



## Facilities Management Division

### The Second Integrated Planning Cycle – 2008/09 to 2011/12

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#### 1. Executive Summary

As stewards of the University of Saskatchewan campus, the work that is performed and the services provided by Facilities Management Division (FMD) inevitably impact the success of all the themes identified in the University's planning processes. Having achieved a great deal throughout the previous planning cycle, and having identified new areas where improvement or attention is required, we are moving confidently into this new phase of development.

In this second planning cycle FMD will focus attention on the theme where FMD has the greatest impact: Building a High Performance and Sustainable Organization. The University Level initiatives being forwarded as part of the Second Planning Cycle are:

- **Enhancement to Master Planning, Capital Construction, and Asset Renewal Processes to support stewardship of the University's physical resources.**

The mandate of this initiative is to ensure enhancement of the processes for activities ranging from planning new facilities and renovating existing space to ensure efficiency and effectiveness of space use to addressing the growing deferred maintenance liability to ensure sound building structures with reliable building systems and supporting infrastructure necessary for the University to meet its goals. A demolition plan should also be considered to address the real potential that some facilities have surpassed their useful lifespan. The cost of fully integrating deferred maintenance issues with program requirements must be evaluated against the cost of new facilities.

Faced with a significant amount of new development and renovations, and a burgeoning construction industry, emphasis by FMD on project governance and project management processes will be critical to the successful delivery of projects within budget and schedules. Strategies and processes will be developed and improved upon in several key areas such as:

- best type of construction delivery for a project
- foster improved relationships with contractors and work with other institutional owners
- financial reporting and payments.

The Integrated Planning Office and FMD will undertake a Multi-Year Capital Plan. Efforts within FMD will be coordinated to develop a report that outlines immediate and future space needs along with associated infrastructure and building conditions and deficiencies for the entire campus. The report will reflect upon capital budget forecasts and long-term financial planning.

- **Implementation of Sustainability Initiatives that contribute to an Environmentally Responsible Campus**

The mandate of this initiative is to continue the progress on sustainability initiatives and to move forward with sustainability in a way that sustainability informs all aspects of the short-term activities and long-term planning. FMD's goal is to model, promote and support environmentally

sustainable practices on campus that are economically viable and appropriate for the University community. The focus will be on implementation of sustainability initiatives that contribute to an environmentally responsible campus such as strategies for sustainable design, construction, operations and maintenance as well as green purchasing and alternative transportation. The primary focus will be on (1) greenhouse gas reduction and energy conservation and (2) solid waste prevention and management, (3) water conservation and protection, (4) biodiversity and habitat protection, and (5) indoor environmental quality.

- **Enhancement of Financial and Business Practices to support a high performance, transparent and integrated environment**

FMD has identified the need to analyze and plan the finances over the long term. The intent is to establish a financial plan over a ten year period to better understand FMD's financial needs and how these needs impact various stakeholders. The plan will include a projection of capital and operating expenditures, including the FMD reserve, as well as revenues (i.e. fees and rates). There are many factors which affect FMD's financial plans including capital construction, occupancy dates, increased square footage, infrastructure, facility age and conditions, maintenance standards, and strategic directions.

In addition a communications strategy will be developed to address internal and external needs, including the need to improve transparency of operations, services, fees, rates, and expenditures. Implementation of a customer relationship management strategy will help identify customers and their needs and also help manage these relationships. Other administrative strategies to be developed include an IT enterprise architecture framework, a human resources strategy, and a logistics services support plan, all of which will support a high performance workplace.

A comprehensive performance reporting framework for FMD will be developed that will provide insight into all key aspects of operations. The Association of Physical Plant Administrators' (APPA) Facilities Performance Indicators tool will be used as a basis for establishing the framework and to benchmark to other similar organizations. In addition, the plan is to consider the criteria from, and later complete an evaluation of, FMD's effectiveness using a tool that is available through APPA, entitled Facilities Management Evaluation Program.

To support these University level initiatives, a series of fifteen FMD Second Planning Cycle Initiatives and thirty-four sub initiatives have been identified. These lists of initiatives and sub initiatives are not exhaustive and may evolve over the course of the second planning cycle; however, each of these identified initiatives and sub-initiatives (lead by various groups within the FMD organization) will directly impact the success of the University level initiatives.

## 2. Introduction

The main goal of the FMD is the stewardship of the physical, financial and human resources entrusted to us. Our employees are our most valued assets and they are essential participants with a shared responsibility for fulfilling our mission. We recognize that the quality, motivation and performance of our employees are the key factors in achieving our success.

High performance is a form of personal mastery – knowing who you are, understanding the reality of your situation and setting priorities for action. FMD has worked toward developing an environment of collaboration and openness. Our employees are charged with responsibilities that affect far more than the confines of our particular unit. The very nature of our endeavour is to consider the needs of the entire institution and the many people who inhabit it.

As our vibrant community continues to grow, it becomes increasingly important to foster closer connections with Saskatoon and the wider Saskatchewan communities. The Campus Master Plan addresses the need to develop our associated facilities arising from these relationships to ensure our campus will be a welcoming environment and a good neighbour.

The continued physical development of the campus will reflect the strategic priorities of the University and convey a sense of pride of place. Whether we are injecting new life into old buildings, giving birth to state-of-the-art facilities where research and learning will flourish, or simply making our workplaces safer and more efficient, we continually strive to improve this place where we work and learn. FMD works to build, maintain and develop an institution that is beautiful, functional, efficient and sustainable. We are building a community.

## **Mission**

To plan, build and maintain the campus buildings, land and infrastructure; providing a safe, sustainable, comfortable and attractive environment for the University of Saskatchewan.

## **Vision**

To be a model facility and service organization that provides outstanding support to the University of Saskatchewan.

## **Values**

- |                       |  |
|-----------------------|--|
| <b>Integrity</b>      | We strive to ensure our work is done, and is seen to be done, in an accountable, efficient, trustworthy, honest and professional manner.                                       |
| <b>Collaboration</b>  | We work together with clarity of purpose in an open environment that fosters sharing, helping and team building.   |
| <b>Creativity</b>     | Our work practices are innovative, we use leading edge technology concepts, and we encourage continuous staff development.   |
| <b>Excellence</b>     | We will satisfy our customers and ourselves that our work is done in a safe, efficient, innovative and professional manner that results in the highest quality and reliability |
| <b>Sustainability</b> | We strive for development that maintains ecological integrity, ensures economic security and provides conditions for social well-being.  |

## **Principles**

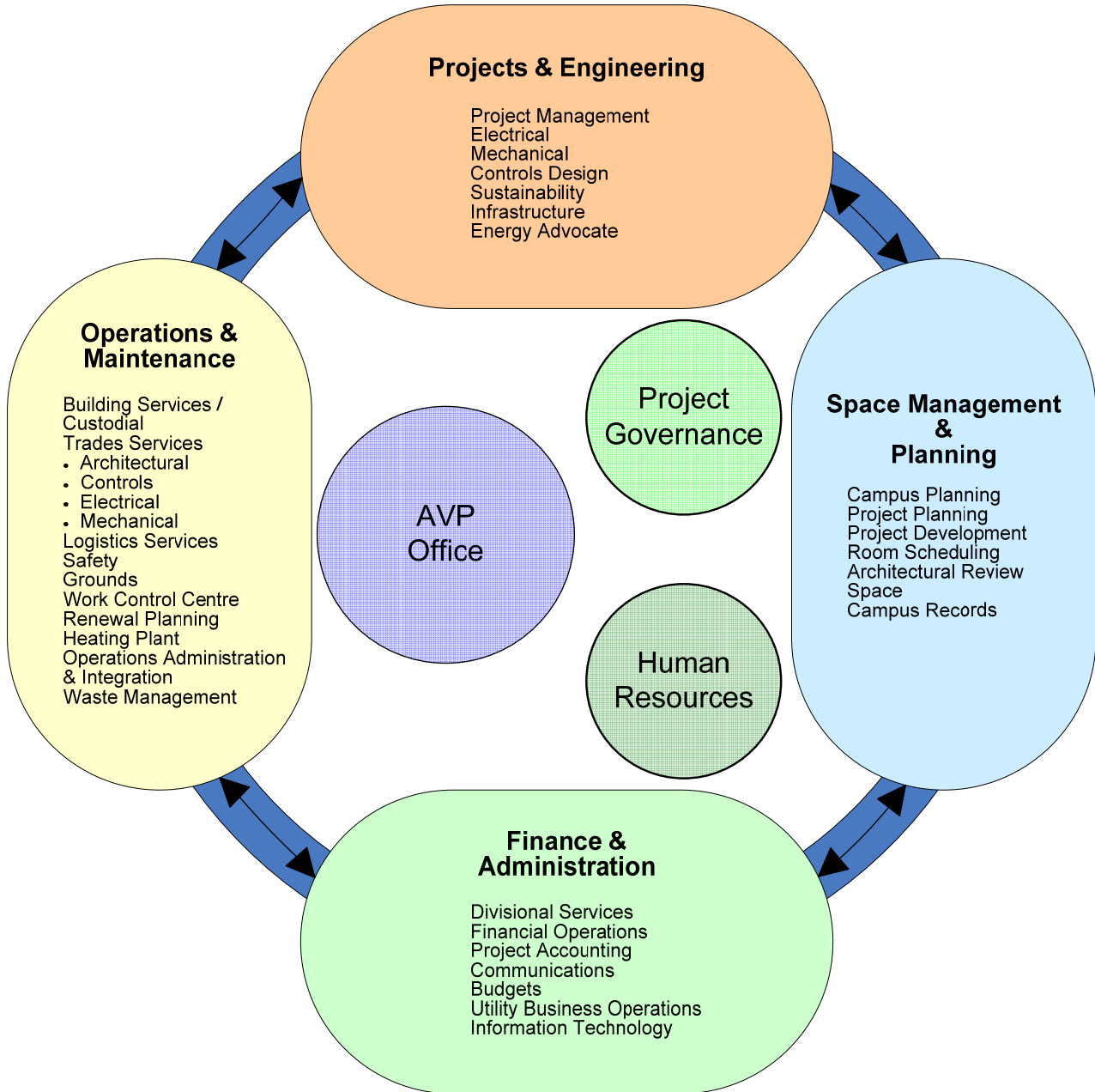
We lead and manage our stewardship responsibilities following these principles:

