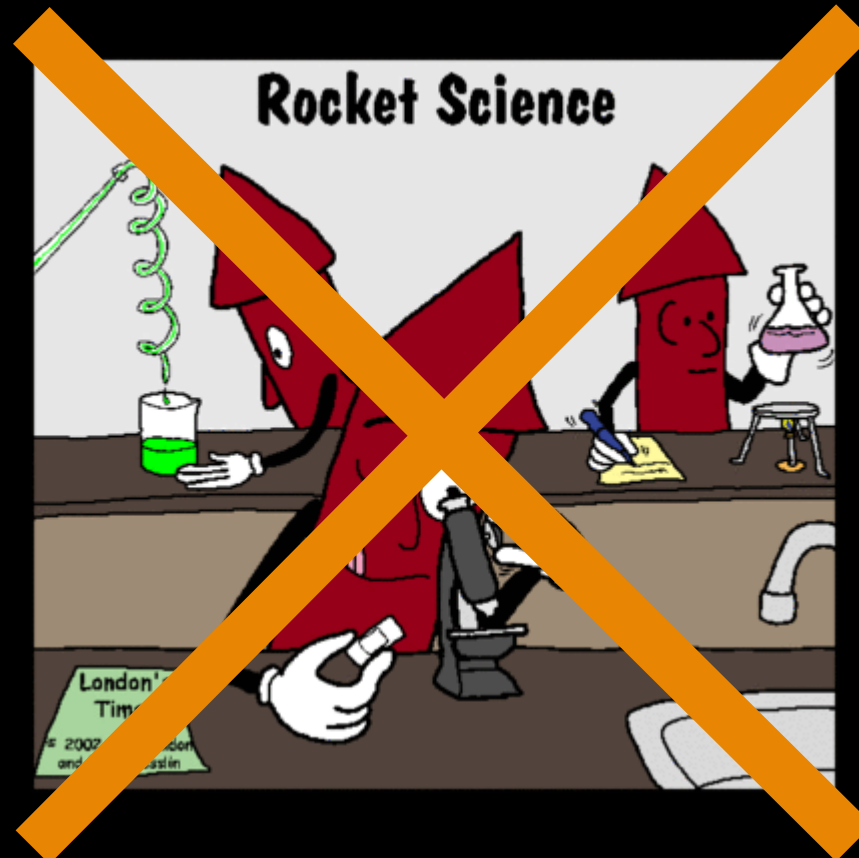




Aligning Operational Activities with Strategic Priorities

Think About



Think About



Think About



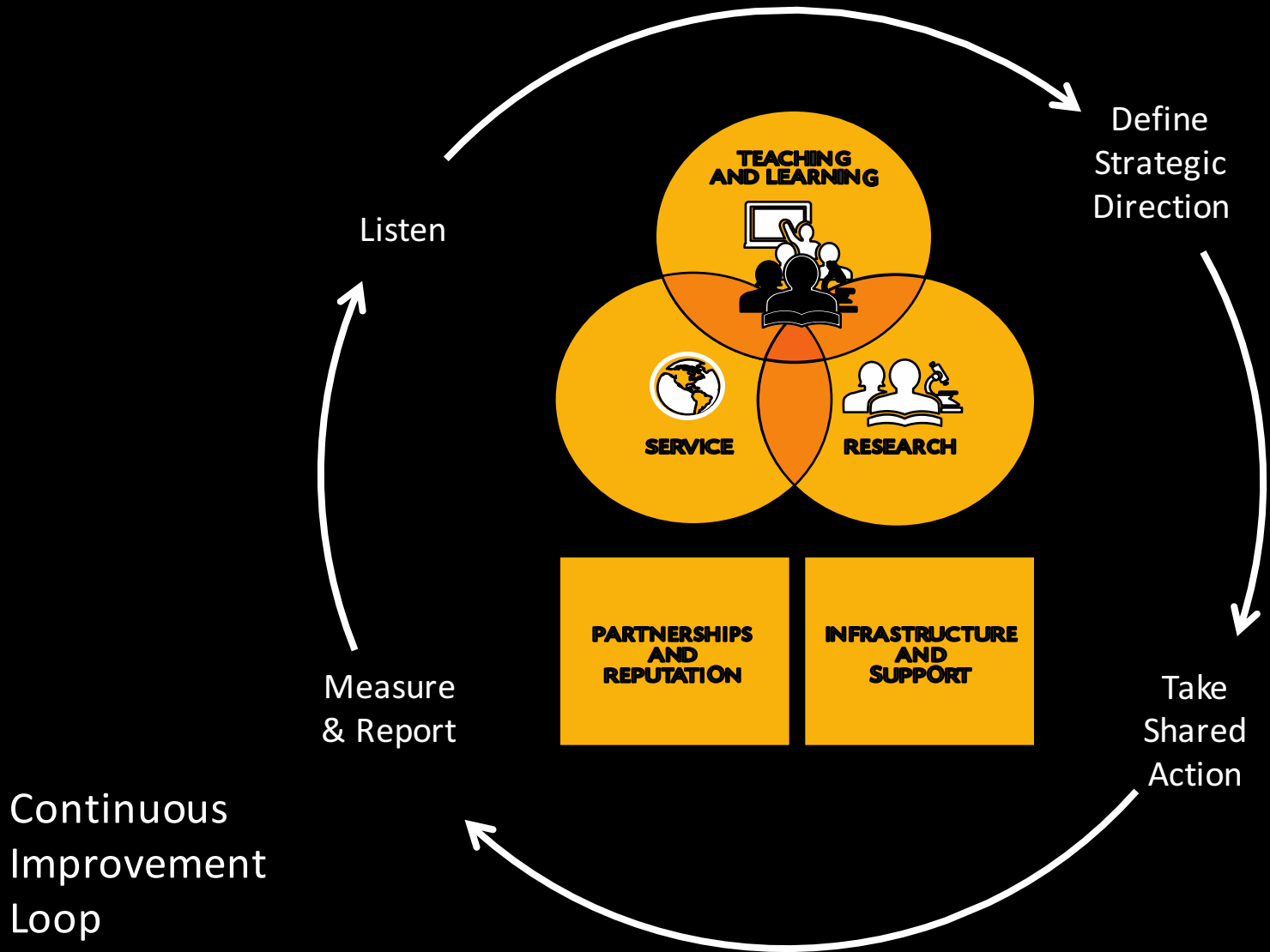
Think About



The Opportunity

Inspiration and
IMPACT

DALHOUSIE STRATEGIC
DIRECTION 2014-2018



Continuous Improvement Loop

STRATEGIC PRIORITIES

1.0 TEACHING AND LEARNING



Enhance the transformative power of teaching and learning

2.0 RESEARCH



Expand the opportunities for research, scholarly and artistic work

3.0 SERVICE



Catalyze the intellectual, social and economic development of our communities

4.0 PARTNERSHIP AND REPUTATION



Take our place nationally and internationally

5.0 INFRASTRUCTURE AND SUPPORT



Build our institutional capacities

1.3 Strengthen student experience, leadership development and additional support for our locally diverse and international students

2.5 Enhance research with state-of-the-art facilities and resources in accordance with the Institutional Framework for the Support of Research

3.3 Promote a culture of service and engagement among students, faculty and staff

4.1 Foster and support key external partnerships and relationships with alumni, other universities, governments, businesses and NGOs

4.4 Prepare for Dalhousie's 200th Anniversary in 2018

5.2 Foster a collegial culture grounded in diversity and inclusiveness

