Customer Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Don Lowe</th>
<th>Task Number</th>
<th>1.1.2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>12/31/2004</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Transform Service Desk into a 24/7/365 Operations Center (New)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Description**

This project involves the formation of the 24/7 service desk operation that includes the monitoring of various critical functions at the university.

Finalize plan to convert the existing Service Desk function into a 24/7/365 Operations Center that manages work order call intake. CMMS administration, access control issues, work coordination across campus, monitoring of various building systems. (updated 9/22/03 - Partial implementation by October 20, 2003.) Updated 11/02.

Updated 06/03

**ACTIONS:**

- Hired Operations Center Manager
- Identified assistant manager
- Access control technician has been transferred to Operations Center
- Staffing needs and job descriptions are being developed
- Temporary Operations Center (daytime hours) (updated 9/22/03 - is expected to be operational October 20, 2003.)
- Space planning on permanent Center in progress -Have identified the best location, Schematic layout is complete, Professional designer is working on design.

Updated 4/7/04 - Operations Center renovation project is out for bid at 4/6/04.

Update 9/29/04- Operations Center space expected to be ready for occupancy on or about November 1, 2004. Planning on how to provide 24/7/365 staffing is in progress.

**Completion Report**

As of 2/13/2004
Customer Perspective

Sponsor | Don Lowe | Task Number | 1.1.2

Updated 12/04
Continuing to expand operation.

Completion Report

As of 2/13/2004
# Customer Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Jim Haley</th>
<th>Task Number</th>
<th>1.1.4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>1/31/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Develop PFD Marketing Plan</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Description

To improve PFD communication with the campus at large and with all specific stakeholder groups when warranted. The purpose is to promote a better understanding of PFD roles and mission, to affect the image and reputation of PFD, and promote understanding of the impact of projects on individuals and quality of campus life.

Investigate PR plan.
Date - June 30, 2003
Updated 10/02

Updated 06/03
Three mailers per year, revised newsletter format, Web pages redesigned.
Next review: October 30, 2003

Updated 9/22/03.
Fall 2003 mailer in development.

Updated 12/03
Briefings (12/03 - 01/04) on North Academic Quad sequencing plan; spring 2004 construction projects presented to BOT 12/12/03.

Updated 3/29/04
Spring newsletter in- work
Community briefing in- work

Updated 10/04

## Completion Report

As of 2/13/2004
Customer Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Jim Haley</th>
<th>Task Number</th>
<th>1.1.4</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Construction web site developed; construction fliers produced; utility pamphlet developed; utility annual report developed.
Services provided and funding plan needs to be developed.

Updated 12/04
Spring 05 newsletter in-work.

Completion Report

As of 2/13/2004
### Customer Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Jim Haley</th>
<th>Task Number</th>
<th>1.1.5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>1/31/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Develop a Customer Satisfaction-Evaluation Program.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Description

A cross-functional team will review current evaluative tools and develop recommendations for the QC by January 15, 2000. This team will evaluate using customer focus group interviews to measure customer satisfaction.

A cross-functional team will review current evaluative tools and develop recommendations by April 30, 2003. This team will evaluate using customer focus group interviews to measure customer satisfaction.

Updated 10/02.

Updated 06/03
Discussion for early July.
Next review: July 30, 2003

Updated 9/22/03
Target evaluation for Alumni at 2004 Reunion Week.

Updated 3/29/04
Meeting scheduled for 4/2/04 with Bob Keller, Paul Wenner, Don Lowe, Tom Fister, Paul DiBenedetto, Jim Haley.

Updated 10/4/04
Survey taken at 2004 Reunion Week.

Updated 6/04
Meeting has taken place. Facilities Survey has been created and distributed to

#### Completion Report

As of 2/13/2004
Customer Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Jim Haley</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Number</td>
<td>1.1.5</td>
</tr>
</tbody>
</table>

Alumni at 2004 Reunion Weekend.

Updated 12/04
Customer survey (campus customers) scheduled for February 05.
### Customer Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Cody Powell</th>
<th>Task Number</th>
<th>1.1.147</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>1/1/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Assess customer building needs between renovations.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Description**

New task item 10/03.

Team members:  Tom Fister, John Walker, Steve Gaski, Scott Brown

First meeting scheduled on 12-17-03.
Updated 12/03

updated 3/29/04
The committee is discussing several objectives to meet the task statement. A questionnaire is being developed aimed toward department chairs. An overall description has not yet been developed.

Update 9/27/04
No further progress has been made.

Update 12/04
No further progress has been made.

### Completion Report

<table>
<thead>
<tr>
<th>As of 2/13/2004</th>
</tr>
</thead>
</table>
### Customer Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Don Lowe</th>
<th>Task Number</th>
<th>1.1.148</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>12/31/2004</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Task Title**

Utilize benchmarking measurements currently available and better analyze data collected for various levels of management.

**Description**

New task item 10/03.

Team members: Don Lowe, Sandra Mohr

Update 9/29/04 - Several meetings have taken place. Team is developing "Dashboard" metrics for upper management; and various metrics for use by middle and front-line managers.

Update 12/04
Draft planned for January.

### Completion Report

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
</table>

**As of** 2/13/2004
Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Cody Powell</th>
<th>Task Number</th>
<th>1.2.15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>10/1/2004</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Improve Rental Property Operations.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Description**

A cross-functional team will develop a detailed report on rental properties to include: workflow analysis for the rental property operations, identification of acquisition, billing, maintenance/repair costs, preventive maintenance program, and management options. This process team will be completed by June 1, 2000.

Representatives from Building Maintenance, Building Services, Campus Services, and the Operations Center are to do an analysis of how PFD supports the rental properties. This analysis will include a workflow analysis, and an analysis of costs. The result may indicate a need for additional staffing, or a need to contract out certain functions, or a need to modify operational procedures.

Updated 06/03

**ACTIONS:**

Workflow Analysis - Representatives from Building Maintenance, Campus Services, Building & Special Services, and the Operations Center have formed a task force to study ways to improve workflow as it relates to care of rental properties.

Cost Analysis - TMA information system software is being restructured to be able to track costs of rental properties easier.

Report is due on September 1, 2003.

Updated 12/03

Rental Inspection Procedure and Forms developed by Task Team. Suggested changes will result in improved record keeping of rental units through TMA and better work coordination and scheduling among shops. "Draft" Forms and

**Completion Report**

As of 2/13/2004
### Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Cody Powell</th>
<th>Task Number</th>
<th>1.2.15</th>
</tr>
</thead>
</table>

Procedures to be implemented on newly acquired property this month. Final version due first quarter 2004.

Updated 3/29/04 - Newly created "Rental Inspection Procedure & Forms" to be implemented Spring 2004 in conjunction with expected spring occupancy turnover and any planned rental property acquisitions. PM work orders to be established for all rental properties to assure annual inspections of existing properties. Director of Maintenance to identify specific shop(s) and training requirements needed to proceed with plan. TMA rental property records to be updated with information gleaned from inspection report/process.

Updated 6/04
Interim procedure in place. Department Managers given copy of "Rental Inspection Procedure & Forms" to be used at each occupancy turnover and or property acquisition. Director of Maintenance to identify training requirements and shops/staff to be trained. SOP being developed for same; expect 1st draft for review & approval by 7/31/04.

Updated 10/1/04
Procedures and inspection forms have been developed to perform rental property inspections at/for the following: 1. Upon property acquisition 2. Rental unit turnovers 3. PM inspections. 18 such inspections performed this past summer. Final analysis of inspections still to be published. Preliminary indications/comments from Paul Allen is favorable. Cody and Tom to work on SOP which will define above plus established procedure for record keeping and notification of results to management. Cody to address training needs and/or personnel needs for same.

Update 12/04
Convert to SOP.

### Completion Report

As of 2/13/2004
Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Jim Haley</th>
<th>Task Number</th>
<th>1.2.88</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>9/26/2005</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Task Title
Periodic Review of Strategic Plan Progress

Description
Strategic Plan Review and Update.

Develop schedule for quarterly standing meeting to review and update PFD strategic plan.

Date - Nov 30, 2002.
Updated 10/02.

Updated 06/03
2003 - March 31, June 23, September 22, and December 15.
Future years - last Monday of each quarter except as adjusted for holiday schedule.