- |                      |   |
|----------------------|---|
| <b>People</b>        | we hire, train, educate and maintain a highly qualified and diverse work force.   |
| <b>Ethics</b>        | we operate to the highest standards of integrity.                                 |
| <b>Direction</b>     | we follow our strategic plan and provide clear direction to our employees.        |
| <b>Communication</b> | we maintain open communication with our employees and with the community.         |
| <b>Structure</b>     | we are prepared to change our structure and processes to ensure success.          |
| <b>Community</b>     | we develop and maintain long-term relationships with our customers and community. |
| <b>Investment</b>    | we reinvest in our people, our operations and in our assets.                      |

### 3. Situation Assessment, 2004 to 2007

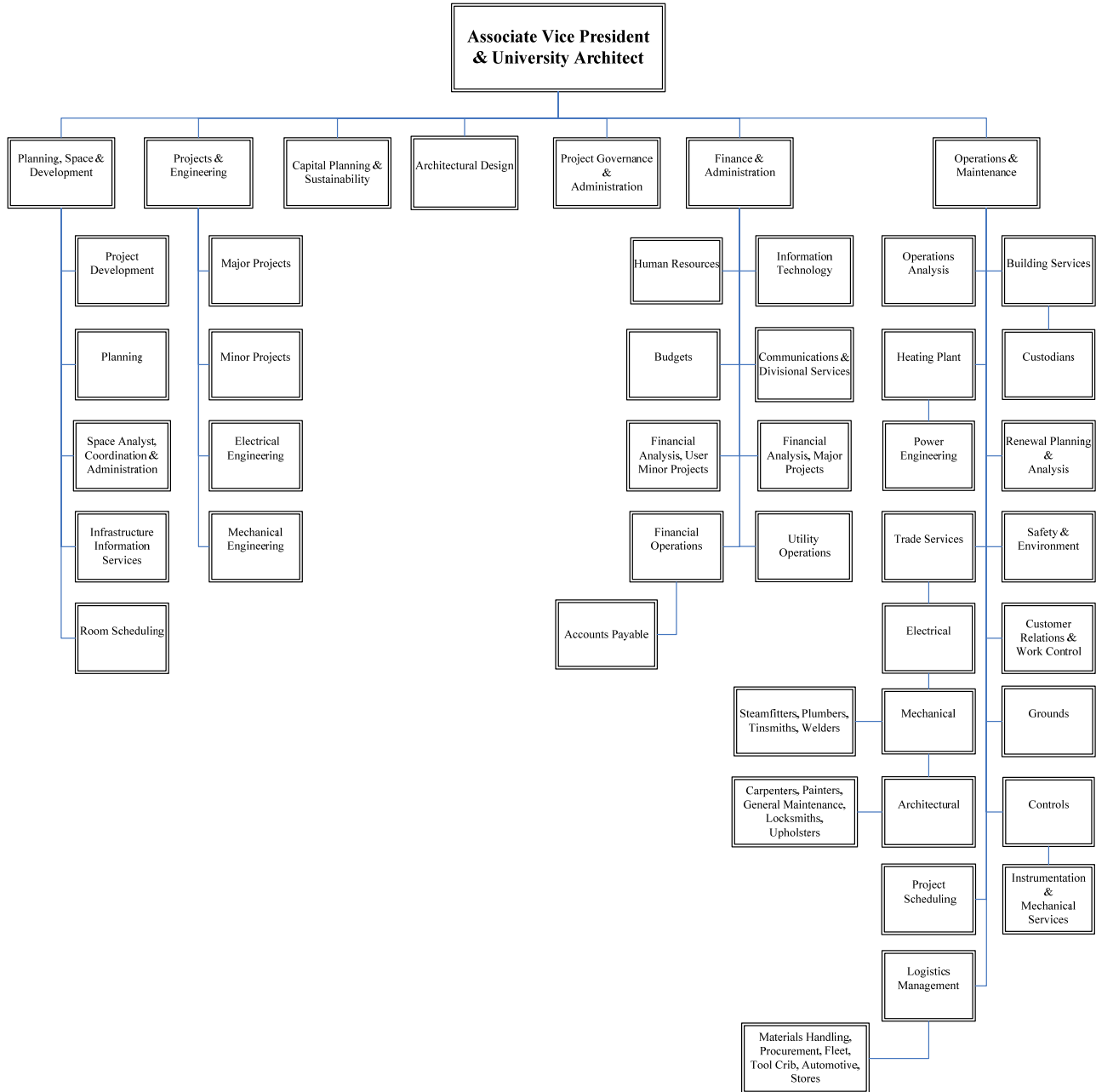
#### a. Current Organization Charts

##### Organizational & Relationship Structure



**Current Organization Chart**

**Facilities Management Division  
September, 2007**



**b. Progress against the Facilities Management’s 2003/04 to 2006/07 Plan**

FMD has made significant progress throughout the 2003/04 to 2006/07 planning cycle with seven of the twelve initiatives remaining on track and proceeding as conceptualized and five of the twelve proceeding but more slowly, differently or with challenges that put completion within this planning cycle in question. Key success areas have been the application of the governance model for major capital projects, completion of needs assessments for roofs and elevators, the ongoing implementation of safety programs to ensure the safety of employees and the general campus community and the completion of a number of process enhancement reviews which have contributed to the increased efficiency and success of FMD’s business practices. Throughout this planning cycle, it has been recognized that the best intentions and plans are subject to change due to unforeseen events impacting the direction and focus of resources. The flexibility to adapt to those changes in direction and to recognize the limits of resources (both in terms of financial and human components) has contributed to FMD’s success during this planning cycle.

The table below outlines, in report card form, the twelve initiatives from FMD’s unit plan and indicates current progress as of July 31, 2007.

**Status**

- Initiative is on track, on time and proceeding roughly as initially conceptualized.
- Initiative is proceeding but is behind schedule or proceeding in a different shape than originally conceptualized, or has encountered some obstacle that puts completion at risk in this cycle.
- Not on track, will not be completed in this planning cycle and may require fundamental rethinking.

	<b>Initiative</b>	<b>Description</b>	<b>Notes on Status</b>
1	Facilities and Infrastructure Management Plan (Buildings, Infrastructure and Municipal) - Needs Assessment	Need for a major assessment of facilities and utility and municipal infrastructure on campus was identified. Ensuring a secure and comfortable physical environment supports our commitment to academic pre-eminence.  Supports IP Section E: Deferred Maintenance Plan and University Infrastructure Needs (Infrastructure Master Plan) as well as Section D: Maintaining Building and Grounds	Assessments are ongoing and reviews are planned every five years. Assessments have been completed for roofs and elevators in 2007. Next for assessments are roads and buried infrastructure.
2	Facilities and Infrastructure Management Plan (Buildings, Infrastructure and Municipal) - Financial Plan	Requires funding outside traditional sources to address.  Supports IP Section E: Deferred Maintenance Plan and University Infrastructure Needs (Infrastructure Master Plan) as well as Section D: Maintaining Building and Grounds	Funding options continue to be discussed and prioritized with Senior Administration. Information provided to assist with Operations Forecast (capital needs). Funding strategies will be addressed with the Province to meet the current and increasing needs.

