Facilities Planning & Management
UNIVERSITY OF WISCONSIN–MADISON

Annual Report

2014 - 2015

Providing excellence in facilities and services for our university community

This annual report is organized into four sections:

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Section 1: FP&M Summary Statement

Facilities Planning and Management is a service organization, reporting to the Associate Vice Chancellor, Bill Elvey. The organization consists of six core departments in addition to the Office of the Associate Vice Chancellor:
- Campus Planning and Landscape Architecture
- Capital Planning and Development
- Environment, Health and Safety
- Physical Plant
- Space Management Office
- Transportation Services

The goals and objectives listed in this report were identified by Facilities Planning and Management to support, and align with, the strategic priorities established by the Vice Chancellor for Finance and Administration. They reflect critical success factors for FP&M, or are associated with specific initiatives designed to improve the effectiveness and efficiency of FP&M services. These goals were identified and advanced by staff working within their departments or representing their departments on cross-organizational teams. The Leadership Team's commitment to these goals validates the work of these employees, and will hopefully, encourage others to engage in improving our services and our organization. The common thread throughout these goals is the desire to achieve our mission; begin to realize our vision of 'an inclusive and diverse team, working together to provide exceptional service for our university community'; and, engage staff in creating a work environment that truly reflects our core values.

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

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

FP&M Shared Values: *Shared values guide how we behave toward our customers, coworkers and stakeholders.*
- We are <u>People Centered</u> by being inclusive, engaged, diverse and customer-focused.
- We promote <u>Stewardship</u> through sustainable, effective and efficient use of resources.
- We promote <u>Integrity</u> by building trust, respect and accountability.
- We support <u>Innovation and Discovery</u> through continuous learning and improvement.
- We promote <u>Safety</u>, ensuring a safe and healthy campus environment.

Departments:

Office of the Associate Vice Chancellor (AVC)
The Office of the AVC provides support services to all units of FP&M in the areas of budget and financial reporting, business operations and purchasing, human resources, and training and organizational development.

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

Capital Planning and Development (CP&D)
CP&D is responsible for identifying and developing capital programs and related policies and procedures to address the University's strategic, long-range physical planning needs. Staff oversees development of the biennial capital budget and serves as university representatives and project managers for the design of new facilities, additions, utility improvements and large scale remodeling projects.

Environment, Health and Safety (EH&S)
EH&S provides guidance, technical consultation and expertise to the campus community in the areas of biological, chemical, environmental, radiation, lake, and fire and life safety.

Physical Plant (PP)
PP is responsible for the maintenance of campus buildings, grounds, utilities and vehicles. Design resources, construction trades and specialized facilities services are available for departmental requests and remodeling projects on a fee-for-service basis.

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

Transportation Services (TS)
TS is responsible for the coordination and administration of all transportation-related services for the University of Wisconsin-Madison campus community. Primary functions include the sale/management of parking permits, special event coordination, maintenance and enforcement, construction coordination, lot and booth operations, citation payments and appeals, information technology, financial, transportation planning and development of multi-modal options.

Section 2: VCFA Strategic Priorities

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

Note: The information included here is based on the FP&M 2014 EID Plan Update and focuses on activity that has occurred since the Plan Update was submitted on December 1, 2014. For a complete list of key actions, survey baseline measures, target performance indicators, and milestone accomplishments achieved prior to December 1, 2014, please reference the 2014 Plan Update document.

Description
The FP&M EID initiative is a shared responsibility between the FP&M Divisional EID Team, the FP&M Leadership Team, and seven departmental EID teams representing the staff in each of the following areas: Office of the Associate Vice Chancellor; Capital Planning & Development; Campus Planning & Landscape Architecture; Environment, Health & Safety; Physical Plant; Space Management; and, Transportation Services. The FP&M 2014 EID Plan Update was a product of the Divisional EID Team who used the results of the 2014 Employee Survey to identify seven priorities. In addition, each of the seven departmental teams was tasked with developing their own plan updates to guide EID efforts within their functional area.

FY 15 EID Plan Update – Priorities, Key Actions, & Milestones Achieved, 12/1/14 – 6/30/15

Diversity Recruitment and Retention
FP&M recognizes that diversity and inclusion initiatives help to create an environment where individuals from different backgrounds, orientations, and points of view are treated fairly and given equal access to opportunities and resources. By increasing representation at all levels, FP&M will be able to leverage a broader range of mindsets and backgrounds for more creative problem-solving and decision-making. Other benefits include increased employee and customer satisfaction, higher productivity, and higher retention.

Key Actions
- Use social media and other diverse recruiting tactics. STATUS: ON HOLD DUE TO FP&M HR DIRECTOR VACANCY.
- Partner with campus and community agencies to develop apprenticeship programs with Environment, Health & Safety and the Physical Plant. STATUS: ON HOLD DUE TO FP&M HR DIRECTOR VACANCY.
- Require all FP&M supervisors and managers to attend VCFA-EID trainings. STATUS: COMPLETE FOR CURRENT SUPERVISORS/MANAGERS; ON-GOING FOR FUTURE HIRES.
- Develop a written set of recruitment guidelines for FP&M hiring managers outlining expected best hiring practices and track individual recruitments to ensure guidelines are being consistently followed. STATUS: REQUIRED HIRING GUIDELINES ARE CURRENTLY BEING DRAFTED AS PART OF HR DESIGN IMPLEMENTATION.

Employee Onboarding
A coordinated, integrated FP&M onboarding process for new hires will increase inclusion and employee engagement from the onset of employment and shorten the time from hire to full productivity.

Key Actions
- Create a formal onboarding process across FP&M.
- Ensure onboarding program includes:
    - Information about affinity groups, childcare, transportation options, mission, vision, and core values;
    - Employee handbook and standard operating procedures;
    - Training plan; and,
    - Worksite preparation and onboarding checklists.
- Develop supervisor training regarding onboarding program responsibilities and expectations.
  STATUS: AN FP&M CROSS-FUNCTIONAL WORK TEAM WAS FORMED IN JANUARY 2015 TO DEVELOP PROGRAM RECOMMENDATIONS TO MEET CAMPUS REQUIREMENTS AND INCORPORATE THE ELEMENTS LISTED ABOVE. DRAFT PROGRAM RECOMMENDATIONS WERE PRESENTED TO THE AVC AND DEPUTY AVC FOR REVIEW IN MAY. THE NEXT STEP IS TO APPOINT A STAFF ONBOARDING PROGRAM COORDINATOR WHO WILL BE RESPONSIBLE FOR PROGRAM IMPLEMENTATION AND DEVELOPMENT OF A TRAINING PROGRAM FOR SUPERVISORS.

Performance Reviews
In FY14, all FP&M employees received an annual performance review, but due to the use of multiple formats and different levels of training, not all evaluations accurately describe work performance, set goals for improvement, or include professional development. With HR Design, UW-Madison will be moving to a performance-based merit system making high quality, consistent performance reviews essential. In addition, in FY15 all FP&M supervisors will be required to have a solid understanding of the core EID competencies, which will also be tracked through the annual evaluation process.

Key Actions
- Create a consistent performance evaluation process across FP&M that meets UW-Madison's performance management policy requirements, strengthens the evaluation process, and incorporates EID competencies for supervisors and managers.
- Establish core competencies and expectations for all supervisors regarding performance management and provide necessary training.
  STATUS: A CROSS-FUNCTIONAL WORK TEAM WAS FORMED IN JANUARY 2015 TO MOVE THIS INITIATIVE FORWARD. THE GROUP COMPLETED ITS WORK IN TIME FOR THE FY15 YEAR-END REVIEW PROCESS AND, AFTER CAREFUL CONSIDERTATION, A PILOT OF THE NEW PROCESS WAS CONDUCTED IN THE OFFICE OF THE ASSOCIATE VICE CHANCELLOR, CAPITAL PLANNING & DEVELOPMENT, AND PHYSICAL PLANT – GROUNDS. FEEDBACK FROM THE PILOT GROUPS WILL BE COLLECTED IN JULY AND THE WORK TEAM WILL MAKE MODIFICATIONS TO THE NEW PROCESS, IF NEEDED. ONCE COMPLETE, A TRAINING PROGRAM WILL BE DEVELOPED SO THAT THE NEW PROCESS CAN BE IMPLEMENTED FOR ALL FP&M STAFF IN TIME FOR FY16 MID-YEAR CONVERSATIONS.

Manager and Supervisor Trainings
The 2014 VCFA EID Survey results suggest a need for FP&M managers and supervisors to continue to develop their competencies. FP&M has already made a substantial commitment to this initiative by requiring all managers to participate in the VCFA EID trainings and by offering the four-day APPA Supervisor's Toolkit Workshop. The FY15 EID Plan continues these efforts by focusing on strategies to build credibility, trust, and growth within the division.

Key Actions
- Provide training/resources for employees to increase trust with management, i.e. trainings on purpose of performance evaluations, learning to receive feedback, how to access resources (FP&M HR, Employee Assistance, Ombuds Office, etc.) to help resolve problems.
- Continue to provide APPA Supervisor Toolkit and VCFA Engagement, Inclusion and Diversity trainings for all FP&M supervisors and managers.
  STATUS: AS NOTED ABOVE, ALL FP&M SUPERVISORS AND MANAGERS ARE REQUIRED TO TAKE THE VCFA EID TRAINING SESSIONS AND A PROCESS IS IN PLACE TO TRACK ATTENDANCE. ADDITIONALLY, THE APPA SUPERVISOR TOOLKIT TRAINING PROGRAM, WHICH IS A FOUR-DAY WORKSHOP ON THE 'NUTS AND BOLTS' OF FACILITIES MANAGEMENT SUPERVISION, WAS OFFERED FOR A THIRD TIME AT UW-MADISON IN MARCH 2015 SO THAT ALL REMAINING PHYSICAL PLANT AND MOST EH&S AND TRANSPORTATION SERVICES SUPERVISORS COULD COMPLETE THE TRAINING. THIS WORKSHOP WILL CONTINUE TO BE OFFERED ON AN ANNUAL BASIS SO THAT NEW HIRES AND OTHER FP&M SUPERVISORS CAN PARTICIPATE. ADDITIONAL TRAINING OPPORTUNTIES WILL BE PURSUED ONCE THE FP&M HR DIRECTOR POSITION IS FILLED.

Develop Internal Talent
Employee development builds loyalty in an organization. An inclusive, engaged workforce is required for an environment where employees develop. An exclusive, disengaged workforce where employees do not develop can cost an organization by the loss of talented individuals with aptitude who have a need to progress and learn. FP&M seeks to foster an environment where employees have commitment (a willingness to persevere through a task) and confidence (a belief in one's ability to accomplish tasks) that is supported by the organization, unit and management, regardless of race, gender, age, sexual orientation, political affiliation, or labor organization membership.

Key Actions
- Host an FP&M Job Fair.
- Provide training opportunities for FP&M employees to help them learn how to advance their career either within FP&M or elsewhere at the University.
- Set an expectation that supervisors will provide employees opportunities to build skills.
- Create a model for advancement/career development.
- Provide feedback/mentoring to internal candidates who are not selected for promotional opportunities.
- Promote FP&M's tuition reimbursement policy to all employees.
- Provide professional development opportunities for all employees to stay current in their respective fields.
  STATUS: A PROFESSIONAL DEVELOMENT, TRAINING, AND CAREER GROWTH SECTION HAS BEEN ADDED TO THE NEW PERFORMANCE REVIEW PROCESS FOR ALL STAFF TO ENSURE THAT EVERY EMPLOYEE HAS A PERSONALIZED PROFESSIONAL DEVELOPMENT PLAN. ADDITIONALLY, THE FP&M TUITION REIMBURSEMENT POLICY WAS APPROVED IN DECEMBER 2014 AND IS BEING COMMUNICATED TO ALL STAFF.