5.5 Enhance our infrastructure with a multiyear capital plan that promotes environmentally sustainable development

5.6 Improve the quality and inventory of research and teaching spaces

5.7 Improve the effectiveness and efficiency of administrative and operational processes aligned with our academic mission

How do I quantify my contributions to these priorities ????

Best Value Business Model (BVBM)



- Adopted in 2013 as an approach to deliver better project results

Select the Best Available Expert



- Identify risks before they happen
- Propose mitigation strategies
- Approach to react to the risk

Plan With the Expert Before Contract



- Project schedule with major milestones
- Risk plan with mitigations and actions
- List of client deliverables

Measure Performance Against the Plan

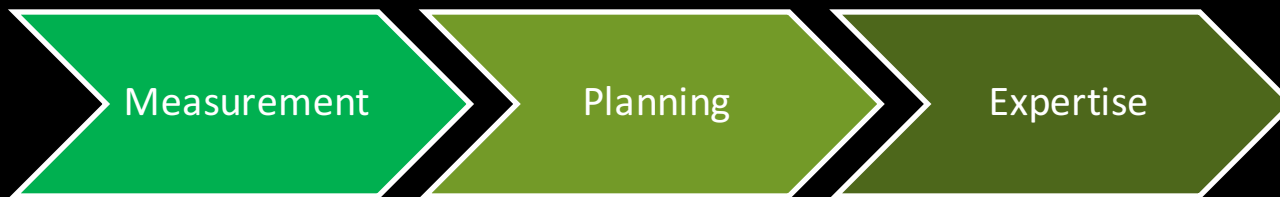


- Exceptions to price, schedule, deliverable
- Advance identification of new risks
- Project closeout report

If we cannot do full BVBM, we can still get benefits.

- If we can only do 1 thing – measure project or activity results;
- If we can do 2 things – add project and activity planning to measurements;
- If we can do 3 things – Select best available expertise to plan with, then measure. (BVBM)
- Our focus - Increase the level of expertise for higher project and activity performance.

