Planning & Priorities Update

April 27, 2011
Campus Physical Plant

- 550 acres
- 9.4M GSF growing to 14.2M+ GSF by early 2013
- 130+ Facilities
- By Fall 2013 targeted 8556 students living on campus (owned and partnership housing)
  - Goal is to house 25% of student body by 2018
- Predominate growth is in Research & Housing
Centralization Efforts

• Facilities Condition Assessment Plan
  – Capital Plan Development
  – Service Level Minimum Standards and Supporting Financial Recommendations (phased)
• Infrastructure Planning
• FM Project Delivery Process

• Facilities Centralization Project
  – Overview & Immediate Priorities
  – A Quick Look @ Current State
  – Dining/Food Services
  – Facilities Service Center
  – FAMIS Implementation
  – Procurement Opportunities

• Building Coordinator Program

FM Priorities Review April 27, 2011
Facilities Conditions Assessment  
Project Plan Development

• Assess exterior, roof systems, and mechanical aspects of buildings
• Assess dining facilities and associated kitchen equipment
• Partnering with IT and Public Safety to assess and integrate their needs into FCA and Infrastructure plans.
• Phase 1:
  – SR1, SR2, Engineering 1, Engineering 2, Health Science Center, Settegast Hall, Bates Hall, Taub Hall, Oberholtzer Hall, Moody Towers
• Phase 2:
  – All other buildings on UH Main Campus
• Expected Completion: April 2012
Prioritization

1. Priority 1 – Currently Critical (Immediate)
2. Priority 2 – Potentially Critical (One year)
3. Priority 3 – Not yet Critical (2-5 years)
4. Priority 4 – Recommended (6-10+ years)

Findings Categories

- The findings from the FCA project will provide the findings by priority as well as category. The categories will align with the CB reporting requirements and include (1) Facility Adaptation, (2) Deferred Maintenance, and (3) Planned Maintenance & Renewal.
<table>
<thead>
<tr>
<th>Study</th>
<th>Projected Budget</th>
<th>Estimated Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Chilled Water, Condensate and Steam Capital Improvement Plan</td>
<td>$51,500</td>
<td>Substantially Complete</td>
</tr>
<tr>
<td>2. Electrical Capital Improvement Plan</td>
<td>$145,950</td>
<td>Substantially Complete</td>
</tr>
<tr>
<td>3. Landscape, Sidewalk &amp; Irrigation Capital Improvement Plan</td>
<td>$255,000</td>
<td>September 2011</td>
</tr>
<tr>
<td>4. Utility Survey</td>
<td>$335,280</td>
<td>July 2011</td>
</tr>
<tr>
<td>Location documentation of water, sanitary, storm, natural gas, and fiber optics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Water, Sanitary &amp; Storm Capital Improvement Plan</td>
<td>$170,000</td>
<td>October 2011</td>
</tr>
<tr>
<td>Will include drainage and detention plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Transportation Capital Improvement Plan</td>
<td>$140,000</td>
<td>November 2011</td>
</tr>
<tr>
<td>7. Infrastructure Improvements Integration Plan</td>
<td>$115,000</td>
<td>March 2012</td>
</tr>
<tr>
<td>Will integrate all CIP’s and IT needs into one overall CIP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Facilities Conditions Assessment Plan</td>
<td>$316,413</td>
<td>April 2012</td>
</tr>
<tr>
<td>Broad overview of conditions of every building on campus</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: FCA & Infrastructure Recommendations to be merged into one Capital Plan with 20+ Year Recommendations once complete – Update every 3-5 Years for Rolling Plan
Audit Issues Addressed or being addressed

- Establish New JOC Program, guidelines, policies and training – **Complete**
- Policy revisions to SAM 01.B.07 and SAM 03.C.03 related to construction rules and processing through project groups – *in route through review process* – **Drafted**
- Establish PM roles and responsibilities – **Complete**
- Establish Project Delivery Process
  - *FM to be complete by 5/31/11*
  - *FPC by 8/31/11*
- Renewal and Maintenance Funding Recommendations and supporting funding and renewal recommendations – *Pending FCA and Centralization Efforts*
- Centralize all Facilities management organizations – *Underway; plan to be developed by 8/31/11*
FM Project Delivery Improvements