Recognition
The 2014 VCFA EID Survey reiterates that recognition, including tools and opportunities, is important to FP&M staff and needs to be improved division-wide.

Key Actions
- Develop supervisory/manager competencies regarding performance appraisals and employee recognition.
- Establish a comprehensive program to acknowledge contributions and recognize employees.
  STATUS: WHILE PROGRESS HAS BEEN MADE IN THE AREA OF IMPROVING PERFORMANCE APPRAISALS, THE PLAN IS TO COMMISSION A CROSS-FUNCTIONAL WORK TEAM LATER THIS SUMMER TO FOCUS ON THIS PRIORITY. IN THE MEANTIME, FP&M CONTINUES TO HOLD ANNUAL LENGTH OF SERVICE AWARDS TO RECOGNIZE EMPLOYEES.

Communication
Communication continues to be a key component for how FP&M informs, includes, and engages employees. The FY15 EID Plan continues to address the diverse needs of staff over multiple shifts as well as those multilingual staff, by using multiple distribution channels to communicate with employees.

Key Actions
- Provide a mechanism to inform FP&M staff of current job opportunities. STATUS: COMPLETE – WEEKLY JOB VACANCY LISTINGS ARE NOW DISTRIBUTED TO STAFF VIA E-MAIL AND ARE POSTED ON BULLETIN BOARDS.
- Provide computer access for employees who do not work in offices. STATUS: IN PROGRESS.
- Allow all employees to attend Benefits Fair, including 2nd and 3rd shift workers. STATUS: COMPLETE. ADDITIONALLY, FP&M PAYROLL STAFF REGULARLY FLEX THEIR SCHEDULES TO MEET WITH 2ND AND 3RD SHIFT EMPLOYEES TO ANSWER BENEFITS QUESTIONS.
- Ensure managers and supervisors regularly pass information on to employees to the best of their ability. STATUS: ON-GOING. ALL E-MAILS TO FP&M STAFF NOW INCLUDE A REMINDER TO SUPERVISORS TO POST COMMUNICATIONS FOR STAFF WHO DO NOT PERORM THEIR WORK ON COMPUTERS AND MESSAGES ARE TRANSLATED WHENEVER FEASIBLE.
- Develop effective strategies for sharing information across the division using multiple distribution channels. STATUS: A MONTHLY FP&M STAFF NEWSLETTER WAS INSTITUTED IN FY15 TO IMPROVE COMMUNICATION. AS A NEXT STEP, THE FP&M EID TEAM PLANS TO COMMISSION A COMMUNICATIONS WORK TEAM LATER THIS YEAR TO IDENTIFY OTHER STRATEGIES TO IMPROVE AND ENHANCE COMMUNICATION WITHIN THE DIVISION.

VCFA Strategic Priority 2: Student Leadership Development (WiGrow)

Goal: Extend WiGrow Initiative to all FP&M student employees.

Description
FP&M piloted the WiGrow program with two groups of students in FY14: (1) Campus Planning and Landscape Architecture – three students studying landscape architecture; and, (2) Transportation Services – 24 students assigned to Booths. Additionally, we expanded the program in Transportation Services to include 33 students in the SAFEWalk program. This allowed us to introduce the program to a group of students working in their field of study and students working primarily to earn income for school. This also allowed us to assess the success and relevancy of WiGrow across a variety of students. Participation in this initiative required that we be more intentional in our interactions with students and that we clearly articulate the knowledge and skills gained by working in FP&M.

Baseline Measure
- Two pilot groups identified for WiGrow completed.
  - Transportation Services Booths – 57 students
  - Campus Planning and Landscape Architecture – 3 students.
- For FY15, we will expand the WiGrow program to all approximately 120 student employees in FP&M.

Target Performance Indicators
- Implementation plan is developed and included in the WiGrow toolkit.
- Number of student supervisors trained for implementation of WiGrow – goal is 100% in FY15.
- Assessment of learning outcomes for students enrolled in WiGrow.
- Number of student employees who complete the WiGrow program – goal is 100% in FY15.
- Learning outcomes for those students participating in WiGrow.
- Number of focused discussions between supervisors and students.
- Percentage of students participating in the pilot groups who receive performance reviews – goal of 100%.
- Final year assessment of pilot conducted with supervisors and students – goal is 100% favorable rating.

Risks & Challenges
- Risk - Supervisors do not have resources and/or skills to adequately coach students.
- Risk - Students lack skills in reflection or are unable to identify transferable skills.
- Risk - Resource allocation and increased demands results in potential to overload/stress staff.

Milestones Accomplished
- WiGrow FP&M Supervisor training – August 2014.
- FP&M WiGrow coordinator, supervisors, and directors provide orientation to WiGrow for participating students – September/October 2014.
- Initial focused discussions completed within 45 days of hire.
  - GOAL: 100% of student employees.
- Evaluation of focused discussion questions/responses.
  - GOAL: 60% of students indicate moderately or strongly agree with the following statement:
    - *"My supervisor helps me make connections between my current work and my academic pursuits."*
  - GOAL: 75% of students indicate moderately or strongly agree with the following statement:
    - *"My supervisor helps me see connections between knowledge gained/used in my current work that are transferable to a future occupation."*
- Collect and report WiGrow performance metrics for focused conversations.
- Develop and implement a supervisor survey to include elements regarding: (1) preparation to implement WiGrow; (2) confidence in implementing WiGrow; and, (3) satisfaction with WiGrow program. Items will form a basis for future years' performance metrics.
- Potential additional goals:
  - Implement a pre and post-career thoughts inventory for student participants.
  - Offer 2 student workshops/retreats for all student employees.

- o Hold another supervisor/manager session.
- o Work with VCFA WiGrow steering committee to submit an article to Inside UW and on the WiGrow website.

STATUS: 100% OF FP&M SUPERVISORS AND 100% OF STUDENT EMPLOYEES IN FP&M PARTICIPATED IN THE PROGRAM THIS PAST YEAR.
(GOAL=100%; ACTUAL=100%, GOAL MET)

IN OUR ANNUAL STUDENT EMPLOYEE SURVEY, 63.42% STATED THAT THEY EITHER MODERATELY OR STRONGLY AGREE THAT THEIR SUPERVISOR HELPED MAKE CONNECTIONS BETWEEN THEIR CURRENT WORK AND THEIR ACADEMIC PURSUITS.
(GOAL=60%; ACTUAL=63.42%, GOAL EXCEEDED).

IN OUR ANNUAL STUDENT EMPLOYEE SURVEY, 78.05% STATED THAT THEY EITHER MODERATELY OR STRONGLY AGREE THAT THEIR SUPERVISOR HELPED MAKE CONNECTIONS BETWEEN THEIR CURRENT WORK THAT ARE TRANSFERABLE TO A FUTURE OCCUPATION.
(GOAL=75%; ACTUAL=78.05%, GOAL EXCEEDED).

TWO STUDENT RETREATS WERE HELD TO PROVIDE TRAINING SESSIONS AND WORKSHOPS FOR STUDENTS TO APPLY DIRECTLY TO THEIR ACADEMIC PURSUITS AND THEIR FUTURE CAREER GOALS. ONE SUPERVISOR RETREAT WAS HELD FOR SUPERVISORS OF STUDENT EMPLOYEES TO DISCUSS THE OVERALL PROGRAM AND HOW TO IMPROVE MOVING FORWARD.

Next Steps & Future Opportunities
- Review/evaluation of responses to focused discussions by supervisors, directors, and the FP&M WiGrow coordinator.
- Review/discuss any additional training needs of supervisors or students.
- Review/evaluation of responses to focused discussions by supervisors, directors, and the FP&M WiGrow coordinator.
- Conduct performance reviews with all students.
- Conduct assessment of WiGrow (supervisors, students, directors) annually.
- Adjust program to meet on-going needs.

VCFA Strategic Priority 3: Resource Stewardship Through Process Improvement

Original Goal: Improve the FP&M customer billing process.

Revised Goal: Improve the FP&M Physical Plant Work Order and Small Projects Processes.

Description
Leadership within FP&M has received feedback that some customers perceive FP&M as not being timely or within cost estimates in addressing service requests, providing required maintenance,

and delivery of in-house projects. As a result, it was decided that a thorough review of the Work Order and Small Project Delivery processes was necessary. Under the guidance of the Administrative Process Redesign (APR) office, a work team with membership from both campus and FP&M was established in February 2015 to reach out to campus customers to understand the customer experience using Lean Six Sigma principles.

Baseline Measure
- Voice of Customer interviews conducted in the Spring 2015 identified three key themes for improvement: Communication, Cost/Billing, and Timeframe for completion of work.
- The Work Order process is not responsive nor user friendly.
- Customers report being frustrated by the lack of transparency and access to timely data/tools.
- A gap exists between customer expectations and realities/constraints of the enterprise.

Target Performance Indicators
- Redesigned processes for Work Orders, small project delivery, and customer billing.
- Requirements for new technology/system to support the redesigned processes.
- A plan to implement the new Work Order processes, including specific points of customer communication.
- A set of metrics to support and control the new processes.

Risks & Challenges
- Challenge – State of Wisconsin rules dictate many aspects of the small project delivery system and impose constraints that limit flexibility.
- Risk – Some FP&M staff are skeptical that current processes can be improved and may be resistant to change.

Milestones Accomplished
- Phase 1: Voice of Customer, Baseline Data, and Identification of Improvement Areas completed in May 2015.
- Phase 2: Intake, Work Order Process, Small Project Delivery, and Billing project charter has been drafted.

Next Steps & Future Opportunities
- Phase 2 potential project team members have been identified.
- Work on Phase 2 is expected to get underway as soon as the draft charter has been approved by the executive sponsors.

Section 3: FP&M Strategic and Operational Priorities - Summary

In addition to the VCFA priorities identified above, FP&M has identified the following goals to pursue in the coming year. These goals have the greatest potential to support and advance FP&M's mission of providing excellence in facilities and services for the UW-Madison community.

Goal 1: Strengthen FP&M's annual performance review process and incorporate EID competencies for supervisors and managers.

Description
FP&M currently requires all permanent staff to receive an annual performance review and has provided an evaluation for 100% of permanent staff in each of the last two years, but there is a need for greater consistency across the organization. In addition, EID competencies need to be added for all supervisors and managers. For FY15, the focus was on enhancing the process, creating consistency across the organization, incorporating EID competencies, and improving the review process for both supervisors and employees. This initiative is especially important because providing meaningful performance evaluations and holding managers, supervisors and staff accountable for performance was identified as a key action in the FP&M 2014 EID Plan Update.

Baseline Measure
- Performance evaluations are required for all permanent staff in FP&M, typically by June of each year.
- Performance evaluations are not required for LTE or student employees.
- A variety of formats is employed for documenting performance reviews.
- Evaluations are not competency based.

Target Performance Indicators
- All performance reviews include a professional development component.
- Each employee receives an annual performance review, completed by May of each year; this includes student employees.
- The format is consistent for employee categories (e.g. exempt has a standard form, non-exempt uses a standard form).
- Training provided to all supervisors on how to provide constructive performance evaluations and coach for success - Goal is 100% of supervisors.
- EID competencies incorporated and communicated in advance of the FY14-15 performance review cycle.
- Performance evaluations completed for 100% of staff.
- Performance evaluations completed for 100% of LTE and student employees.
- Random check of quality of performance reviews are conducted regularly.