BVBM & Traditional Approach



Facilities Management Minor Capital Projects

Measurement

Planning

Expertise

Macro must be enabled to update today's data. See Instructions tab at bottom left of Excel window. Update

Tuesday, May 03, 2016

Project	Actual	PO Commitment	PREQ Commitment	Allocated	Act - PO + PREQ + Allocated	FAMIS Budget	Current Encumbrance	Encumbrance Less (Act+PO+PREQ)	Encumbrance Less (Act+PO+PREQ+ALLOC)
BOUCHER CAROL									
ACTIVE									
2014-0102-CFI - KIENAST - LSC OCEANOGRAPHY 3676	\$ 28,285.74	\$ 4,591.76		\$ 151,626.85	\$ 184,504.34	\$ 192,814.99	\$ 192,814.99	\$ 159,937.50	\$ 8,310.65
2014-0257-KEN ROWE - RENOVATE CLASSROOM 4055 - DESIGN	\$ 52,540.65	\$ 16,057.63		\$ 60,481.84	\$ 129,080.11	\$ 75,025.00	\$ 75,025.00	\$ 6,426.72	\$ (54,055.11)
2015-0184-OCEANOGRAPHY - RENOVATE ROOMS 3667, 3668, 3670	\$ -			\$ 7,659.83	\$ 7,659.83	\$ -	\$ -	\$ -	\$ (7,659.83)
2015-0107-D BUILDING - SEXTON - RENOVATE CWRS	\$ 54,267.30	\$ 17,388.16		\$ 248,038.95	\$ 319,694.40	\$ 319,925.54	\$ 319,925.54	\$ 248,270.08	\$ 231.14
SUBSTCOMPL									
2014-0078-OXFORD/COBURG ETHERNET/SECURITY PROJECT	\$ 130,213.98	\$ 541.36		\$ -	\$ 130,755.34	\$ 215,441.36	\$ 215,441.36	\$ 84,686.02	\$ 84,686.02
2014-0046-WELDON LAW - 4TH FLOOR LIBRARY - GRAD STUDENT COLLABORATION	\$ 716,861.18			\$ -	\$ 716,861.18	\$ 719,081.83	\$ 719,081.83	\$ 2,220.65	\$ 2,220.65
2014-0273-LIFE SCIENCES CENTRE - COMMON AREA - RENOVATIONS TO COMPLETE	\$ 130,527.25			\$ 21,601.55	\$ 212,128.80	\$ 207,388.65	\$ 207,388.65	\$ 16,861.40	\$ (4,740.15)
2015-0201-CAMPUS MOVES - HHA, 1376 LEMARCHANT AND MCCAIN	\$ 21,461.06			\$ -	\$ 21,461.06	\$ 23,656.31	\$ 16,195.00	\$ (5,266.06)	\$ (5,266.06)
2015-0378-LAW - 4TH FLOOR GRAD OFFICES SPACE DEMO	\$ 14,630.56			\$ 1,369.36	\$ 16,000.52	\$ 17,400.00	\$ 17,400.00	\$ 2,769.44	\$ 1,399.48
AWAITAPP									
2014-0108-KEN ROWE - INSTALL CLERESTOREY WINDOWS IN 3 OFFICES	\$ -			\$ 6,780.00	\$ 6,780.00	\$ 8,926.15	\$ 2,884.00	\$ 2,884.00	\$ (3,896.00)