• Enforcement of University policy

• Developed and will implement a project delivery process to serve as roadmap for successful cost, schedule, and quality performance on projects. Process being documented and supporting tools created to:

  ❖ Support FM in the delivery of 200-300 Minor Projects per Year
    • Enable Plant Operations to provide high quality service to its customers, stakeholders, and the university.
    • Provide a balanced, systematic approach to planning and delivering construction/renovation projects.
    • Incorporate project management best practices
      ❖ FM Complete by 5/31/11
      ❖ FPC by 8/31/11
Develop Standardized Project Process

Communication with Customers and Stakeholders

Dispute Resolution Process

Estimating

Design Review

Commissioning

Inspections

Initiate the Project → Plan the Project by Phase → Procure Services/Products → Manage Deliverables → Manage Project Changes → Perform Project Controls → Close the Phase → Close the Project

Communication with Customers and Stakeholders

Dispute Resolution Process

Estimating

Design Review

Commissioning

Inspections

FM Priorities Review April 27, 2011
Centralization & Support Project

Integration of Organizations and Support Services

• Tier One Objectives
  – Residential Campus
  – Research
  – Sustainability
  – Financial and Resource Challenges
  – Service Focused

• S-STAR
  – Collaborative Committee with Mutual Objectives
  – Academic (Agnes DeFranco & Steve Soutullo)
  – Programmatic (Keith Kowalka, Emily Messa and Floyd Robinson)
  – Facilities (Melissa Rockwell, TJ Meagher & Javier Hidalgo)
  – Business/Financial (Emily Messa & Pat Sayles)
    • Plan by 8/31/2011
    • Implementation now – FY 2012/2013
FM Integration Planning Committee

- Develop Strategy
- Organization Structure & Staffing
  - Space & Resourcing
- Contracts
- Service level and maintenance standards
  - POM Model
- Facilities Service Center
- Procurement and Asset Management
- Business Plan
- Implementation phasing plan

FM Priorities Review April 27, 2011
FM Integration Planning Committee

• Planning Members
  – Melissa Rockwell, Planning Chair
  – Sameer Kapileshwari, Technical Services
  – Daniel Cleaves, Facilities Service Center
  – Javier Hidalgo, Service & POM Model
  – Carlos Villarreal, Labor Services
  – TJ Meagher, Auxiliary Representation
  – Cheryl Grew-Gillen, Event & Program (*new member*)
  – Cynthia Ramos, Facilities Support Services Planning
  – Supporting Participation as Task Plan Requires
Facilities Centralization

- Facilities Centralization
  - Areas
    - Student Affairs
    - Athletics
    - Plant Ops
      - *Staff Reports Changed week of 4/9
      - *Town Hall Meetings held to date with:
        » FM Integrated Management Team
        » RLH Staff
        » Others to follow

- Initial Focus is on Safety & Operational Issues
  - Develop a Risk Mitigation Plan for Critical Life/Safety Issues (All)
  - Integrated After Hours Response Plan (Short/Long Term)
  - Facilities Service Center Integration (by 7/1)
  - Policy, Process & Contractual issues cleanup (audit/non-audit)
  - Day to day issues (significant)
  - Bayou Oaks/Calhoun Lofts Support Plan
Strategic Planning & Change Management

- Focusing on the Unified & Centralized Facilities Organization
  - Long range planning (Service level, Capital and Infrastructure plan)
  - Quality/integration of processes and services (POM Model)
  - Service Based Organization “We are UH”
  - Accountability and performance management, including outcomes
  - Financial and resource management (Business Plan to include Procurement/Resource Components)
  - Communication (Daily & Strategic)
  - Cultural & Organizational Changes (Critical)
  - Supportive of Tier One Objectives