Risks & Challenges
- Challenge – Cycle-time for performance reviews has been challenging due to workloads, particularly during the summer months.
- Challenge – Assessing the quality of performance reviews, particularly of the face-to-face interactions, is difficult.
- Challenge – Employees may not trust the process or feel comfortable meeting with supervisors.
- Risk – Assessing employees against an expectation that has not been previously or completely communicated.
- Risk – Competencies not being explained in terms that are readily understood by all employees.
- Challenge – Ensuring performance reviews include face-to-face discussion between supervisor and employee.

Milestones Accomplished

YEAR-END STATUS: IN DECEMBER 2014, FP&M LEADERSHIP FORMED A CROSS-FUNCTIONAL WORK TEAM COMPRISED OF SUPERVISORS AND FRONT-LINE STAFF TO DEVELOP RECOMMENDATIONS FOR A STANDARDIZED PERFORMANCE REVIEW PROCESS AND FORMS THAT WOULD BE CONSISTENT ACROSS THE DIVISION, INCORPORATE EID COMPETENCIES FOR MANAGERS/SUPERVISORS, AND COMPLY WITH THE NEW CAMPUS PERFORMANCE MANAGEMENT POLICY. BECAUSE OF THE MAGNITUDE OF THE CHANGES, IT WAS DECIDED TO PILOT THE NEW PROCESS AND FORMS IN PHYSICAL PLANT-GROUNDS, CAPITAL PLANNING & DEVELOPMENT, AND THE OFFICE OF THE ASSOCIATE VICE CHANCELLOR FOR FY15. STATUS UPDATES BELOW REFLECT THE PROCESS USED BY THE PILOT GROUPS.

- Phase I – Focus on exempt positions (e.g. manager/supervisor/professional)
  - Collect and analyze forms used in FP&M for evaluation of exempt staff . STATUS: COMPLETE.
  - Incorporate competencies into forms for exempt staff – January 2015. STATUS: COMPLETE.
  - Finalize and approve form to be used for exempt staff. STATUS: COMPLETE.
  - Develop job aids to explain competencies and expectations for exempt staff. STATUS COMPLETE.
  - Conduct communication/training campaign to inform exempt staff of new form and competencies to be used for their positions – February 2015. STATUS: COMPLETE.
- Phase II – Focus on non-exempt positions.
  - Collect and analyze forms used in FP&M for evaluation of non-exempt staff. STATUS: COMPLETE.
  - Incorporate competencies into forms. STATUS: COMPLETE.
  - Finalize and approve form to be used for non-exempt staff. STATUS: COMPLETE.
  - Develop job aids to explain competencies and expectations for non-exempt staff. STATUS: COMPLETE.
  - Conduct communication/training campaign to inform non-exempt staff of new form and competencies to be used for their positions. STATUS: COMPLETE.
- Approval of revised format for evaluation form. STATUS: COMPLETE.
- Update training for supervisors on new forms and evaluation process. STATUS: COMPLETE.

Next Steps & Future Opportunities

- The pilot groups completed the FY15 year-end review process using the new forms in June.
- The work team will collect feedback on the new process and forms this summer and make modifications to the process and forms as necessary based on user feedback.
- All FP&M staff will conduct mid-year conversations using the new forms in December 2015.
- Training on the new process and forms will be developed and rolled out division-wide in two phases; first in November 2014 for the mid-year conversations, and second, in March 2016 for the year-end review process.

Goal 2: Continue to develop and disseminate FP&M policies and procedures.

Description

FP&M policies and procedures have not been consistently documented or communicated historically. Last year, the FP&M EID Plan identified the need for clear, consistent, and transparent policies in order to build credibility and trust between the FP&M Leadership Team and employees. This initiative, which began in FY14, focuses on the development/documentation of specific

divisional policies and procedures using a new, standardized template that was developed in 2014. While excellent progress has been made in identifying, prioritizing and drafting policies, a number of policies are yet to be finalized. The goal for FY15 was to make substantial progress in this area.

Baseline Measure
- FP&M lacked a codified process of policy development when this initiative started in FY14.
- Policies and procedures were not formatted and tracked consistently historically.
- Policies were not readily available to staff.
- As of June 2014, an approved process exists for identifying need, drafting policy and procedures, soliciting input, finalizing and communicating policies and procedures; and an approved policy/procedure template has been established; a prioritized list of HR policies to develop has been written; and, an FP&M Policy Advisory Review Group has been formed.

Target Performance Indicators
- Policies and procedures are written in plain, easily understandable language.
- Policies and procedures are communicated across the entire organization through a variety of media.
- Policies are reviewed and updated on a regularly scheduled basis.
- Managers/supervisors are educated on new policies and procedures.

Risks & Challenges
- Challenge – Overcoming past practice.
- Challenge – Acceptance and application by all managers and supervisors.
- Challenge – Staff turnover in FP&M Human Resources and Office of the AVC have reduced staff resources to draft and move new policies through the approval process.

Milestones Accomplished
- Complete final approval of the five pending policies – September 2014.
- Continue to develop 38 additional policies already identified – continuing throughout FY15, with a goal of completing at least two new policies per quarter.
- Additional policies developed and communicated as needed – On-going.

STATUS: IN TOTAL, EIGHT POLICIES WERE DRAFTED AND APPROVED IN FY15: PROCEDURE FOR POLICY DEVELOPMENT, TUITION REIMBURSEMENT, COMMITTEE PARTICIPATION, EVENT PARTICIPATION, DISCRETIONARY EQUITY AND RETENTION ADJUSTMENT, DISCRETIONARY MERIT COMPENSATION, STAFF PARKING ASSIGNMENT POLICY, AND PURCHASING CARD.

Next Steps & Future Opportunities
- Monthly meetings of the Policy Advisory Review Group are occurring to ensure that steady progress occurs on this goal; currently, the group is completing its review of two additional policies: Leave Without Pay and Safety Shoes.
- Several future policy topics are on hold pending implementation of HR Design.
- Efforts are ongoing to ensure policies are translated and distributed division-wide so they are accessible to all staff.

Goal 3: Complete update and launch of a new FP&M website.

Description
Although individual departments have updated webpages over time, the overall FP&M website is outdated, both in content and in design. In addition, there is no overall consistency between departmental pages. Improving the website by aligning with the campus and VCFA standard design and upgrading the content, was identified in FP&M's 2014 Annual Plan as an important component in an improved communication strategy for FP&M. The new site will include pages containing content specifically designed to increase employee engagement, inclusion and diversity and will provide important information to applicants for possible employment in FP&M. While significant progress was made in FY14, the scope of the project is such that this initiative was carried forward in the 2015 Annual Plan.

Baseline Measure
- The old FP&M website was externally-focused with only limited resources for employees (e.g. the Training site).
- Content was not updated on a regular basis.
- As of October 2013, two FP&M departments had launched new websites using the standard DoIT CMS package.
- In January 2014, FP&M hired a new Communications Specialist whose duties include management and oversight of all FP&M websites. As part of this responsibility, the Communications Specialist was tasked with overhauling the external FP&M websites and launching a new employee intranet.

Target Performance Indicators
- Complete re-design of the FP&M website to align with the design of the VCFA homepage. All departments have a consistent, user-friendly design.
- The FP&M website includes an intranet to facilitate communication with employees and improve employee engagement.
- Website traffic is measured via Google Analytics and is analyzed to inform future development.
- Website includes Google Translate to facilitate use of the site in multiple languages.
- Number of FP&M staff members trained in the UW CMS program and using it to manage and update web pages.
- Percent of FP&M sites using CMS and meeting the FP&M standard – goal is 100%.

Risks & Challenges
- Challenge – Departments must agree on a common design.
- Challenge – The time required to create the content for the various sites.
- Risk – Cost and time required to re-design sites.

Milestones Accomplished
- Continue review of existing websites as needed by the AVC Communications Specialist through June 2015.
- FP&M homepage – go live September 2014. STATUS: COMPLETED DECEMBER 2014.
- FP&M intranet – go live September 2014. STATUS: COMPLETED DECEMBER 2014 IN CONJUCTION WITH THE MAIN TOP LEVEL SITE.
- FP&M website committee formed - October 2014. STATUS: THE PURPOSE FOR THIS GROUP HAS CHANGED SOMEWHAT TO ALIGN WITH THE COMMUNICATION PRIORITY FROM THE

2014 EID PLAN UPDATE. A WORK TEAM CHARTER IS BEING WRITTEN. ANTICPATE TEAM FORMATION BY AUGUST 2015.

- All FP&M websites re-designed using CMS – June 2015. STATUS: All SITES ARE CURRENTLY IN VARIOUS STAGES OF DEVELOPMENT USING THE CMS FORMAT. EXPECTED GO LIVE FOR REMAINING SITES, SEPTEMBER 2015.
- FP&M business portals re-designed – starting in July 2015. STATUS: ASSESSMENT OF CURRENT BUSINESS PORTALS NEEDS TO BE DOCUMENTED PRIOR TO STARTING REDESIGN. REVIEW OF BUSINESS PORTALS NOT STARTED YET.

Next Steps & Future Opportunities
- Create a communications work team to align with the communications priority outlined in the 2014 FP&M EID plan. The work team charter is being reviewed and finalized. Team members will include representation from multiple FP&M departments. The team will focus on creating consistent communication methods across the division, utilizing department websites as a tool.
- Continue to partner with UW Communications and DoIT, for guidance as appropriate.

Goal 4: Provide project management services for capital projects.

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

Baseline Measure
- Baseline Measures exist for the completion of capital projects (three projects scheduled for completion during FY15).

Target Performance Indicators
- Complete projects on time, within budget to the specified level of quality.
- Complete planning & design on 14 projects ($85M) during FY15. STATUS: PLANNING AND DESIGN COMPLETED ON SEVEN PROJECTS DURING FY 15.
- Complete construction on 3 projects ($463M) during FY 15. STATUS: CONSTRUCTION COMPLETE ON TWO AND A HALF PROJECTS DURING FY 15.
- Quality, schedule, and budget established by construction documents and bids; tracked and managed at the project level.

Risks & Challenges
- Challenge – process and schedule are determined by UWSA and DFD. Within the last year, the scheduling of A/E selections has slowed considerably and it is difficult to target selection dates for projects.
- Challenge – DFD holds the planning, design and construction contracts for all capital projects.
- Challenge – ensuring targeted funds are raised in a timely fashion for those projects funded, in part, or entirely, by gifts.

Milestones Accomplished

Construction complete by 6/30/2015

- West Campus Cogeneration Facility Chiller Addition ($67M) – Complete construction by January 2015. STATUS: CONSTRUCTION COMPLETE BY JUNE 2015.
- University Houses Renovation ($15M) – Complete construction by May 2015. STATUS: PROJECT HAS BEEN DELAYED AND SPLIT INTO PHASES FOR COMPLETION. PHASE I WORK WILL BE COMPLETE BY JUNE 2015, PHASE II WILL BE COMPLETE AUGUST 2015.
- Dayton Street Utility Extension Project Phase II ($3M) – Complete construction by June 2015. STATUS: CONSTRUCTION COMPLETE JULY 2015.

