



Key:	COMPLETE	
	ON TARGET	
	DUE within next 45 days	
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Activity Number	Activity - AFE Criteria	Notes	FM2 Services	UofC Owner	Project Lead	Task No.	Task	Time Allocated	Due Date Status Color
1.1	Leadership roles and responsibilities are clearly defined.	Additional focus should be placed on documentation of roles and responsibilities of the newly structured leadership team.	Consultation with CMOB Manager	Arleta Porter	Adrian Velez and Myriam Weaver	1.1.1	New org-chart is posted on the FS website and each position is hyperlinked to a description of responsibilities.	4 months (due 11/30/2017)	COMPLETE
					Myriam Weaver	1.1.2	Strategic communication announcing the availability of the information to staff and customer base.	5 months (due 12/31/2017)	
1.2	The leadership system is understood by and communicated among all levels. The leadership system includes mechanisms for the leaders to conduct self-examination, receive feedback, and make improvements.	Need to build out electronic feedback on the employee website. Need to communicate more often and become a more transparent organization to rebuild the trust that has been lost.	Continuance of bi-weekly communications meetings to discuss implementation and continual development of the communications plan as well.	Arleta Porter	Adrian Velez	1.2.1	Create annual self-evaluation process.	7 months (due 02/28/2018)	2/28/2018
					Adrian Velez	1.2.2	Create an annual peer evaluation process.	17 months (due 12/31/2018)changed from 7/31/18	
1.3	The organization has clearly aligned its mission, vision, and values statements with those of the campus. Regularly communicates with employees, customers, suppliers, and other stakeholders.	The mission/need that was developed for each OS needs to be communicated to staff. The tie between that need and the campus mission need to be made. A clear big picture of the path forward needs to be created and the resources for survival need to be provided.		All	Myriam Weaver	1.3.1	Each SLT member will be responsible for contributing to the development of the strategic plan and initiating the buy-in process by communicating the planning process.	3 months (due 10/31/2017)	
					Myriam Weaver	1.3.2	Each SLT member will be responsible for rolling out the developed strategic plan.	7 months (due 02/28/2018)	
1.4	Facilities management leaders spend time on a regular basis with their customers and front-line staff.	This action has been suggested by FM2, but it is currently not being taken.		All	Arleta Porter	1.4.1	Schedule 2-4 hours minimum field time per week. Initiate the process of reporting out regarding engagement and buy-in at weekly SLT meeting.	2 weeks (due 08/22/2017)	COMPLETE
1.5	Performance measures at each level of the organization are clearly defined.	Business processes and procedures need to be updated or in some cases created and training and communication needs to be provided to all levels of the organization. Utilizing the Impact table, employees need to be introduced to the plan-do-check-act cycle and continuous process improvement needs to occur.	Additional Plan-Do-Act training and assistance developing and updating KPIs	Gerry McGillian	Sumit Ray	1.5.1	Finalize KPI tree that defines KPIs at each level of the organization that feed into the KPIs for the level above. (Sumit has indicated that he may have 4 KPI's) See impact table for additional implementation after KPI's have been defined.	3 months (due 10/31/2017)	COMPLETE
					Kevin Austin	1.5.2	Finalize KPI tree that defines KPIs at each level of the organization that feed into the KPIs for the level above. See impact table for additional implementation after KPI's have been defined.	3 months (due 10/31/2017)	
					Andy Cobb, Camilo Garza, and James Coleman	1.5.3	Finalize KPI tree that defines KPIs at each level of the organization that feed into the KPIs for the level above. See impact table for additional implementation after KPI's have been defined.	3 months (due 10/31/2017)	
1.6	Senior leaders establish and reinforce an environment where shared values support self-direction, innovation and decentralized decision-making.	This is going to take time and diligence. The leadership team has been provide tools and training on how to build trust with their staff. This training can be expanded if necessary.		All	Arleta Porter	1.6.1	SLT to delegate 1 task per week to an individual that they would not normally delegate to, and request that all direct reports do the same.	2 weeks ( due 08/22/2017)	COMPLETE