Updated 9/22/03.
2004 - March 29, June 21, September 27, and December 13.

Updated 10/4/04
2005 - March 28, June 20, September 26, and December 12.

Completion Report

As of 2/13/2004
Evaluate and develop plan for Central Storage Facility.

Evaluate and develop plan for Central Storage/Surplus Facility. Physical Facilities (Building Services, P & C), Joe Cox, Bill Shawver.

December 2003.

New 10/02.

Team is scheduled to meet in mid-January 2004 to discuss feasibility of project.

Target due date will be 6/1/04.

Updated 12/03

Updated 6/04

After meeting with Joe Cox a potential list of participants has been generated. The intent is to create a program of requirements that would deal with issues of storage: temporary, long term, and on-going. Due to scheduling conflicts in summer, tentative meeting planned for mid-August.

Updated 10/4/04

Committee membership being developed and anticipate first meeting late October.

Update 12/04

No further progress.

Completion Report

As of 2/13/2004
# Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Paul DiBenedetto</th>
<th>Task Number</th>
<th>1.2.115</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>6/30/2005</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Task Title
Review PFD materials and information that could/should be on-line

## Description
Provide a method to determine what PFD information could and should be available on the PFD web site.

### Milestones & Tasks:
- Meet with each PFD division to assist and or review possible ways to communicate information both externally and internally (A small work group or committee may need to be formed) - January 15, 2003.
- Evaluate all information gathered and determine how best to display the information on the web - April 15, 2003.
- Gather all the appropriate information and deliver it to the IS staff to implement on the web server - May 15, 2003.

New 10/02.

06/03
Not Complete - Task 1 has been met but task 2 and 3 are behind schedule.

Updated 9/22/03
Not Complete - this topic is to be covered at the October Associate VP Direct Reports Meeting. Complete time moved back to 1/15/04.

Updated 12/03
Not Complete - This topic was covered at the October Associate VP Direct Reports Meeting. All but one task has been completed. The final task involves creating a new web site with the suggestions made at the November Associate VP Direct Reports Meeting. Another review with this group will need to be initiated at the

## Completion Report

As of 2/13/2004
# Internal Process Perspective

| Sponsor       | Paul DiBenedetto | Task Number | 1.2.115 |

February or March meeting. The expected completion date is 6/15/2004.

Updated 03/04
The expected completion date is 10/29/2004

Updated 10/1/04
Not complete.
All but one task have been completed. The final task involved creating a new web site with the suggestions made at the November Associate VP Direct Reports Meeting. The expected completion date is 10/29/04.

Update 12/04
Will not switch to PHP.

## Completion Report

As of 2/13/2004
Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Cody Powell</th>
<th>Task Number</th>
<th>1.2.135</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>12/1/2005</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Task Title**

Equipment/building system list development for TMA  
(Supersedes task #1.2.19)

**Description**

New 9/22/03

Develop basic framework of equipment and building systems in TMA. The end result of the framework shall provide a consistent platform to develop meaningful reports at the technician level through senior management. The following steps are necessary to fulfill this task:

- Develop and approve a standard naming convention for equipment and system types
- Hire temporary employee(s) to review building drawings, verify and label/barcode equipment in the field, collect equipment "nameplate" information
- Assimilate and enter collected information into TMA
- Coordinate with Operations Center to develop procedures, reference lists and training for work order entry using equipment records

updated 3/29/04

Equipment naming conventions are currently in progress. HVAC and refrigeration equipment are currently being entered into TMA as equipment records. The general system framework has already been established. Other equipment will be entered into TMA once HVAC, refrigeration and building automation system data entry is complete.

Update 6/04

HVAC and refrigeration equipment is still being added to TMA as equipment records. Elevators, emergency generators, special purpose equipment, and water softeners are also being added.

**Completion Report**

As of 2/13/2004
Update 9/27/04
Elevators have been completed and are in use. HVAC equipment is continuing to be added. A student has been hired to add some equipment records and ensure naming conventions are reconciled between TMA and Siemen's Apogee Software.

Update 12/04
Report due in January.
### Equipment/building system maintenance program development (Supersedes task #1.1.3)

**Description**

New 9/22/03

Evaluate individual pieces of equipment and building systems to determine an appropriate maintenance program

- Analyze equipment record data and establish criticality classes
- Develop equipment specific preventive and/or predictive maintenance procedure.
- Enter procedures into TMA
- Determine implementation staffing, needs, i.e. in-house, manufacturer, contractor
- Determine most effective and efficient frequency of each maintenance task

This task is dependent on substantial completion of the equipment/building system list development in TMA

updated 3/29/04

Completion of this task is contingent upon task 1.2.135. Progress has been made in developing a plan to accomplish this task upon substantial completion of 1.2.135.

Update 9/27/04
No change has occurred.

Update 12/04
First update due in January 05.
**Internal Process Perspective**

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Cody Powell</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>6/1/2005</td>
</tr>
<tr>
<td>Task Number</td>
<td>1.2.137</td>
</tr>
</tbody>
</table>

**Task Title**

Improvement of equipment/building system maintenance program
(Supersedes task #1.1.3)

**Description**

New 9/22/03

Evaluate data provided by TMA. Maintenance program effectiveness shall be monitored by established metrics. Examples of which may be:

- Comparison of PM work orders against urgent/emergency/routine on individual equipment
- Monitor number of work orders submitted by task on individual equipment records
- Comparison of urgent/emergency/routine work orders against building automation system equipment set points and alarms

This task is dependent on substantial completion of the equipment/building system maintenance program development

updated 3/29/04
Contingent upon tasks 1.2.135 and 1.2.136. No substantial activity.

Update 9/27/04
No change has occurred.

Update 12/04
No change.

**Completion Report**

![Completion Report Table]

As of 2/13/2004
**Internal Process Perspective**

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Jim Haley</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Number</td>
<td>1.2.152</td>
</tr>
<tr>
<td>Due Date</td>
<td>6/1/2005</td>
</tr>
</tbody>
</table>

**Task Title**
Develop one universal survey. Solicit feedback (customers, professional peer groups).

**Description**
New task item 10/03.

Team members:  Don Lowe

Updated 12/03 - No action to date. Will schedule meeting with Don Lowe in January 2004.

Updated 3/29/04  
No action to date. Will schedule meeting with team members to initiate action later Spring 2004.

Updated 10/1/04  
No reportable progress. Jim, Don, & Tom to meet to discuss strategy, goals and objectives. Separate meeting (Jim chaired) earlier this year resulted in compilation of several potential survey questions which can be used in the development of the university survey.

**Completion Report**

---

As of 2/13/2004
### Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Don Lowe</th>
<th>Task Number</th>
<th>1.2.153</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>6/30/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Update and improve current Maintenance Purchasing process.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Description

New 12/03

Sponsor - Jim Haley (also Dale Hinrichs, Bill Shawver)

Task Title - Update and improve current Maintenance Purchasing process
Examine the Maintenance Purchasing process from a "clean sheet" prospective to define the ideal process that is technology based, efficient, and meets fiduciary and audit requirements.

Team - Tom Fister (leader), Barbara Jena, Don Lowe, Sandra Mohr, Dick Pratt, Steve White, Chris Worley

12/03 - Kickoff meeting was held 11/17/03 with sponsors (Jim, Dale, Bill) giving an overview (establishing purpose) of the initiative, and setting parameters for same. Task team subsequently met to formalize an action plan, assign tasks and establish future meeting dates.

1st deliverable (initial report) due March 04

updated 3/29/04 by Tom Fister.

Series of meetings held since 12/03 kickoff. Meetings initial focus has been on identifying current processes, paper flow and limitations. Several redundant, manual processes were identified from these early meetings with more recent discussions centering around minimizing or eliminating the same.

### Completion Report

As of 2/13/2004
Suggested improvements currently being weighed include creating TMA - Banner interfaces, expanded use of credit cards, issuing F#s to shops in block quantities and the auto creation of PO through data entered to TMA work order records. Other improvements discussed and recommended for immediate implementation by the team were to include work order numbers in text/description line of F#/LPOs and to load purchase information onto the work order. While recognizing that these latter changes do not simplify the purchase process per-se; they do allow customers receiving work order related charges on Banner to identify the order charges relate to and reconcile them back to the work order. That step will save countless hours of after-the-fact reconciliations by our customers and PFD.

