



# Pennsylvania's State System for Higher Education Charge for Facilities and Infrastructure Working Group

November 12, 2020

## Overview

The framework for the Working Groups (WG) includes:

- [Integrations Overall Charter](#) – Provides the purpose and organizational structure for the overall Integrations initiative, including Integration Guidelines with Guiding Principles.
- [Working Group Charter](#) – Defines the roles and responsibilities of the Working Groups and articulates the purpose, goals, principles, scope, roles, and deliverables with which the WGs are charged.
- Working Group Charge (this document) – Includes specific milestones, questions, and goals to be addressed by each WG specifically.

## WG Deliverables and Timing

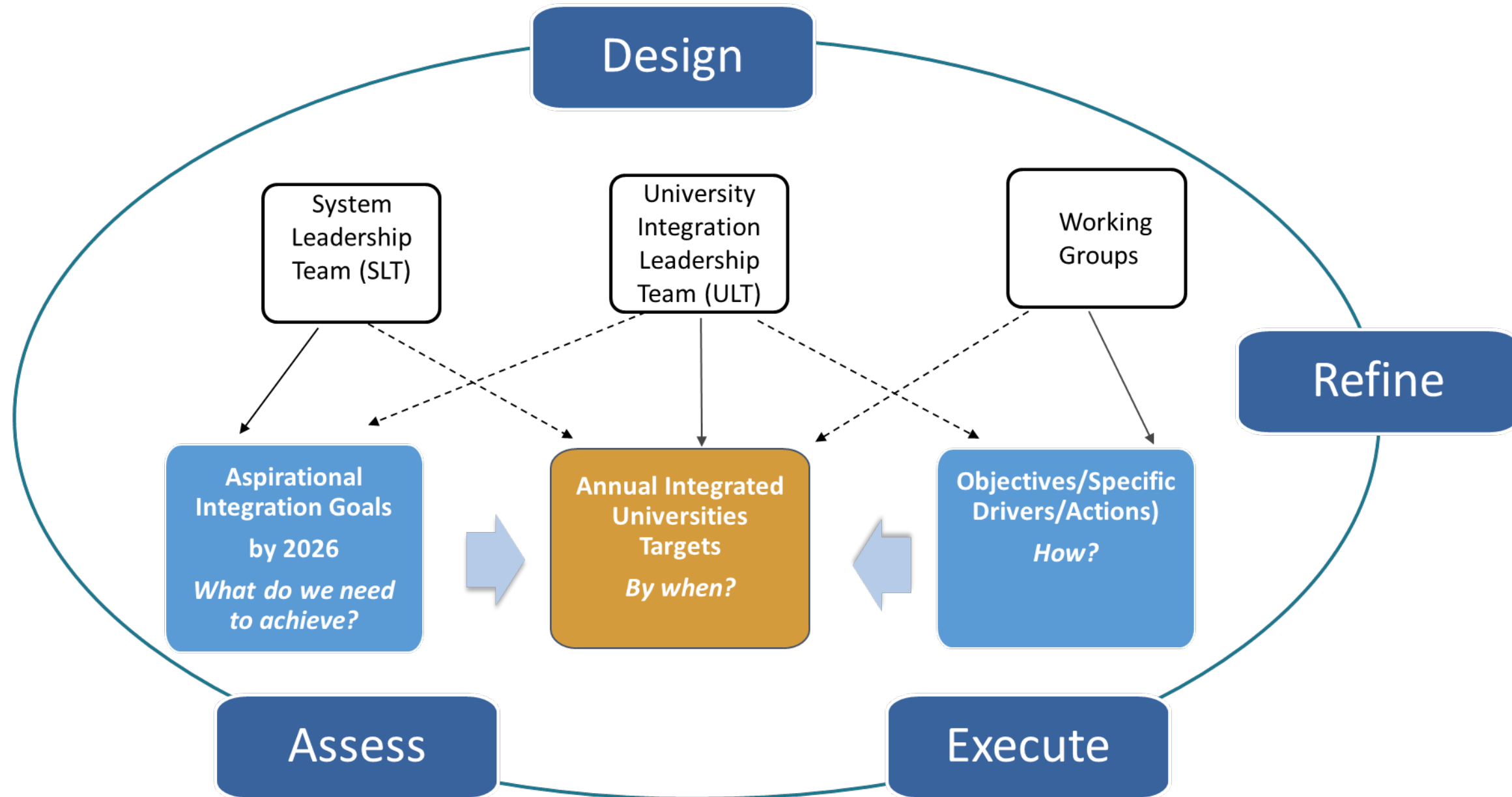
Timing	Deliverable	Details
11/18/20	<b>Consultation Plan</b> – Determine who to consult with, how, and how WG consultation aligns with initiative-level consultation	See <i>Consultation Plan template</i> provided on SharePoint.
12/4/20	<b>Critical Path August 2022</b> – Confirm the critical path milestones and define the critical path steps and timing to meet critical path milestones for Fall 2022 (what must be done by August 2022 for successful launch and how long will it take)	See <i>Critical Path Milestones</i> and <i>Critical Path Steps template</i> provided on SharePoint.
12/11/20	<b>Aspirational Goals and Annual Targets</b> – Aspirational goals to accomplish by 2026, and define annual integrated institution targets to evaluate progress	See below and <i>Goals/Targets template</i> provided on SharePoint.
1/8/21	<b>Priority 1 Questions (First Draft)</b> – Use above to filter, prioritize, and develop draft recommendations for Priority 1 questions (i.e., key questions to define the future state) and accompanying organizational charts and impact analysis	See below, <i>Priority 1 Recommendations template</i> , and <i>Organizational Chart template</i> provided on SharePoint.
1/15/21	<b>Priority 2 Considerations for 2022-2026</b> – Outline considerations for what can be done after August 2022 and how it can be sequenced (i.e., known prerequisites)	See below and <i>Priority 2 Considerations template</i> provided on SharePoint.
2/12/21	<b>Priority 1 Questions (Second Draft)</b> -- Update recommendations, incorporating feedback from Systems Leadership Team (SLT) on First Draft	See above.
3/12/21	<b>Priority 1 Questions (Final Draft)</b> – Update recommendations, incorporating feedback from SLT on Second Draft	See above.