Initiative	Description	Notes on Status
3	<p>Stewardship of the Human Asset - Safety</p> <p>Creating a sense of place by providing the best safety program. Development of safe work practices and safe job procedures.</p> <p>Supports Section E: Enriching the Physical Environment</p>	<p>Ongoing implementation of projects and procedures to reduce safety concerns on campus: Critical Asbestos Management Program, Hazard Assessment Project, Contractor Safety Program, Fall Protection Retrofit, Return to Work Program, Confined Space Program Development, PCB Audit and Program implementation, Fire Alarm Testing plan, safety meetings</p>
4	<p>Business Analysis</p>	<p>FMD fees review underway. Payment process review complete.</p> <p>Projects completed or part of ongoing process enhancement:</p> <ul style="list-style-type: none"> <li>• SERF Operation</li> <li>• Logistics Management Reorganization</li> <li>• Capital Renewal Plan Development</li> <li>• Minor Capital Program Management</li> <li>• Performance Measurement &amp; Benchmarking</li> <li>• Contingency &amp; Reserve Allocation</li> <li>• Facility Focus System Optimization</li> <li>• Shops &amp; Stores Restructure</li> <li>• Capital Asset Plan.</li> </ul>
5	<p>Banner Integration</p>	<p>Integrate Banner management information system with Facility Focus management system information and telephone management systems. Supports Section D: Changing Practices</p> <p>Have successfully integrated in areas possible; developing project and financial reporting from Banner; Facility Focus system linkage continues to be developed as part of ongoing Facility Focus Optimization Project.</p>
6	<p>Utilities Business Plan and Utilities Management System</p>	<p>Create a utilities business plan including a utilities management system. Supports Section E: Enriching the Physical Environment, University Infrastructure Needs, as well as Sect D: Maintaining Building &amp; Grounds</p> <p>Utilities Advisory Group and Utilities Management Committee are established, Multi-Year Budget, Natural Gas Procurement procedures complete. Utilities management system needs assessment will be conducted subsequent to current optimization phase of Facility Focus system. The Utilities Business Plan will be formulated through the development of funding strategies for infrastructure needs.</p>
7	<p>Human Resource Planning and Employee Development</p>	<p>Development and implementation of complete human resource plan. Supports Recruitment, Selection and Retention within Section D: Human Resources Management Plan.</p> <p>New HR Manager started December 1, 2006.</p> <p>Human resources plan will focus on recruitment and retention, employee development, and employee relations.</p>

Initiative	Description	Notes on Status
8	<p>Communications</p> <p>Enhancing satisfaction, productivity and retention of FMD employees through development, enhancement and improvement of Divisional communications.</p> <p>Supports Section D: Human Resources Management Plan.</p>	<p>Employee satisfaction survey completed.</p> <p>Projects completed or part of ongoing process enhancement:</p> <ul style="list-style-type: none"> <li>• FMD website improvements</li> <li>• Customer Satisfaction meetings</li> <li>• Building Matters publication &amp; internal newsletter</li> <li>• Divisional communications through one port (Communications Manager)</li> <li>• Divisional ombudsman position.</li> </ul>
9	<p>IT Support Systems and Services</p> <p>Provide stewardship and support services for FMD IT projects critical to campus-wide strategic directions and college activities.</p> <p>Supports Section D: Changes Practices, Standardizing IT Systems.</p>	<p>Associate Director, IT position created and filled in August, 2006. 5-Year IT Business Plan under development, including integration of University ITS requirements. Website upgrades, ongoing optimization plan for Facility Focus, support and interfacing to campus ITS systems, support for security of FMD IT.</p>
10	<p>Architecture and Engineering</p> <p>Provide practices which contribute directly to substantial cost savings in operations and maintenance of the assets of the institution. Supports Section D: Increasing Cost Recoveries &amp; Section E: Governance Model for Major Capital Projects</p>	<p>Associate Director, Engineering &amp; Major Projects position will provide more focus on managing engineering and major capital project management within P&amp;D and enhance relationships with external suppliers and customers. Project management review is complete; recommendations will be reviewed and implemented as appropriate.</p>
11	<p>Planning</p> <p>Increase pre-eminence in space planning and analysis with an international reputation for excellence. Work to improve space planning.</p> <p>Supports Section E: Major Building Projects.</p>	<p>Continue definition of defined roles and responsibilities for IPO and Space Planning which will increase confidence in space decision making and planning.</p>
12	<p>Infrastructure and Information Services</p> <p>Diligence and functional efficiency by supplying accurate and accessible documentation of the University's assets was necessary.</p> <p>Supports Section E: Major Building Projects.</p>	<p>We have successfully updated a large backlog of required of records and have planned for several important initiatives (Fire Department records). Efforts to effectively manage work and focus on areas of priority for University record keeping are ongoing.</p>

**c. Progress against Changing Practices and Enriching the Physical Environment sections of the First Integrated Plan**

Due to the natural link between the Changing Practices and Enriching the Physical Environment sections of the first Integrated Plan in the work done by FMD, an update has been provided on both areas. Over the first planning cycle, FMD had made significant changes to practices in order to address the budget reduction, improve the working environment for employees, improve sustainability of practices and increase efficiency. These changes ranged from changes in equipment used to improve efficiency and work environment (such as reducing injuries and strain on employees) to changing chemicals used to reduce environmental impact to reviewing delivery of services to

ensure best practices. In addition to the Changing Practices, the projects and initiatives outlined under the Enriching the Physical Environment section provide enhanced functionality and efficiency to the overall Campus community. As part of the each project’s development efficient operation, ongoing maintenance and lifecycle costs and environmental impact are maintained as cornerstones in the development process. There are areas within the initiatives for the First Planning Cycle, such as the Deferred Maintenance/cyclical renewal plan where progress has been made but long term funding commitments will determine viability of the plan and the physical condition of the University.

The table below reports on the progress towards meeting the initiatives identified in Section D: Changing Practices and Section E: Enriching the Physical Environment of the First Integrated Plan.

**Section D: Changing Practices**

No.	Initiative	Description	Notes on Status
58	Maintaining Campus buildings and grounds	The Integrated Plan indicated that, while protecting our long-term investment and minimizing life-cycle costs, the University would look for additional savings through sustainable development, changes to design practices, customization of operations, changes to landscaping and maintenance standards and other changes in the operations of FMD.	A number of initiatives and efficiencies have been implemented to achieve a \$1.2 million budget reduction to FMD over this planning cycle.  Specific examples include the Lighting Retrofit Program, implementation of LEED principles for construction and renovation projects, and improvements to building cleaning process.
59	Alternative Service Delivery	The Integrated Plan indicated that the University should examine its internal service rates and its commitments to external professional agencies.	FMD is currently conducting a full rate review and continues to work with customers on the transparency of our service rates.  External consultants are utilized to enhance service delivery where appropriate.

## Section E: Enriching the Physical Environment

62	Building projects to be completed by end of planning cycle	The Integrated Plan identified a number of major building projects and major information system projects which would be completed, come on stream, or begin development during this planning cycle.	The following projects were identified and completed: <ul data-bbox="982 283 1404 451" style="list-style-type: none"><li>• Thorvaldson Building (1924 Wing)</li><li>• College Building</li><li>• Stadium Parkade</li><li>• Preston Avenue Widening/Entrance</li><li>• Crop Development Centre Phase One</li></ul>
			The following projects were not identified but completed during this planning cycle: <ul data-bbox="982 567 1315 861" style="list-style-type: none"><li>• Griffiths Stadium Upgrades</li><li>• Research Annex (Phase 2)</li><li>• Place Riel Transit Hub</li><li>• Chiller #4 Addition</li><li>• College of Law Expansion</li><li>• Toxicology Centre – Aquatic Toxicology Expansion</li><li>• University Services Building Renovations</li></ul>
			The following projects are in planning, design or construction: <ul data-bbox="982 945 1396 1144" style="list-style-type: none"><li>• Engineering Expansion (Planning)</li><li>• University Residence Development (Planning)</li><li>• Aboriginal Student Space (Design)</li><li>• CFI/Canadian Light Source Biomedical Beamline (Construction)</li></ul>
63	Building Projects expected to begin construction during the planning cycle	The Integrated Plan identified a number of major building projects and major information system projects which would be completed, come on stream, or begin development during this planning cycle.	The following projects were identified to be completed, come on stream or begin development during this planning cycle: <ul data-bbox="982 1302 1404 1713" style="list-style-type: none"><li>• Academic Health Sciences (staged project – components in all three stages; i.e. complete, under construction and in development)</li><li>• Kirk Hall (renovations underway)</li><li>• Western College of Veterinary Medicine Expansion and Renovation (multi-phase project with components in all three stages; i.e. complete, under construction and in development).</li><li>• CFI – InterVac (in development – site work initiated)</li></ul>