Planning/Design complete by 6/30/2015

- Babcock Hall Dairy Plant Renovation & Center for Dairy Research Addition ($31.9M) – complete construction documents by October 2015. STATUS: CONSTRUCTION DOCUMENTS WILL BE COMPLETE BY JUNE 2016.
- Bascom 165 Office Remodel ($1.74M) – complete bidding May 2015. STATUS: BIDDING MAY BE COMPLETE FALL 2015; NOT SURE YET.
- Chemistry Instructional Addition and Renovation ($108M) – complete 10% concept report by fall 2015. STATUS: 10% DESIGN REPORT WILL BE COMPLETE BY FALL 2015.
- Elizabeth Waters Hall Renovation ($10.1M) – complete bidding by January 2015. STATUS: BIDDING WAS COMPLETE DECEMBER 2014.
- Engineering Hall Structures Lab Addition ($1.6M) – complete A/E Selection October 2014. STATUS: A/E SELECTION COMPLETE DECEMBER 2014.
- Meat Science and Muscle Biology Building ($42.8M) – complete 10% concept report by December 2014. STATUS: 10% DESIGN REPORT COMPLETE JANUARY 2015.
- Memorial Union Renovation/Alumni Park ($62.6M) – complete construction documents by December 2014. STATUS: CONSTRUCTION DOCUMENTS COMPLETED DECEMBER 2014.
- Music Performance Facility, Phase I ($21.8) – complete 35% design by May 2015. STATUS: 35% DESIGN COMPLETE APRIL 2015.
- Parking Ramp 75 Addition ($33.9M) – complete construction documents by March 2015. STATUS: CONSTRUCTION DOCUMENTS COMPLETE AND BIDS OPENED MARCH 2015.
- SERF Replacement Project ($87.7M) – complete A/E selection in Spring 2015. STATUS: A/E SELECTION TARGETED FOR FALL 2015.
- UW Police Department Addition ($4.8M) – complete A/E selection in November 2014. STATUS: A/E SELECTION COMPLETE DECEMBER 2014.
- West Playfield Upgrade ($6.7M) – complete A/E Selection in October 2014. STATUS: A/E SELECTION COMPLETE FEBRUARY 2015.
- Wisconsin Alumni Association Below Center Renovation ($2.8M) – complete construction documents by December 2014. STATUS: CONSTRUCTION DOCUMENTS COMPLETE DECEMBER 2014.
- Witte/Sellery Halls Renovation ($47M) – complete A/E Selection by May 2015. STATUS: A/E SELECTION COMPLETE DECEMBER 2014.

Next Steps & Future Opportunities

- Each project manager will continue to monitor project schedules, budgets and quality and will work with campus customers and, through the Division of Facilities Development (DFD), work with contractors to complete both continuing and new projects on time, within budgets and to the expected levels.

Goal 5: 2005 Campus Master Plan on-going implementation.

Description
This goal tracks the number of major capital improvement project initiatives and overall development goals identified in the approved 2005 Campus Master Plan. The objective is to assure that we are moving ahead with the goals identified in the plan and that the Campus Master Plan is a highly respected and utilized document guiding campus growth and assuring transparent, participatory planning for the physical development of campus. This is an on-going priority for FP&M. The 2015 Campus Master Plan update is now underway and will be completed in FY16.

Baseline Measure
- The Baseline Measurement is the number of major projects and overall goals completed annually. From 2005 through July 1, 2014, we have completed (or will complete in 2013) 28 major projects (roughly 29%) of the 95 potential projects identified in the 20-year 2005 Campus Master Plan.
- In FY15, the following capital projects will continue with planning and design development:
    o Memorial Union – Phase II
    o Alumni Park
    o Babcock Hall Dairy Plant renovation & Center for Dairy Research Addition
    o College of Engineering Facilities Master Plan
    o Music Performance Facility
    o Veterinary Medicine Expansion Feasibility Study

Target Performance Indicators
During FY15, the following capital projects will begin their planning & design development:
- Chemistry Instructional /Addition & Renovation
- Meat Science & Muscle Biology Building
- UW Police Department Addition
Performance indicators for these projects include:
- Quality, schedule, and cost established for each project.
- Comparison of map of completed projects to the 2005 Campus Master Plan graphic.

Risks & Challenges
- Risk - Project implementation involves construction delays, weather and material delivery difficulties.
- Challenge – Funding of projects. State dollars are scarce and each project needs to be prioritized against other campus, UW System, and State priorities. Private dollars also continue to be scarce as resources are directed to other priorities and initiatives on campus that do not support brick and mortar projects.
- Risk - Resource allocation and increased demands results in potential to overload/stress staff.

Milestones Accomplished
- Each of the above projects has their own milestone schedules and overall completion schedule as defined in Capital Planning & Development's Quarterly Report.

IN FY15, 28 PROJECTS HAVE BEEN COMPLETED SINCE 2005. TWO PROJECTS ARE IN CONSTRUCTION AND FIVE PROJECTS ARE IN PLANNING & DESIGN, INCLUDING:
- MUSIC PERFORMANCE, PHASE I

- BABCOCK HALL DAIRY PLANT RENOVATION
- MEAT SCIENCE AND MUCSLE BIOLOGY FACILITY
- UW POLICE DEPARTMENT ADDITION
- WALNUT STREET GREENHOUSES (SOON TO BE IN ADV. PLANNING)

THE FOLLOWING PROJECTS ARE IN ADVANCE PLANNING OR AT THE UNIT MASTER PLAN LEVEL:
- COLLEGE OF ENGINEERING FACILITIES MASTER PLAN (SOON TO BE COMPLETE)
- VETERINARY MEDICINE EXPANSION FEASIBILITY STUDY (SOON TO BE COMPLETE)
- COLLEGE OF LETTERS & SCIENCES FACILITIES MASTER PLAN

Next Steps & Future Opportunities
- Continue to support major projects and 2005 Campus Master Plan goals to assure that they are implemented effectively. At the end of each fiscal year, we will review the number of projects completed to assure that we are moving forward with the planned opportunities and goals of the 2005 Campus Master Plan and recommendations coming out of the 2015 Campus Master Plan Update process. NOTE: THIS GOAL WILL BE COMBINED WITH GOAL 7 IN FP&M'S FY16 ANNUAL PLAN TO REFLECT THE SHIFT IN FOCUS TO THE 2015 CAMPUS MASTER PLAN.

Goal 6: Improve storm water management on campus.

Description
UW-Madison is part of the Yahara Lakes watershed and occupies over 4 miles of lakefront on its largest water body, Lake Mendota. Virtually all of the storm water runoff from campus ends up in either Lake Mendota or Lake Monona. This objective tracks pervious land area changes for the main UW-Madison campus to better understand our impact on storm water runoff. The goal, which is a continuation from FY14, is to maintain or increase the amount of pervious area within the main campus boundary. Maintaining or increasing pervious area is important because it helps the university meet Wisconsin Department of Natural Resources (DNR) requirements for storm water runoff, as well as sediment and phosphorus control. Doing so demonstrates the UW's commitment to improving water quality; reducing the quantity of storm water flowing into the lakes (and thus reducing risk of flooding); and, strengthens relationships with surrounding municipalities.

Baseline Measure
- As of 2008, campus consists of approximately 556 acres of pervious area (66%) and 283 acres (34%) of impervious area north of University Avenue (including the Lakeshore Nature Preserve).
- Additional studies are being completed for the current conditions across campus including the urban area south of University Avenue.

Target Performance Indicators
- Initial goal is to increase pervious areas to 70% and decrease impervious areas to 30% campus-wide by 2015.
- Calculations will be done on an annual basis to compare prior data with changes made over the past fiscal year in development.
- Changes to the overall numbers are based on the number and types of major capital improvement projects in development each year.

Risks & Challenges
- Challenge – tracking changes and ensuring that the data set is accurate and up-to-date.

Milestones Accomplished
- Update storm water model and analysis for entire campus as part of the overall Campus Master Plan update process in 2015.
- Review and recommend changes to major capital improvement projects to assure storm water management is being considered and impervious areas are reduced as much as possible to meet the goal.
- Confirm 70% goal can be met with current, on-going projects in FY15.

FY15 STATUS: WE CONTINUE TO WORK ON A PROJECT- BY-PROJECT BASIS TO MAXIMIZE STORMWATER INFILTRATION, INCREASE PERVIOUS AREAS AND DECREASE IMPERVIOUS AREAS ON CAMPUS. A COMPREHENSIVE ANALYSIS AND GREEN INFRASTRUCTURE PLAN IS BEING DEVELOPED AS PART OF THE 2015 CAMPUS MASTER PLAN UPDATE PROCESS, INCLUDING A COMPLETELY UPDATED STORMWATER MODEL AND RECOMMENDATIONS FOR ADDITITIONAL BEST MANAGEMENT PRACTICES.

Next Steps & Future Opportunities
- Continue to monitor major projects during design and construction to assure best management practices are used to manage and reduce storm water impacts.
- Utilize the results of the 2015 Campus Master Plan Update process and the Green Infrastructure/Stormwater Management Plan recommendations to manage stormwater on campus in a more sustainable fashion.

Goal 7: 2015 Campus Master Plan Update.

Description
This goal is the start of the 2015 Campus Master Plan Update process which will be completed over the next 18 to 24 months with eventual completion in FY16, Q3. The project includes an update to the 2005 Campus Master Plan; the development of a Campus Landscape Master Plan; an update the 2005 Long Range Transportation Plan; an update to the 2005 Campus Utilities Master Plan; and the development of a new Storm Water Management Master Plan for the campus.

Baseline Measure
The Campus Master Plan is updated every 10 years to reflect changing facility needs, priorities and initiatives related to meeting the needs of the campus community. The last Campus Master Plan was completed in 2005 which followed a 1995 Campus Master Plan. The process will be fully transparent and engaging for the entire campus community of faculty, staff, students and community members. In 2005-06, over 225 stakeholder meetings were held during the planning process. The 2015 Campus Master Plan Update process will likely have a similar number of meetings to engage the campus constituencies.

Target Performance Indicators
The target schedule is as follows:

- Finalize communications plan – June-July 2014.
- Identify and select consultant – July-August 2014.
- Hire additional .5 FTE in FP&M to assist in planning efforts – September 2014.
- Initiate project, gather and analyze data – September 2014.
- Develop concepts and meet with constituency groups - September 2014 – January 2015.
- Present preliminary plans in a public forum – March 2015.
- Present final draft plans in a public forum – October 2015.
- Complete project and deliverables – December 2015.
- Share final documents with stakeholder groups – December 2015 through July 2016.

Other performance indicators include the number of stakeholder meetings held, how many people are engaged in the planning process, and how effectively the recommendations are communicated to the stakeholders, campus leaders and the various constituency groups.

Risks & Challenges
- Challenge – various stakeholders could feel as though they were not involved enough or their personal recommendations were not heard if not included in the final plan.
- Challenge – the planning process make take longer if public discussions require additional meetings and negotiations with stakeholders.
- Risk - Resource allocation and increased demands results in potential to overload/stress staff within FP&M that are facilitating the Campus Master Plan process on top of their already busy schedules.

Milestones Accomplished
- Brief campus leadership on the Campus Master Plan scope/process   August 2014
- Work with DOA/DFD to hire consultant team   August 2014
- Hire additional .5 FTE in FP&M   September 2014
- Kick-off meeting with consultant team   September 2014
- Present preliminary plans to stakeholders   March 2015
- Present final draft plans to stakeholders   October 2015
- Complete final documents   December 2015
- Share final documents with stakeholders   July 2016+

FY-END STATUS: REVISED SCHEDULE (BASED ON DELAY IN CONTRACTING):
- CONSULTANT TEAM UNDER CONTRACT   JAN. 29, 2015
- KICK-OFF MEETING WITH CONSULTANT TEAM   FEB. 2, 2015
- PRESENT PRELIM PLANS TO STAKEHOLDERS   SEPTEMBER 2015
- PRESENT FINAL DRAFT PLANS TO STAKEHOLDERS   APRIL 2016
- COMPLETE FINAL DOCUMENTS   SEPTEMBER 2016
- SHARE FINAL DOCUMENTS WITH STAKHOLDERS   OCTOBER 2016+

Next Steps & Future Opportunities
- Work to assure campus community is fully engaged in the planning process for the Campus Master Plan Update process. Meet regularly with staff in University Communications to push out public information on upcoming stakeholder meetings and input sessions on draft plans. Keep senior campus leadership informed and involved in the planning process.
- Work with the consultant team to develop draft concepts and initial planning recommendations to be shared with the campus community in September 2015. Update the

plan in Spring 2016 based on comments received and present final draft documents the Fall of 2016 for completion by the end of the calendar year in 2016. Begin zoning approval process with the City of Madison early in the draft planning process to assure a smooth approval by the local neighbors, alders, city staff/leadershiup, and city committees.