Updated 6/04
Team presented findings and recommendations to Process Improvement sponsors on 6/14/04. Team recommended that we utilize TMA generated requisitions and POs to process Limited Purchase Order request (LPO's or orders <=$500.00 ) and to consider raising the limits of LPOs. Team suggested that this step be considered Phase I in process and that team continue to investigate Banner/TMA hookup and or improving purchasing process for orders >$500. Sponsors directed team to perform a limited test of proposal, using a single shop and limited number of pre-assigned LPO numbers.  AQT shop chosen for test. Test to be initiated after 7/1/04. Expect to reconvene with Sponsors to discuss results in late July/August.

Updated 10/1/04
In June 04, team met with sponsors and gave presentation of findingd and recomendtion. Sponsors agreed with findings; recommended a maintenance department (Air Quality Tech) be used as "test" of proposed system.

In August 04, started issuing TMA based LPOs for needs of AQT Shop. Met with Accounting personnel and agreed on layout of proposed purchase order.

In September 04, 9 purchase orders for goods. Waiting on billing from vendor to

Completion Report

As of 2/13/2004
Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Don Lowe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Number</td>
<td>1.2.153</td>
</tr>
</tbody>
</table>

finish transaction processing.

Anticipate completed cycle/test by end of October with PFD-wide implementation
NLT December 2004.

Update 12/04
Test in progress. Partial invoice problem to be resolved.

Completion Report

As of 2/13/2004
<table>
<thead>
<tr>
<th><strong>Sponsor</strong></th>
<th>Don Lowe</th>
<th><strong>Task Number</strong></th>
<th>1.2.159</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Due Date</strong></td>
<td>5/1/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Task Title</strong></td>
<td>Analyze Staffing Needs in Relation to Campus Changes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Description**

Conduct and analysis of staffing needs for Operations Division that considers campus changes such as construction of new buildings, apartment complex, and changes to the Athletic Complex.

Update 12/04
No progress to report.

**Completion Report**

As of 2/13/2004
Recent and upcoming changes in operational tasks include:
(1) Dramatic increase in Millett Arena usage due to air conditioning upgrade
(2) Addition of scoreboard, lighting, and new plaza area at Yager Stadium
(3) New Softball stadium
(4) Specialized needs for McKie Baseball Field
(5) Relocation of the Grounds' Crew due to the pending East Bleacher project at Yager Stadium

With the addition of new facilities, increased usage in other facilities, and increasing technical requirements from Performing Arts and other customers, this study will examine the staffing needs and the organizational structure for Special Facilities. Additionally, with the recent loss of one key personnel member in our scheduling and technical support section; and, the pending retirement of two veteran employees, this study will examine the future structure best suited to provide our customers with optimum, cost effective and efficient service.

Update 12/04
Due date changed.
<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Jim Haley</th>
<th>Task Number</th>
<th>1.3.155</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>10/15/2004</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Establish new Facility Contracting Organization</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Description**

New task 10/04
Develop position description for Manager of Facility Contracting.

Updated 12/04
FCO office reconfiguration nearly complete.
Clerical position to be advertised in January.
Director, FCO position to be advertised in late January.

**Completion Report**

As of 2/13/2004
Study the opportunities for an open protocol building automation system (RPMS) and the advantages and disadvantages of migrating away from single

Team Member: Doug Hammerle, Tony Ferraro, Charlie Baker, Cody Powell, and Don Lowe

1. Study Advantages/Disadvantages of:
   * Web based front-end system
   * Multiple vendors for control components
   * Cost and training implications of multiple vendors

2. Study incorporation of other applications on campus such as fire alarm, security, door access into common front-end system along with RPMS.

3. Future technological opportunities to make information/data available to more users.

Update 12/04
Met with Johnson Controls in Oct.
Met with FieldServer in Nov.
Plan to meet with Seimens in Jan.
Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Don Lowe</th>
<th>Task Number</th>
<th>2.2.34</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>8/1/2005</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Task Title

Improve the aesthetics and serviceability of building exteriors.

Description

This task will develop recommendations for assessing and conducting periodic inspections and improving the appearance of our buildings’ exteriors. This Improvement Plan will identify departmental/divisional responsibilities.

Develop recommendations for assessing the condition of building exteriors; conducting periodic inspections of building exteriors; and for improving the appearance of building exteriors. Report will include identification of which group is responsible for the various elements of the exterior. Updated 11/02.

Report is due by (updated 9/22/03 - April 1, 2004.)

Updated 4/7/04
Expand this task to include not only aesthetics and serviceability issues, but also to provide for a periodic condition assessment of all major building elements (in between ISES audits and major rehabilitations).

Updated 12/04
No progress to report.

Completion Report

As of 2/13/2004
Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Tom Pruckno</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Number</td>
<td>2.2.92</td>
</tr>
<tr>
<td>Due Date</td>
<td>9/1/2004</td>
</tr>
</tbody>
</table>

Task Title
Develop program for controlling appearance of construction areas.

Description
Define what issues are. Discuss solutions.

Persons: Jim Haley, Art Faura, Jim Buckley, Terry Ponder.

New 10/02.

Updated 12/15/03 - Established that each project will have at minimum green mesh on the fencing. Target areas to consider are wash down areas, consistent and tasteful construction signage, contractor cleanup of mud outside of construction areas. No other progress.

Updated 3/30/04
Have met once to identify the issues and establish work items. Jack W. is summarizing BHKR’s findings from the Operational Impact Assessment as a starting point. The idea is to add to this document.

Updated 6/04
No progress.

Updated 9/04
No progress.

Updated 12/04
Documenting problems. Plan to meet in late January.

Completion Report

As of 2/13/2004
Customer Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Tom Pruckno</th>
<th>Task Number</th>
<th>3.1.97</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>7/15/2005</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Task Title**

Develop program to gather stakeholder satisfaction following construction projects.

**Description**

Develop and implement a post occupancy evaluation process. Implementation will begin with the completion of the MacMillan Hall Center for American and World Culture project. Tom Pruckno, Mike Smith, Lisa Vaillancourt.

New 10/02.

06/03 - No progress has been made.

9/22/03 - No progress has been made.

12/11/03 - No progress has been made.

Updated 3/30/04

Met on February 18th. Next meeting on April 9th. Have identified specific tasks and a specific project (MacMillian) to begin focusing on.

Updated 6/04

Met on April 9th. Next meeting is scheduled for July 14th. Will focus on MacMillan as the first project to review.

Updated 9/04

We met on June 30 and July 14 and conducted after action reviews of the process. Will continue to do these AAR's for each of coming projects. Information obtained in these sessions will be used to adjust our process.

Update 12/04

**Completion Report**

---

*As of 2/13/2004*
Customer Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Tom Pruckno</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Number</td>
<td>3.1.97</td>
</tr>
</tbody>
</table>

AAR for first phase of McGuffey in work.

Completion Report

As of 2/13/2004
Design-Maintainability Standards. A cross-functional team will review major rehabilitation/new construction for past five years in order to identify systemic problems in design-maintainability. The team will prepare recommendations to QC and modifications to MU Construction Standards by December 1, 2000.

Develop/Implement Design-Maintainability Standards
Review existing standards and update to present maintainability standards.

Develop design-maintainability standards by reviewing major rehabilitation and new construction in the recent past. Study will identify problems relating to maintenance access to equipment, chronic service and repair problems, significant energy inefficiencies, lack of adequate service areas (custodial storage, dumpster space, delivery areas, etc). Recommendations for inclusions into PFD's Construction Standards due by (updated 9/22/03 - April 1, 2004.)

Update 12/04
No progress to report.

As of 2/13/2004
**Internal Process Perspective**

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Paul Wenner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>3/1/2005</td>
</tr>
<tr>
<td>Task Title</td>
<td>Develop Long-term Fire Safety Improvement Plan.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A cross-departmental team will identify associated risks to MU community, capital assets and operations. In conjunction with EHSO, develop a fire safety capital improvement plan (phased) with funding strategy for maximizing life safety protection.</td>
</tr>
</tbody>
</table>

**Fire Alarm System Replacement**
- Pearson - study/est. due date-complete
- Millett (coordinate with new HVAC F.A. System) - study/est. Complete
- Miami Inn and Marcum Conference Center need fire alarm upgrades.