1.7	Informed of current trends and practices in the industry (i.e., higher ed facilities management).	Start sending people to APPAU, APPA Annual Conference and other educational opportunities. Write article and submit subject matter for presentation at the annual conference.		All	Adrian Velez	1.7.1	Draft a 1 year training goals to include Supervisor's Toolkit, Institute, and Academy as well as other considerations such as Outward Mindset for non-union employees.	7 months (due 02/28/2018)	9/30/2018
					Myriam Weaver	1.7.2	Send staff to the APPA Facilities Management Institute.	3 months (due 10/31/2017)	
					Myriam Weaver	1.7.3	Bring the APPA Leadership Academy to campus. A) CEFP by 11/30/2017 B) Leadership Academy by 03/23/2018	14 months (09/30/2018)	

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1.8	A succession plan is in place to ensure continuity of leadership.	Needs to be addressed.	Develop a succession plan that addresses all non-union positions as well as holding discussions with the unions to communicate future needs.	Arleta Porter	Adrian Velez and Arleta Porter	1.8.1	Conduct a SWOT analysis of key positions and develop a succession plan.	7 months (due 05/31/2018)	5/31/2018
2.1	A strategic plan exists that includes the goals and objectives of the department.	Needs to be addressed.	Hold a strategic planning session with FS staff and key steak holders and produce a strategic plan that culminates with the receipt of the APPA Award for Excellence. Hire a facilitator.	Arleta Porter	Myriam Weaver	2.1.1	Create scope of work, assemble working committee, and assist in evaluation of proposed facilitators.	1 month (due 08/31/2017)	COMPLETE
					Myriam Weaver and Lindsay Wagner (FM <sup>2</sup> )	2.1.2	Carry out strategic planning scope of work.	5 months (due 12/31/2017)	
2.2	The strategic plan was developed with participation from internal and external stakeholders, approved by the administration, and effectively communicated.	Needs to be addressed. With the addition of campus forums the FS Optimization Project could easily be turned into a strategic plan that could be explained and communicated to FS staff and the campus community alike.	Addressed above.	Arleta Porter	Myriam Weaver and Lindsay Wagner (FM <sup>2</sup> )	2.2.1	In consultation with SLT and the S/P Working Committee, identify and engage external stakeholders in the strategic planning process.	5 months (due 12/31/2017)	COMPLETE
2.3	Customer needs and expectations serve as major drivers for setting strategic direction.	SLA negotiations should occur with each customer on an annual basis. This will allow FS staff to align the expectations of the campus community with the strategic direction of the department.	Provide continued support in the development of SLAs will all customers.	Gerry McGillian	Kevin Austin	2.3.1	Identify customers that should be involved in strategic planning effort. These may be the same individuals that executed the SLA's.	3 months (due 10/31/2017)	COMPLETE
2.4	Goals and key performance measures are understood by all and periodically reviewed.	FS staff will need to diligently utilize the Impact Table that was developed to track progress. For example, customer feedback (POS) may be used as the KPI for line staff.	Addressed above.	All	Kevin Austin and Sumit Ray	2.4.1	Finalize KPI tree that defines KPIs at each level of the organization that feed into the KPIs for the level above. See 1.5.1, 1.5.2 and 1.5.3 impact table for additional implementation.	3 months (due 10/31/2017)	COMPLETE
					Adrian Velez	2.4.2	Ensure all employees confirm goals and evaluations in WorkDay.	4 months (due 11/30/2017)	
2.5	Performance measures at each level of the organization are used to meet goals.	FS staff will need to diligently utilize the Impact Table that was developed to track progress.	Addressed above.	All	Kevin Austin and Sumit Ray	2.5.1	Align KPI tree with strategic plan and goals. See 1.5.1, 1.5.2 and 1.5.3 impact table for additional implementation.	5 months (due 12/31/2017)	COMPLETE