64	Major Projects identified in the Integrated Plan for priority development during the first planning cycle	The Integrated Plan identified a number of major building projects and major information system projects that would be completed, come on stream or begin development during this planning cycle.	The following projects were identified for priority development in this planning cycle: <ul style="list-style-type: none"> <li>• Global Commons (completed)</li> <li>• Aboriginal Space on Campus (interim area developed)</li> <li>• Aboriginal Student Space (in design)</li> <li>• New Learning Centre/Main Library Transformation (construction underway on Phase 1, design underway on Phase 2)</li> <li>• Core Area Revitalization Space Relief Plan (in design)</li> </ul>
65	Deferred Maintenance Plan	FMD conducts ongoing condition assessments to identify levels of deferred maintenance. The result indicates over \$200M in deferred maintenance liability, which is growing.	Roof assessments and elevator assessments completed in 2007. Next priorities include roadways and utility infrastructure assessments. Deferred maintenance/cyclical renewal plan is in progress but long term funding commitments will determine viability of the plan and the physical condition of the University.
66	University Infrastructure Needs	The Integrated Plan calls for the development of an Infrastructure Master Plan to support the University's physical plant.	Preliminary work on the draft of the Infrastructure Master Plan is underway.

d) **Financial performance**

**Key Financial Information**

<b>Ref #</b>	<b>2002/03</b>	<b>2003/04</b>	<b>2004/05</b>	<b>2005/06</b>	<b>2006/07</b>
1. Total Expenditures	26,943,600	27,822,900	27,679,700	27,652,953	30,621,777
2. Revenue					
a. Operating Budget	15,383,800	17,115,500	17,053,100	17,395,788	17,749,558
b. Cost Recovery	8,916,200	9,457,300	8,959,300	9,039,098	9,151,873
c. Sales	188,900	176,200	145,300	279,416	292,475
d. Fees	2,957,200	2,689,200	1,828,200	2,377,307	3,312,005
Total Revenue	27,446,100	29,438,300	27,985,900	29,091,609	30,505,911
3. Expenditures minus Revenue (Surplus) Deficit	(502,500)	(1,555,400)	(306,200)	(1,438,656)	115,866
4. Accumulated Reserves	3,072,700	4,628,100	4,934,300	6,372,956	6,257,090

**Notes:**

- (1) New Building Space Funding is included in Operating Budget balances as follows:
- |                               |           |           |
|-------------------------------|-----------|-----------|
| - 07/08 Funding – Preliminary |           | 363,698   |
| - 06/07 Funding – Adjustment  |           | (143,343) |
| - 06/07 Funding               | 456,300   |           |
| - 05/06 Funding               | 376,050   |           |
| - 04/05 Funding               | 341,349   |           |
| - 03/04 Funding               | 1,048,129 |           |
| - 02/03 Funding               | 365,001   |           |
| - 01/02 Funding               | 145,590   |           |
| - 00/01 Funding               | 233,386   |           |
- (2) Cost recoveries relate to recoveries of Shops' labour; Fees relate to fees charged to Major & Minor Capital projects by Engineering & Projects, Space Management & Planning, and Finance & Administration units..
- (3) Note that the accumulated reserve balance will be reviewed on consultation with senior administration through the long term financial plan, which is one of the key priorities within the Enhancement of Financial and Business Practices.

**Utilities**

<b>Ref. #</b>	<b>2002/03</b>	<b>2003/04</b>	<b>2004/05</b>	<b>2005/06</b>	<b>2006/07</b>
1. Total Expenditures	11,772,500	12,466,800	12,116,300	13,485,524	14,272,831
2. Revenue:					
a. Operating Budget	11,069,900	11,837,900	11,949,200	13,951,634	14,641,185
b. Cost Recovery	1,499,100	1,303,100	1,141,300	1,129,706	1,300,377
c. Sales					
d. Fees					
Total Revenue	12,569,000	13,141,000	13,090,500	15,081,340	15,941,562
3. Expenditures minus Revenue (Surplus) Deficit	(796,500)	(674,200)	(974,200)	(1,595,816)	(1,668,731)
4. Accumulated Reserves	-	-	-	-	-

**Notes:**

- (1) Any "reserves" are taken by Central Funds
- (2) Internal recoveries are sales to ancillary U of S units.

**Utilities Infrastructure Renewal Fund (UIRF)**

<b>Ref. #</b>	<b>2002/03</b>	<b>2003/04</b>	<b>2004/05</b>	<b>2005/06</b>	<b>2006/07</b>
1. Total Expenditures	1,574,000	1,213,300	1,949,900	247,700	6,022,800
2. Revenue:					
a. Operating Budget	-	-	-	-	-
b. Cost of Sales	(5,787,300)	(6,526,600)	(6,945,600)	(7,707,400)	(8,216,000)
c. Sales	7,507,300	8,240,800	9,321,300	10,068,600	10,751,800
d. Fees	-	-	-	-	-
Net Fund Contribution	1,720,000	1,714,200	2,375,700	2,361,200	2,535,800
3. Net Contributions minus Expenditures (Surplus) Deficit	(146,000)	(500,900)	(425,800)	(2,113,500)	3,487,000
4. UIRF Balance	(4,396,300)	(3,895,400)	(3,469,600)	(1,356,100)	(4,843,100)

Notes:

- (1) Total expenditures are capital expenditures out of the UIRF.
- (2) Cost of sales includes external cost recoveries noted in Utilities statement plus additional allocation of administrative costs that are not part of Utilities.
- (3) Sales include sales to external agencies plus infrastructure charge to ancillary units.

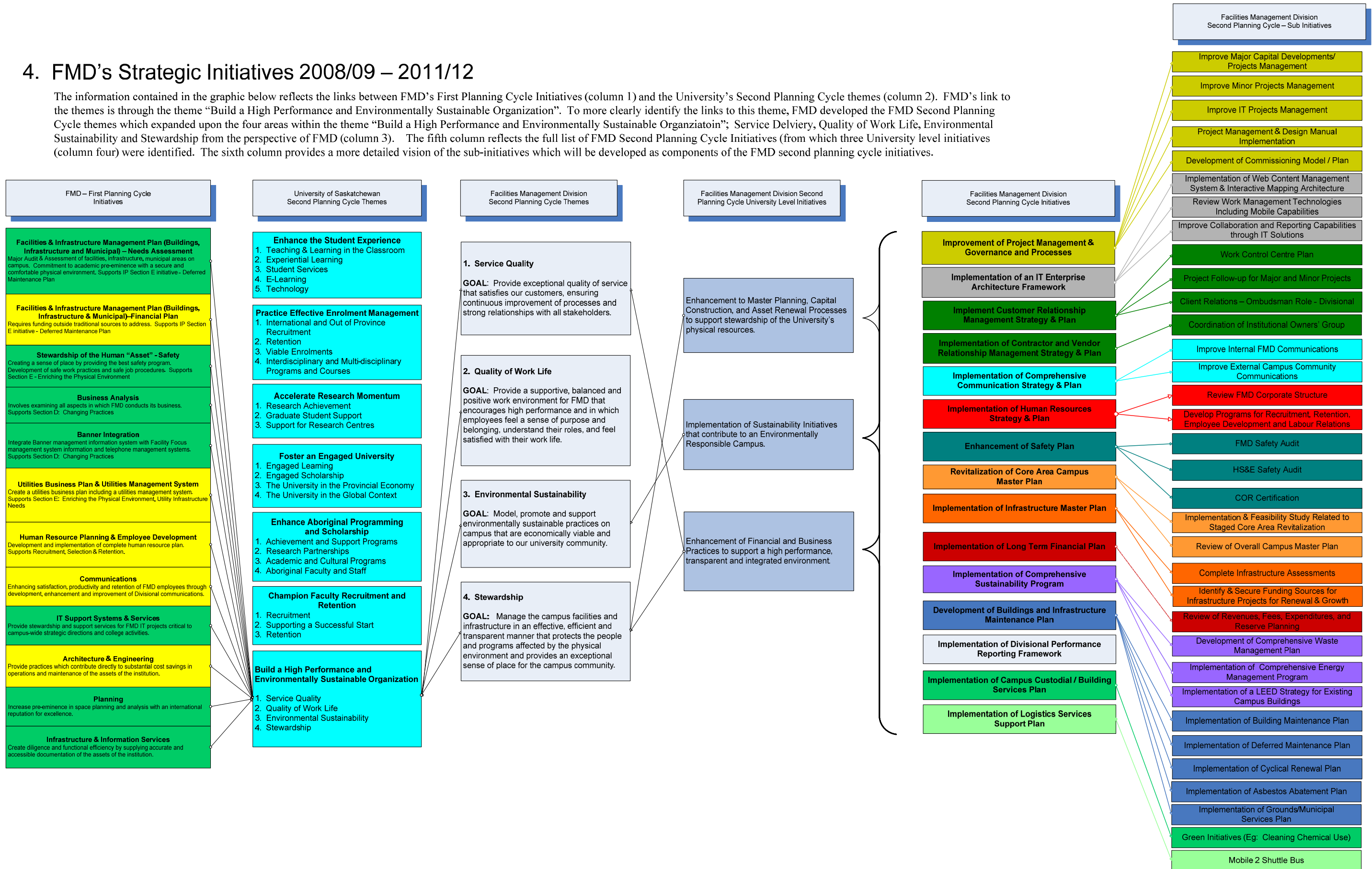
**e) Assessment of FMD’s strengths/ weaknesses/ opportunities/ threats (SWOT) entering the planning process**