- Change Management Process
  - Address Immediate Safety & Operational Issues
  - Set Strategy
  - Structure
  - Task Plan & Support Components
  - Programmatic Linkage
  - Initial priorities
  - Communication & Implementation Plan
Current Challenges Identified

- Past culture
- Financial Constraints
- Limited Resources
- Disconnect within and between auxiliary units
  - Reactive approach
  - Lack of long range/integrated plans
  - Inadequate resource levels due to decentralization of resources
  - Support services not evenly distributed/funded
- Duplication in all areas – resources (not Athletics)
- Safety, compliance & risk issues
- Process & policy issues
Immediate Integration Efforts Underway

- POM Model & SLA Target Development
- FCA & Infrastructure Plans
- CRWC/Athletic Support Services Peer Review
- Facilities Service Center (24/7)
- FAMIS Work Management Implementation
- Lock Shop & Key Operations
- Staff Reporting
- Maintenance vs. Construction
  - Redefinition
  - Construction back to FM/Skilled Trades/JOC
- Contracting, Resourcing & Procurement Analysis
- Emergency Planning & Response Efforts
  - Tiered response expectations
- Risk Mitigation Plan Development
  - Remaining plan to be developed by 9/1/11
- Building Coordinator Program
### FACILITIES SERVICES CENTER

#### HOURS OF OPERATION

- **Monday Thru Friday**: 7:00pm - 10:00pm
- **Saturday**: 7:00am - 4:00pm
- **Sunday**: 12:00pm - 8:00pm

<table>
<thead>
<tr>
<th>Time</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
<th>Sunday</th>
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</tbody>
</table>
Facilities Services Center

Melissa Rockwell
Executive Director
Facilities Management

TBD
FM Support Services Manager

Duty Supervisors Weekly Reports

Lead Facilities Services Dispatcher / Supervisor (Auxiliaries)

Central Plant after hours call support

TBD
Planned Maintenance

Facilities Dispatcher Technical Systems

Facilities Dispatcher Central Facilities Svcs.

Facilities Dispatcher Assistant (support for all areas)

2-3 Student Workers

Hours of Operation
Monday thru Friday 7AM – 10PM
Saturday 7AM – 4PM
Sunday 12PM – 8PM
After Hours - Central Plant
Work Flow Process for After Hours Response

3-4948 (FIX-IT)

Central Plant logs call

Auxiliary

Campus or Auxiliary or Other?

Call Auxiliary Supervisor

Campus

Call Duty Supervisor for approval and guidance

Other

Do you need Plant OPS or Cotton?

Cotton

Call 3-4948 FIX-IT

Plant OPS

Do you need Cotton?

Internal

Dispatch person on call

Internal

Complete work and notify Central plant

Cotton

Complete work and notify Central plant

Call contact for other Facilities

Call Cotton if required and notify Central Plant

Complete Log and send log to Customer Service/Aux. contacts

FM Priorities Review April 27, 2011
## Tiered Response

<table>
<thead>
<tr>
<th>Tier 1- Response Locally</th>
<th>Tier 2- Campus Support/Contractor</th>
<th>Tier 3- Emergency Responders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minor leaks and spills</td>
<td>Continued System Issues</td>
<td>Life Safety</td>
</tr>
<tr>
<td>Daily Maintenance</td>
<td>Fire &amp; Security alarms</td>
<td>Supporting Services</td>
</tr>
<tr>
<td></td>
<td>Elevators</td>
<td>Fire/Flood/Death</td>
</tr>
<tr>
<td></td>
<td>HVAC &amp; Controls</td>
<td>Structural Failure</td>
</tr>
<tr>
<td></td>
<td>Building Access</td>
<td>Natural Disasters</td>
</tr>
<tr>
<td></td>
<td>Security (doors and windows)</td>
<td>Terrorism</td>
</tr>
<tr>
<td></td>
<td>Outages</td>
<td>Hazmat Incidents</td>
</tr>
<tr>
<td></td>
<td>Water event</td>
<td></td>
</tr>
</tbody>
</table>
FAMIS: Supporting the Centralized Facilities Organization