**Sprinkler System Installation**
- Residence Halls -on hold
- Millett (under seating areas where space used for storage or shops) - study/est. Complete
- Presser Hall - Part of building renovation project.

**King Library**
- Address fire truck access around building and/or install sprinklers and risers in building.
- Improve water supply piping to King and Hall Auditorium - new 12" line from Spring along Campus to McGuffey Drive.

**CPA - upgrade F.A. System - study/est. Complete.**

**Completion Report**
- Recreational Sports Fire Alarm upgrade - Complete.
- Shriver Fire Alarm Upgrade-Complete.
- Residence Hall Fire Alarm Upgrade-Complete.

*As of 2/13/2004*
Update 12/04
No further progress.

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Paul Wenner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Number</td>
<td>3.2.45</td>
</tr>
</tbody>
</table>

**Completion Report**

- Recreational Sports Fire Alarm upgrade - Complete.
- Shriver Fire Alarm Upgrade-Complete.
- Residence Hall Fire Alarm Upgrade-Complete.

As of 2/13/2004
## Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Paul Wenner</th>
<th>Task Number</th>
<th>3.2.50</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>6/1/2005</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Task Title
MU-City Letter of Understanding Utilities

### Description
Engineering will coordinate an agreement with the City of Oxford identifying utility responsibility for DCW, Sanitary, and Fire; and develop a CAD-based overlay that clearly identifies areas of responsibility.

Provide updated proposal to City outlining all utilities and suggested responsibilities. Negotiate and finalize agreement with City on utility responsibilities - City reviewing previously submitted proposal and will return with comments. Updated 10/04.

Engineering support staff and Oxford City engineer and Service Director are primarily responsible.

### Completion Report

As of 2/13/2004
Develop Long-range Storm/Sanitary/DCW Plan.

Hire a consultant to study the existing water system, sanitary and storm sewers on and surrounding campus. Coordinate with the City of Oxford concerning their long-range plans for replacement or upgrades to the above systems. Recommend upgrades or extension of systems to support future campus growth and correct ongoing problems. Estimate costs of recommendations and phased plan for implementation.

Power clean and camera all campus storm sewer systems. Repair and replace sewers as required. Repair and or add new catch basins as required. Adjust grades to adequately drain to existing and new catch basins. The Campus will be broken

Completion Report

* Water, sewer installed along Withrow Lane
* New sanitary sewer on Chestnut and Campus to eliminate Bunger Field Sewer
* New water service on High and North Patterson to Withrow Lane.
Internal Process Perspective

| Sponsor  | Paul Wenner | Task Number | 3.2.52 |

into quadrants with the first being worked on in 2005. Total project completion will be 2009. Survey all existing campus storm sewer manholes and sewer lines to establish a reliable map of location, elevation, and grade. This will be in conjunction with the City of Oxford's program of surveying storm sewer and drainage. Project start 2005 with a 2007 completion.

Increase storm sewer size and capacity running east on High Street with the addition of interval catch basins. This will be done in conjunction with the City of Oxford. Commence 2005 complete 2006. Increase the capacity and size of the storm sewer system running North and South along Patterson Drive (Rt. 27). Additional new catch basins will be added. This will be done in conjunction with the City of Oxford. Commence 2006 complete 2008.

Sanitary Sewer: Survey to establish the location and invert elevations of all sanitary manholes and lines on campus. This will be done in conjunction with the City of Oxford. Commence 2005 complete 2006. Power clean and camera all campus sanitary sewer systems. Repair and replace sewers as required. The campus will be broken into quadrants to accomplish this with work commencing in 2005 and being completed in 2009.


Update 12/04
No further progress.

Completion Report

* Water, sewer installed along Withrow Lane
* New sanitary sewer on Chestnut and Campus to eliminate Bunger Field Sewer
* New water service on High and North Patterson to Withrow Lane.

As of 2/13/2004
Review and update Section 15, Construction Building Standards.

These standards will be incorporated into the new Masterspec software.

Fire Protection - to be completed by 08/03 (updated 10/04 - to be completed by 12/04)
Plumbing - to be completed by 09/03 (updated 10/04 - to be completed by 12/04)
Mechanical - to be completed by 11/03 (updated 10/04 - to be completed by 12/04)
Controls - to be completed by 12/01/03 (updated 10/04 - to be completed by 12/04)

Standards will be reviewed by Engineering staff with input from Maintenance, EHSO staff and others as necessary.
New 10/02.

Updated 10/04
Update 12/04
Updated meter spec.
Review and update Construction Standards

Revise the 16 divisions of the MU Construction Standards.

MU Engineers as needed.
MU shops as needed.
MU Interiors people as needed.

Part 3: Revise 3 sections per month for divisions 1 - 14, Revise sections 15 and 16 in two months each.

Division 16 completed by Dec 15, 2002.
Division 1, 2 and 3 completed by Jan 31, 2003, Division 4, 5 and 6 completed by Mar 1, 2003, Division 7, 8 and 9 completed by Apr 1, 2003, Division 10, 11 and 12 completed by May 1, 2003, Division 13, 14 completed by Jun 1, 2003, Division 15 completed by Aug 1, 2003.

Revise Parts 1 and 2 beginning Sept. 1, 2003 and finish by Dec 15, 2003. Included:
Bob Keller (language of the campus) (design guidelines), Doug Hammerle (life cycle cost analysis), Terry Ponder (checklists, forms), Rick Costello (requirements for submittals),
EHSO (Environmental quality guidelines)

Part 4: Lisa Vaillancourt (service space design guidelines), Bob Keller (landscape guidelines), Tim Gruenhagen (audiovisual guidelines), Matt H. and Tom Clark (Telecom guidelines), Paul Wenner and Dave Ellcessor (confined space program).
New 10/02.

Completion Report

As of 2/13/2004
Updated 9/22/03
Division 16 is done and currently under final review.

Division 15 is underway.

Have split up remaining divisions and waiting to distribute to PM's.

Updated 12/15/03 - All 16 divisions have been given to the PM's to coordinate and edit. Each section is about 60% complete.

Updated 3/30/04 - Each section has been revised except division 15. No further work has been accomplished.

Updated 6/04 - No further work has been accomplished.

Updated 9/11/04- No further work has been accomplished.

Updated 12/04 - No further work has been accomplished.

Completion Report

As of 2/13/2004
# Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Steve Gaski</th>
<th>Task Number</th>
<th>3.2.101</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>5/5/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Expand recycling program</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Description

Develop a comprehensive, university-wide green environment program to include: construction and demolition debris, green buildings, waste reduction, and expanded recycling programs. Senior Administration, Purchasing Office, Regional Campuses, Physical Facilities (all divisions), ASG, HDGS. May 2003. New 10/02.

We have approached this by doing individual areas with the intent to create a comprehensive university plan with senior administration support in the end.

Planning and Construction: Tom Pruckno has taken the lead in involving CIS Model into new and renovation projects. Intent is to build recycling standards into the project specs. Hughes renovation and McKie Field showed good results this past year. (Updated 10/03 - This now has been made into a separate task.)

P&C and Engineering: Some initiatives have been made toward green buildings as it relates to energy issues. More direction needs to come from leadership and architects in beginning of projects.

HDGS: Has made great strides in initiating recycling in the residence hall rooms and in dining halls. Recycle Mania has proved to be a great success. Diversion rates in residence halls has increased from 8% to 38% in the past three years.

E-Scrap: We finally got senior administration attention and ad hoc university committee has formed to address computer recycling.

## Completion Report

<table>
<thead>
<tr>
<th>Due Date</th>
<th>12/13/2004</th>
</tr>
</thead>
</table>

As of 2/13/2004
Internal Process Perspective

**Sponsor**  Steve Gaski  

**Task Number**  3.2.101

Recycling Operations: Will be moving into larger, more efficient facility in June.  
(Updated 10/03 - Recycling Operations - Has expanded into a new facility and has improved efficiencies and increased throughout.)

Regional campuses: Currently working with Chuck Mack to increase the number of containers and output from Middletown Campus.  
(Updated 10/03 - Have applied for a grant to help in this matter.)

ASG: Has taken a supportive role with programming in both residence halls and off campus housing.

Building Services: Is exploring and testing a variety of green products to use for cleaning purposes.

Carpet: Have program set up with DuPont (via state contract) to recycle all carpet.