Goal 8: Sustainability – Continue to advance the 'UW Builds Green' program.

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

Baseline Measure
* Advance the 'UW Builds Green' program.

Target Performance Indicators
* Leadership in Energy and Environmental Design (LEED) – Silver certification.
* Successful LEED certification.
* Adherence to the principles of sustainability included in the Division of Facilities Development (DFD) Sustainability Guidelines.

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

Milestones Accomplished
Currently, there are six projects expected to achieve LEED certification:
* Aldo Leopold Residence Hall – tracking LEED Silver (certification expected July 2014). STATUS: LEED GOLD CERTIFICATION AWARDED JULY 2014.
* Charter Street Heating Plant – tracking LEED Gold (certification expected August 2014). STATUS: LEED CERTIFICATION PROCESS CONTINUING–GOLD CERTIFICATION EXPECTED OCTOBER 2015.

- Memorial Union Renovation, Phase I – tracking LEED Silver (certification expected October 2014). STATUS: LEED CERTIFICATION PROCESS CONTINUING–SILVER CERTIFICATION EXPECTED MARCH 2016.
- Signe Skott Cooper Hall – tracking LEED Silver (certification expected October 2014). STATUS: LEED SILVER CERTIFICATION AWARDED OCTOBER 2014.
- Student Athlete Performance Center, Camp Randall North Addition – tracking LEED Silver (certification expected August 2014). STATUS: LEED SILVER CERTIFICATION AWARDED MARCH 2015.
- Wisconsin Institutes for Medical Research Phase II – tracking LEED Silver (certification expected September 2014). STATUS: LEED SILVER CERTIFICATION EXPECTED MARCH 2016.

Next Steps/Possible Barriers to Success
- DOA/DFD HAVE INDICATED THAT THEIR SUPPORT FOR LEED CERTIFICATION MAY BE LIMITED GOING FORWARD

Goal 9: Redesign of parking permit renewal process – complete redesign to allow for annual renewal in lieu of priority ranking system.

The current parking permit renewal system requires departments to reprioritize employees each year to allocate parking. Customers must then apply for parking every year. Departments, including Transportation Services (TS), dedicate hundreds of hours to this process while at least 80% of employees elect to park in the same lot each year (TS sells about 10,000 annual base lot permits). The prioritization process also requires substantial processing power, storage space, and system oversight due to the high traffic generated by customers attempting to accept their offers online. A parking renewal system would allow employees to keep their same lot each year and TS would only need to actively manage the 20% of employees who need to change their parking assignment. This project was begun as part of the 2014 Annual Plan. Due to the size and scope of the effort, work on this process improvement continued in FY15.

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

Target Performance Indicators
- Reduce the time needed for individuals and departments to obtain parking (reduce overall time by 70%).
- Reduce departmental costs by reducing role of Unit Transportation Coordinator (UTC) functions (reduce resource need by 50%).
- Reduce TS administrative costs to manage the process (reduce by 40%).
- Cycle time for permit process.
- Permit processing costs.
- Customer satisfaction survey/feedback.

Risks & Challenges
- Transfer of decision-making – a renewal policy will take decision-making authority away from Department management and shift it to TS.
- Need for an Exceptions policy to manage replacement of key personnel, departmental moves, loss of space due to construction, and sabbaticals.

- Challenge to convince Departments of the benefit to most of their staff for using a faster, more efficient process as a trade-off for a diminished decision-making role.
- Communicating a changed role for the UTCs -- more of a communication liaison with a reduced commitment of resources.
- Integration of new process into software programs and processes.
- Timeframe available for accomplishment.

Milestones Accomplished
- Collect and analyze data from test group – complete July 2014. STATUS: COMPLETED AUGUST 2014.
- Compile an overview of results and feedback to be shared with stakeholders – complete July 2014. STATUS: COMPLETED AUGUST 2014.
- Finalize timeline, cost, and delivery dates for custom changes – complete August 2014. STATUS: STILL WORKING WITH VENDOR TO FINALIZE CUSTOM SOFTWARE CHANGES.
- Implement work teams to determine role of UTCs and Exceptions process – complete August 2014 (UTCs) and July 2014 (Exceptions). STATUS: WORK TEAMS WERE COMPLETED. WORK IS STILL ON-GOING TO DEVELOP EXCEPTION PROCESS.
- Develop specific guidelines for Exception handling – complete November 2014. STATUS: WORK IS STILL UNDERWAY ON EXCEPTION HANDLING.
- Develop reports for UTCs (based on their role) – complete November 2014. STATUS: REPORTS HAVE NOT BEEN COMPLETED.
- Develop specific Waitlist priority in T2 Flex – complete.
- Begin scheduling meetings in Fall 2014 with all major stakeholder groups to present the process plan to be used in implementation; adjust the plan as needed based on feedback from groups – begin September of 2014; complete by December 2014. STATUS: MEETINGS WERE HELD WITH ALL THE SHARED GOVERNANCE GROUPS TO OUTLINE THE CHANGES AND GARNER FEEDBACK.
- Continue to test process as tasks changes are made – on-going. STATUS: TESTS ARE STILL ON-GOING.
- Finalize decision to proceed – January 2015. STATUS: A DECISION WAS MADE IN JANUARY 2015 TO DELAY THE PROJECT IMPLEMENTATION BASED ON THE NEED TO FURTHER DEVELOP THE EXCEPTIONS AND NEEDED SOFTWARE UPDATES.
- Develop communication plan for roll out in spring 2015 – complete December 2014. STATUS: COMMUNICATION PLAN HAS BEEN DRAFTED BUT NOT COMPLETED.

Next Steps & Future Opportunities
- Continue to develop plans to manage exceptions. Work with stakeholders to review and revise.
- Continue to work with our software provider to install the needed upgrades and updates to our system to effectively manage the process.
- Finalize the communication plan and meet with shared governance groups to outline the process.
- Complete the hiring of the vacant associate director positions to allow more time to be dedicated to this project.

Goal 10: Construction of the UW Hospital Parking Ramp 75 Expansion.

Description
The expansion of the Hospital parking structure will be used to replace parking on the west campus that was lost to construction and provide for additional visitor parking capacity to meet the needs of the hospital. 100% design was submitted to DOA in June 2014.

Baseline Measures
- Current parking structure is at 95% capacity.
- Project is at 100% Design.

Target Performance Indicators
- Target is to complete structure design by August 2014.
- Target is to add 780 spaces to existing facility at a cost of $33,950,000.

Risks & Challenges
- Risk - An area transportation study of street and road capacities; pedestrian access through an active construction site; and, managing construction over the full range of seasonal climatic conditions.
- Challenges - Maintaining parking in one of Wisconsin's busiest parking facilities while the facility capacity is doubled; staging and construction in very limited space; heavy construction adjacent to an advanced high-risk surgery center; collaborating with Hospital operations and administration; and, providing adequate parking for patients and visitors while the construction is underway.

Milestones Accomplished
- Final Review and edits to designs – August 2014. STATUS: DESIGN WAS COMPLETED.
- Bid Opening – March 2015. STATUS: BIDS WERE OPENED AND PROJECT HAS INITIALLY COME IN $2 MILLION UNDER THE A/E's CONSTRUCTION COST ESTIMATE.
- Start of Construction – August 2015. STATUS: CONTRACT IS SIGNED AND CONSTRUCTION IS SCHEDULED TO BEGIN IN AUGUST 2015.
- Substantial Completion – September 2016. STATUS: A MEETING WITH THE CONTRACTOR IS SCHEDULED FOR JULY 2015; FINAL SCHEDULE WILL NOT BE DETERMINED UNTIL THAT MEETING.

Next Steps & Future Opportunities
- Partner with UW Health to develop temporary parking on the future site of WIMR III and Forest Products Lab to reduce some of the parking lost during construction.
- Work with the contractor to look for early construction opportunities that will not reduce parking while moving up the Substantial Completion date.
- Maintaining communication with UW Health and customers to inform them of construction phasing and impacts.
- Schedule regular project meetings to ensure that the project remains on schedule and within budget.

Goal 11: Complete beta-test of Biosafety's ARROW project initiative and develop training tools for PIs. COMPLETE

Description
The Application Review for Research Oversight at Wisconsin (ARROW) project is a comprehensive campus-wide effort to streamline the process and create a single point source for animal, human, and biosafety, protocol registrations. This project is a carryover from FY13. The project is managed by the Graduate School and is designed to work in conjunction with federal grants and their management. EH&S is providing assistance to help with the final design and programming features needed to make the Institutional Biosafety Committee (IBC), Institutional Animal Care and Use Committee (IACUC) and the Institutional Review Board (IRB) process work as one unit. EH&S has contributed significant resources to develop smart forms and programing.

Baseline Measures
- This goal was initiated as part of FP&M's 2014 Annual Plan and will continue in FY15.
- The current IBC protocol application is a manual paper process. Forms are reviewed manually by the Office of Biological Safety (OBS) staff. Completed forms are copied into a tracking system. Data from the tracking database are not readily available to investigators.
- PIs are required to re-enter background information for each protocol.

Target Performance Indicators
- Reduced time for PIs to enter information into the ARROW database.
- Increased efficiency in the development of IBC protocols. OBS staff will spend less time checking protocol information; entering the information into a tracking system; corresponding with investigators; and, make it easier to create meeting agendas, meeting minutes, and action items.
- Automation of the current manual process.
- Wider availability of information to researchers and PIs.
- Protocol information would be held in centralized, single-source database.
- Processing time for protocol updates/reviews.
- Customer satisfaction – feedback from PIs.

Risks & Challenges
- Risk – Existing servers may be inadequate and need to be replaced or upgraded.
- Risk – Limited resources are available for on-going support.
- Challenge – Loss of programmer (early retirement from the Graduate School).
- Challenge - The system must meet the federal biological safety regulations and guidelines promulgated by accrediting agencies.
- Challenge - The information system must support business processes and data needs of researchers and compliance mandates.
- Challenge - The information system must implement a security model that ensures appropriate control over the information, allowing access only to those who are authorized.
- Challenge - The information system must deliver a high level of performance for its customers.
- Risk - The limitation on project resources and recent personnel changes may continue to affect meeting completion dates.

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

Milestones Accomplished
- Development of forms, workflow and protocols – August 2013.
- Development of reporting tools – August 2013.
- Pilot testing – September 2013.
- Data migration/conversion plan – October 2013.
- On-going maintenance and support plan complete – October 2013.
- Communication plan complete – October 2013.
- Training tools and reference materials complete – November 2013.
- Delivery of training – December 2013.
- Initial projected 'go-live' date – December 2013.
- Due to higher priorities in the Graduate School, this project has been pushed back. The latest projection of the go-live date is August 30, 2014.
- EH&S continues to work with the Graduate School on the implementation of the project. – August 2014.
- The project is currently going through alpha testing – September 2014.
- EH&S has been preparing UBS staff for training researchers on the rollout of the program – September 2014.
- EH&S will also assist with patches to fix problems within the program – September 2014.

THIS PROJECT WAS COMPLETED SEPTEMBER 2014. PATCHES WILL CONTINUE TO BE MADE TO THE PROGRAM. OVER THE NEXT THREE YEARS ALL OF THE RESEARCHERS (ABOUT 400 PRINCIPAL INVESTIGATORS) WITH IBC PROTOCOLS WILL BE CONVERTED TO THE NEW ARROW PROGRAM.