2014-0335-DENTISTRY - ORAL PATH RENOVATION	\$ 20,571.22	\$ 3,027.36		\$ 34,646.86	\$ 118,245.44	\$ 143,366.27	\$ 23,961.33	\$ 362.75	\$ (34,284.11)
2015-0075-MCCAIN BUILDING - FOSTER - CFI - RESEARCH GRANT APPLICATION	\$ -			\$ 24,995.37	\$ 24,995.37	\$ 34,325.45	\$ -	\$ -	\$ (24,995.37)
2015-0117-LIFE SCIENCES CENTRE - OCEANOGRAPHY - RENOVATE ROOMS 3660, 3666	\$ 358.46			\$ 228,167.89	\$ 228,167.89	\$ 179,287.89	\$ 20,000.00	\$ 19,041.54	\$ (209,126.35)
2015-0338-CFI - LSC - PSYCH - STEWART	\$ 1,179.26			\$ 61,140.27	\$ 62,319.52	\$ 73,613.73	\$ -	\$ (1,179.26)	\$ (62,319.52)
PROJDESIGN									
2015-0191-LIFE SCIENCES CENTRE - BIOLOGY - 8TH FLOOR - GREENHOUSE - EXTERIOR	\$ 6,670.01	\$ 54,348.90		\$ 2,890.19	\$ 63,909.10	\$ 1,500,000.00	\$ 150,000.00	\$ 88,981.09	\$ 86,090.90
2015-0249-GERARD HALL AND H-BUILDING - INST ALL BIKE RACKS (DESIGN ONLY)	\$ 556.24	\$ 278.25		\$ 836.08	\$ 1,670.56	\$ 1,671.00	\$ 1,000.00	\$ 165.52	\$ (670.56)
2016-0027-LAW - 1ST FLR COM. WALL RENEWAL	\$ -			\$ 7,756.77	\$ 7,756.77	\$ 10,500.00	\$ 1,200.00	\$ 1,200.00	\$ (6,556.77)
2016-0028-LAW - 1ST FLOOR MALE WASHROOM	\$ -			\$ 48,784.81	\$ 48,784.81	\$ 98,500.00	\$ 11,700.00	\$ 11,700.00	\$ (37,084.81)
2016-0023-LAW - 1ST FLR UMISEX LOCKER ROOM	\$ -			\$ 116,064.56	\$ 116,064.56	\$ 144,315.00	\$ 20,140.00	\$ 20,140.00	\$ (95,324.56)
2016-0030-LAW - 1ST FLR ADMISSIONS RENOVATIONS	\$ -			\$ 196,605.76	\$ 196,605.76	\$ 279,000.00	\$ 39,600.00	\$ 39,600.00	\$ (157,095.76)
2016-0038-WELDON LAW BUILDING - LEVEL 1 & 2 WAYFINDING - SIGNAGE ALLOCAT	\$ -			\$ 2,970.12	\$ 2,970.12	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	\$ 22,029.88
2016-0043-STUDENT UNION BUILDING - BASEMENT LEVEL - ROOM # 10 - VARIOUS LO	\$ -			\$ 26,500.00	\$ 26,500.00	\$ 26,500.00	\$ 20,000.00	\$ 20,000.00	\$ (6,500.00)
PRICING									
2014-0255-WELDON - DESIGN NEW VESTIBULE AND LOBBY SPACE	\$ 28,324.22	\$ 7,512.75		\$ 2,465.03	\$ 38,302.00	\$ 38,788.00	\$ 38,788.00	\$ 2,351.03	\$ (114.00)
2016-0026-LAW - 1ST FLOOR FEMALE WASHROOM & LOCKER ROOM	\$ 137.18			\$ 141,008.70	\$ 141,145.88	\$ 166,450.00	\$ 19,150.00	\$ 19,012.82	\$ (121,995.88)