Updated 06/03

Graduate assistants currently working with ICA and Special Facilities to expand recycling at sporting events.  Grant proposal being generated to help fund efforts. 
Updated 12/03

Update 6/04
A $25,000 grant submitted to OEFF to fund recycling at sporting events. Miami Recycles is working with ICA and Special Facilities on this project.  
Battery recycling begun in April has yielded great results and participation, particularly in the Shriver Center and Recreational Sports. Additional grant monies being sought to help fund and expand the program.

Started a paper recycling project with Kramer School in March. Through grant funds, we have placed an additional 40 recycling containers and 3

**Completion Report**

As of 2/13/2004
Internal Process Perspective

| Sponsor   | Steve Gaski | Task Number | 3.2.101 |

recycled plastic picnic tables at the Middletown campus to help expand their program.
We no longer sell used computers at the auction and have been recycling them for the past year and a half. A university wide committee will be proposing to VP Christenberry and VP Norman an SOP and university policy for the handling and disposal of computers and related equipment. This to be formalized in the late summer.
Recycle-mania this year expanded to 17 universities nationwide this past spring. Miami won the contest this year, in addition to seeing a growth in residence hall recycling. The HDGS recycling committee has been very proactive and supportive for the past 5 years.

Update 12/04
Adding battery, cell phone, ink cart., and plastic grocery bags January 1.
Received EPA WasteWise Partner of the Year in Nov 04.
Received National Recycling Coalition award for creativity.

Completion Report

As of 2/13/2004
This plan will address how to meet the increasing need on campus for readily available high-level technical support and training on intelligent/addressable fire alarm systems that are being installed throughout campus. Such systems require greater technical knowledge than the systems they replace.

New 11/02.

Updated 06/03

ACTIONS:

- Have identified an existing position that can be converted into a fire alarm technical support position
- Job description is complete, and includes input from University Fire marshal and fire safety professionals
- Continuing education courses/seminars have been identified and turned over to Training Manager for inclusion into overall training offerings
- Siemen's has been contacted regarding their fire alarm training resources
- Two electricians have been identified as fire alarm specialists that will support new fire alarm technical person

Updated 12/11/03 - Position is under salary review due to difficulty attracting qualified candidates

updated 3/29/04

Personnel office has required individual interviews with all applicants prior to performing a salary review. All but one applicants have had a telephone interview. If no response from the remaining applicant occurs by the first week of April, all

As of 2/13/2004
Internal Process  Perspective

| Sponsor | Cody Powell | Task Number | 3.2.102 |

information will be submitted back to the personnel office for review.

Update 6/04
Qualification reviews have been performed and submitted to Personnel. Personnel has requested that two additional postings occur prior to reviewing the salary for a special market rate. The qualification reviews for the second of three postings is currently in progress.

Update 9/27/04
Qualification reviews are being finalized for the second of three separate postings. An interview may occur with one qualified applicant from the second posting.

Update 12/04
Fire Alarm Tech hired starting Jan 3.

Completion Report

As of 2/13/2004
Examine methods to increase construction project recycling

Define what construction items should be recycled and how they can be recycled. Write descriptions of how contractors are to handle the materials, for inclusion into Miami University "up-front" documents.

Persons to support this task: Jim Buckley (recycling expertise), Art Faura (fill materials, transplanting trees), Joe Kimball/or new person (HVAC recycling), Clarence Blevins (trucking and storage issues), Advancement Services (selling of architectural artifacts to alumni), Rob Coveney (recycling of lights / electrical components), Joe Cox (reuse of furniture on campus).

Meet with group by Jan 1, 2003 to begin planning. Complete the planning by Jun 1, 2003 for inclusion into contract documents.
New 10/02

Updated 3/30/04 - Met with recycling consultant, Steve Shew on March 23rd. Walked Benton, Ice Arena, and Presser. He recommends that we inventory what we think are recyclable items and with his help try to re-use items for our own use, find buyers for various items or give to other non-profits.

Updated 6/04
Have begun outlining a rough recycling log. Goal is to have someone (graduate student) inventory Benton, Ice Arena, and Presser and compile a list of items that

Completion Report
Internal Process Perspective

**Sponsor**  Tom Pruckno  
**Task Number**  3.2.113

can be recycled.

Updated 9/04
Our summer student has created a recycling inventory of Benton Hall, Ice Arena, and Presser Hall to be used as a basis for finding companies to recycle the various components within these buildings. Looking to work with Steve Shue to market the materials.

Update 12/04
Create inventory for Reid Hall.

Completion Report

As of 2/13/2004
**Internal Process Perspective**

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Tom Pruckno</th>
<th>Task Number</th>
<th>3.2.129</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Due Date</strong></td>
<td></td>
<td></td>
<td>3/1/2005</td>
</tr>
<tr>
<td><strong>Task Title</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Review and document the project turn-over and close-out process.**

**Description**

Review, update and document the project close-out and turnover process. Update the Project Managers’ Manual accordingly. Completion date: JULY 2003 in conjunction with the completion of MacMillan Hall CAWC project. Participants: Don Lowe, Tom Pruckno, Paul Wenner.

New 10/02.

06/03 - Completion date moved to coordinate with MacMillan CAWC completion.

Have established with FCA stronger contract language in Contractor's contract to update the as built documents on a monthly basis and established procedure for Associate to check them as part of the pay application process.

Have changed the Associate's contract with the FCA to increase the dollar amount withheld for closeout document delivery.

Have asked the Project Managers to collect the shop drawings/submittals of major components before the completion of the project and to compile it into a pre-close out book for MU trades people to work with.

Updated 9/22/03

Have established with FCA stronger contract language in contractor's contract to update the as built documents on a monthly basis and established procedure for Associate to check them as part of the pay application process.

Have changed the Associates contract with the FCA to increase the dollar amount

**Completion Report**

As of 2/13/2004
Internal Process Perspective

Sponsor: Tom Pruckno            Task Number: 3.2.129

withheld for closeout document delivery.

Have asked the PM's to collect the shop drawings/submittals of major components before the completion of the project and to compile it into a pre-close out book for MU trades people to work with.

Updated 12/15/03
Project turn over begins during construction before the Contract Completion Certificate (CCC) has been signed with the MU shops reviewing/inspecting the installed work. Also the as-built and O&M manuals should be complied/recorded through out the construction period.

Before the CCC is signed the contractors are to have completed the project in its entirety including:

Final cleaning of all spaces including mechanical areas
Turn over all “attic stock” materials
Remove all materials not returned to MU
Demonstrate all equipment to MU service personnel
Demonstrate the operation of the building systems to the user groups and building point of contact
MU key shop complete cutting of the building keys
MU Graphics Designer to oversees installing building directories, room names, etc by contractor
MU Fire Marshall to test and inspect sprinkler and fire alarm systems
MU IT people have tested data/networking systems
Contractor returns all keys loaned to them
Final site restoration is complete

From the point of the signing of the CCC the contractors and consultants have 3 months to turn in to MU Project Manager the proper documentation as listed below:

Final Change Orders

Completion Report

As of 2/13/2004
Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Tom Pruckno</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Number</td>
<td>3.2.129</td>
</tr>
</tbody>
</table>

Demonstration Certificates
Completed Punch Lists
Signed off on final inspections
Occupancy Permits turned over
Operations and Maintenance Manuals
Warranties compiled in a “schedule of warranties” table
List of all colors used in the building
As-Built drawings (paper and electronic copies)
Shop drawings
Set up and facilitate an after action review of the project to soliate what went right with the project and what could have been done better

The MU Project Manager is to review the submitted materials for completeness. PM should review the construction submittals and insert any missing items into the O&M manuals and throw out any duplicates.

From the point of the signing of the CCC the contractors and consultants have 3 months to turn in to MU FCA the proper documentation as listed below:

Final Certified payroll reports
Affidavit from prime contractors that all subcontractors and material men and suppliers have been paid
Final pay applications

Will establish working group with Terry Ponder, Steve Pohlman, Doug Hammerle, Lisa Armitage and Don Lowe to review what has been established/existing to expand upon.

Updated 3/30/04 - Meeting is scheduled for 3/30/04.

Updated 6/04
Meeting is scheduled for 6/21/04. Assignments were distributed to the team - Update the substantial completion certificate and contract completion certificate.