The assessment of FMD’s SWOT is outlined in detail below. The strengths of FMD are linked to the dedicated and skilled workforce and the understanding of the stewardship role in identifying and meeting the Campus needs. Areas of weakness (and therefore opportunities for improvement) can be summarized into general areas: the need for adequate resources to meet the identified needs, the need for an improved understanding, communication and development of the working relationships with both the Campus community and the wider general community, and the need to further develop the practices and processes to support the work done within FMD. The threats to FMD surround the availability of the required resources to address identified needs, the prioritization of needs based on external influences and the current economic environment which impacts the ability to provide services both through external sources and through recruitment of internal resources. The clear understanding of the components within FMD’s SWOT provides the basis for ensuring progress within the second planning cycle.

<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• Employees (pride, ownership, dedication, highly skilled and knowledgeable).</li> <li>• Accountable and effective planning, design, safety and space allocation standards.</li> <li>• Ability to develop and implement strategic plans.</li> <li>• Strong customer service and recognition of stewardship role.</li> <li>• Good internal communication and working relations.</li> <li>• Strong technical and business systems.</li> <li>• Knowledge of environmental factors and sustainable initiatives.</li> <li>• Efficient delivery of capital dollars with limited resources.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>• Inadequate financial, physical and human resources.</li> <li>• Insufficient management and system reporting/ benchmarking.</li> <li>• Lack of empowerment to efficiently and effectively implement solutions.</li> <li>• Culture of silos.</li> <li>• Succession planning.</li> <li>• Marketing &amp; communication plans.</li> <li>• Lack of understanding of FMD roles and responsibilities within the campus community.</li> <li>• Clear employee development programs.</li> </ul>
<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Enhance campus community engagement and understanding of stewardship role.</li> <li>• Increased awareness and development of operational and sustainable initiatives.</li> <li>• Relationship building with government partners, agencies, city organizations, contractors, consultants and businesses.</li> <li>• Effective management of land use and Master Plan strategies.</li> <li>• Strong leadership and team management.</li> <li>• Campus environment supportive and innovative.</li> <li>• Clarification of roles and responsibilities.</li> <li>• Continued support and development of employee programs.</li> <li>• Effective management of increased capital investment to serve academic, research and student needs.</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>• Increased regulatory, code and legislative requirements.</li> <li>• Targeted funding by institution and province.</li> <li>• Pressure to lower capital costs, but increase lifecycle costs.</li> <li>• Increase in special interest groups and their ability to influence university direction.</li> <li>• Hot economic environment – limited contractor base, outsourcing, cost escalation, limited labour pool.</li> <li>• Continued space deficiencies, increasing deferred maintenance and lack of capital renewal.</li> <li>• Conflicting priorities and strategies influencing FMD.</li> <li>• Inability to attract personnel in an extremely competitive labour market.</li> </ul>

# 4. FMD's Strategic Initiatives 2008/09 – 2011/12

The information contained in the graphic below reflects the links between FMD's First Planning Cycle Initiatives (column 1) and the University's Second Planning Cycle themes (column 2). FMD's link to the themes is through the theme "Build a High Performance and Environmentally Sustainable Organization". To more clearly identify the links to this theme, FMD developed the FMD Second Planning Cycle themes which expanded upon the four areas within the theme "Build a High Performance and Environmentally Sustainable Organization"; Service Delivery, Quality of Work Life, Environmental Sustainability and Stewardship from the perspective of FMD (column 3). The fifth column reflects the full list of FMD Second Planning Cycle Initiatives (from which three University level initiatives (column four) were identified. The sixth column provides a more detailed vision of the sub-initiatives which will be developed as components of the FMD second planning cycle initiatives.



## 4. FMD's Strategic Initiatives 2008/09 – 2011/12

### a) College/Unit-specific Plans

#### *Improvement of Project Management & Governance Processes*

The intent of this initiative is to review and implement improvements to the Project Management & Governance Processes based on the recommendations with the “Review of the Governance and Management of Major Capital Projects” as well as ongoing internal review of best practices and process improvement. Specific areas being reviewed:

- Improve Major Capital Development/Project Management
- Improve Minor Projects Management
- Improve IT Project Management
- Project Management & Design Manual Implementation
- Development of Commissioning Model/Plan

#### *Implementation of an IT Enterprise Architecture Framework*

Facilities Management Information Technology group will be undertaking the development and implementation of an information technology enterprise architecture framework that will allow FMD to align their IT investments with their business goals and objectives. An enterprise architecture framework documents the current, ideal and target state of business processes, applications, information and technical components in order to support the organization's current and future business directions. FMD will be utilizing a value-based approach to identifying an appropriate target state from the ideal state in order to ensure that FMD is undertaking its highest priority tasks and realizing good value for their investments. Some of the key areas that will be addressed will be closing gaps that are present between the organization's strategy and the ability of the IT group to support it; and performing the necessary upgrades to the IT infrastructure to ensure data and process stability, regulatory requirements and vendor support are maintained.

- Implementation of Web Content Management System and Interactive Mapping Architecture
- Review Work Management Technologies including Mobile Capabilities
- Improve Collaboration and Reporting Capabilities through IT Solutions

#### *Implement Customer Relationship Management Strategy & Plan*

The Customer Relationship Management Strategy & Plan is committed to the strengthening of customer relationships through increased communication, understanding and involvement of customers in the process in an open and transparent manner and development of key performance indicators on which to assess the progress in the customer service delivery. Specific areas being reviewed are:

- Work Control Centre Plan
- Project Follow-up for Major and Minor Projects
- Client Relations – Ombudsman Role - Divisional

#### *Implementation of Contractor and Vendor Relationship Management Strategy & Plan*

The Contractor and Vendor Relationship Management Strategy & Plan is intended to improve communication and collaboration between contractors and vendors to the benefit of all parties. An example of an initiative to strengthen the relationships between parties is the Coordination of the Institutional Owners' Group to collectively work with contractors to ultimately mitigate cost

escalation.

### *Implementation of Comprehensive Communication Strategy and Plan*

The intent is to continue work on the enhancement and develop a Communications Plan and marketing strategy that will help ensure the satisfaction and effectiveness of FMD employees and stakeholders. We will work to improve ongoing communication with University community. Specific areas:

- Improve Internal FMD Communications
- Improve External Campus Community Communications

### *Implementation of Human Resources Strategy and Plan*

The intent is to continue work on the development and implementation of a complete Human Resources Plan that supports recruitment, selection and retention, succession planning, employee development and training etc. within the Division. Specific areas:

- Review FMD Corporate Structure
- Develop Programs for Recruitment, Retention, Employee Development and Labour Relations

### *Enhancement of Safety Plan*

The intent is the enhancement of the safety plan committed to supporting FMD employees with skill development and knowledge in safety and environment practices to ensure everyone's safety. Specific areas:

- FMD Safety Audit
- HS&E Safety Audit
- COR Certification

### *Revitalization of Core Area Campus Master Plan*

The intent is to ensure the long term viability of the campus through the revitalization of the Core Area Campus Master Plan. The Master Plan establishes the physical framework for growth of new areas and enhancement of existing areas of the campus. Specific areas:

- Implementation & Feasibility Study related to Staged Core Area Revitalization
- Review of Overall Campus Master Plan
- Donor Recognition/Tribute Study/Plan

### *Implementation of Infrastructure Master Plan*

The intent is to continue development and implementation of the Infrastructure Master Plan; a plan that will support the strategic and sustainable reinvestment in the utility infrastructure component of the campus. The comprehensive assessment of inventories including all, roadways and thoroughfares, pedestrian accesses, utility components such as power distribution, heating and cooling plant services, water and sewer distribution, communication networks, tunnels and grounds is essential in determining the future capacity to meet the needs of the University community. Specific areas:

- Complete Infrastructure Assessments
- Identify & Secure Funding Sources for Infrastructure Projects for Renewal and Growth

### *Implementation of Long Term Financial Plan*

The intent is to establish a Long Term Financial Plan (over a ten year period) to better understand FMD's financial needs and how these needs impact various stakeholders. The plan will include a projection of capital and operating expenditures as well as revenues. The overall plan will review revenues, fees, expenditures, and resource planning

### *Implementation of Comprehensive Sustainability Program*

Implementation of the Comprehensive Sustainability Program will focus over the next planning cycle on initiatives that contribute to an environmentally responsible campus. The primary focus will include, but not necessarily be limited to:

- Development of Comprehensive Waste Management Plan
- Implementation of Comprehensive Energy Management Program
- Implementation of a LEED Strategy for Existing Campus Buildings

### *Development of Buildings and Infrastructure Maintenance Plan*

A global Buildings and Infrastructure Maintenance Plan will be developed and will address all of the following components:

- Implementation of Building Maintenance Plan
- Implementation of Deferred Maintenance Plan
- Implementation of Cyclical Renewal Plan
- Implementation of Asbestos Abatement Plan
- Implementation of Grounds/Municipal Services Plan

### *Implementation of Divisional Performance Reporting Framework*

The Divisional Performance Reporting Framework will report on achievement against the established targets in order to ensure accountability and transparency and provide insight into all key aspects of the operations. The Association of Physical Plant Administrators' (APPA) Facilities Performance Indicators tool will be used as a basis for establishing the framework and to benchmark to other similar organizations.