Dashboard | Dashboard - FR Backlog | ACTIVE Commitments | Work Orders by PM | Work Orders by Crew ...

Measurement

Planning

Expertise



Inspiration and
IMPACT

DALHOUSIE STRATEGIC
DIRECTION 2014-2018

Facilities Management

Business Plan 2015-2016





Facilities Management
Business Plan 2015-2016

DALHOUSIE
UNIVERSITY

Core Objectives

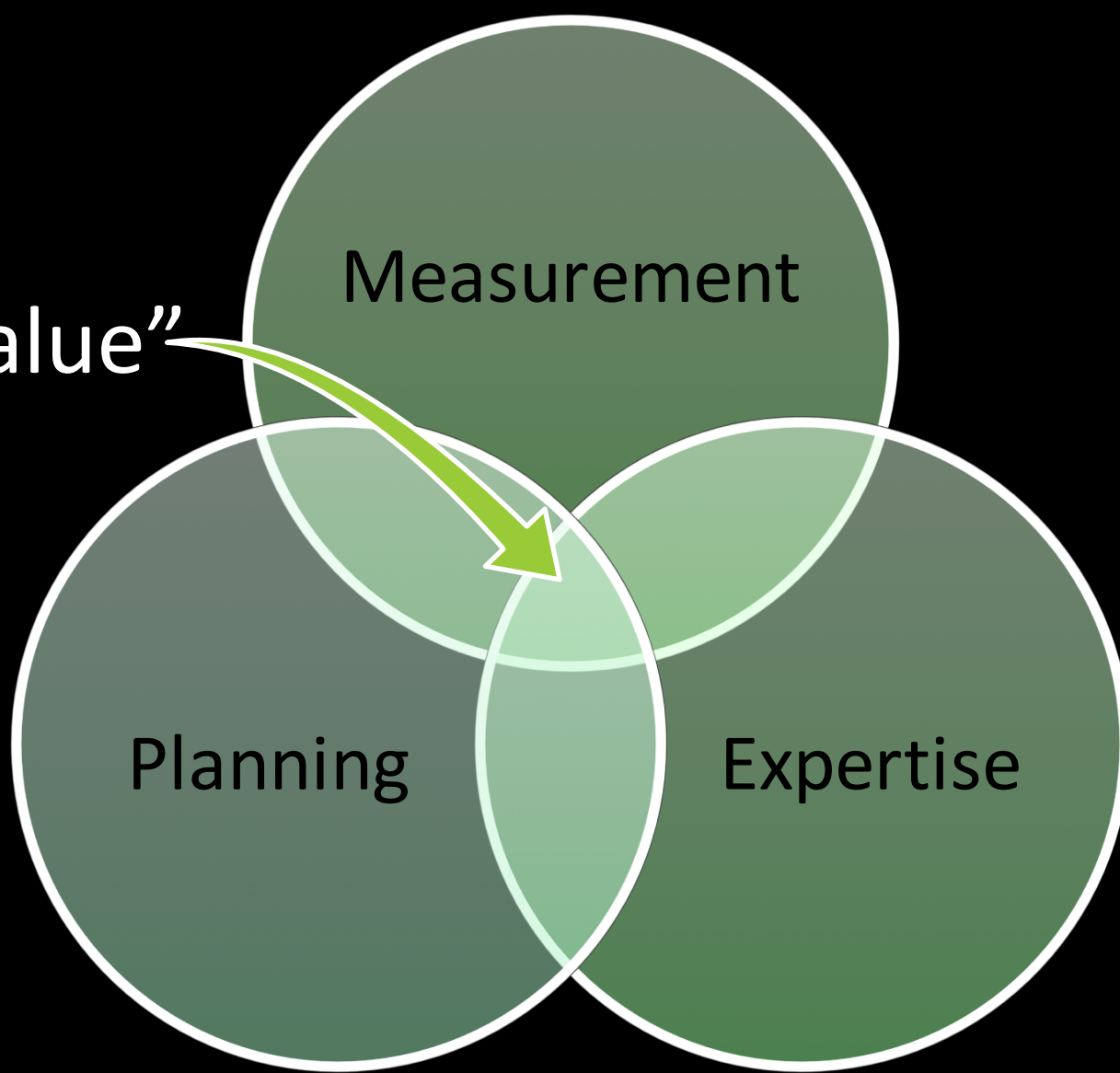
FY 2016-17

Safety	Productivity	Quality	FM Values
0 Safety Incidents	Facilities Renewal: Bill \$15.7M	Client Satisfaction: Measure baseline for each PM.	Commitment
50 Third Party Site Safety Audits	Client Funded: Bill \$13.2M	Risk Management: Risk plans completed monthly on all projects.	Dedication
150 Site Safety Observations		Cost Management: Change Orders + Unused Funding = 15%.	Integrity
			Leadership
			Quality
			Teamwork

Residence Food Services Renovation

- Change order rate of 14%+
- Although functionally complete in time for September, substantially completion certificate was issued in December.
- Three separate liens were contemplated (none perfected).
- Hidden financial and human cost of time lost. Losses accumulate against this project, and also against other concurrent and future projects.

“Best Value”



Measurement

Planning

Expertise



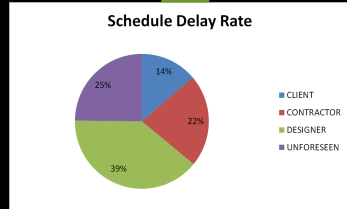
Facilities Management

Business Plan 2015-2016

Core Objectives

FY 2016-17

- Productivity**
 - Facilities Renewal: Bill \$15.7M
 - Client Funded: Bill \$13.2M
 - 150 Site Safety Observations
- Quality**
 - Client Satisfaction: Measure baseline for each PM.
 - Risk Management: Risk plans completed monthly on all projects.
 - Cost Management: Change Orders + Unused Funding = 15%.
- Value**
 - Leadership
 - Quality
 - Teamwork



A	B	C	D	E	F	G	H	I	J
DATE ENTERED	NAME OF THE USER / REVISION	ISSUE / REVISION / WORK DESCRIPTION / DISCUSSION	ACTUAL DATE BLOCKED	SCHEDULE IMPACT	COST IMPACT	CONSTRUCTION COST / CONTRACTOR COST / RESERVE	INSTITUTIONAL RISK / SEVERITY	LESSONS LEARNED	
1-18-16	1-18-16	1-18-16	1-18-16	21.00	10	\$10,000	5	1-18-16	
1-20-16	1-20-16	1-20-16	1-20-16	20.00	1	\$	10	1-20-16	



Procurement

Departmental Focus

- Perform tasks within Budget
- Compliance with Legislation
- Data
 - Activity volumes and values,
 - Contract compliance,
- Stories of individual successes.
- How do these relate to Strategic Priorities??

Collaborative Effort



Develop Data and Strategic Alignment



- All staff asked to track two things
 - Where I have added value
 - Where did something not go according to plan
- Broader perspective of “Value” as it relates to strategy
- Developing expertise through Risk Identification

