Faculty Forum : Blue Sky Strategic Plan Pathway 5

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Strategic Plan Assessment

Pathway 5

Restoring the Dream: Renewing Pride and Stewardship of Place

November 8, 2017

Stewart Harvey, Executive Director, Facilities & Capital Management Services
The Blue Sky Plan:

Pathway 5 Team

**Stewart Harvey** (Chair)
Executive Director, Facilities & Capital Management Services

**Fred Servello**
Dean, College of Natural Sciences, Forestry & Agriculture

**Jeff St. John**
Senior Associate Provost for Academic Affairs

**Heather Hamlin**
Associate Professor of Aquaculture

**Patti Miles**
Associate Professor of Operations Management

**Tim O’Neil**
BOV Member
5. **Restoring the Dream: Renewing Pride and Stewardship of Place**

- Revitalize the brick-and-mortar infrastructure critical to fulfilling UMaine’s flagship mission
- Continue to build annual budgeted investments to fully fund appropriate levels of maintenance and renewal in campus upbeat and beautification
- Employ progressive capital construction delivery methods
- Develop a long-term plan to restore and use buildings effectively in the campus historic district
- Adopt and implement a five-year information technology plan
- Continue to implement sustainable initiatives to meet University’s Climate Commitment
Revitalize the brick-and-mortar infrastructure critical to fulfilling UMaine’s flagship mission

- Incorporate the Total Cost of Ownership (TCO) approach to our management of UMaine’s asset portfolio.
- Develop an Asset Investment strategy that addresses where, what and how we invest.
- Ensure a comprehensive, aligned and programmatic framework for facilities and asset management
Pathway Accomplishments

5.

- Revitalize the brick-and-mortar infrastructure critical to fulfilling UMaine’s flagship mission
  - Incorporate the Total Cost of Ownership (TCO) approach to our management of UMaine’s asset portfolio.

**LIFE CYCLE COMPONENTS**

- **Acquisition Costs**
  - Build, Buy, Lease
  - Sources of Funds: Gifts, Endowment, Bonds

- **Maintenance Costs: Daily**
  - Cleaning, Trash, Grounds
  - Sources of Funds: Annual Operating & Maintenance Budget

- **Maintenance Costs: Periodic**
  - Corrective, Preventive, Predictive

- **Utility Costs**
  - Electricity, Gas, Water, Sewer
  - Sources of Funds: Annual Utility Budget

- **Capital Renewal Costs**
  - HVAC, Water, Electric, Gas, Sewer, Roof, Safety, Streets
  - Sources of Funds: Capital Reserves, Gifts, Funded Depreciation, Other One-Time Institutional Resources
Pathway Accomplishments

- Revitalize the brick-and-mortar infrastructure critical to fulfilling UMaine’s flagship mission
  - Develop an Asset Investment strategy that addresses where, what and how we invest.

\[
\text{NAV Index} = \frac{(\text{Replacement Value - Building Needs})}{\text{Replacement Value}} \times 100
\]

Campus leadership can set different NAV levels for different buildings and portfolios, helping to balance capital investments across campus and prioritize project selection.

Investment Strategy

- Capital Upkeep Stage
- Repair and Maintain Stage
- Systemic Renovation Stage
- Demolition/Transitional/Gut Renovation Stage
The Blue Sky Plan: Pathway Accomplishments

5. Revitalize the brick-and-mortar infrastructure critical to fulfilling UMaine’s flagship mission

   - Ensure a comprehensive, aligned and programmatic framework for facilities and asset management
     - Classroom paint and polish process
     - Sightlines annual benchmarking
     - Space management policy
• Continue to build annual budgeted investments to fully fund appropriate levels of maintenance and renewal in campus upbeat and beautification

  • FM Maintenance Accounts
  • Funded Depreciation (renewal)
  • Hosmer Fund
  • Classroom Paint & Polish
  • Classrooms for the Future

3 tiered budgeting process – 1 and 5 year capital budgets
The Blue Sky Plan:

Pathway Accomplishments

5.

- Employ progressive capital construction delivery methods

Industry standards for public projects are

**DESIGN-BID-BUILD (DBB)**
This is the most commonly used delivery method for construction

**CONSTRUCTION MANAGER AT RISK (CM@Risk)**
Increased opportunity to utilize expertise of CM@Risk firm to evaluate project cost and schedule from a constructability perspective.

**DESIGN-BUILD (DB)**
One entity is responsible for both design and construction.
Pathway Accomplishments

5. Develop a long-term plan to restore and use buildings effectively in the campus historic district

- Background
  - Historic Preservation master plan-2007
  - UMaine Historic Districts
    - Tier one - 10 buildings
    - Tier two - 25 buildings
  - Building design guidelines

- Building rehab concept document
5. Adopt and implement a five-year information technology plan.

2012 UM IT plan goals/initiatives:

- Establishing a residence hall wireless service
- Installing Voice over IP (VoIP) throughout campus, Hutchinson Center and Darling Marine Center
- Developing a computer replacement program
• Adopt and implement a five-year information technology plan

UMS IT plan goals/initiatives

• Implement a five-year Information Technology Plan to ensure a robust and leading-edge technology infrastructure that supports the multifaceted mission of the university.
  • IT Leadership and Governance
  • Training and Professional Development
  • Learning space IT support
  • IT Support for and Collaboration with Distance and Online Learning
  • IT for research
5. Continue to implement sustainable initiatives to meet University’s Climate Commitment

- **Carbon Emissions** – 10-yr reduction by 19%

- **Sustainability Awards**
  - Princeton Review 2010-present: Top 50 Green Schools
  - 2013 – EPA Environmental Merit Award

- **EPA Recognition** for efforts in recycling 97% of food waste

- **UM Strategic Energy and Utility Plan**

- **Energy Solutions for UM** (UMS RFP43-16)
  - UMaine meets 2007 Climate Leadership Commitment (formerly ACUPCC)
  - Minimizes costs associated with energy
  - Provides predictable and stable cost into the future
  - Reliable service to UMaine’s mission
Pathway Accomplishments

5.

- What else has been accomplished related to this Pathway?
- Are these initiatives still relevant?
- Considering the Pathway’s broad goals, how else might this work be advanced?