- A web-enabled work-order system that will allow a more efficient process of reporting and follow-up of work-orders.
  - Tied to Space Management System
- Information for facilities managers to become more proactive instead of reactive to facilities requirements and enable better decision making.
  - Tracking and management of planned work
  - Backlog
  - Reports and Productivity Tracking by Service Area
  - Joint system with Residential Life Work Management
  - Programmed Maintenance program development for warranty management
Other Business Benefits of Updated and Efficient Work Order System

- Efficient and streamlined processes - using standardized data that is shared across the university.
- Key resource for Building Coordinator Program and Facility Wide Reporting
- Improve safety and environmental planning capabilities, reducing risk from accident and regulatory compliance violations.
- Data standardization across the university and the elimination of redundant information held by multiple organizations in various degrees of quality and accuracy.
- Fast and accurate reporting on critical facilities information.
- EHS will be utilizing system and phasing and sharing of work orders will benefit customers and improve services including research support.
The FACILITY MANAGEMENT Modules include

- Physical Plant work order management
- Preventive maintenance
- Maintenance projects
- Resource scheduling/labor tracking
- Inventory control
- Purchasing
- Self-service request management
- Key control
- Asset Inventory

*Call Technology will also be a key component of the Facilities Service Center*
• A Quick Look.........
  – What we know before FCA
  – Risk Mitigation Planning
  – Integration with Master Planning and Capital Planning Efforts
  – CB Reporting Implications/Discussion/Direction
  – Other
Moody Towers – a quick look
Capital Renewal & Deferred Maintenance

• Moody Towers
  – Chilled water piping replacement
  – Hot water piping replacement
  – Air handlers coil replacement
  – Electrical panels replacement (Partial)
  – Trash chute liner repairs
  – Commons roof replacement
Moody Towers
Capital Renewal & Deferred Maintenance

- Main Entry Doors Replacement
- Sewage vent pipes repairs/replacement
- Commons heating coils replacement
- Elevator controls upgrade/replacement (partial)
- Exit doors monitoring upgrade
- Bathroom upgrades
- Foundation repairs
Quadrangle

Capital Renewal & Deferred Maintenance

- Electrical Panel replacement - partial
- Electrical wiring replacement
- HVAC upgrades
- Windows replacement
- Corridors carpet replacement
- Furniture refurbishing
Quadrangle
Capital Renewal & Deferred Maintenance

- Exterior walls seal & water proofing
- Foundation repairs
- Bathroom upgrades
- Sanitary sewage infrastructure issues
- HVAC coils replacement
- Air ducts cleaning
- Electrical issues
• Children’s Learning Center
  – Emergency Lighting
  – Carpet & Ceramic Tile replacement

• University Center Satellite
  – Video wall

• University Center
  – Video wall
  – Bike racks
  – Chili’s Too (temporary space renovation).
  – ARAMARK Cash Room renovation
  – Houston Room A/V Booth digital projector upgrades
Religion Center
Capital Renewal & Deferred Maintenance

- Curtain wall replacement (1/3 of building)
- HVAC upgrades
- Mechanical room water pipes replacement
- Air ducts cleaning/repairs
• Structural issues
• Southwest corner roof leak
• Chiller gearbox repairs
• West side external lights repairs
• Wooden floor repairs
• Racquetball court floor repairs
• Contractual & PM Issues
Athletics

- Stadium Structural issues (Must have plan by 2013 – replace or phase repair by 2015)
- Hoffheinz Asbestos/Scoreboard
- Significant life/safety/fire compliance issues throughout facilities
- Maintenance staffing and plan non-existent
- METRO Mitigation Projects
Supporting Evaluation Efforts

