FP&M and Research Cores Meeting  
Wed, Jan 17, 2018 from 9:00 am – 10:00 am  
Union South – Northwoods (3rd Floor)

**Attendees**  
- Michael Anderle (Waisman Brain Imaging)  
- Dan Grabois (School of Music)  
- Martha Vestling (Chemistry)  
- Isabelle Girard (OVCRGE)  
- Sarah Swanson (Botany)  
- Kyle Hanson (Lab Management CoP)  
- David Darling (FP&M)  
- Pam Barrett (FP&M)  
- Jerry Hunter (College of Engineering)  
- Elle Grevstad (Biochemistry)  
- Charlie Fry (Chemistry)  
- Lance Rodenkirch (SMPH)  
- Marilyn Larson (Center for Limnology)  
- Milo Westler (Biochem NMRFAM)  
- Margaret Tennessen (FP&M)  
- Anjali Sridharan (FP&M)

**Notetaker**  
- Jenn Hekman (FP&M)

### FP&M – Near-term Action Items

Improve communication path for work requests and facility emergencies, especially after-hours calls:
- Clearly communicate the correct 8-digit phone number for work requests and after-hours emergencies, and send out template signage for departments and managers to print and post in their labs and buildings.
- Consider adding who to call, especially after-hours, as part of the safety training for labs.
- Follow-up on the busy-signal received when people called regarding Birge Hall flooding incident (Nov 10, 2017). With 50 lines possible, callers should not receive a busy signal.
- Remove the “leave a message” option when dialing 263-3333 after hours: calls should immediately be transferred to ICS.
- Clarify FP&M working hours and after-hours schedule and communicate to customers.

Include APR feedback link to Research Resources Reporter newsletter.

Use semester meetings with facility managers to improve communications from FP&M to facility managers and from facility managers to building occupants.

Provide regular updates through Research Resource Reporter newsletter.

Develop a 101/Primer on what it takes for new equipment to be placed in a space.

### FP&M – Long-term/On-going Action Items

Clearly communicate expectations for facility managers in relaying information and status reports to building occupants during emergencies, renovations and routine work requests.

Improve the Campus Renovation Services (CRS) design process to include open discussions with customers about options, potential costs, and alternatives.

Reexamine why and when work orders are routed through Campus Renovation Services (formerly PAC) for review instead of being directly processed by Physical Plant.

Communicate the results of the Facility Condition Assessment, once completed.
Introductions – Isabelle Girard thanked everyone for attending and introduced David Darling. David shared that the purpose of the meeting: to address issues, acknowledge the lack of follow-up from the December 2016 meeting, and share the areas’ progress.

Recap of 2016 Meeting – There was a meeting of the same two groups approximately a year ago and while there were a lot of high hopes, not much has come to fruition yet. That meeting included: an announcement of the creation of the CRS division, the findings from the APR Study that had been completed, topics raised by Rob Lamppa (FP&M Director of Physical Plant at the time) and concerns raised from Research Core Managers and staff. All raised similar concerns around:

1. Timeliness
2. Communication
3. A need for greater effectiveness and efficiency, particular around scheduling, estimates, and final costs.

At the time, Rob Lamppa saw software/CMMS as the solution to many of the problems discussed.

Updates since December 2016 meeting

1. One of the main action items for FP&M from the last meeting was for FP&M to provide proactive updates on process improvement to engage the research community. Unfortunately, regular meetings with FP&M and the Research Cores did not happen.
2. However, the following things have happened since the last meeting:
   a. Rob Lamppa, Executive Director of Physical Plant, left the University at the beginning of September 2017.
   b. The APR project became part of a bigger effort, the Service Excellence initiative.
   d. David Darling joined FP&M as the new Associate Vice Chancellor in Mid-August of 2017.
   e. CRS has hired an estimator and a scheduler during the last year to provide more real life estimates from Physical Plant and for more accurate schedules.

Service Excellence – an initiative to improve service by FP&M Physical Plant. The APR project is one piece under the Service Excellence initiative, which consists of three main areas of focus.

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<th>Work with State of WI and UW System to pursue increased renovation flexibilities and threshold limits with the State.</th>
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<td>Increase resources, particularly FTEs, to meet work needs.</td>
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<td><strong>Research Core Managers and Staff - Action Items</strong></td>
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<td>Improve safety by employing safe storage practices. Avoid storing items directly on the floor – instead store items in plastic totes or trays, leaving at least 3 inches between the items and the floor.</td>
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<td>Add work request and facility emergency response plan to lab safety training.</td>
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<td>For work requests involving instrumentation, include equipment specifications on the CRS submittal and/or attach the equipment documents to the lab classification form.</td>
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1. **After Hours** – FP&M has been working with after-hours service call center, ICS. The previous average response time was 4 hours. Several steps have been taken to improve response time, including changing the after-hours call process and providing training to the call center ICS. This has resulted in reducing the response time by 45 minutes over the last 3 months.