Completion Report

As of 2/13/2004
Internal Process Perspective

| Sponsor   | Tom Pruckno | Task Number | 3.2.129 |

Place a folder on G drive for warranties. Place a folder on G drive for A/E and Contractor performance evaluations,

Review the warranty items list.

Updated 9/04
No progress has been made.

Update 12/04
Continue reviewing documents for turn-over with PMs.

Completion Report

As of 2/13/2004
Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Bob Keller</th>
<th>Task Number</th>
<th>3.2.141</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>5/1/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Develop formal documentation of the long range master plan

New 9/22/03

Format should allow for updating on an annual basis. Format should be adaptable to both hard copy and web posting.

Participants: Bob Keller, Paul DiBenedetto, Lisa Vaillancourt.

Updated 12/03
Completion date: June, 2004.

Updated 10/4/04
Completion date: May 2005.

Completion Report

As of 2/13/2004
# Financial Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Task Number</th>
<th>3.3.131</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>7/1/2004</td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Task Title**
Develop a long-range plan to Hamilton Campus

**Completion Report**

As of 2/13/2004
# Financial Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Chuck Mack</th>
<th>Task Number</th>
<th>3.3.132</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>7/1/2004</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Develop a long-range plan for Middletown.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Completion Report**

---

As of 2/13/2004
## Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Paul DiBenedetto</th>
<th>Task Number</th>
<th>4.2.65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>12/31/2005</td>
<td>Task Title</td>
<td>Develop PFD Information/Document Management</td>
</tr>
</tbody>
</table>

### Description

A cross-functional group will develop an Improvement Plan for managing, reducing and storing documentation. They will determine what documents need to be managed through the net, develop standardized formats for departmental documents, and develop SOPs for managing documentation and storage. This cross-functional group, with the Information Manager as lead, will develop an improvement plan by June 1, 1999.

A cross-functional group will develop an improvement plan for managing, reducing and storing documentation. They will determine what documents need to be managed through what technology, develop standard formats for departmental documents, and develop an SOP for managing documentation and storage.

Milestones and Tasks:
- Create the cross-functional work group - November 30, 2002.
- Determine the type of documentation that will be managed/improved and determine what technology will deliver these improvements. (SOP’s Fax cover sheets and Forms would be handled differently than Aperture or AutoCad) - July 1, 2003.
- Create a test environment and evaluate how well end efficient these modifications are performing. Make adjustments if necessary. Cross training employees may also be necessary - September 30, 2003.
- Get approval from the Associate Vice President and Primary Staff and create a deliverable and /or SOP - October 30, 2003.
- Communicate and train the PFD personnel on these new standards and guidelines - November 30, 2003.

As of 10/02.

### Completion Report

As of 2/13/2004
Internal Process Perspective

Sponsor | Paul DiBenedetto | Task Number | 4.2.65

06/03
On Target - All published dates have been met at this time.

Updated 12/03 - Will deliver the following documents on December 9, 2003 for this task:
1. Controlling Board Requests
2. Digital Photo's
3. Architectural Renderings, Presentation Boards, Printer Photographs

The following procedures will be modified by the ConstructWare application:
4. Construction Documentation - Drawings and Specifications
5. Permit drawings, Specifications and Building Permits
6. Record Documentation - Record Drawings
7. Project Fact Sheets
8. Project Info Sheets
9. Review (Progress) Drawings
10. Special Drawings during Construction

Updated 03/04
Will resubmit when implemented in Constructware. That date is to be determined.
Expected completion date is ongoing but will be reviewed by 12/31/2004

Updated 10/1/04
On target - All published dates have been met at this time.

Update 12/04
New CAD standards manual evaluated and approved.

Completion Report

As of 2/13/2004
Develop a Transportation Plan.

Review existing transportation requirements with the goal of reducing the number of vehicles and associated costs with maintaining our transportation requirements. Campus Services (Motor Pool Manager) as lead on this cross-functional group, will develop recommendations.

Review existing transportation needs with the goal of exploring ways to reduce the number of vehicles (and associated costs of fuel and maintenance). Report due by (updated 9/22/03 - April 1, 2004.)

Update 12/04
Gathering information for benchmarking with other campuses.
Internal Process  Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Don Lowe</th>
<th>Task Number</th>
<th>4.2.69</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>8/1/2005</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Task Title
Evaluate Central Stores and Receiving Operations.

Description
This task will evaluate the current stores operation in order to identify improvement objectives. This group will evaluate the current system for improvement, identify costs/benefits of the storeroom being under PFD, evaluate future space requirements, identify other services that could be provided, and evaluate a separate (and independent) receiving office.

Evaluate the existing stores operation so as to identify possible improvements to the process of buying parts, supplies, and consumable items. Included in the evaluation will be an analysis of whether or not stores operation should be contracted out, operated by PFD, or left under Purchasing. Explore ways to manage inventory better. Explore better ways to charge costs to work orders. Explore other services that could be provided by this operation. Evaluate receiving operation and space storage requirements. Recommendations due by (updated 9/22/03 - April 1, 2004.).

Update 12/04
No progress to report.

Completion Report

As of 2/13/2004
## Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Susan Rooney</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Number</td>
<td>4.2.105</td>
</tr>
<tr>
<td>Due Date</td>
<td>1/31/2005</td>
</tr>
</tbody>
</table>

### Task Title

**Plant Fund Accounting Actions**

### Description


10/30/02 - All involved met to discuss the need and role of a new PFD accountant.

11/1/02 - Sheila and Susie developed a job duty flow chart.

11/18/02 - All met to review the Plant Fund Job Responsibility Flow Chart.

12/2/02 - All met and identified areas of concern in Flow Chart.

1/13/03 - All met with reps from Purchasing and Maintenance Purchasing to discuss Purchasing/Accounting/PFD Interface on Project Accounting/PO

2/10/03 - Sheila, Susie, and Jerry met with Bill Shawver to discuss Purchasing procedures as it related to PFD Construction.

9/27/04 - No change.

Update 12/04
Reconvened group in Nov 04. Individuals have action assignments.
Dale H. to look into printing POs at Cole.

### Completion Report

As of 2/13/2004
## Internal Process  Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Terry Ponder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>6/1/2005</td>
</tr>
<tr>
<td>Task Number</td>
<td>4.2.119</td>
</tr>
</tbody>
</table>

### Task Title

Define role and responsibilities of Facilities Contract Office

### Description

FCA to work with Assoc. VP to more clearly define role of FCO in relation to PFD, HDGS, Regional Campuses and Miami Community at large. To review and reassess the responsibilities of FCO in light of changing state mandates, increased duties within PFD and coping with long term planning of the University. Define day to day work processes, priority keys and limits of FCO in practical application of duties. Gain focus on when and where the FCO assumes the various roles of observer, advisor, administrative supporter and decision maker for specific activities. New 10/02.

Updated 06/03

Initial meeting with Jim, Paul, Bob and Don was cancelled due to scheduling problems with the Yager Turf bid. Jim has suggested that input from the others will be critical in working through this goal. A new meeting will hopefully be proposed prior to the beginning of the school year. A draft for the selection of Design Professionals has been circulated but no responses have been received to date. This will be an ongoing process but a clearer perspective of the role of FCO should be presented by December 1, 2003.

Updated 9/19/03

Discussions on the responsibilities of the FCO will necessarily need to include Purchasing Processes to be discussed with Jim Haley on the role of the Facilities Contracting office. The draft for procedures to select design professionals was distributed in the spring of 2003. Jim Haley has been the only recipient to return comments. Meeting with Jim Haley has been scheduled for 9/25/03.

### Completion Report

<table>
<thead>
<tr>
<th>Completion Report</th>
</tr>
</thead>
</table>

As of 2/13/2004
**Internal Process Perspective**

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Terry Ponder</th>
<th>Task Number</th>
<th>4.2.119</th>
</tr>
</thead>
</table>

Updated 10/1/04
Contracting policy to be developed with Chris Wilson from University AG Office. Additional policy definition will be generated in like manner. Initial discussions to begin early October 2004. New position to be added in FCO which will necessitate procedure change.

Update 12/04
Draft expected in Jan.

---

**Completion Report**

As of 2/13/2004
### Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Tom Pruckno</th>
<th>Task Number</th>
<th>4.2.138</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>9/1/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Implementation of Constructware</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Description**

New 9/22/03.