PLAN INTEGRATION IS CRITICAL

- Facilities Condition Assessment
- Infrastructure Plan
- METRO
- S-STAR
  - Organizational and support services realignment
  - Business and Service Plan Development
  - Units to focus on Core Services
  - Non-Core to be redirected
- University Master Plan
- Academic Plan
- Tier One Objectives, including Research & Residential
<table>
<thead>
<tr>
<th>Space Category</th>
<th>FY 2010</th>
<th>FY 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Space</td>
<td>1,914,731</td>
<td>1,914,731</td>
</tr>
<tr>
<td>E&amp;G Space</td>
<td>3,401,052</td>
<td>3,541,347</td>
</tr>
<tr>
<td>Auxiliary Space</td>
<td>2,665,654</td>
<td>2,665,654</td>
</tr>
<tr>
<td>Research Space</td>
<td>1,038,363</td>
<td>1,038,363</td>
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<tr>
<td>Total GSF</td>
<td>9,019,800</td>
<td>9,160,095</td>
</tr>
<tr>
<td>Total Acres</td>
<td>550</td>
<td>550</td>
</tr>
</tbody>
</table>

**Space Breakdown**

**2 Year Look**

*FM Priorities Review April 15, 2011*
## Allocation Model Development

### Initial Draft Assumptions

<table>
<thead>
<tr>
<th>Standard Facilities Allocation (all formula’s are divided by GSF)</th>
<th>Formula</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Space</td>
<td>CRV*1.0%*80%</td>
</tr>
<tr>
<td>E&amp;G Space</td>
<td>CRV*2%*80%</td>
</tr>
<tr>
<td>Auxiliary Space</td>
<td>CRV*2.5%*80%</td>
</tr>
<tr>
<td>Research Space</td>
<td>CRV*3.0%*80%</td>
</tr>
</tbody>
</table>

### Standard Facilities Allocation by Type of Space

<table>
<thead>
<tr>
<th>Standard Facilities Allocation by Type of Space</th>
<th>$ Value</th>
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</thead>
<tbody>
<tr>
<td>Support Space</td>
<td>$1.98</td>
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<tr>
<td>E&amp;G Space</td>
<td>$5.19</td>
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<tr>
<td>Auxiliary Space</td>
<td>$5.55</td>
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<tr>
<td>Research Space</td>
<td>$7.72</td>
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<tr>
<td>Average</td>
<td>$5.11</td>
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</table>

FM Priorities Review April 27, 2011
## Sample Allocation Model

<table>
<thead>
<tr>
<th>Complete Allocation Model Components</th>
<th>Allocation/GSF</th>
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<tbody>
<tr>
<td>Grounds</td>
<td>$0.15</td>
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<tr>
<td>Facilities</td>
<td>$5.11</td>
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<tr>
<td>Utilities</td>
<td>$2.44</td>
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<tr>
<td>Capital Renewal Escrow</td>
<td>$0.55</td>
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<tr>
<td>Capital Plan</td>
<td>$1.79</td>
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</table>

$10.04
## APPA Managed Target Level

<table>
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<tr>
<th>Level</th>
<th>Three</th>
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</thead>
<tbody>
<tr>
<td>Description</td>
<td>Managed Care</td>
</tr>
<tr>
<td>Costumer Service &amp; Response Time</td>
<td>Services available only by reducing maintenance, with response time of one month or less</td>
</tr>
<tr>
<td>Customer Satisfaction</td>
<td>Accustomed to basic level of facilities care. Generally able to perform mission duties. Lack of pride of physical environment.</td>
</tr>
<tr>
<td>Preventive Maintenance vs. Corrective Maintenance</td>
<td>50 - 75%</td>
</tr>
<tr>
<td>Maintenance Mix</td>
<td>Reactive maintenance predominate due to systems failing to perform, specially during harsh seasonal peaks. An effort is still made at PM: priority to schedule as time &amp; staff permits. High number of emergencies (e.g., pumps failures, heating &amp; cooling systems failures) causes reports to upper administration</td>
</tr>
<tr>
<td>Aesthetics, Interior</td>
<td>Average finishes</td>
</tr>
<tr>
<td>Aesthetics, Exterior</td>
<td>Minor leaks and blemishes, average exterior appearance</td>
</tr>
<tr>
<td>Aesthetics, Lighting</td>
<td>Small percentage of lights out, generally well lit and clean</td>
</tr>
<tr>
<td>Service Efficiency</td>
<td>Maintenance activities appear somewhat organized but remains people dependent. Equipment &amp; building components are mostly functional but suffer occasional breakdowns. Service &amp; maintenance call response times are variable &amp; sporadic, without apparent cause. Buildings &amp; equipment are periodically upgraded to current standards &amp; use, but not enough to control the effects of normal usage and deterioration.</td>
</tr>
<tr>
<td>Building Systems' Reliability</td>
<td>Building &amp; system components periodically fail</td>
</tr>
<tr>
<td>Facility Maintenance Operating Budget as % of CRV</td>
<td>3.0 - 3.5</td>
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<tr>
<td>Campus Average FCI</td>
<td>1.5 - 2.9</td>
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## 5-Year Facilities Management Expenditure Comparison