Look Beyond Departmental Responsibilities

A	B	C	D	E	F	G	H	I	J
#	DATE ENTERED	SOURCE OF THE RISK / INNOVATION	RISK / INNOVATION BRIEF NARRATIVE DESCRIPTION (Note: Press "ALT+ENTER" to Create a New Line within a Cell)	ACTUAL DATE RESOLVED	SCHEDULE IMPACT	COST IMPACT	Satisfaction with Contractor's Risk Response	INSTITUTIONAL RISK SEVERITY	LESSONS LEARNED
0	1-15-09	Please identify the responsible party & category for the risk (from the drop down menu)	<p>Please describe the details of the risk:</p> <ol style="list-style-type: none"> 1. What is the risk / brief description of the background? 2. What will be done / what is the action plan to minimize this risk? 3. Who is responsible for specific actions? What actions are most pressing and when are they needed? 4. Brief narrative of the risk impact (potential or actual impacts to cost, schedule, quality)? 5. Any on-going, week-to-week updates to this risk (if applicable) 	2-1-09	15	\$10,000	1-10 Scale	10 = Major Institutional Impact 5 = Moderate Institutional Impact 1 = Project Level Impact Only	<p>Please describe the details of Lesson Learned:</p> <p>What could be done to avoid or encourage this impact in the future? Be specific.</p>
1	7-27-15	CLIENT: Non-Scope Change	<ol style="list-style-type: none"> 1. Insufficient communication to stakeholdes causes delays / rework. 2. Risk Report updated weekly and sent to Stakeholders. 3. Contractor will provide risk updates. Dal PM will update and send Risk Report. 4. Ongoing potential impact on stakeholder satisfaction and schedule. 					5	
2	7-27-15	CONTRACTOR: Error / Omission / General Issues	<ol style="list-style-type: none"> 1. Contaminated soil (pyritic slate) is discovered causing delays and additional costs. 2. Hazmat testing to be performed. Disposal / relocation plans to be provided prior to startup. Disposal contingency built into budget. 3. Dal PM to arrange testing. Contractor to provide disposal plan 4. Impact on cost and schedule. 5. Testing shows contamination (not pyritic). Contractor has confirmed original disposal location is acceptable at no additional cost. 	9-21-15	1	\$ -	10	1	<ol style="list-style-type: none"> 1. Always test for contaminants as early as possible (design), as the impact to cost and schedule could have sidelined the project. 2. Fast and best resolution requires bringing all the experts together (contractor and consultant).
			1. Weather interruptions cause delays.						

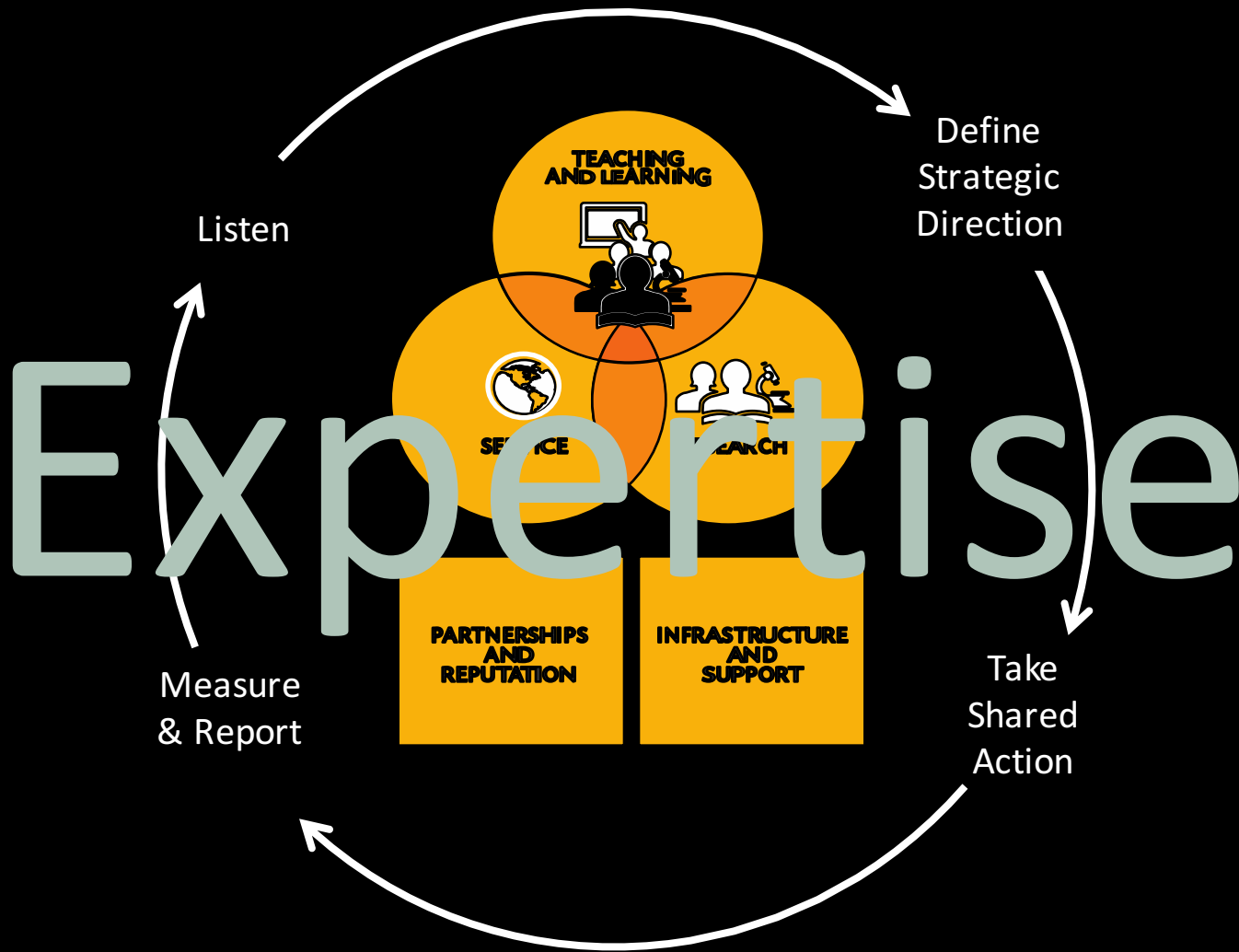
- Incorporate procurement risks in FM registry