2. **Renovations** – Much of the work so far has been internal to FP&M and may not be visible to customers, yet. The Physical Plant conducted a summer pilot program to improve the renovations process and began rolling out the changes campus-wide in fall 2017. The changes include sending biweekly project updates to customers on the status of projects and contacting customers quickly when CRS realizes that the schedule or scope cannot be met. The biweekly updates were well-received and are now done routinely on all projects in construction.

3. **Implementation of CMMS** – Last year FP&M leadership believed a full RFP process would not be necessary, but ultimately a RFP was required. FP&M is in the final stages of completing the RFP process for a new CMMS. FP&M acknowledges that the software will only be as good as the people and processes around it.

**Open Discussion**

[Note: Questions and responses on similar topics were combined here and paraphrased for the sake of clarity.]

1. **Ideal communication methods and path?**
   a. FP&M has recently made some changes to move closer to the ideal method - When calls come in after-hours the call is handled by local after-hours response company, ICS. The process no longer includes UWPD as a middleman for dispatching, FP&M has developed training and scripts for ICS staff answering calls, ICS’s ability to dispatch the right person from the start has been improved, and ICS started tracking when a call is made, when a staff person is reached, and when the staff person reaches the site. UWPD will be added to a call when there is a need.
   b. The goal is for a total response time of less than 1 hour. At the end of January FP&M will decide on the next steps to reduce response times by another 1 to 1.5 hours. This may drive other shifts being needed, but so far leadership has guided but not pushed for alternate shifts.

2. **Communications – Maintenance and Repair Related:**
   a. Communication of the problem to FP&M – need to improve how incidents are reported to FP&M. For example, the flood/leak at Birge Hall took 7 to 8 hours to be reported.
      i. FP&M shared that one option is to have more automatic systems, like water monitoring sensors. Some researchers already do this themselves and FP&M is also looking at the use of sensors.
      ii. FP&M recommended the development of a policy throughout research not to store anything on the floor and keep things 3” off the floor. While items could still be damaged by leaks from above, it would protect items on the floor from pooling water from the leak.
      iii. Research managers shared that most people, including many of them, aren’t always clear on who to call and acknowledged that many grad students will walk away from potential issues rather than calling it in.
1. **ACTION:** FP&M will share the number and a graphic/document that can be posted by researchers. It is important that there is one main number to always call. For example, FP&M core hours are 7:30am-4:30pm, but many people would not expect 5pm or even 6pm to be considered after hours.

b. Communication of status – Need communications to building occupants in the immediate aftermath of an incident and follow-up communications to building occupants as the issue is addressed.

i. FP&M generally tries to leverage the facility manager through a two-step communication process – first, FP&M communicates to the facility manager and then the facility manager communicates to the building occupants. However, there is currently a lack of a good protocol for FP&M communications to the facility manager, as well as a lack of clear and standard expectations for facility managers to communicate to building occupants.

1. For example, at Birge Hall there was a lack of initial communication – occupants didn’t know if they could work in their labs or where it was safe to work. But then there was good follow-up communication. For example, with the elevator, the status update included a picture of the torched circuit board and occupants understood that with a 50+ year old elevator getting new parts can take time.

ii. Action steps to address the issues:

1. FP&M already has meetings with facility managers each semester and will be working to train further facility managers, but given the variety of backgrounds and priorities, it will take time to get everyone on the same page. One thought is to provide scripts to facility managers for what to communicate to building occupants.

2. The Work Order (WO) system is the best source for information and for follow through on communication. Whenever a call is made to Physical Plant Customer Service (263-3333)/ICS After-Hours, a work order is created that is visible to UWPD and the facility managers.

3. **Communications – General Information**

a. Research Resources Reporter monthly email newsletter (from Office of Campus Research Cores) will include a small section for FP&M to include important information.

b. Research core managers and staff are also encouraged to contact any of the FP&M staff present at the meeting and FP&M encouraged feedback and questions.

4. **Communications – Renovations**

a. Design process – customers want to see more options with the different costs and benefits/drawbacks of each option. Currently there is little feedback or discussion with designers.

i. Previously, CRS made the decision to centralize communication through the project admin to help consolidate communication points and information flow. However, CRS acknowledges that it’s not always working to have just one person and are looking to change it.
ii. Is it possible to identify what room would be most cost effective? Often researchers come in saying what room they would like, but would be helpful if designers would ask what other rooms are available and researchers are shown options and locations.

iii. Designers sometimes have trouble getting the specs for the equipment, to which the researcher responded that it can be 5 months before they are even asked.

iv. Would be helpful for design specs to be included in the original submittal to CRS, both listed out on the submittal form and by attaching the equipment documents.

v. It would be helpful for CRS to receive the lab questionnaires back quickly and thoroughly filled out to help with the design process.