Implement the use of Constructware for project management PFD wide. Minimum size of project to be determined.

Participants: Paul DiBenedetto, Tom Pruckno, Paul Wenner, Steve Pohlman, Terry Ponder.

Updated 12/15/03 - Implementation has occurred for the design module and budget module. Twenty-seven projects are listed in the system. All PM's have some form of training - have begun one-on-one training.

Bidding module will be mid-December, construction module will be early January 2004 and construction cost module will be February 2004.

Updated 3/30/04 - Construction cost module will be April ’04.

Student Apartment Housing is using RFI’s, meetings and submittals.

Looking to upload budgets into the system for the major projects.

Updated 6/04
Have implemented the contracts module, and the change order forms. Will begin routing next.
Student Apartment Housing is using RFI’s, meetings and submittals.

**Completion Report**

As of 2/13/2004
Internal Process Perspective

**Sponsor**  Tom Pruckno  **Task Number**  4.2.138

Have established budgets for SAH, Ice Arena, SW parking garage, Psychology building, SEAS, Peaking Engines project and Conservatory.

Have updated the Policies and procedures manual for A&E’s and Contractors.

Updated 9/04

Continue the implementation, most projects are using RFI's and submittals, meetings, correspondence, and daily reports. Have implemented the contracts module and finishing the change order process including routing next.

Update 12/04

Modules in work: Budget, routing, dashboard, COs, pay apps, invoices.

**Completion Report**

As of  2/13/2004
Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Cathy Brown</th>
<th>Task Number</th>
<th>4.2.143</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>1/31/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Develop and implement an improved mechanism to reward the top performers and motivate the poor performers.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>New task item 10/03.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Team members: Don Lowe, Chuck Mack</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update 12/04</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>No progress to report.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

As of 2/13/2004
## Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Steve Gaski</th>
<th>Task Number</th>
<th>4.2.144</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>3/31/2005</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Task Title**

Examine the classified performance evaluation system for improvement.

**Description**

New task item 10/03.

Team members:  Cathy Brown, Art Faura, Cody Powell, Mark Lawrence

Team will meet to discuss current system and develop methods, including survey, to develop an improvement plan.
First meeting to be scheduled mid-January 2004.
Target due date will be 6/1/2004.
Updated 12/03

Updated 6/04
No action taken to date.  Initial meeting to be scheduled in July.

Updated 10/4/04
Committee is formed and meeting October 5th.  Recommendation should be ready end of November.

Update 12/04
Committee working on standard form for PFD and training outline.  Expect report by mid-Feb.

### Completion Report

<table>
<thead>
<tr>
<th>Due Date</th>
<th>12/13/2004</th>
</tr>
</thead>
</table>

As of 2/13/2004
<table>
<thead>
<tr>
<th>Task Title</th>
<th>Description</th>
<th>Due Date</th>
<th>Completion Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incorporate technology innovations, i.e. bar-coding, PDA's electronic purchase orders, cell phone, communications, web-based project management, GPS.</td>
<td>New task item 10/03. Team members: Paul DiBenedetto, Art Faura, Tom Fister, Doug Hammerle, Bob Keller 1. Work on the planning, benefits and implementation costs of utilizing a bar code system in the tool room and general store room. This would require input and cooperation from the maintenance Purchasing group. Tom Fister and Paul D. setting up test warehouse for trial run. Report due: 11/04. 2. Explore the benefits, costs and training required for the implementation and the use of PDSs to send and receive work orders via the TMA system. Testing the viability of using PDAS with introduction of two units to maintenance. Updated 10/04. Report due: 12/04. 3. Study the communications needs of PFD to include: Wireless technology in Cole, Cell phone/radio implementation PDA/cellphone/digital camera benefits and needs. 4. Expanded use of GPS beyond current locator of above and below ground stationary objects. Exploring need to update base station and software. Updated 10/04.</td>
<td>6/1/2005</td>
<td>As of 2/13/2004</td>
</tr>
</tbody>
</table>
5. Continue to evaluate other technology opportunities as the department needs change and future hardware/software develops.
Cell phone/radio implementation complete.

Update 12/04
Working on PDA implementation test.
### Task Title
Building Maintenance Section Staffing Plan

### Description
Develop a plan to meet current needs utilizing existing positions and resources. The following new positions are currently being considered from reclassified existing positions:

- Maintenance Planner
- Second Shift Manager
- Second Shift Preventive Maintenance Crew (4 FTEs)
- Second Shift Assistant Electrician
- Assistant Pest Control Technician

Update 12/04
Position Description for Second Shift Manager completed. Reevaluating existing positions for better use.

### Due Date
3/1/2005

### Sponsor
Cody Powell

### Task Number
4.2.156

### Completion Report

As of 2/13/2004
<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Susan Rooney</th>
<th>Task Number</th>
<th>4.2.161</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>5/1/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Hire new plant fund accountant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Finalize position description; advertise by 2/1/2005.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Completion Report**

As of 2/13/2004
Financial Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Jim Haley</th>
<th>Task Number</th>
<th>4.3.72</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>1/31/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Move the budgeting/accounting of overtime to the divisions.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Description**

Move the budgeting/accounting of overtime to the divisions. The QC will determine costs/benefits of having divisions account for overtime, develop an improved tracking/reporting system for overtime, and establish control limits by trade. This will be completed by October 1, 1999.

Management of Overtime.
Identify needed reports.
Date - Dec. 31, 2002.
Updated 10/02

Updated 06/03
Project is underway at University level to change financial reports to allow management at divisional level.
Next update (due date): November 30, 2003

Updated 12/03
Investigating use of Brio Intelligence and Special Banner, Kronos, and TMA reports to develop data and information necessary to allow management of overtime budget at department/division/section level.

Updated 3/29/04
Brio Training complete. Investigating development of necessary reports.

**Completion Report**

As of 2/13/2004
Financial Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Jim Haley</th>
<th>Task Number</th>
<th>4.3.72</th>
</tr>
</thead>
</table>

Updated 10/4/04
No progress.

Updated 12/04
Report comparison test scheduled for Jan 05.

Completion Report

As of 2/13/2004
Learning and Growth Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Cathy Brown</th>
<th>Task Number</th>
<th>4.4.75</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>1/1/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Develop a Safety Training Program</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Description**

The Safety QIB will develop and submit a Safety Training Plan to the QC by January 15, 1999. This plan will identify responsibilities and procedures for conducting safety training in PFD. (4.4.4)

Team Members: Staff Development Manager, Cathy Brown, Asst. Manager Operations Center, Sandra Mohr, EHSO Rep., Dave E., IS Manager, Paul D., Safety Committee Chair and University Engineer, Paul Wenner, Sr. Director Facilities Operations, Don Lowe, and University Architect, Bob Keller.

Identify required safety training for each PFD position. (June 2003)

Updated 06/03 - Complete: All required OSHA safety training has been identified for each PFD position. The required safety training has been approved by the PFD Safety Committee and the PFD Quality Council.

Investigate possibility of developing via TMA, a means of capturing safety training requirements per position, timelines for training, and assigning and alerting responsible person. (January 2004)

Updated 06/03 - Currently working with Asst. Manager Operations Center (Sandra Mohr) and EHSO rep. (Dave Ellcessor) concerning capturing the safety training requirements per position and timelines for training. It appears that we will be able to pull up reports via TMA prior to required safety training due dates.

Identify plan for providing the required safety training. (July 2004)

**Completion Report**

As of 2/13/2004
**Learning and Growth Perspective**

**Sponsor**  Cathy Brown  
**Task Number**  4.4.75

Updated 3/29/04
Identify required safety training for each PFD position. Complete. All required OSHA safety training has been identified for each PFD position. The required safety training has been approved by the PFD Safety Committee and the PFD Quality Council.

Investigate possibility of developing via TMA, a means of capturing safety training requirements per position. (June 2004).
Currently working with Asst. Manager Operations Center (Mohr) and EHSO rep. (Ellcessor) concerning capturing the safety training requirements per position. Have developed a code to use for each of the 29 identified safety training requirements. Currently in the process of updating the training records in TMA with the new codes; approximately 100 records have been updated. It appears that we will be able to pull up reports via TMA prior to required safety training due dates.

