

Integrated Planning Taxonomy Summary – Facilities Renewal/Renovation

Introduction

Facilities are an integral part of the University of St. Thomas experience. The physical plant at the University of St. Thomas includes 54 buildings totaling 3.2 million square feet of space. The value of the physical plant is well over \$1 billion and impacts nearly every member of the campus community. In order to manage this resource, Facilities Management employs a staff of 120 people working in the various functions such as Campus Scheduling, Carpentry & Painting, Central Receiving, Construction Management, Custodial, Electrical Maintenance, Environmental Health & Safety, Grounds Maintenance, Mechanical Maintenance, Recycling and Waste Management. In addition to permanent staff, \$2.4M is budgeted in Facilities Management operations for external vendors to perform services related to building maintenance, modernization, repairs, and replacements projects. In FY16, the university also plans to invest \$1.9M in deferred maintenance projects and \$3.4M in capital improvement projects, better known as plant projects. In total, Facilities Management oversees a total annual budget of approximately \$25.3 million.

Timeline

- September – Memos distributed on budgeting process
- October – Budget open for input in Cognos
- November – Budget approvals complete by Deans and Vice Presidents
- November thru January – Budgets are reviewed and modified
- February – Budgets are approved by the board
- February thru May – Project planning begins
- July – Project funding available

Opportunities and Proposed Solutions for Integrated Planning

- Opportunity 1 – There is typically an emphasis on operational budgeting activities in October before considering the facility needs necessary to achieve institutional priorities. Due to the late nature of plant project planning, there is often little time available to evaluate appropriately. Cost estimates are often best guesses with a tendency to include larger contingencies to cover potential unknown factors that could inflate the costs of the project. This over inflation may cause other projects to be terminated due to a lack of sound information and funding.
 - Potential Solution – Develop a plant project methodology that begins in late spring with an “Open Call for Plant Projects.” This will give faculty and staff time to plan the project in a diligent manner resulting in a more accurate estimate to be submitted at the beginning of the budget process (early September). Set plant project requests at the very beginning (September) of the budget process with involvement of Facilities Management staff.
- Opportunity 2 – Undue effort is spent on planning projects that may not have the support of a member of the President’s Cabinet. This results in a misallocation of resources for projects with no support from senior leadership.
 - Potential solution – All requests for Facilities Management to provide planning services for a plant project projected to cost over \$10,000 must be approved by a member of the President’s Cabinet. AVP or Dean level support is required for projects under the \$10,000. This approval must take place prior to submitting a request to the Facilities Management leadership for consideration.
- Opportunity 3 – Unplanned projects that become a priority, but were not part of the budget process require a reallocation of resources resulting in delays, termination of planned projects, unanticipated costs, and loss of opportunity.
 - Potential solution – A more intentional plant planning process with active participation of the President’s Cabinet will result in a better understanding of the process, minimization of ‘add-on’ projects, and a respect for the current resources available to maintain and renovate the university physical plant.