2.6	A budget is developed with input from staff that reflects historic expenditures, an analysis of needs, effective allocation of available resources to support the organization's goals and objectives, and seeks new and innovative measures to leverage resources.	A maintenance business plan that includes a budget needs to be developed for each zone on an annual basis.	Assist FS staff in the development of maintenance business plans in coordination with the finance department.	Arleta Porter	Crystal Smith and Christal Wilson	2.6.1	Review and document current processes.	7 months (due 02/28/2018)	COMPLETE
2.7	Standards have been defined for overall operational performance, built environment, and landscape.	Needs to be addressed. Level of detailed required could be added to SLAs or incorporated into Maintenance Business Plans.	Addressed above.	Gerry McGillian	Myriam Weaver	2.7.1	Publish SLA's on FS website (publish template with section 7.0 blank). Also need to publish KPI's.	7 months (due 02/28/2018)	2/28/2018
					TBD.	2.7.2	Ensure that staff know and uphold the standard, i.e. building engineers and call center staff should know level of service for each building.	7 months (due 02/28/2018)	
2.8	A campus master plan is in place, current, and utilized for decision making.	Needs to be addressed.	Review Gap Analysis and documentation of how used in decision making and advise.	Alicia Berg	Richard Bumstead	2.8.1	Document all existing master plans and dates created. Conduct a gap analysis and provide recommendations for any additional outside services necessary.	3 months (due 10/31/2017)	2/28/2018

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					Maya Gharpure	2.8.2	Document how the existing plan is utilized in the decision making process.	7 months (due 02/28/2018)	
2.9	The operational units participate in the development of the construction program and are active participants in the acceptance of completed projects.	Needs to be addressed.	Develop processes that allow operations staff the opportunity to be involved in construction projects during the design phase. Conduct training on the process with both departments.	Art Del Muro	Art Del Muro	2.9.1	Develop/ <b>Reinforce</b> processes that allow operations staff the opportunity to be involved in construction projects during the design phase.	7 months (due 02/28/2018)	2/28/2018
					Art Del Muro	2.9.2	Conduct training on the process with both departments (capital projects and operations).	7 months (due 02/28/2018)	
2.10	Strategies and processes are in place to ensure continuity of functions in the event of staff turnover or other disruption.	Needs to be addressed.	Develop a response procedure and a cross-training plan that will aid in ensuring continuity of service.	Arleta Porter and Gerry McGillian	Arleta Porter	2.10.1	Coordinate this effort with the succession planning effort in 1.8; provide template for planning to each director (i.e., Sumit)	10 months (due 05/31/2018)	5/31/2018
2.11	Emergency response plans are in place, current, and communicated to facilities employees and the campus community as required.	Needs to be addressed.	Develop emergency response pans for all identified threats associated with the operations unit.	Gerry McGillian	Sumit Ray and Nicole Gall	2.11.1	Write emergency response plans in conjunction with the new safety staff.	12 months (due 07/31/2018)	7/31/2018
3.1	Surveys, tools, and other methods are used to identify customer requirements, expectations, and satisfaction levels.	The surveys available to customers through Maximo need to be better utilized. SLA negotiation meetings can also be utilized as an opportunity to get feedback from customers. A list of standard questions can be developed and perhaps incorporated into annual SiteLines survey.	Survey and Standardized question development. Assess KPI's from survey monkey for completed workorders, also assess project management survey results-- provide recommendations.	Gerry McGillian and Art Del Muro	Kevin Austin and Jayme McGriffin	3.1.1	Increase utilization of Maximo customer survey and consider other means of getting customer feedback. Create an annual survey or host customer town hall meetings. POS Questionnaire, Sitelines will do a survey of clients. May want a separate survey for RH&D.	7 months (due 02/28/2018)	2/28/2018
					Matthew Curtin	3.1.2	Provide survey methodology and results from completed capital projects.	7 months (due 02/28/2018)	