5. Off-campus research stations
   a. FP&M is still developing a full understanding of the services provided for off-campus locations and a process for making those decisions. FP&M will be looking further at how to address locations across the state as we add 490,000 square feet of Extension space and try and figure out funding for services at off-campus locations.

6. Renovations
   a. Researchers have serious concerns about time and cost, especially with installation of new equipment. It can take more than a year to get the ball rolling and there is great variation in costs for the same equipment in two different buildings.
      i. FP&M explained that price can often increase for older, complex buildings if other issues are found that need to be addressed in order to make the initial work possible or to address things that are no longer up to code. Other times, the price increases because follow-up steps are required due to things like MAQs, which was the case for three projects in the last year alone.
      ii. CRS doesn’t always know the cost when they start working on the estimate, since they may not know what they will find as they start the project and run into new issues.
      iii. When labs are vacated, often times they need to be cleaned. Safety is currently working on clearing out several spaces, which delays the start of projects.
   b. FP&M needs to better communicate what CRS can do well and what is outside of CRS’s scope.
      i. CRS is charged with projects that are less than $185,000 and can be done with internal labor. Currently, CRS is working beyond their charge by trying to force fit projects under the $185,000 threshold through multiple redesigns, phasing of projects, and removing items from one project and moving them to another project.
      ii. CRS could be great if they were working within their scope and so FP&M is working on helping CRS to do that:
         1. **Bureaucratic relief** – working on a bill to raise the threshold from $185,000 to possibly $300,000, along with other greater flexibilities.
         2. **Additional resources** – provide more robust project management and staffing. Currently, people are being asked to perform at 50% over what a normal FTE could do and they have been doing so for a long time. Therefore, will re-scope staffing to handle the volume, allowing quicker turn-around of quotes and better project management by tracking the scope, schedule, and budget of projects.
a. This past year there were 300 projects with only 6 engineers and 4 architects.

3. With greater resources, CRS can provide better admin/management of projects and better communication with customers.
   a. Scope creep is a big issue, along with incomplete cost estimate and work hours that aren’t held to hard numbers or limits. For example, currently there is no protocol for a supervisor to follow-up and ask why a project took 18 hours of work instead of the 6 hours of work estimated.

7. Renovation vs. WO – how to decide?
   a. Can send in simple WOs, but there are a couple potential issues:
      i. If submitting separate WOs for the same space, or ones that involve more than 3 trades, it will automatically go to CRS for review. CRS is not sure why it happens this way, as it was not something that CRS requested. CRS will be reexamining this practice.
      ii. A potential problem of piecemeal work through WOs is that the customer may run into an issue that cannot be resolved via WO and then the customer is stuck after already paying for the other completed WOs.

8. Projects over $185,000?
   a. As soon as CRS suspects that a project may be over $185,000 they will schedule a meeting with the customer, CRS and Capital Planning and Development (CPD). The group then discusses options, including removing items from the scope, possibly reclassifying work as maintenance rather than renovation, or making it a capital/major project.
   b. There are two funding options for projects over $185,000:
      i. Gift/grant funded – has the most flexibilities, takes approximately 18 months, needs to be designed by an external A/E, and bid competitively.
      ii. GPR/PR funded – this is the state process and can take 2 or more years and is often done through enumeration, all-agency projects, or small projects.

9. Scope creep – customers are concerned that even starting a project will open a can of worms and find problems that were already there. Two issues – shouldn’t FP&M already know about future needs and potential problems in advance, and it does not seem fair to tack on time and expense to the project for these types of issues.
   a. Future Needs/Potential Problems – FP&M has just received approval to conduct facility condition assessments (FCA) of campus building. This process will be completed over several years. When done, these FCAs will tell the status of various systems in many buildings and will store the information in a database.
      i. It would be helpful to communicate the findings of the assessment with customers and share upfront what are the constraints of different buildings, so departments will have this information when they are looking for space.
   b. Funding – typically, FP&M is only funded on what is in place today, not what may be needed in the future or what is needed for growth. FP&M has tried to submit upgrades and future needs through the state system many times, but has not received approval from the state. Without state approval, the only other funding option for these large projects would be gift/grant funds, which
no one has or is offering for these type of projects. The only option left then is to charge the project that needs the upgrades to happen.

i. Another option could be a centralized taxing or charge for core upgrades.

c. Future possible option to allow for quicker and less costly new lab spaces would be to renovate or construct a new building with shell space that can then be converted as needed to lab space. This is a better option than trying to put a lab space in a 150 year old building with asbestos issues, for example.

Next meeting

1. Provide a 101/Primer on what it takes for new equipment to be placed in a space. Would include the decision process, the different stages/criteria that make things more difficult, and help core managers to be a good resource for others and share the information.