### *Implementation of Campus Custodial/Building Services Plan*

The intent is to continue the implementation of the Campus Custodial/Building Services Plan to ensure the ongoing maintenance of the campus facilities at an acceptable standard of cleanliness as well as meeting the sustainable initiatives to protect the environment (E.g.: Green Initiative for Cleaning Chemical Use). The plan also includes initiatives to protect the employees and minimize injuries in the workplace.

### *Implementation of Logistics Services Support Plan*

The implementation of the Logistics Services Support Plan is committed to increase the stewardship and service quality of materials and resources in support of the maintenance and operations of the Campus Community. Example of initiative: Mobile 2 shuttle bus to deliver materials to minimize travel time for personnel as well as provide transportation support to the Campus community.

## **b) Contributions to University-level Themes and Planning Priorities**

### **1. Enhancement of Capital Planning, Construction and Renewal**

Theme addressed by initiative: Build a High Performance and Environmentally Sustainable Organization

#### ***Description of Initiative***

Addressing the Capital Planning, Construction and Renewal activities across campus is a balancing act that considers both physical and functional needs within funding and budgetary limitations. Whether planning new facilities or renovating existing space, a challenge for FMD is to embrace cultural shifts from singular to interdisciplinary teaching and research with creative design solutions that maximize the efficiency and effectiveness of space use. The University's growing deferred maintenance liability cannot be ignored and must be addressed to ensure sound building structures with reliable building systems and supporting infrastructure necessary for the University to meet its goals. Due to aging facilities and infrastructure, some buildings cannot be functionally or practically upgraded to meet program requirements and demolition should be considered a necessary stage of a building's life cycle and considered during the Renewal process. The cost of fully integrating deferred maintenance issues with program requirements must be evaluated against the cost of new facilities.

Faced with a significant amount of new development and renovations, and a burgeoning construction industry, emphasis by FMD on project governance and project management processes will be critical to successfully delivering projects within budget and schedules. Strategies and processes will be developed and improved upon in several key areas such as:

- best type of construction delivery
- foster improved relationships with contractors and work with other institutional owners
- financial reporting and payments.

The IPO and FMD will undertake a major investigative Multi-Year Capital Plan. Efforts within FMD will be coordinated to develop a report that outlines immediate and future space needs along with associated infrastructure and building conditions and deficiencies for the entire campus. The report will reflect upon capital budget forecasts and long-term financial planning.

All of the projects in planning, design and those under construction will be referenced back to key principles of the Master Plan. The direction for adjustment of the Master Plan involves several key aspects. The starting point for all redevelopment remains the University's Strategic Directions, related foundational documents and other integrated plans, missions and priorities. Potential issues for consideration are:

- Provide a short term development plan and a longer term demonstration plan
- Provide a detailed implementation plan for key aspects of the Master Plan
- Coordinate the growth of the campus with existing facilities and infrastructure needs
- Include outlying areas of campus in the revised Master Plan –such as Kenderdine Campus
- Ensure a balance between pedestrian and motorized transportation
- Enhance the Architectural Guidelines and historical descriptions
- Provide commentary of existing campus design and buildings for inclusion
- Ensure capital planning includes full life cycle costs (including asset renewal and eventual demolition)
- Development of an Infrastructure Master Plan to ensure infrastructure needs are developed and maintained to support the growing campus.
- Address growing deferred maintenance backlog by working with the Province to ensure adequate funding directed towards building and infrastructure renewal. Current Facilitates Condition Index (FCI) is 8.5% or fair condition (See section on Performance Measures/Metrics and Comments for more detail).

- Complete Condition Assessments for all physical plant assets at the university to strategically address the growing deferred maintenance backlog (currently approximately \$200 M).

### Objectives/Outcomes by 2012

- Improved Project Management process.

Project management and construction delivery models will be scrutinized to ensure budgets, schedules and performance are controlled. The FMD project management structure and processes will be solidified and relationships with contractors strengthened to minimize risk(s) in all phases of project delivery. Projects will receive LEED consideration and, as possible, sustainable measures and applications applied.

- Increased space and increased functionality of space within Campus inventory.

The coordination of planning and project management forces and effective communication is essential to providing functional program space. When possible, deferred maintenance will be addressed as part of the revitalization.

- Reduced Deferred Maintenance Backlog and Enhanced condition of assets

Asset Renewal will require a sustained funding increase from the current levels of approximately \$7 million annually to at least \$32 million in order to maintain the current physical state of the university and keep the FCI under 10% (fair condition). Delays in this level of funding put at risk the ability to replace and maintain the infrastructure and building systems at the reliable levels previous sustained.

- Well established Master Plan

Review and update the current Master Plan to ensure core area revitalization, sustainability and infrastructure needs are appropriately addressed.

### Revenues and Costs

A total of **four** additional staff for the Projects and Engineering unit and the Planning & Development unit combined will be necessary to carry the workload associated with the expected delivery of the capital projects. Funding for these positions will be provided primarily through fee for service, rather than base.

To fulfill the requirements of a physically growing university as noted above, the Operations and Maintenance department will require an additional staff complement of at least 35 to provide current service levels for additional space and increased workload associated with reducing the Deferred Maintenance backlog. Funding for these positions will be provided through new building space dollars as well as from Minor Capital (and UIRF, as applicable).

### Performance Measures and Metrics

See Comments for definition/explanation of Performance Measures and Metrics.

- Determine and define Functionality Satisfaction Index
- The current space deficiency of 44,000 net m<sup>2</sup> (or 79,200 gsm) shows University's dire space problems, but not the poor quality of functional space. Completion of the major projects, adds approximately 63,000 gross m<sup>2</sup> of **new** space (2011/2012) to the University (and approximately 14,850 net m<sup>2</sup> renovated). Additionally 7,455 net m<sup>2</sup> will be reallocated, renovated and/or upgraded as part the Campus Core Revitalization Plan.
- FIMP model 2 standard of care for all facilities.

- FCI (Facility Condition Index) – target is FCI at 16% or below (poor condition is considered 10% to <30%), which would require annual contributions to capital renewal of \$10 Million, up from current level of \$7 Million.
- Needs Index: work will be undertaken to measure the adaptation value, with a goal to begin measuring the Needs Index and benchmarking to other organizations.

Responsibility:

*Planning and Capital Projects:* Ron Niekamp, Acting Director, Space Management & Planning and Ron Cruikshank, Acting Director, Projects & Engineering

*Renewal:* Howie Wall, Director, Operations & Maintenance

Timeline

2008	Develop and implement Project Management Manual
2008	Develop Infrastructure Master Plan
2009	Complete review of Master Plan
2009	Complete planning for Core Area Revitalization
Ongoing	Customer and vendor relationship management

Comments

FMD will experience a significant increase in work effort (2007 – 2012) to successfully implement the growth of new construction, renovations, and deferred maintenance backlog along with ongoing maintenance of existing and new facilities expected by the University. Integral to these work plans is staff retention, new hires and succession planning and an assurance that the skill-sets of the individuals and the team are properly managed. Adequate funding is required to ensure that new construction, renovations, deferred maintenance and ongoing operations are appropriately implemented and sustained.