3.2	The roles, responsibilities, and services provided by the facilities department are well defined, communicated, and understood within the department and by all communities served.	Needs to be addressed.	Addressed above.	Gerry McGillian		3.2.1	1.1.1 (due 11/30/2017) and 2.7.1 (due 02/28/2018) address this. Once Information is made available it needs to be communicated to all levels.	7 months (due 02/28/2018) This was corrected to the latest due date of the associated activities.	2/28/2018
3.3	Levels of service are set to exceed customer expectation and are defined in terms that can be understood by the administration, building users, and facilities staff.	FS staff needs to develop a procedure to communicate SLA contents to all parties involved in the delivery of service.	Additional consultation for SLA negotiation and development as well as assistance in getting appropriate information into Maximo.	Gerry McGillian	Kevin Austin	3.3.1	SLA's are in place with all customers. FS staff and the customers know what is in the SLA. SLA's will be introduced at 10/2017 quarterly meeting to OPS staff. Rollout thereafter.	12 months (due 07/31/2018)	7/31/2018
3.4	The communities served know how to obtain, monitor progress, and evaluate the services offered.	Increased customer communications. Allow customers to see staff comments; perhaps create drop-down feature to standardize status bar.	Addressed above.	Gerry McGillian and Alicia Berg	Charlie Maher	3.4.1	Maximo optimization allowing customers to submit, monitor, and provide feedback for the services offered.	12 months (due 07/31/2018)	7/31/2018
					Charlie Maher and TBD	3.4.2	Create a customer portal. Offer customer training. Increase how-to information on the internet.	12 months (due 07/31/2018)	
					Charlie Maher and TBD	3.4.3	Provide a customer training day annually.	12 months (due 07/31/2018)	

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3.5	Customer feedback is used to build positive relationships, drive processes and effect improvements.	FS staff should incorporate customer feedback that is recorded during annual SLA negotiations into the Plan-Do-Check-Act cycle and adjust accordingly.	Assess current process and documentation and determine whether meets criteria or needs augmentation. If necessary, make recommendations.	Gerry McGillian	Kevin Austin	3.5.1	Create a procedure allowing for the evaluation of customer responses and process adjustment on a quarterly basis. Tracking sheet has been developed, need to document and communicate process.	5 months (due 12/31/2017)changed from 10/31/17	COMPLETE
					Myriam Weaver	3.5.2	Tracking sheet has been developed, need to document and communicate process. Process should include: when response is required, who is client (univ bldg, student, FS employee)	3 months (due 10/31/2017)	
3.6	Campus users have a clear understanding and positive view of the services provided by the facilities organization.	This can be accomplished through successful annual negotiations meetings.	Addressed above.	Gerry McGillian and Art Del Muro	Myriam Weaver	3.6.1	Create annual meeting format and schedule meetings to include key representatives of the services that are being provided. Develop process and communication plan.	10 months (due 05/30/2018)	5/30/2018
					Art Del Muro	3.6.2	The forms are web-based and are used when campus clients desire service.		
4.1	A systematic process is in place for identifying and prioritizing performance indicators, comparative information, and benchmarking studies for the most critical areas.	In conjunction with the efforts that occur in OS- 11 FS staff should participate in the APPA FPI on an annual basis to benchmark against other institutions. (Assist with defining data points for Siteline and FPI to assist with staff engagement).	Additional consultation and guidance in the development of appropriate KPIs and dashboards that enable staff and customers easy access to useful data.	All	TBD after Strategic Plan	4.1.1	All leaders and direct reports are familiar with Sightlines and FPI data and utilize it to make decisions, set goals and communicate with staff.	7 months (due 02/28/2018)	2/28/2018
					TBD after Strategic Plan	4.1.2	KPI's will be identified for each area of Facilities Services.		
