic and Operational Priorities – Summary Chart**

<b>Priority area</b>	<b>Goal/Objective</b>	<b>Baseline measure</b>	<b>Defined target</b>	<b>Year-end actual measure</b>
Resource stewardship	1: Provide project management services for capital projects.	Budget, schedule and specifications established by construction documents and contractors' bid.	Complete projects to required quality, on budget and on schedule.	8 major projects met targets. Schedules delayed on two projects due to site conditions/weather.
Resource stewardship	2: Complete the Design Guidelines and Update the 2005 Campus Master Plan for presentation to the City of Madison Plan Commission	Not established.	Approval by all stakeholders and the City of Madison Plan Commission in 2013.	In process. Target adjusted to January 2014.
Process improvement: Technology	3A: Complete the installation of the Access and Revenue Control system in parking structures.	2010 – No ARC systems in any of the 15 parking garages on campus.	Goal for FY13 – complete installation in remaining 5 parking garages.	2 installations complete. 3 remaining to be installed in August 2013.
Resource stewardship	3B: Complete design and gain approval for construction of the Hospital parking structure expansion.	Project initiated due to capacity issues with existing ramp.	Project to add 700 spaces. Complete design concept report and cost estimate.	On track for approval of project in 2013, construction starts in 2014.
Process improvement	3C: Complete a study of the campus bus system and implement changes to improve effectiveness and efficiency of the system.	Cost of service Headway Ridership	Improve efficiency. Improve accessibility for those with disabilities.	Study completed. Implementation plan will be developed into a new goal/objective in FY14 plan.
Process improvement	3D: Implement a bicycle way finding program.	No baseline established.	Increase use of dedicated bicycle routes and paths.	Not completed. Planning to continue in FY14.
Process improvement: Technology	3E: Complete redesign of the parking permit renewal process to allow for annual renewal.	Annual process to prioritize, offer, approve and accept	Actively manage only 20% of employees who need parking (reduce cycle time, improve satisfaction).	Delayed until new system operable. Planning for Summer 2014 implementation.

Process improvement	3F: Develop and maintain network of campus resources to communicate with student population	Number of social media contacts. Partnerships with offices serving students.	Utilize existing methods/media accessed by students.	Complete. Process now established as operational.
Process improvement	4A: Assist Graduate School with completion of beta test of biosafety's ARROW project.	No baseline established.	Go live originally identified as October 2013.	Not completed. New project timeline being established by the Graduate School.
Process improvement	4B: Improve chemical waste management.	Baseline of quarterly pickup requiring 5 days of contractor time.	Time reduced to 4 days.	Complete. Process now established as operational.
Resource stewardship Sustainability	5A: Advance UW Builds Green program.	No baseline established.	LEED Silver certification. Divesting of surplus property.	5 projects certified or tracking at silver or better. 2 projects Green but not certified. WVDL property declared surplus.
Resource stewardship Sustainability	5B: We Conserve	Baseline energy costs.	Completed projects result in annual savings.	5 projects completed w/cumulative annual savings estimated at \$2.1M.
Process improvement	6: Budget allocation and tracking	Baseline established by FY13 budget numbers.	Re-allocation to fully fund departments and initiatives.	Complete. Process now established as operational.
Process improvement	7: Identify and implement key indicators to measure services.	No baseline measurements publicized.	Key indicators established for 7 of 7 departments.	Initial target accomplished. Refinement and monitoring to be ongoing.
Attract and retain an outstanding and diverse staff	8: Attract and retain an outstanding and diverse staff.	Demographic report.	Create diverse search and screen committees. Engage staff in recruitment process. Provide new employee orientation.	Targets were met. Goal to be continued under EID initiative.