Definitions/descriptions of the Performance Measures and Metrics are outlined below:

- Functionality Satisfaction Index – develops a measure of customers’ satisfaction with space – planning, construction and maintenance all contribute to the level of satisfaction.
- FIMP model 2 standard of care for cleaning, maintenance and grounds for all facilities is the target that we wish to maintain, as established in the last integrated plan.
- FCI – Facility Condition Index (Deferred Maintenance/Capital Replacement Value (CRV)). This is an indicator of the adequacy of investment in our buildings and infrastructure. The current FCI rate is 9%, which is in the range of “fair” (5% to <10%). Ideally, the University should strive for an FCI of “good” resulting in a rate of less than 5%. However, the funds being applied to CRDM are less than 20% of what they need to be to achieve this goal, making this a very unrealistic objective. Our stretch goal by 2012 is to keep the FCI at or below 16%, which is in the “poor” range (10% to <30%). This would require annual contributions of \$10 Million, up from \$7 Million currently.
- Needs Index (Deferred Maintenance and Capital Renewal and Adaptation Value/(CRV)). This indicator is a more comprehensive indicator of the adequacy of investment in our buildings and infrastructure but it cannot currently be measured because information on adaptation value is not available. During the second planning cycle, work will be undertaken to measure the adaptation value, with a goal to begin measuring the Needs Index and benchmarking to other organizations.

## 2. Implementation of Sustainability Initiatives that Contribute to an Environmentally Responsible Campus - Strategic Plan

Theme addressed by initiative: Build a High Performance and Environmentally Sustainable Organization

### Description of Initiative

The mission of FMD is to “plan, build and maintain the campus buildings, land and infrastructure to provide a safe, sustainable, comfortable and attractive environment”. Accordingly, the Campus Core Area Master Plan places sustainability as a cornerstone of future development.

Similarly, the University recognizes the value of environmental sustainability as critical to the future of the campus, as evident by its inclusion as central to the last theme of the Second Integrated Planning Cycle.

Over the past decades the University, and more specifically FMD, has made progress on sustainability initiatives. The challenge is to move forward with sustainability in a more holistic, systematic and coordinated way, so that sustainability informs all aspects of the short-term activities and long-term planning. It is the goal of FMD to model, promote and support environmentally sustainable practices on campus that are economically viable and appropriate for the University community.

To achieve this goal, FMD will focus on the implementation of sustainability initiatives that contribute to an environmentally responsible campus. This will involve continuing development of strategies for sustainable design, construction, operations and maintenance as well as green purchasing and alternative transportation. The primary focus will be on (1) greenhouse gas reduction and energy conservation and (2) solid waste prevention and management. In addition, consideration for and study of (3) water conservation and protection, (4) biodiversity and habitat protection, and (5) indoor environmental quality will be pursued. Plans to address these areas of environmental sustainability will begin to evolve with studies and pilot projects evolving over the timeframe of the planning cycle.

The preliminary targets are based on:

*Greenhouse Gas/Energy Intensity Objectives* -- Saskatchewan has set goals of greenhouse gas emission stabilization by 2010, 32% reduction from current levels by 2020, and 80% reduction from current levels by 2050. Saskatoon has established 2013 targets of a 10% reduction below 1990 levels for corporate emissions, and a 6% reduction for the community. Ambitious targets given that overall Saskatchewan emissions have grown by about 60% since 1990.

*Waste Prevention:* The University landfills approximately 4189 metric tonnes of solid waste - roughly double the amount of universities like Calgary and Toronto (considerably larger in size). The Saskatoon Waste and Recycling Plan contains commitments for future landfill bans of paper, cardboard, and CRD waste and calls for regular increases in tipping fees and increased load inspections to encourage diversion rather than dumping at the Landfill. Saskatchewan Environment is examining the need for strict enforcement relative to disposal of mercury containing materials (fluorescent bulbs).

*Water Conservation and Quality* -- LEED- New Construction targets 20-30% reductions in water use, 50-100% reductions in potable water use for irrigation, and a 25% decrease in rate and quantity of storm water runoff. Storm water treatment will be implemented in Saskatoon and the University should be prepared to reduce amounts to avoid municipal treatment costs.

*Bio-diversity and Habitat Protection* -- LEED – New Construction targets 50% of a site area for conservation/restoration to provide habitat and promote bio-diversity.

## Objectives/ Outcomes by 2012

Complete baseline studies within two years of:

1. Greenhouse Gas Inventory (2007)
2. Energy Assessment (2008)
3. Waste Assessment (2008)
4. Construction, Renovation, Demolition Waste Assessment (2009)
5. Water Assessment (2009)

Complete qualitative assessments of (6) indoor environmental quality and (7) outdoor environmental quality (including habitat and bio-diversity) over the next 2-3 years.

Use data to assist with development of definitive objectives for these areas. Preliminary objectives can be articulated, given targets developed in other jurisdictions.

- By 2008: LEED – New Construction and LEED Commercial Interiors utilized for new construction. (Certification Status pending.)
- By 2010: LEED – Existing Buildings utilized for major renovations and retrofits.
- By 2012:
  - 6% reduction over 1990 levels of greenhouse gas emissions.
  - divert from landfill normal waste streams (non construction; non hazardous waste) through various initiatives of salvage, compost, reuse etc.
  - divert from landfill a minimum of 50% by weight of construction/demolition waste.
  - 20% reduction in potable water use.
  - 20% decrease in rate and quantity of storm water runoff.
  - 50% of the main campus outdoor site area will be conserved to provide habitat and promote bio-diversity.
  - 5% improvement in building user satisfaction with indoor environmental quality and .5% decrease in related absenteeism.

## Revenues and Costs

In order to achieve the goal of being an environmentally sustainable university, financial commitments must be made to make substantive progress towards this goal. Current funding mechanisms such as the minor capital allocations cannot be relied on given historical and current levels of funding in order to achieve substantive progress. As such, the following principles have been developed to guide this reinvestment process;

Funding Principles:

- Similar to funding strategies utilized at other institutions, it is proposed all energy conservation and greenhouse gas reduction initiatives shall be financed from future savings of university resources that occur as a result of these efforts. The most appropriate financial strategy for funding a project based on this principle shall be articulated as part of specific project plans;
- Other sources of financing, such as incentive programs, will be leveraged as they become available. Carbon trading will also be pursued as the carbon market matures in Canada. In Europe's mature carbon market, carbon is currently trading at over 20 euros (about \$25 Canadian) per tonne.
- For required changes in FMD operations in support of sustainable practices, funding shall be from current operational budgets / minor capital allocations and any additional funding needs shall be financed from future savings in operations, maintenance and utilities. Any change in operations shall ensure that the sustainable product or activity provides equal or superior performance ensuring lifecycle costs are maintained or improved;
- Initiatives that concurrently address sustainability as well as priority operational, maintenance, renewal and deferred maintenance issues, will serve as additional criteria in order to optimize opportunities, funds and resources.

- Opportunities to concurrently address sustainability initiatives along with priority operational, maintenance, renewal and deferred maintenance issues will provide additional criteria in order to optimize the use of funds and resources.
- Partnership with other campus units and agencies, municipal, provincial and federal entities shall be encouraged in order to build a sustainable community;
- In as much as possible Performance Measures related to the specific initiative or project shall be regularly assessed and reported, and shall at a minimum meet those directed by governmental goals/objectives. Exceeding these minimums is the expectation of all projects. (See goals).

Examples of potential Energy Savings / Sustainable activities or initiatives to occur during the planning cycle are;

- Campus Lighting Retrofit
- HVAC Fan Rebalancing Program
- HVAC Controls Infrastructure Renewal
- Non- Hazardous Waste Streams
- Policy – Waste stream minimization (Recycling, Reuse)
- Surplus Assets – Partnering w/Habitat, the ReUSE Store sale to public
- Viable inventory process useful and efficient for re-use of construction material within the university
- Compost and/or Waste To Energy initiatives
- Purchase or development of renewable energy capacity

### Performance Measures

Measurement of the progress of the strategic initiative will be benchmarked against;

- Established Governmental Goals
- Canadian University Best Practices
- International Standards and Best Practices
- U of S goals
- FMD Sustainability Objectives

An annual report will be prepared. The report will contain quantitative and qualitative indicators to report progress towards meeting the stated goals and initiatives along with future projects, goals and initiatives. The results of this report will be accessible to all members of campus to contribute to campus-wide momentum and positive feedback from clients.