4.2	Benchmarking results, comparisons, and performance indicators are tracked and used to drive action within the organization. KPIs in each area?	FS staff needs to utilize the Impact table that has been developed.	Addressed above.	All	Lindsay Wagner (FM <sup>2</sup> )	4.2.1	Rename Hoshin to Plan-Do-Act/Impact Tables and work with each Project Lead to fill-out Impact Table. Reality-check due dates and adjust as necessary.	2 weeks (08/23/2017)	COMPLETE
					Myriam Weaver and Lindsay Wagner (FM2)	4.2.2	Assign Major Task Owners and Project Leads. Set up change management tracking in BOX for specific tasks	2 months (due 09/30/2017)	
					All SLT	4.2.3	Refer to BOX (and Binders) to check tasks in each Ownership area of influence.	2 months (due 09/30/2017)	
4.3	The department ensures that data and information are communicated and accessible to all appropriate users. The required data and information have all the characteristics users need, such as reliability, accuracy, timeliness, and appropriate levels of security and confidentiality.	FS staff needs to work to develop user dashboards that allow Maximo users quick access to accurate data and information.	Addressed above.	Gerry McGillian and Alicia Berg	Charlie Maher and TBD	4.3.1	Continue implementation of Maximo Optimization: Address data accuracy, create a Standard Operating Procedure for inputting data, train staff, exception reports/KPI's. identify the staffing levels required to execute the impact table.	12 months (due 7/31/2018)	7/31/2018
4.4	An effective facilities inspection or audit program is in place that provides a regular appraisal of facilities conditions, identifies maintenance and repair needs, and quantifies facilities maintenance resource requirements.	Needs to be addressed. Can be accomplished with Maximo data.	Review Gap Analysis and documentation of how used in decision making and advise.	Alicia Berg and Gerry McGillian	Antonio Mena, Charles Maher, Sr. Director of Operations &	4.4.1	Work with the Facilities Conditions vendor to ensure that the correct data is being recorded in Maximo.	12 months (due 7/31/2018)	7/31/2018
					Antonio Mena, Charles Maher, Sr. Director of Operations & Preventative Maintenance	4.4.2	Develop an official procedure defining the utilization of facilities conditions data in capital planning and budgeting.	3 months (due 10/31/2017)	
4.5	An expenditure report is available to managers on a regular basis and is used to effectively evaluate and control expenditures in assigned sub-units.	Needs to be addressed.		Arleta Porter	Crystal Smith	4.5.1	Review and document current processes.	7 months (due 02/28/2018)	COMPLETE

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4.6	An effective system of measuring and recording utility data is in place and is used to establish trends, minimize costs, promote energy conservation, and encourage environmental preservation.	Needs to be addressed.	Assistance in the implementation of Energy Cap	Gerry Mcgillian	Sumit Ray	4.6.1	Effectively utilize Energy Cap (Energy Management Information System)	7 months (due 02/28/2018)	2/28/2018
4.7	The organization has a process to ensure that hardware and software systems are user-friendly, reliable, up-to-date, and meet the needs of all users.	Needs further development.	Continued assistance with the integration of Maximo and other FS Systems.	Alicia Berg and Gerry Mcgillian	Charlie Maher	4.7.1	Formalize an annual self-evaluation	7 months (due 02/28/2018)	2/28/2018
5.1	Staff positions are properly classified and allocated in adequate numbers to meet the standards for the targeted level of service.	Needs further development.	Addressed above.	Arieta Porter	Adrian Velez	5.1.1	Work with all SLT leaders to define targeted staffing levels that align with the campus master plan and review job descriptions to ensure they are up to date and accurate.	12 months (due 07/31/2018)	7/31/2018
5.2	Training programs provide for new employee orientation and technical skills enhancement for all staff.	Needs to be addressed.	Assist in development of new employee orientation training as well as a system to track staff training and development initiatives.	Arleta Porter and Gerry Mcgillian	Adrian Velez	5.2.1	Develop and implement a new employee orientation. Recommendations: tweak the previous version, have Jim do a video, identify a book as gift for new employees	7 months (due 02/28/2018)	7/31/2018