Goal 12: Develop an Environment, Health & Safety Strategic Plan

Description
The development of a Strategic Plan for Environment, Health and Safety (EH&S) will provide a broad framework of themes and objectives designed to guide the development of programs and specific action plans for EH&S. The Strategic Plan will build on our sixty-year history of providing high-quality customer service and institutional support to the campus community. The final product will help us to align resources with Facilities Planning and Management (FP&M) and campus missions. The EH&S Strategic Plan will assist the department with prioritizing needs and efficiently allocate resources to provide consistent, and timely responses to problems and challenges.

Baseline Measures
- Benchmarking of EH&S trends:
  o Compiling an inventory of EH&S programs
  o EH&S program benchmarking against external (peer) programs
- Customer survey feedback and analysis:
  o Who are our customers?; what do they need?; what is our current capability to meet those needs?; what are the biggest gaps?
    - What are our customers telling us about EH&S as a department and campus safety programs in general?

- What are the customer's preferences for EH&S involvement in decisions?
- Identify potential areas for improvement:
  - Gap analysis:
    - Identify areas of ineffectiveness.
    - Identify gaps for areas of requirements that are not being met.
  - Workflows of internal processes to be evaluated.

Target Performance Indicators
- What will success look like for the future of EH&S at UW-Madison? Areas of focus will be:
  - Management (leadership, engagement, inclusion, diversity, delegation, structure, interdisciplinary teams, and professional development).
  - Customer Service (responsiveness, value, quality, and meeting expectations) and Education/ Training (in-person and on-line training, meeting demographic, and cultural needs).
  - Facilities (services for buildings, incinerator, boathouse, and hazardous waste).
  - Operations (budgets, technology, and regulatory compliance).
  - Employee focus (engagement, structure, professional development, interdisciplinary teams, and training).
  - Performance (key areas tracked using operational performance metrics).
- 2014 customer survey results.
- EID survey results (2012 and 2014).
- Department operational performance metrics evaluation.
- EH&S activities and alignment with institutional, FP&M and EH&S missions.
- **Multivariate analysis** of EH&S programs (targets) to identify strengths and weaknesses.
  - Management/Leadership.
  - Customer focus/service and education/training.
  - Building environments/facilities.
  - Operations focus.
  - Workforce/employee focus.
  - Performance and results.

Risks & Challenges
- People resources and time to complete the various tasks. Depending on the level of work needed; some areas may be difficult to complete, especially if there are staff departures in key areas or, if a surge in work load and safety requests come into the department from the campus.
- As we review metrics and survey data, there will need to be some level of validation of the numbers. This is needed to ensure that we are not being misled in our assumptions. Utilizing common sense, subject matter area experts, and benchmarking, will help to ensure that valid conclusions are reached.
- Compliance structure and mandated changes creates a vulnerability to operations. Unfunded mandates can also create a tremendous amount of work. EH&S closely monitors federal and state regulations for changes and updates, but they continue to grow and change incessantly. We cannot predict future events; we can only react to them as they occur. A large component of ensuring compliance with regulations is through federal and state agency inspections. These may come in the form of annual, biannual programmatic inspections, or they may be in the form of surprise, unscheduled inspections. Finally, there may be inspections due to an environmental or safety-related incident on campus.

Milestones Accomplished
- Compile and complete the analysis of the EH&S customer and EID surveys – Q1.
- Review EH&S mission and vision alignment with the university and FP&M. Review EH&S metrics for relevancy and content – Q2. STATUS UPDATE: THIS PROJECT HAS BEEN TABLED UNTIL 2016 DUE TO HIGHER PRIORITY TASKS. THE KEY PROJECT GOING FORWARD WILL BE TO ADDRESS THE ON-GOING RELATIONSHIP WITH THE UW HEALTH RADIATION SAFETY PROGRAM. A NARRATIVE DOCUMENT HAS BEEN PREPARED ENTITLED EH&S RADIATION SAFETY PROGRAM AND UW HEALTH RELATIONSHIP – HURDLES AND CHALLENGES
- Conduct and complete multivariate analysis of EH&S programs – Q3.
- Prepare and finalize an EH&S Strategic Plan report – Q4.

Next Steps & Future Opportunities
- THE EH&S STRATEGIC PLAN GOAL HAS BEEN DEFFERED TO 2016 DUE TO A HIGHER PRIORITY TASK. THE NEW GOAL IS ENTITLED EH&S RADIATION SAFETY PROGRAM AND UW HEALTH RELATIONSHIP.
- A NEW WORK PLAN IS BEING PREPARED AND WILL BE COMPLETED BY JULY 2015.
- THE GOAL OF AN EH&S STRATEGIC PLAN WILL BE REVISITED AT THE END OF THE 2015-2016 FISCAL YEAR.
- THE STRATEGIC PLAN GOAL WILL BE RE-EVALUATED. THE PROJECT OUTLINE AND OBJECTIVES WILL BE REVIEWED AND THE MILESTONES WILL UPDATED TO REFLECT THE NEW TIMELINE IN MAY/JUNE 2016.
- THE REVISED STRATEGIC PLAN GOAL WILL BE ADDED TO FP&M'S FY16 ANNUAL REPORT IN JULY 2016.

Goal13: Collaborate with Educational Innovation groups to develop a learning space improvement plan.

Description
For the past several biennia UW-Madison has requested funding from the UW System Classroom Renovation Instructional Technology (i.e. instructional space) Improvements Program in the capital budget to upgrade the condition and instructional environment in the general assignment classrooms. In FY13-15, UW-Madison will create new collaborative, flexible learning spaces by remodeling eleven classrooms into seven classrooms. The Educational Innovation (EI) initiative will create a sustained campus environment that maintains and enhances student learning while gaining efficiencies and generating new resources. EI will take place across campus, within and across programs, departments, colleges and centers, and will be supported by new and streamlined policies and practices. A learning space improvement plan needs to be developed which embodies the goals and principles of EI while leveraging the funding opportunities in the biennial capital budget.

Baseline Measures
- The number and type of classroom renovation projects completed through the UW System program.
- The current inventory of collaborative, flexible learning spaces on campus.
- The current utilization rates for classrooms with instructional technology.

Target Performance Indicators
Increased interaction with EI groups on campus.
- Develop a comprehensive learning space improvement plan. STATUS: A LEARNING SPACE IMPROVEMENT COMMITTEE WAS FORMED WITH THE VICE PROVOST FOR TEACHING AND LEARNING. THE COMMITTEE INCLUDES FACULTY, STUDENTS, AND VARIOUS ACADEMIC UNITS.
- Coordination and acceptance of learning space improvement plan by UW System. STATUS: A LEARNING SPACE IMPROVEMENT PLAN WILL BE PREPARED BY FALL 2015 TO PROVIDE A CONTEXT FOR THE 2015-17 CLASSROOM RENOVATION AND INSTRUCTIONAL TECHNOLOGY IMPROVEMENT CAPITAL BUDGET REQUST FOR UW-MADISON.
- The number of collaborative, flexible learning spaces funded through the UW System capital program. STATUS: THE NEED AND DESIRE FOR ADDITIONAL COLLABORATIVE, FLEXIBLE LEARNING SPACES IS SELF-EVIDENT. THESE ARE BEING PROVIDED IN BOTH GENERAL ASSIGNMENT AND DEPARTMENTAL SPACE.
- The utilization rates for instructional space with collaborative, flexible environments.
- The ability to adapt and provide instructional environments to meet changing pedagogies and learning approaches. STATUS: THIS HAS BEEN STUDIED IN THE COLLEGE OF ENGINEERING MASTER PLAN AND WILL BE STUDIED IN THE LEARNING SPACE IMPROVEMENT COMMITTEE, THE SCHOOL OF BUSINESS MASTER PLAN, AND THE CAMPUS LIBRARIES MASTER PLAN.

Risks & Challenges
- Risk – Meeting the growing and changing demand for collaborative, flexible learning spaces.
- Challenge – Creating collaborative, flexible learning spaces which lack adequate resources or the needed support to sustain their operation.
- Challenge – Implementing scheduling policies, processes and practices which maximize the utilization of the flexible learning environments.
- Challenge – Aligning the curricular changes and new pedagogies contemplated by academic departments and faculty with the learning space inventory to identify a plan for development.
- Risk - Resource allocation and increased demands results in potential to overload/stress staff.

Milestones Accomplished
- Complete design in fall 2014 and early spring 2015 to allow the remodeling/construction to occur in summer 2015. STATUS: THE GROUP A CLASSROOM RENOVATION AND INSTRUCTIONAL TECHNOLOGY IMPROVEMENT PROJECTS ARE IN PLANNING AND WILL BE COMPLETED BY EARLY 2016. THE GROUP B PROJECTS ARE BEGINNING DESIGN NOW.
- Engage EI groups in FY15 to assess current state and create a context/plan/request for future needed learning space improvements on campus. STATUS: THE LEARNING SPACE IMPROVEMENT COMMITTEE BEGAN MEETING IN EARLY 2O15 AND WILL PREPARE A PLAN BY OCTOBER/NOVEMBER 2016.

Goal 14: Extend the access to university facilities and related data via INSITE to FP&M units and campus administrative users.

Description
The Space Management Office (SMO) collects, maintains and analyzes information about university facilities and space use. UW-Madison facilities information in tabular and graphic formats resides,

etc. in INSITE, a web-based application. Additional data (i.e. Principal Investigators, occupancy, grants) was collected through the 2012 Facilities and Administrative space survey and populated in INSITE. Person/payroll data is refreshed twice per year and occupancy data is updated as provided by campus departments.

The goal for FY15 is to extend access to university facilities and related data to FP&M units and campus administrative users. The data can be used to respond to basic inquiries, for analytical purposes in planning, or for daily decision-making.

Baseline Measures
- Inventory of FP&M users with access to university facilities data via INSITE.
- Inventory of campus administrative users with access to university facilities data via INSITE.
- Inventory of facilities and related data residing in INSITE.

Target Performance Indicators
- Increased value of facilities and related data in analysis and decision-making. STATUS: UNITS ARE BECOMING MORE CONFIDENT IN THE USE OF FACILITIES DATA FOR THEIR MANAGEMENT AND DECISION-MAKING.
- Expand the consultative role of the SMO to campus administration, deans and departments.
- Establish an INSITE users group and conduct regular meetings to share facilities and related data applications. STATUS: INSITE USERS GROUP MEETINGS HAVE BEEN SCHEDULED ANNUALLY. THE INCREASED NUMBER OF INSITE USERS MAY REQUIRE ADDING ANOTHER USER GROUP MEETING EACH YEAR.
- Increased inventory of FP&M users with access to university facilities data via INSITE.
- Increased inventory of campus administrative users with access to university facilities data via INSITE.
- Increased inventory facilities and related data residing in INSITE. STATUS: THE GENERAL LIBRARY SYSTEM AND THE SCHOOL OF MEDICINE AND PUBLIC HEALTH ARE INITIATING SPACE SURVEYS TO ASSURE THE ACCURACY AND TIMELINESS OF THEIR DATA.

Risks & Challenges
- Risk – Assurance of the accuracy, quality, and timeliness of facilities and related data residing in INSITE.
- Challenge – Identify adequate resources to provide training and oversight for departmental use of INSITE and the data contained therein.
- Challenge – Processes necessary to keep facilities and related data up-to-date.
- Challenge – Achieve optimal system performance as additional INSITE users increase.
- Risk - Resource allocation and increased demands results in potential to overload/stress staff.