BVBM Principles at Strategic Level

- BV is the framework we want to use
 - Increased level of Expertise
 - Foundation - Data Driven decisions
 - Repeatable approach
- False Starts...
 - Data Driven action plans are difficult to develop
 - Prioritization difficulty with limited resources
- Current efforts are focused on BVBM training at senior levels.

Decisions

- Decisions are based on experience, and data if available.
- Experience does not always correlate with **Expertise**.
- No Data & No Expertise = BIAS
- Move towards “**Data Driven**” decisions



Take Away's

Measurement

Planning

Expertise



Facilities Management

Business Plan 2015-2016



Core Objectives

FY 2016-17

Productivity

Facilities Renewal: Bill \$15.7M

Client Funded: Bill \$13.2M

Quality

Client Satisfaction: Measure baseline for each PM.

Risk Management: Risk plans completed monthly on all projects.

Cost Management: Change Orders + Unused Funding = 15%.

Value

Client Satisfaction

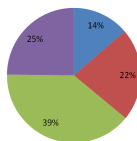
Leadership

Quality

Teamwork



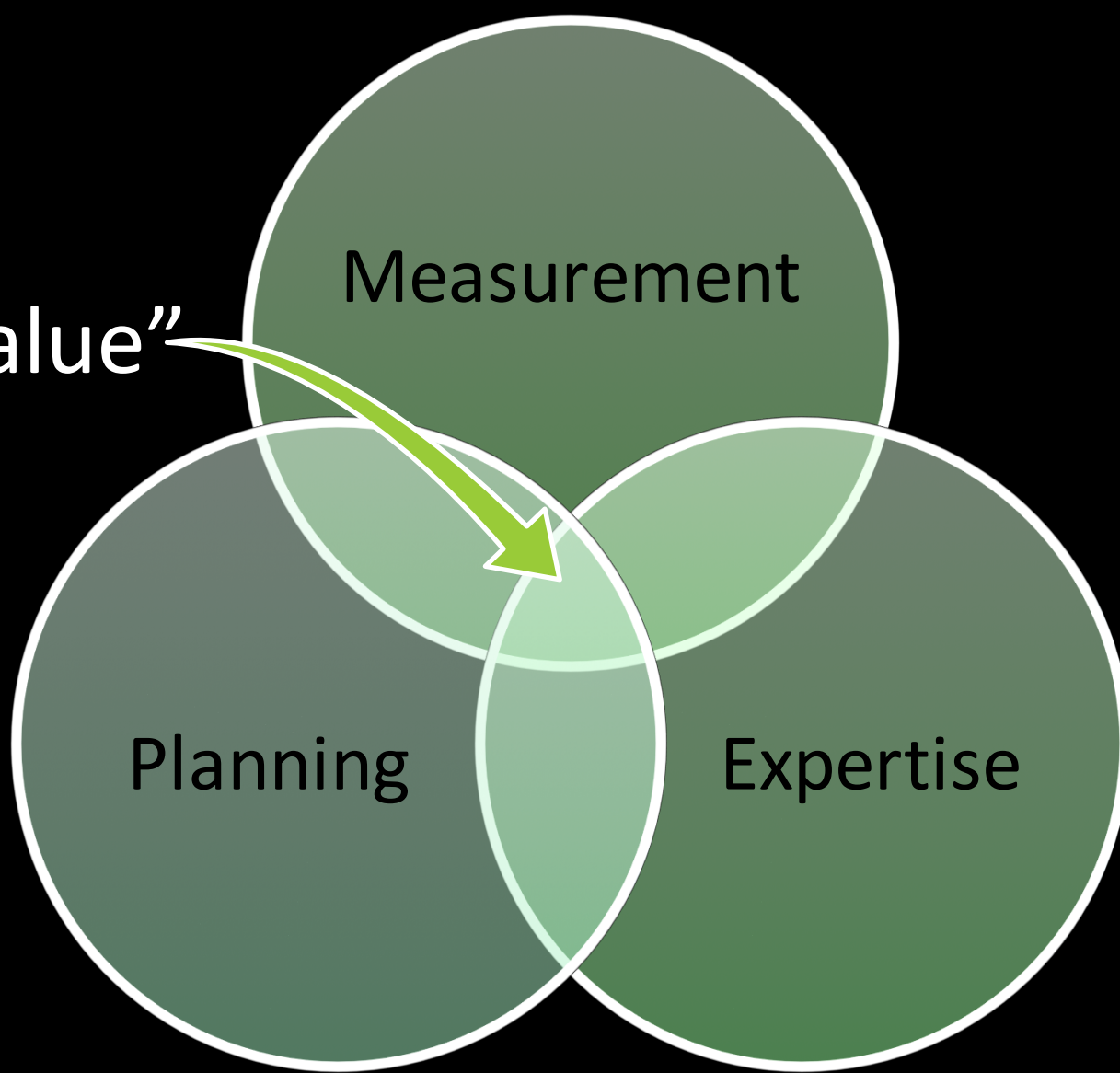
Schedule Delay Rate



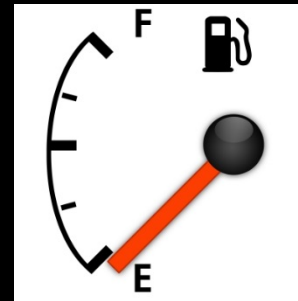
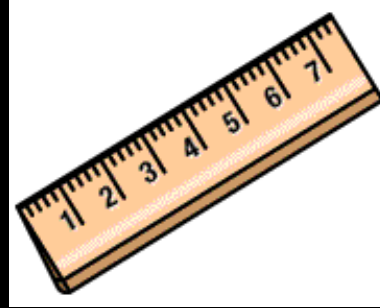
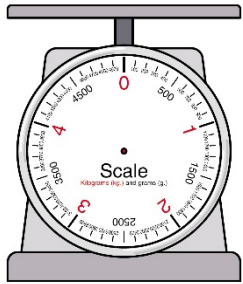
- CLIENT
- CONTRACTOR
- DESIGNER
- UNFORESEEN

A	B	C	D	E	F	G	H	I	J
DATE ENTERED	NAME OF THE USER / REVISION	ISSUE / REVISION / WORK DESCRIPTION	ISSUE / REVISION / WORK DESCRIPTION	ACTUAL DATE BLOCKED	SCHEDULE IMPACT	COST IMPACT	CONSTRUCTION WITH CONTRACTOR'S DELAY RESPONSE	INSTITUTIONAL RISK SEVERITY	LESSONS LEARNED
1	1-16-16	1- Please identify the responsible party & assign to the lead for the Area Owner named	1- Please identify the responsible party & assign to the lead for the Area Owner named 2- What will be the impact of the change to the schedule? 3- How will the change impact the project's completion date? 4- How will the change impact the project's budget? 5- How will the change impact the project's quality? 6- How will the change impact the project's safety?	2-14	15	\$10,000	1-16-16	1-16-16	1- Please identify the responsible party & assign to the lead for the Area Owner named 2- What will be the impact of the change to the schedule? 3- How will the change impact the project's completion date? 4- How will the change impact the project's budget? 5- How will the change impact the project's quality? 6- How will the change impact the project's safety?