					Nicole Gall (EH&S) and Adam Santos	5.2.2	Clean-up CATT's and provide a process that makes supervisors accountable for maintaining CATT's information validity and compliance. CATT's will tracks all training attended by staff members and set annual technical training goals for all frontline workers.	12 months (due 07/31/2018)	
5.3	An effective communication system exists within the department to ensure that each employee knows his or her role in the department, the role of related areas, and the overall role of the department.	Needs to be addressed.	Addressed above.	Arleta Porter	Myriam Weaver and Arleta Porter	5.3.1	Adopt "Be Essential" and communicate the concept to all FS staff along with strategic plan information	7 months (due 02/28/2018)	2/28/2018
5.4	Safety policies and procedures have been established, written, and communicated to all staff.	Needs to be addressed.	Addressed above.	Gerry Mcgillian	Nicole Gall (EH&S) and Adam Santos	5.4.1	Work with the safety staff to write policy and develop training program.	12 months (due 07/31/2018)	7/31/2018
					Nicole Gall (EH&S) and Adam Santos	5.4.2	Develop missing JSA's, assist with updating CATT's, provide KPI's on accidents.	12 months (due 07/31/2018)	
5.5	Accident records are maintained and used to reduce accidents and identify needs for special attention.	Needs to be addressed.	Addressed above.	Gerry Mcgillian	Nicole Gall (EH&S) and Adam Santos	5.5.1	All accident reports are located in a single location and made available for staff to utilize in training exercises.	12 months (due 07/31/2018)	7/31/2018
					Gerry Mcgillian	5.5.2	Need to determine how accident tracking (OSHA recordables) will be tracked and reported to staff.		
5.6	The organization promotes employee development and professional development through formal education, training, and on-the-job training such as rotational assignments, internships, or job exchange programs.	Needs to be addressed.	Addressed above.	All	Adrian Velez	5.6.1	Create and launch a professional development program	12 months (due 07/31/2018)	7/31/2018
					Senior Leadership Team	5.6.2	Identify and recommend 5-10 FS staff for Leadership Institute.		

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5.7	Career development is supported through involvement in job-related and professional organizations, and opportunities to advance within the department.	Needs to be addressed.		Arleta Porter	Arleta Porter and Adrian Velez	5.7.1	Create policy or practice for career development opportunities. Seek out speaking opportunities at conferences in organizations such as NACUBO, SCUP, CACUBO, and others. Covered in 1.7 and 5.6.	7 months (due 2/28/2018)	2/28/2018
					Myriam Weaver	5.7.2	Send FS staff to APPA, COAA, SCUP, ASHRAE events.	Ongoing	
5.8	Work performance and attendance tracking measures are in place, are understood by staff members, and are used by supervisors to assess performance.	Needs to be addressed.	Addressed above.	Arleta Porter	Adrian Velez	5.8.1	UChicagoTime tracks <u>attendance</u> . <u>Performance</u> measures are tracked on paper (union) and in WorkDay (non-union). Align desired outcomes on forms to goals/objectives from strategic plan.	8 months (due 04/30/2018)	4/30/2018
5.9	The organization utilizes both formal and informal assessment methods and measures to determine employee well being, employee satisfaction, and motivation. Assessment findings are linked to performance results to identify priorities for improving the work environment, employee support climate and the supervisor's effectiveness(coaching).	Needs to be addressed.	Addressed above.	Arleta Porter	Myriam Weaver	5.9.1	Continue utilizing the annual survey.	Ongoing	2/28/2018
					Myriam Weaver	5.9.2	Document annual survey intention and progress. Share the results of next year's survey with key staff.	7 months (due 02/28/2018)	
5.10	Employee recognition programs are in place for individuals and groups (may include community service).	Needs to be addressed.	After development of strategic plan, assess current activities and determine if additional work is needed to tie to Key KPIs	Arleta Porter	Adrian Velez & Myriam Weaver	5.10.1	Provide documentation for Safety, Spot, Keller awards. Also provide information for Ronald McDonald House, Build for Chicago, and Ace Tech community engagement efforts.	8 months (due 04/30/2018)	4/30/2018