Identify plan for providing the required safety training. (July 2004)

Updated 9/04
Currently in the process of updating the training records in TMA with the new codes; approximately 150 records have been updated.

**Completion Report**

As of 2/13/2004
# Learning and Growth Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Cathy Brown</th>
<th>Task Number</th>
<th>4.4.107</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>1/1/2005</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Task Title
Develop Master Training Schedule/Plan

## Description
Team Members: Staff Development Manager, Division Directors

Working with Division Directors, develop a training schedule/plan that includes all necessary annual/reoccurring training. Review and investigate training needs on an annual basis to determine additional training required that would optimize staff's potential and keep them current with the changing work environment. (January 2004)

Identify and eliminate obsolete training requirements that are listed in the Job Enrichment Manual (January 2004)

New 11/02

Updated 12/03 - This was put on hold due to the Union negotiations per Don Lowe. As part of the Union negotiations, the University agreed to form a committee (3 union reps and 3 university reps) to discuss job enrichment issues. I have been asked to be part of the University team. The first meeting took place on 12/12/03. Present at this meeting were the University reps (union reps have not been identified by the union at this point).

Have begun the process of looking into several of the current programs to identify additional training needs and to eliminate obsolete training. Currently reviewing new job enrichment programs for the Plumbers and Steam Plant staff and have met with directors and managers in these areas and have also met with outside consultants.

Updated 3/29/04

## Completion Report

As of 2/13/2004
Learning and Growth Perspective

| Sponsor       | Cathy Brown | Task Number | 4.4.107 |

Working closely with the Director of Building Maintenance and appropriate supervisors, have begun the process of looking into the current JE programs for the plumbers and Area Shop personnel. Additional training needs and obsolete training requirements have been identified. Presented draft recommendation to AVP for plumbers on 3/19/04. Should have final JE proposal ready to present to the AVP in the next few months for plumbers and Area Shop personnel.

Updated 9/04
New JE apprenticeship type program for Plumbers has been finalized and approved by AVP. Currently working on updating the Area Shop JE Program.

Completion Report

As of 2/13/2004
<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Cathy Brown</th>
<th>Task Number</th>
<th>4.4.142</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>8/1/2004</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Training and Travel Budget Updates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>New 10/02/03</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provide updated training and travel budgets and balances to departmental directors and section heads annually.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>10/4/2004</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Completion Report</th>
</tr>
</thead>
</table>

As of 2/13/2004
Learning and Growth Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Cody Powell</th>
<th>Task Number</th>
<th>4.4.150</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>1/1/2005</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Task Title**

Refine the skill assessment and application of knowledge requirements for job enrichment.

**Description**

New task item 10/03.

Team members: Cathy Brown and Cody.

First meeting scheduled on 12-17-03.
Updated 12/03
updated 3/29/04
The committee is still developing the scope and final goals relative to the task statement. Next meeting is scheduled on April 13th.

Update 6/04
The committee will accomplish two tasks. A policy shall be developed in the job enrichment program for hands-on skill assessment prior to admission and completion of a given program. An evaluation form shall be developed to be used by supervisors on a frequency basis (i.e., quarterly) outlining progress and areas requiring improvement of on-the-job abilities. A draft of the evaluation is currently being written.

Update 9/27/04
No change has occurred.

Update 12/04
Draft evaluation completed.

**Completion Report**

```markdown
As of 2/13/2004
```
Internal Process  Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Dave Ellcessor</th>
<th>Task Number</th>
<th>5.2.83</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>1/1/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Develop a Safety Improvement Plan</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Description**

Develop a Safety Improvement Plan for providing the safest possible environment for employees. This Improvement Plan, with action items, should include these major components:
- Develop PFD Safety Program
- Develop Safety Training Plan
- Conduct Workplace Safety/Hazard Assessments
- PFD Safety Manual
- Risk Management and Loss Prevention Programs
- PFD Safety Coordinator Position

Develop a Safety Improvement Plan for providing the safest possible environment for employees. This Improvement Plan, with action items, should include these major components:

Develop PFD Safety Program - by June 2003  (updated 10/04 - on-going as function of Safety Committee)
Develop Safety Training Plan - by March 2003 (updated 10/04 - on-going by Dave Ellcessor and Manager of Staff Development)
Conduct Workplace Safety/Hazard Assessments - (updated 10/04 - on-going by Dave Ellcessor)
PFD Safety Manual - by August 2003 (updated 10/04 - being evaluated by Safety Committee)

Updated 10/04 - PFD/HDGS Safety Coordinator Position eliminated - Dave

**Completion Report**

As of 2/13/2004
Ellcessor is performing this role.
Develop a plan to increase diversity of PFD staff.

Examine opportunities to increase the diversity of the PFD staff. Goal is to proportionally mirror the make-up of the Southwest Ohio region population.

New 10/02

Team to be established in August with report due in October 2003.


Updated 1/15/04 - First meeting held with Jim Haley, Don Lowe, Paul Wenner, Bob Keller, Cathy Brown.
1. Invite Raquel Dowdy Cornute, EEOO and Michelle West, Recruitment and Employee Relations Specialist to our next meeting to assist us in identifying possible recruitment opportunities for minorities.
2. Put a focus group together of our existing minority employees (including women) to discuss possible environmental improvements that would impact the recruiting and retention of minorities.
3. Ask the assistance of our existing minorities in recruiting other minorities.
4. Consider possible partnering with HD&GS concerning transportation opportunities that would improve our recruitment and retention of minority employees.
5. Research minority publications for possible advertising opportunities.
6. Contact local minority community organization for possible position advertisement/recruitment opportunities.
7. Consider the possibility of improving our diversity of full time staff by hiring more minority students.

As of 2/13/2004
## Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Jim Haley</th>
<th>Task Number</th>
<th>5.2.109</th>
</tr>
</thead>
</table>

Updated 10/4/2004
No progress.

Updated 12/04
Team to address recommendations to be formed in January 05.

### Completion Report

As of 2/13/2004
Develop a document describing the FCO and Maintenance Purchasing interrelationships.

FCA and Manager of Maintenance Purchasing to coauthor a short paper to clearly indicate what duties are to be performed by each, what duties are shared, what duties fall in the "gray area" and how the current clerical staff supports both. We may present emergency/contingency procedures when staff of either are out of office and off campus. Taking a look at reconfiguring space arrangements, occupation of space and best use of clerical support including possible increase of personnel.

New 10/02.

Updated 06/03
Maintenance Purchasing and Facilities Contract Office remain in transition. Physical changes in the office environment will dictate some change of duties and responsibilities. Purchasing in Bonham is still making process changes, particularly in the issuing of purchase orders and processing change orders. Personnel changes appear to be inevitable but to date are undetermined. DH Architects are in design for the Maintenance Purchasing and Facilities Contract Office areas. An operations process paper will follow the physical changes. This should be completed by November 1, 2003.

Updated 9/19/03
A "Rules for Contracting" document has been issued by Robin Parker and Bill Shawver. The Maintenance Purchasing and Facilities Contracting office renovation are in the final stages of design. Personnel duties may change as additional staff space has been incorporated into the design. Staffs of both departments continue to cover for one another and cross training for buyers is being discussed. Changes in
the T&M/work order procedures may include duty changes in Maintenance Purchasing and Facilities Contracting.

Updated 12/03 - Physical reconfiguration of Maintenance Purchasing and the Contracting Office has been delayed. Additional staff still being considered.

Updated 10/01/04
Construction and renovation of Facilities Contracting and Maintenance Purchasing nearing completion. New clerical position to be advertised in approximately 2-3 weeks. Maintenance Purchasing also has clerical position open. Various duties to be discussed and possible redistribution when all new personnel are on board.

Update 12/04
Same as Oct.
Internal Process Perspective

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Cathy Brown</th>
<th>Task Number</th>
<th>5.2.149</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>1/1/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Title</td>
<td>Market PFD / employee achievements, internal and external.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>New task item 10/03</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Team members: Donna Boggs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Completion Report

As of 2/13/2004
### Task Title
Assessment Program for Potential Area Shop Technician Candidates

### Description
Develop and implement a skill assessment program focusing on hands-on skills, ability to troubleshoot, and ability to learn for university employees wishing to become area shop technicians.

Update 12/04
Training Boards developed for various trades. Tests conducted.