### Responsibility:

Ron Cruikshank, Acting Director, Projects & Engineering  
Howie Wall, Director, Operations & Maintenance

## Time Line

	<i>GHG/Energy</i>	<i>Waste</i>	<i>Water</i>	<i>Indoor EQ</i>	<i>Outdoor EQ</i>
2007	GHG Baseline Completed				
2008	Energy Baseline Completed	Baseline Completed			Habitat Assessment Completed
2009	Finalization of Objectives and Strategy	Finalization of Objectives and Strategy	Baseline Completed Finalization of Objectives and Strategy	Assessment Completed Finalization of Objectives and Strategy	Finalization of Objectives and Strategy
2010	<i>Implementation Phase</i>	<i>Implementation Phase</i>	<i>Implementation Phase</i>	<i>Implementation Phase</i>	<i>Implementation Phase</i>
2011	<i>Implementation Phase</i>	<i>Implementation Phase</i>	<i>Implementation Phase</i>	<i>Implementation Phase</i>	<i>Implementation Phase</i>
2012	6% reduction over 1990 levels of greenhouse gas emissions	Divert normal waste streams from landfill and reduce CRD by 50%	20% reduction in potable water use. 20% decrease in storm water runoff.	5% improvement in building user satisfaction & .5% decrease in related absenteeism	50% of site conserved for habitat and bio-diversity

## Comments

Further information on the preliminary targets:

*Greenhouse Gas/Energy Intensity Objectives* -- The American College and University Presidents Climate Commitment (324 signatories) recognizes the need for an 80% reduction in emissions by 2050, and commits signatories to climate neutrality in the short term.

*Waste Prevention*: LEED New Construction and LEED Existing Buildings contain certification prerequisites for waste minimization policy, waste audits, minimization of mercury containing light bulbs, source reduction of waste materials, waste materials collection and recycling, and a minimum 50% waste diversion for CRD materials.

### **3. Enhancement of Financial and Business Practices**

Theme addressed by initiative: Build a High Performance and Environmentally Sustainable Organization

#### Description of Initiative:

*Summary: Enhancement of financial and business practices and implementation of performance reporting framework to support a high performance, transparent and integrated environment.*

At FMD, long term plans are a part of everyday business. The master capital plan and other foundational documents have provided a basic direction for the physical plant of the University. These plans are updated and renewed periodically to reflect changing priorities and needs. The need to analyze and plan the finances over the long term has also been identified. The intent is to establish a financial plan over a

ten year period to better understand FMD's financial needs and how these needs might impact stakeholders. The plan will include projections of capital and operating expenditures, including the FMD reserve, as well as revenues (i.e. fees/rates). Many factors affect FMD's financial plans including capital construction, occupancy dates, increased square footage, infrastructure, facility age and conditions, maintenance standards, and strategic directions.

In addition to the financial plan, there are other business practices for which long term plans and strategies will be developed and implemented to support the Division and the relationship with stakeholders. A communications strategy will be developed to address both internal and external needs, including the need to improve transparency of operations, services, fees, rates, expenditures, etc. Implementation of a customer relationship management strategy will help identify customers and their needs and help manage these important relationships. A human resources strategy will be developed to integrate and align decisions about people with the desired outcomes of the Division. By integrating human resources management with the planning processes and activities we will support the accomplishment of our mission, goals and broader University initiatives. Through a detailed workplace analysis and the development of benchmarks we will take a structured approach to ensuring the effective use of our human capital that realizes the full potential of our staff and supports creative and innovative solutions to organization wide issues. Other administrative strategies to be developed include an IT enterprise architecture framework, and a logistics services support plan, all of which will support a high performance workplace.

An important component in planning is establishing targets and reporting on achievement against these targets. This will assist in ensuring accountability and transparency in all areas. A comprehensive performance reporting framework for FMD will be developed that provides insight into all key aspects of operations. The Association of Physical Plant Administrators' (APPA) Facilities Performance Indicators tool will be used as a basis for establishing the framework and to benchmark to other similar organizations.

In conjunction with the development and implementation of the strategies mentioned above, the plan is to consider the criteria from, and later complete an evaluation of, FMD's effectiveness using a tool that is available through APPA, entitled Facilities Management Evaluation Program. It is a peer review program that involves a team of employees, management, members of the University community, externals, etc. to assess such areas as leadership, strategic and operational planning, customer focus, information and analysis, human resource management, process management, and performance results.

### Objectives/Outcomes by 2012:

- Financial structure that ensures resources are allocated efficiently and effectively, that revenues appropriately recover costs, and that fees and rates are understood and accepted by University community
- Effective communications that improve FMD's level of consultation and openness to internal and external stakeholders and, as a result, improve stakeholders' understanding of FMD's operations and services
- Customer relationship management strategy enabling FMD to effectively manage relationships with varied customers
- Effective human resource programs, IT infrastructure and logistics practices that support the needs of Division, providing a more effective, efficient and supportive work environment and facilitating better services to customers
- Satisfied employees, customers, senior management, funders, and community stakeholders
- Well established performance reporting framework providing relevant, reliable and understandable information for customers, University senior management, and FMD management and employees on FMD's performance, achievements, issues of concern, and areas for improvement. Examples of University level indicators will include Facilities Condition Index, Needs Index, Capital Renewal Index – see initiative on Capital Planning, Construction and Renewal
- Facilities Management Evaluation Program report that provides insight into areas of strength and improvement for FMD to help determine what other business practices require enhancement

### Revenues and Costs:

This Financial and Business Practices initiative will not generate new revenues but will ensure that revenues are appropriately aligned with corresponding expenditures. An additional 25% of an Accounting Assistant position will be added in 2007 to address some of the performance reporting needs. The development of plans, strategies and performance reporting framework have been assigned to existing personnel. Contract dollars will be required for external consultants to supplement the work required, which will cost upwards of \$350,000. This amount will be allocated from the FMD reserve. It is expected that there will be significant gains in increased productivity, cost savings, satisfied customers, satisfied employees, etc.

### Performance Measures/Metrics:

- Satisfied and knowledgeable customers (75% satisfied or very satisfied, 90% of customers understand or fully understand FMD's programs and services and how to access them)
- Success of the Human Resources Strategy will be measured by;
  - Increased (10%) participation and improved (10%) rating in the annual U of S Employee Opinion Survey
  - Additional HR metrics/performance measures to be identified and monitored throughout this planning period.
- APPA's Facilities Performance Indicators: Performance Level of Gold (4 out of 5), which indicates that a comprehensive, sound, systematic performance reporting program is in place that considers trends and benchmarking, the results of which indicate very good performance levels (see comments for further explanation).

### Responsibility:

Julia Jones, Director, Finance & Administration  
Howie Wall, Director, Operations & Maintenance

### Timeline

April 30, 2008

- Complete initial draft of performance reporting framework – indicators to measure, benchmark and report
- Complete initial draft of long term financial plan, including fees analysis and begin implementation
- Complete initial draft of communications plan
- Complete initial draft of human resources strategy (using available data)
- Begin comprehensive workplace analysis

Sept 30, 2008

- Develop and distribute first performance report (using 06/07 data)

December 31, 2008

- Identify and implement HR Metrics

April 30, 2009

- Develop and distribute performance report (using 07/08 data)
- Develop and begin implementation of customer relationship management strategy
- Develop and begin implementation of IT enterprise architecture framework
- Develop and begin implementation of logistics services support plan

June 30, 2009

- Publish performance report on-line (website, intranet, etc.)

December 31, 2009

- Complete comprehensive workplace analysis

April 30, 2010

- Complete FMEP (Facilities Management Evaluation Program)
- Update HR strategy to incorporate workplace analysis findings

April 30, 2012

- Develop, distribute, and publish fifth performance report to satisfy Performance Level Gold
- Hone financial plan through annual reviews and enhancements
- Annually revisit and refine programs for communications, human resources, customer relationship, and logistics support strategies
- Annually revisit and refine IT enterprise architecture

**Comments:**

To ensure the successful implementation of this initiative, numerous people will be engaged including senior management, customers, FMD management and employees, etc.

Further to the Performance Measures/Metrics, the APPA's Facilities Performance Indicators provides a framework for measuring performance, using a balanced scorecard perspective. The tool allows for an overall assessment of the maturity of measuring performance as well as the level of performance. Currently, we would likely be considered to be Bronze (2 out of 5), because we only have the beginnings of a systematic approach to measuring our performance. Although our performance could very well already be Gold, we do not yet have the tools to measure this.

**5. Resource Plan Details**

**a) Faculty and Staff Complement Plan**

FMD's summary of staff complement for 2007/08 is shown below. An estimate of the expected staff complement is provided for each year of the second integrated planning cycle, based on our current knowledge of capital construction, occupancy dates, increased square footage, cyclical renewal and deferred maintenance requirements, maintenance standards, and integrated planning initiatives.

	<b>Baseline</b>	<b>Estimated Increase or Decrease</b>			
	2007/08	2008/09	2009/10	2010/11	2011/12
<b>FMD Staffing (FTE)</b>					
Total	418	+7	+18	+14	+0
<b>FMD Space (Gross Square Feet)</b>					
	+980	+140	+280	+0	+0

**FMD Staffing (FTE)**

Portions of new positions identified above, may be funded from Fee for Service, if applicable.

**Space and Infrastructure Requirements to Support Plan**

Estimates for Space & Infrastructure Requirements include 140 gross square feet per office requirement.

**Fundraising and Advancement Priorities to Support Plan**

None.