					Myriam Weaver	5.10.2	Provide information for other community involvement programs like coat, toy and food drives, etc. Create calendar.	8 months (due 04/30/2018)	
5.11	Processes are in place to determine the effectiveness of recruitment and retention programs and to identify areas for improvement.	Needs to be addressed.	Process development	Arleta Porter	Adrian Velez	5.11.1	Develop KPIs to track recruitment and retention in key hires as well as conducting exit interviews. Officially document this procedure. Examples are quantitative (days to fill) and qualitative (new hire 90-day interview).	7 months (due 02/28/2018)	2/28/2018
6.1	Processes are in place to ensure that departmental facilities and equipment are adequate for the provision of effective and efficient services.	Needs to be addressed. (obtain list of depreciable assets from finance)	Conduct a needs assessment.	Arleta Porter and Gerry McGillian	Kevin Austin and Monica Rocean	6.1.1	Document the process of how equipment is requested and approved. Establish an equipment inventory. A) Obtain list of equipment B) Update	7 months (due 02/28/2018)	2/28/2018
6.2	An effective work management system is in place to identify, report, correct, and document substandard conditions and maintenance requirements.	Needs further development.	Maximo Support.	Alicia Berg and Gerry McGillian	Charlie Maher and TBD	6.2.1	Continue Maximo optimization efforts. Addressed in 4.3.	12 months (due 07/31/2018)	7/31/2018
6.3	Work authorization and scheduling procedures have been established that are consistent with the identified role of each work unit and achieve an equitable distribution of resources.	The addition of the Central Maintenance of Building Department will address this issue with successful deployment and further development of processes and procedures.	CMOB Support	Gerry McGillian	Sr. Director of Operations & Preventative Maintenance	6.3.1	Document all workflow procedures.	12 months (due 07/31/2018)	7/31/2018

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6.4	An effective preventive maintenance (PM) program is in place to provide regular inspection and servicing of facilities equipment to assure maximum service life, reliability, and operation.	Needs further development.	Addressed above.	Gerry McGillian	Sr. Director of Operations & Preventative Maintenance	6.4.1	Continue implementation of CMOB. Implementation of the 90-day PM scheduling process with staffing and SOP.	12 months (due 07/31/2018)	7/31/2018
6.5	An estimating system is used that provides accurate estimates of labor and material requirements in order to plan and schedule the execution of work and to determine the causes of significant deviations between actual costs and estimated costs.	The addition of the Central Maintenance of Building Department will address this issue with successful deployment and further development of processes and procedures.	Addressed above.	Gerry McGillian	Sr. Director of Operations & Preventative Maintenance	6.5.1	Develop and implement a standard estimating procedure. Including standard documentation to be utilized. Need to establish a new due date and designate individual responsible.	3 months (due 10/31/2017) on hold	10/31/2017
6.6	Design guidelines that incorporate such elements as energy consumption, operating costs, environmental concerns, maintainability, sustainability, accessibility, and safety have been prepared, updated, and are utilized.	Needs further development.	Assist in the revision of FS Standards.	Alicia Berg	Maya Gharpure	6.6.1	Ensure that the FS standards are up to date and utilized.	7 months (due 02/28/2018)	2/28/2018
6.7	The delegation of budgetary responsibilities for management of sub-units of the budget is effective in controlling expenditures.	Needs further development.	Addressed above.	Arleta Porter	Crystal Smith and Christal Wilson	6.7.1	Document current efforts.	7 months (due 02/28/2018)	COMPLETE
7.1	The appearance of the buildings and grounds is in keeping with the surrounding community as well as the desired image of the institution.	Needs to be addressed.	Develop measurement tools to be utilized annually. Tied to SiteLines and FPI activity listed in 4.1	Gerry McGillian	Andy Cobb, Camilo Garza, and James Coleman	7.1.1	Develop Inspection Program for APPA level 1-2 buildings (on scale of 1-5). Sightlines will complete a cleanliness survey, DCS/ABM complete cleanliness QA. UofC typically scores 81-82 on 100 point scale.	7 months (due 02/28/2018)	2/28/2018