Milestones Accomplished
- THE GENERAL LIBRARY SYSTEM AND SMPH STAFF HAVE BEEN TRAINED IN INSITE AND PLAN FOR COMPLETION OF SPACE SURVEYS AND THE INCREASED USE OF FACILITIES AND RELATED DATA.
- Target completion date – July 2015.

Next Steps & Future Opportunities
- Increase the FP&M and campus academic and administrative staff trained and authorized to use INSITE. Expand the INSITE users group and conduct semi-annual meeting.

Goal 15: Continue to re-energize the Physical Plant Safety Program, including review and update of policies, procedures, and implementation to create a "Culture of Safety".

Description
In an on-going effort of continuous improvement, the Physical Plant (PP) Department is committed to re-engaging all its employees in an effort to fully establish a "Culture of Safety"; where performing work in a safe and efficient manner is "just the way we do things" at UW-Madison. Work process evaluations, collaborative observations with supervisors and employees, on-going safety issue identification by all employees and appropriate education/training that were established as part of FP&M's 2014 Annual Plan will be continued. Follow-up, and site visits will be undertaken for verification of safe working conditions, and subsequent process improvement/education/action will be administered.

Baseline Measure
- To be developed through safety trend analysis – There has been an inconsistent level of safety training for new and existing employees.

Target Performance Indicators
- To maintain a "Culture of Safety" across all aspects of Department work. Ensure all employees have received adequate training to complete their work in a safe, yet efficient, manner. Educate through positive safety behavior acknowledgement and through on-going safety refresher training and procedural implementation.
- There is an engaged commitment to, and an integration of, safety into "the way we work" in PP. Anticipated trend reduction of incident, by type.

Risks & Challenges
- Challenge – Resource commitment to develop Standard Operating Procedures (SOPs). Challenge – Continuation of issue identification and corrective action across groups. Challenge – Obtaining commitment from Supervisors to complete post-training observations to ensure that newly identified and/or modified safety protocols are being followed in the field.

Milestones Accomplished
- Request for written indication of perceived or outstanding safety issues (or not) from every employee. STATUS: ON-GOING. INITIAL 2014 SUPERVISOR RESPONSES HAVE BEEN PROCESSED; WORK ORDERS HAVE BEEN ISSUED WHERE SAFETY CONCERNS HAVE BEEN DISCOVERED.
- Form a Safety Oversight Group to oversee the Safety program operation. STATUS: WILL BE COMPLETE BY THE END OF 2015.
- Continue to investigate and prioritize identified safety-related issues. STATUS: ON-GOING.
- Form an Employee Safety Advisory Board to hear issues, appeals, and resolve impasses. STATUS: COMPLETION ANTICIPATED BY THE END OF 2015.

- Develop on-going training and operational protocol to address prioritized safety-related issues/concerns. STATUS: OPERATIONAL TRAINING IS ON-GOING. OSHA 30 WAVE 003 COMPLETED. OSHA WAVE 004 SCHEDULED FOR LATE FALL OF 2015.   OSHA10 COURSE WAVE 001 (CUSTODIAL SUPERVISORS) SCHEDULED FOR COMPLETION IN JUNE 2015.
- Develop implementation plan and execute – on-going as we respond to our findings.
- "Draft" a PP Safety Program Manual developed for initial release – intended to be a "living document" to be updated and improved as required. STATUS: FINAL DRAFT IN REVIEW; RELEASE BY END OF 2015.
- Begin Supervisor Safety Meeting Program to include safety observations, incident investigation, and incident prevention. STATUS: BEGIN OCTOBER 2015.
- Develop Department/Shop specific safety programs, SOPs, and department/shop-specific training for PP employees. STATUS: REMAINS ON-GOING.
- Additional activities:
  - SAFETY BRIEFING WITH SAFETY SHIRTS BEING ISSUED HAS BEEN COMPLETED FOR ALL CRAFTS IN APRIL.2015.
  - IMPLEMENTED MONTHLY "SAFETY BOOT CAMP" SESSION FOR NEW HIRES AND EMPLOYEES THAT MISSED THE INITIAL SAFETY BRIEFING. EMPLOYEES ARE BEING TRAINED ON THE BASIC SAFETY REQUIREMENTS INCLUDING SAFETY AWARENESS AND PERSONAL PROTECTIVE EQUIPMENT. THE SESSION HAS DURATION OF ≈ 4 HOURS AND IS HELD ONCE A MONTH ON THE LAST MONDAY OF THE MONTH OF A NEW PAY PERIOD. THE INTENT WILL BE TO ASSIGN OVERALL SAFETY RESPONSIBILITIES TO THE HIRING SUPERVISOR FOR COMPLETION AS REQUIRED BY THE HIRING OF NEW EMPLOYEES.

Next Steps & Future Opportunities
- Advance scheduling of activities will be coordinated through PP Safety and EH&S supervision to ensure proper resource allocation.
- Program communication will ensure all understand that, "There are no stupid questions, except those that go un-asked." [Originators name can be kept confidential at the writer's request.]
- All responses resulting in identified issues will be prioritized for investigation.
- Real issues as uncovered will move to the top of the list, and addressed.
- All issues/concerns presented will be responded to and/or addressed, to ensure that we always "close the loop" through good communication.
- All affected parties will be slated to receive safety refresher training regarding compliance and operational requirements.
- Any questions and all comments related to process improvement will be considered, evaluated, answered and implemented where feasible.

Goal 16: Advance Physical Plant Energy Conservation Measures.

Description
Physical Plant (PP) promotes education and awareness of the importance of energy conservation and environmental stewardship. The University has been able to leverage its resources to reduce its annual campus energy consumption. Further reductions through campus operational energy efficiency projects in FY15 will include those listed below.

Baseline Measure
- Current conditions and energy consumption data and modeling results.

Target Performance Indicators
- Accomplishments of the set goals.
- Measurement and verification of results confirming anticipated savings.

Risks and challenges
- Risk - Unforeseen possible construction project constraints or funding complications during the various stages of the projects.

Milestones Accomplished
- Complete construction phase of the energy retrofit project at Biotron building (annual savings of $446,000 with 13.7 year payback) in FY15. STATUS: COMPLETE.
- Complete construction phase of the campus exterior lighting retrofit phase II (annual savings of $282,000 with 12.8 year payback) in FY15. STATUS: COMPLETE.
- Complete construction phase of the TURN (Tunnel Upgrade and Refurbishment Now) phase II project (annual savings of $122,000 with 20 year payback) in FY15. STATUS: COMPLETION IN FY16.
- Continue construction phase of the energy retrofit project at Vet Med (annual savings of $361,000 with payback of 10.5 years) in FY15. STATUS: COMPLETION IN FY16.
- Continue construction phase of the energy retrofit project at Bock Labs (annual savings of $202,000 with 10.7 year payback) in FY15. STATUS: COMPLETION IN FY16.
- Complete the design process and start construction (assuming funding gets approved by DFD) for energy retrofit project at WIMR (annual savings of $70K with 7.8 year payback) in FY15. STATUS: DESIGN PROCESS COMPLETE. START CONSTRUCTION IN FY16.
- Complete the design process and start construction (assuming funding gets approved by DFD) for energy retrofit at Waisman Center (annual savings of $216K with 10.4 year payback) in FY15. STATUS: DESIGN PROCESS COMPLETE. START CONSTRUCTION IN FY16.
- Complete the design process and start construction for the McArdle Lab (annual savings of ~$219,000) and 445 Henry Mall (annual savings of ~$36,000 with a 5 year payback) in FY16. STATUS: SCOPE, COST, AND FUNDING DISCUSSION COMPLETE.
- Work with DFD (contingent on possible State sale of the campus heating/cooling plants) on scope, cost, and funding for a comprehensive Chilled Water System Optimization project (annual savings of $2.8 million with 10 year payback) in FY15. STATUS: DEFERRED TO FY16.

Next Steps & Future Opportunities
- Keep and enhance close working relationships with UWSA and DFD staff and coordination of the projects with building occupants.

Goal 17: Initiate a campus-wide program to address reuse, recycling and/or disposal of solid waste streams to provide value to the University.

Description
Physical Plant (PP) promotes education and awareness of the importance of environmental stewardship. This includes all waste and recycling streams. PP proposes to engage its WE CONSERVE program and the UW-Madison Office of Sustainability to develop a solid waste program

aimed at minimizing disposal costs, while working to identify options to provide maximum returns for its recycled waste streams. In addition, incentives could be developed to encourage all Schools, Colleges, and Departments to look at how they might reclaim space in their facilities by recycling, reclaiming, reusing, or getting rid of unwanted items through this program.

Baseline Measure
- Annual breakdown of solid waste quantities (tons) by type vs. cost to dispose minus revenue from recyclable waste streams.

Target Performance Indicators
- Maximize returns on recyclable streams and minimize quantity of waste sent to the landfill.
- Reduction in tons of refuse sent to the landfill and associated cost. $/ton received for recyclable streams. Number of tons of product identified for reuse and/or repurpose.

Risks & Challenges
- Determine whether or not SWAP fits into the program, and if so, what is their role and how do we get them to perform?
- Are there alternatives to SWAP that we can utilize?
- What roles will WE CONSERVE and the UW-Madison Office of Sustainability play in the program?
- How should we engage the Facility Managers?
- How do we manage the ebbs and flows in the program?
- Pursuing Green Initiatives is the right thing to do. However, it will be important for us to know how much the University is willing to financially support these initiatives.

Milestones Accomplished
- Engage WE CONSERVE and the Office of Sustainability to help develop program – Sept 2014.
- Audit/review all current solid waste streams – Oct 2014.
- Review existing contracts for recyclables, and re-bid/change if necessary to increase revenue. STATUS: COMPLETE.
- Develop draft program for disposal and recycled materials. STATUS: IN-PROGRESS. WORKING WITH THE NEW FPM/SWAP DISPOSAL WORKGROUP.
- Contact SWAP to determine how/where they would fit into the overall program. STATUS: THEY HAVE BEEN INTEGRATED INTO THE NEW FPM/SWAP DISPOSAL WORKGROUP FOR PLANNING.
- Look into alternatives to SWAP. STATUS: WHETHER OR NOT TO DO THIS WILL BE DETERMINED THROUGH THE WORKGROUP PROCESS.
- Engage Facility Managers in the development of the program. STATUS: HAVE ENGAGED REPRESENTATIVES FROM THIS GROUP TO JOIN THE NEW WORKGROUP.
- Develop final program and schedule for waste/recyclable product streams. STATUS: DEFFER UNTIL THE END OF SECOND QUARTER FY16.
- Record disposal/recyclable/reused amounts and related cost and/or revenue. STATUS: ON-GOING.

Facilities Planning & Management - FY15 Strategic and Operational Priorities
Year-end Summary Chart (Highlighted goals were new for FY15)

Priority Area	Goal/Objective	Baseline Measure	Defined Target	Year-end Actual Measure
VCFA: Engagement, Inclusion, and Diversity	Establish 2015 EID goals.	2014 EID employee survey results.	The FP&M 2014 EID Plan identified seven priority areas: 1) diversity, recruitment and retention; 2) employee onboarding; 3) performance management; 4) supervisor/manager training; 5) develop internal talent; 6) recognition; 7) communication.	Two FP&M project teams were commissioned last Spring to work on the following EID priorities: employee onboarding and performance management. The employee onboarding group is currently completing its work and preliminary team recommendations have been shared with the AVC and Deputy AVC. The next step is to appoint/hire an FP&M Onboarding Coordinator who will be responsible for implementing the program. The performance management group completed its work in May and is currently completing a pilot of the new performance management process. Two additional work teams will be chartered this Summer: recognition and communication.
VCFA: Student Leadership Development (WiGrow)	Extend WiGrow Initiative to all FP&M student employees.	Two pilot groups participated in WiGrow project in FY14.	Provide training for all supervisors of student employees. Achieve 100% engagement of all student employees.	All 16 FP&M student staff supervisors participated in the on-going WiGrow program and we had 100% participation from our 77 eligible students. Student survey responses to the program varied with many strong to moderate responses to the success of the program providing the students with the tools they need to advance in their careers outside of FP&M.
VCFA: Process Improvement and Resource Stewardship	Improve the FP&M customer billing process. NOTE: In November, this project was paused due to the start of another APR project focused on the FP&M Physical Plant Work Order process. The year-end update provided here is for this project.	Customers perceive FP&M as not being timely or within cost estimates in addressing service requests, providing required maintenance and delivery of in-house projects.	Redesigned process(es) for Work Orders, small project delivery, and customer billing. Requirements for new technology/system to support the redesigned process(es). A plan to implement the new Work Order process(es), including specific points of customer communication. A set of metrics to support and control the new process(es).	Phase 1: Voice of Customer, Baseline Data, and Identification of Improvement Areas completed in May 2015. Phase 2: Intake, Work Order Process, Small Project Delivery, and Billing project charter has been drafted.