1	7-21-16	1- Please identify the responsible party & assign to the lead for the Area Owner named	1- Please identify the responsible party & assign to the lead for the Area Owner named 2- What will be the impact of the change to the schedule? 3- How will the change impact the project's completion date? 4- How will the change impact the project's budget? 5- How will the change impact the project's quality? 6- How will the change impact the project's safety?	7-21	15	\$10,000	1-16-16	1-16-16	1- Please identify the responsible party & assign to the lead for the Area Owner named 2- What will be the impact of the change to the schedule? 3- How will the change impact the project's completion date? 4- How will the change impact the project's budget? 5- How will the change impact the project's quality? 6- How will the change impact the project's safety?
1	7-21-16	1- Please identify the responsible party & assign to the lead for the Area Owner named	1- Please identify the responsible party & assign to the lead for the Area Owner named 2- What will be the impact of the change to the schedule? 3- How will the change impact the project's completion date? 4- How will the change impact the project's budget? 5- How will the change impact the project's quality? 6- How will the change impact the project's safety?	7-21	15	\$10,000	1-16-16	1-16-16	1- Please identify the responsible party & assign to the lead for the Area Owner named 2- What will be the impact of the change to the schedule? 3- How will the change impact the project's completion date? 4- How will the change impact the project's budget? 5- How will the change impact the project's quality? 6- How will the change impact the project's safety?

“Best Value”



If you can only do 1 thing...Start Measuring



Broaden Operational Perspective



Make Connection with Strategy



Its OK to Stumble



Wal-Mart



Thank You