7.2	The condition and cleanliness of facilities are in keeping with the image and standards adopted by the institution as well as activities associated with its mission and programs.	Needs to be addressed.	Addressed above. Tied to SiteLines and FPI activity listed in 4.1	Gerry McGillian	Kevin Austin	7.2.1		7 months (due 02/28/2018)	2/28/2018
7.3	Building systems and infrastructure are maintained and operated at a level of reliability that contributes to the successful implementation of the institution's mission and programs.	Needs to be addressed.	Addressed above. Tied to KPI development activity in 1.5	Gerry McGillian	Sumit Ray	7.3.1		3 months (due 10/31/2017)	10/31/2018
7.4	Funding resources are effectively used and are adequate to support a level of facilities maintenance that prevents the deferral of major maintenance and repairs.	Needs to be addressed.	Addressed above in activity 4.4	Gerry McGillian and Alicia Berg	Antonio Mena	7.4.1	Tied to development and implementation of the Facilities Condition Index (FCI) in activity 4.4	12 months (due 7/31/2018)	7/31/2018
					Antonio Mena	7.4.2	Tied to development and implementation of the Facilities Condition Index (FCI) in activity 4.4		
7.5	Staff is highly motivated and productive, taking pride in the accomplishment of their duties.	Needs to be addressed.	Addressed above in activity 5.9. Assess whether the survey can be used as a metric for this goal.	All	Arleta Porter	7.5.1	Provide questions and historical trending from employee satisfaction survey. This may be one good source for data.	7 months (due 02/28/2018)	2/28/2018



Key:	COMPLETE	
	ON TARGET	
	DUE within next 45 days	
	OVERDUE	

Activity Number	Activity - AFE Criteria	Notes	FM2 Services	UofC Owner	Project Lead	Task No.	Task	Time Allocated	Due Date Status Color
7.6	Customer satisfaction measures ensure that the levels of service are consistent with customer needs and requirements and within the facilities department’s capability.	Needs to be addressed.	Addressed above in activity 3.1. Assess whether the survey can be used as a metric for this goal.	Gerry McGillian and Art Del Muro	Kevin Austin	7.6.1	See 3.1 for Operations, prefer town halls and individual meetings.	7 months (due 02/28/2018)	2/28/2018
					Matthew Curtin	7.6.2	See 3.1 for tasks.	7 months (due 02/28/2018)	
7.7	Managers and supervisors stay in touch with the needs of the education enterprise.	Needs to be addressed.	Addressed above with strategic planning, annual goal setting, and KPI's.	All	TBD after Strategic Plan	7.7.1	Create a strategic plan that tracks to the plan of the University. Map how our S/P links to initiatives of the University. Goals of University are laid out at Board meetings (in board materials). SLA and space statistics support the University's master plan.	5 months (due 12/31/2017)	12/31/2017
8.0	At the request of the institutional representative this section would include any items or subjects that are not covered by the criteria in Sections 1 through 7. These items may include those things that are specific to the campus.		Write Innovative Practice and Sustainability Award submissions	All	Art Del Muro	8.0.1	Campus North Residence Hall (completed Fall 2016). Established EUI target as part of design-build RFP.		COMPLETE
					Alicia Berg	8.0.2	Keller Center will be the most sustainable building on campus but also the most sustainable top-10 policy school. (LEED Platinum and Living Building Challenge)		
					Study: Sara P.; Project: Sumit R.	8.0.3	Green house gas reduction. Baseline study completed and Sumit's projects underway.		
					Kathleen Golomb and Richard Bumstead	8.0.4	Water management: In 2015 we installed a system of automated controls and a 120,000 gallon storm water storage vault to be used for both storm water detention and water reuse in the North Sciences Quad.		
					Arleta Porter	8.0.5	Check to Pay (CUCABO write-up and award) and Capital Project Cash Flow Model.		
					Roslyn Johnson and Charlie Maher	8.0.6	Diversity software and targets for procurement.		
					Andy Cobb and Adam Santos (CUP); Robert Bandura and Joe Tomaselli (Stretching)	8.0.7	Reduction in OSHA recordables at CUP as a result of JSA, on-site interviews, stretching		
					Adrian Velez and Tiffany Grant	8.0.8	Internship program and community involvement.		