Priority Area	Goal/Objective	Baseline Measure	Defined Target	Year-end Actual Measure
Process Improvement	1. Strengthen FP&M's annual performance review process/incorporate EID competencies.	Performance evaluations required for permanent staff each year. Evaluations not competency- based and do not include EID competencies for exempt staff.	All performance reviews include EID competencies, consistent categories, and professional development component. Training provided to all supervisors. 100% completion rate.	Year-end status: In December 2014, FP&M leadership formed a cross-functional work team comprised of supervisors and front-line staff to develop recommendations for a standardized performance review process and forms that would be consistent across the division, incorporate EID competencies for managers/supervisors, and comply with the new campus performance management policy. Because of the magnitude of the changes, it was decided to pilot the new process and forms in Physical Plant-Grounds, Capital Planning & Development, and the Office of the Associate Vice Chancellor for FY15.
Process Improvement	2. Continue to develop and disseminate FP&M policies and procedures.	Policies and procedures formatted and tracked. Policies readily available to staff.	Process communicated across the entire organization. Reviewed and updated on regular basis.	Status: In total, eight policies were drafted and approved in FY15: procedure for policy development, tuition reimbursement, committee participation, event participation, discretionary equity and retention adjustment, discretionary merit compensation, staff parking assignment policy, and purchasing card.
Process Improvement: Technology	3. Complete update and launch of a new FP&M website.	Two departments have implemented new websites using the new DoIT CMS package; the FP&M website is externally focused with limited resources for employees.	Complete re-design of the FP&M website. All departments have a consistent, user-friendly design; the website includes an intranet to facilitate communication with employees.	The FP&M website was successfully launched in November 2014 using the CMS, with a designated section for FPM staff resource content. Remaining department sites for Physical Plant, Campus Planning & Landscape Architecture, and Space Management are in various stages of website development using the upgraded responsive CMS template.

Priority Area	Goal/Objective	Baseline Measure	Defined Target	Year-end Actual Measure
Resource Stewardship	4. Provide project management services for capital projects.	Budgets, schedule, and specifications established by construction documents and contractor's bid.	Complete projects to required quality/scope, on time, and within budget. Complete planning and design on 14 projects and complete construction of three projects during FY15.	Seven of the 14 projects were completed by the target measure of the end of FY15. The remaining seven projects continue in various stages of design and construction.
Resource Stewardship	5. 2005 Campus Master Plan on-going implementation.	Number of major projects and overall goals completed annually from 2005-2015.	In FY15, six projects will continue with planning and design development; three projects will begin planning and design development.	In FY15, 7 projects continue in design development and 3 projects are, or will be, in construction soon.
Resource Stewardship	6. Improve storm water management on campus.	As of 2008, 556 acres of pervious area (66%) and 283 acres of impervious area (34%).	Increase pervious areas to 70% and decrease impervious area to 30%.	All major capital improvement projects continue to develop and implement best management practices for handling stormwater on their development sites. More urban sites, like Music Performance and Chemistry, will have difficulty meeting the campus policies but all avenues will be investigated as part of the overall design phase of each project. Pervious vs. impervious area continues to be monitored on a project by project basis. Stormwater management and the development of a comprehensive green infrastructure plan is part of the 2015 Campus Master Plan Update process.

Priority Area	Goal/Objective	Baseline Measure	Defined Target	Year-end Actual Measure
Resource Stewardship	7. 2015 Campus Master Plan Update.	Update of the 2005 Campus Master Plan for 2015: development of a Campus Landscape Master Plan, update of the long-range Transportation Plan, and update of the 2005 Campus Utilities Master Plan.	Complete updated plans by third quarter, FY16.	The 2015 Campus Master Plan Update process is well underway. The process was started late due to extended contract negotiations and contract signing which will delay completion until December 2016 (Q2-FY17). All campus and community leadership groups, along with all major shared governance groups on campus, have been briefed on the planning process and the scheduled including public engagement and approval processes. The first round of public information meetings has been held and the consultant team is completing their data gathering and site analysis phase of the project. Next step is to synthesize that data and being development concepts and ideas to be share in the fall semester of 2015.
Resource Stewardship: Sustainability	8. Sustainability - Continue to advance 'UW Builds Green' program.	LEED Silver certification.	Six projects are seeking LEED certification in FY15.	Three projects received LEED Certification in FY 15 and the certification process is continuing for the remaining three.
Process Improvement	9. Redesign of parking permit renewal process.	Employee parking requests are prioritized, offered, approved and accepted annually.	Reduce overall parking permit renewal time by 70%; reduce TS administrative costs; improve overall customer satisfaction.	It was determined in January 2015 that more work was needed before the changes could be implemented. Work is still on-going to develop exception handling processes updating the permit software to manage the new system.
Resource Stewardship	10. Construction of the UW Hospital Parking Ramp 75 Expansion.	Current parking structure at 95% capacity. Project is at 100% Design.	Start construction by August 2015; complete the project by September 2016 adding 780 spaces at a cost of $33,900,000.	The design of the project was completed and bids were opened in December 2014. The bids came in $2 million under the A/E construction cost estimate. The contract was signed with the low bidder JP Cullen. A pre-construction meeting is scheduled for July 2015 with construction scheduled to start in August 2015. Final schedule will not be determined until the meeting with the contractor.

Priority Area	Goal/Objective	Baseline Measure	Defined Target	Year-end Actual Measure
Process Improvement	11. Complete beta-test of Biosafety's ARROW project initiative and develop training tools for PIs.	Current International Biosafety Committee (IBC) protocol application is a manual paper process. PIs are required to re-enter background information for each protocol.	Reduce data entry time required by PIs; increase efficiency in development of IBC protocols; automate the process; provide wider availability of information/data; and, establish a centralized protocol database.	The project was completed in September 2014. Patches to the ARROW tool will be on-going. Over the next three years, researchers will be adding new information through the ARROW database. Currently, about 40% of principal investigators are entered into the ARROW database. All new research protocols must use the ARROW program. As older protocols come up for renewal they will be entered into the database. To achieve 100% enrollment, it will take three years since all protocols must be renewed every three years.
Process Improvement	12. Develop an Environment, Health & Safety Strategic Plan.	Benchmarking, customer survey, department survey and feedback.	Align EH&S with FP&M and campus missions, prioritize needs, and more efficiently allocate resources.	This project has been tabled until 2016 due to higher priority tasks. The key project going forward will be to address the on-going relationship with UW Health Radiation Safety program. A narrative document has been prepared entitled EH&S Radiation Safety Program and UW Health Relationship – Hurdles and Challenges.
Process Improvement and Resource Stewardship	13. Collaborate with Educational Innovation (EI) groups to develop a learning space improvement plan.	The number and type of classroom renovation projects completed through UW System. Current inventory of flexible learning spaces and utilization rates for classrooms with instructional technology on campus.	Increased interaction with EI groups. Comprehensive learning space improvement plan. Coordination and acceptance of learning space improvement plan by UW System.	A learning space improvement committee was formed with the Vice Provost for Teaching and Learning. The committee includes faculty, students, and various academic support and administrative units. A Learning Space Improvement Plan will be prepared by Fall 2015 to provide a context for the 2015-17 Classroom Renovation and Instructional Technology Improvement Capital Budget request for UW-Madison.

Priority Area	Goal/Objective	Baseline Measure	Defined Target	Year-end Actual Measure
Process Improvement and Resource Stewardship	14. Extend the access to university facilities and related data via INSITE to FP&M units and campus administrative users.	Inventory of FP&M users with access to facilities data via INSITE; Inventory of campus administrative users with access to facilities data via INSITE; and, inventory of facilities data residing in INSITE.	Increased value of facilities and related data in analysis and decision-making. Expand consultative role of the Space Management Office to campus administration, deans and departments.	INSITE user's group meetings have been scheduled annually. The increased number of INSITE users may require adding another user's group meeting each year. General Library System and the School of Medicine and Public Health are initiating space surveys to improve the accuracy and scope of their data.
Process Improvement	15. Continue to re-energize the Physical Plant (PP) Safety Program; including review and update of policies, procedures, and implementation to create a "Culture of Safety".	To be developed through safety trend analysis.	Maintain a "Culture of Safety" across all areas. There is an engaged commitment to, and an integration of, safety into "the way we work" in PP.	"Safety Boot Camp" module is on-going. Delivery improvements have been initiated as unpredictability of the number of participants has been realized. Real time improvements include conducting 1 session per month with 1 training coordinator. Additional improvements to be implemented: Work with HR to gain an understanding of incoming new hires and adjust training accordingly. Migrate toward method of Supervisor completed training. SOP development activity – in progress. "LOTO" SOP's -Scheduled Completion September 2015. Sheet metal fall prevention methods-Completed May 2015. Shop periodic safety meeting launch in progress – Scheduling will be ongoing. OSHA 10 Wave 001 – 2nd Shift Training: June 09th - 11th. OSHA 10 Wave 002 – 3rd Shift Training: June 16th – 18th. Safe Supervisor Module Tentative Schedule of ≈ October 2015. OSHA 30 Wave 004 Scheduled for October 2015. OSHA 30 Wave 005 Scheduled for November 2015. 2016 Retain-Maintain-Sustain Safety Program in planning phase.

Priority Area	Goal/Objective	Baseline Measure	Defined Target	Year-end Actual Measure
Resource Stewardship: Sustainability	16. Advance Physical Plant energy conservation measures.	Current conditions and energy consumption data and modeling results.	Nine priority conservation projects have been identified for FY15.	Tunnel/Steam Pits Phase II – 75% complete. Vet-Med project – 20% complete. Bock Lab Project – 70% complete. WIMR East Tower engineering is complete; construction to begin June 2015. Waisman project engineering complete; construction to begin Oct. 2015. McArdle Lab project is in design, construction start Jan 2016. 445 Henry Mall in design, construction start Sept. 2015.
Resource Stewardship: Sustainability	17. Initiate a campus-wide program to address reuse, recycling and/or disposal of solid waste streams to provide value to the University.	Annual breakdown of solid waste quantities (tons) by type vs. cost to dispose minus revenue from recyclable waste streams.	Maximize returns on recyclable streams and minimize quantify of waste to the landfill.	An APR Implementation team was initiated by the APR Sponsor to implement the recommendations from the Capital Inventory Process Review Team but there was no FP&M representative invited to participate on the implementation team. FP&M and UW Business Services are sponsoring an independent initiative to improve the coordination of business processes related to handling items destined to SWAP and or waste/recycling. The team includes representatives from UW Purchasing, SWAP, Space Management, EH&S, Physical Plant, Office of Sustainability, and 3 building managers.