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<th>Category</th>
<th>FY 2006</th>
<th>FY 2007</th>
<th>FY 2008</th>
<th>FY 2009</th>
<th>FY 2010</th>
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<td>Total Expenses</td>
<td>$11,900,430</td>
<td>$11,087,366</td>
<td>$12,259,025</td>
<td>$12,071,363</td>
<td>$11,814,944</td>
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<tr>
<td>Campus E&amp;G - GSF</td>
<td>5,249,639</td>
<td>5249,639</td>
<td>5,483,228</td>
<td>5,405,985</td>
<td>5,576,458</td>
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<td>Cost/GSF</td>
<td>$2.27</td>
<td>$2.11</td>
<td>$2.24</td>
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<td>$2.12</td>
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<td>CRDM Allowance *</td>
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<td>$10,000,000</td>
<td>$3,000,000</td>
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<tr>
<td>CRDM/GSF</td>
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<td>$1.90</td>
<td>$1.82</td>
<td>$0.55</td>
<td>$0.46</td>
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<tr>
<td>Total/GSF</td>
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<td>$4.01</td>
<td>$4.06</td>
<td>$2.78</td>
<td>$2.58</td>
</tr>
</tbody>
</table>

* Only FY 2010 is verified
Maintenance & Operations
Allocation Model Next Steps

- Finalize Service Levels & Delivery Model
- Organizational Structure
- Resourcing Plan & Data Validation
- Programmatic Linkage
- Reinvestment Plan
- Funding Model
- Implementation Phasing Plan
- FCA & Capital Plan
- Total Reinvestment Plan Recommendation
  - Short term
  - Long term
More work to do....
Supporting & Auxiliary Efforts

- METRO Planning & Zone Mitigation
- Integration of Emergency Planning
- Dining Services Contract Assumption based on improved service level – 9/1/11
- Stewardship 101 “We Are UH” training to begin June 2011 – through Implementation of Centralized Facilities Program
  - Quarterly service meetings with key customers
  - Development of Computer Literacy Program (CLICK)
  - Staff Recognition Program
  - Professional Image and Uniform Improvements
- Development of 5 year FM Business Plan
Ongoing Challenges

• **Growing Need**
  – Block obsolescence (increasing number of buildings 50 years old)
  – Academic expectations and amount of space to maintain continue to rise
  – Escalation of replacement and renewal costs
  – CRDM funding limitations (review reports of current account status)
  – System wide support for major projects

• **Strained Resources**
  – Maintenance operations underfunded, Space Growing
  – Staffing, funding and expectations misaligned
  – Reduced state support
  – Debt limits
  – Complexity of administrative processes (contracts)
  – HEAF Recapitalization?
What’s Next

- Development of Integrated Facilities Plan (all areas)
- Academic Plan Tie-In including exploration of non-traditional approaches (integration and collaboration)
- Visioning & Resourcing
  1. Create an organizational purpose & vision (“We are UH”)
  2. Remove all duplication & create reinvestment strategy
  3. HEAF recapitalization
  4. Develop 20+ Year Capital Renewal and Infrastructure Plan
  5. Create a maintenance POM Model with minimum standards for “managed care”
  6. Look at policies like “No Net New Space”,
     - Space Management Program should be evaluated
     - Before building new ensure space can be properly funded at the desired level.

FM Priorities Review 4.27.11