## Goal Setting

Related to the aspirational goals provided in the Integrations Initiative Charter, define annual integrated institution targets against which to evaluate progress.

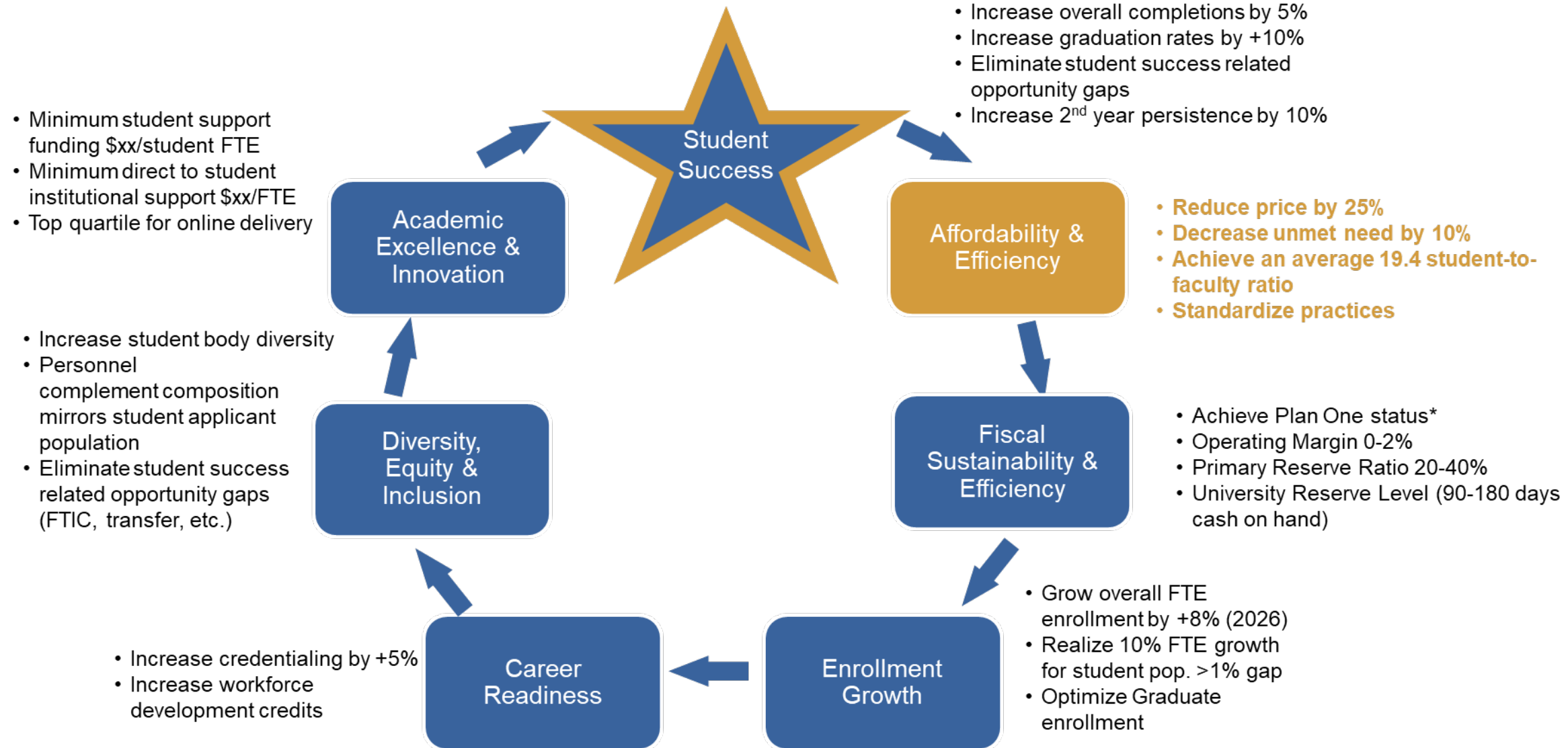
# Integration Goal Setting Process





The overall integrations-level aspirational goals are included below and within the Integrations Initiative Charter. Address the highlighted goal(s) applicable to your WG.

## Goals Relevant to Facilities and Infrastructure Working Group





Use the considerations and questions below to discuss, prioritize, and develop draft recommendations for Priority 1 questions to define the future state and impact analysis.

### **Integration Overarching Considerations**

- What is the current resource inventory for the area (people, facilities, technology, policies)?
- What elements can be integrated into a singular structure for performing the necessary functions (and, as an exception, which require joint and concurrent delivery models)?
- What data do we have regarding existing functions in this area? What data will inform decisions?
- What are the qualitative considerations related to integrating this function?
- Have we kept the guiding principles, goals, and objectives in mind in our efforts?
- What input from other working groups is critical to forming alternatives and recommendations?

### **For Each Recommendation, Assess the Impacts**

- People – Student, faculty, staff, governance (e.g., trustees, organizations) – individuals impacted by the change and any know required activities to support the change (classification, side letter changes, training etc.)
- Process – Policy, procedures, contracts, partnerships, etc., that support the current state which would have to be changed to support the recommendation
- Technology – Systems, support, applications that support the recommended changes and if any updates would be required
- Finance – Required funding to implement or lead to a cost savings
- Physical Assets – Physical assets (buildings) that would be impacted by recommendations
- Compliance and Legal – Federal, state, and local laws, regulations, and other requirements that would need to be changed to implement the recommendation
- Community – Known community stakeholders impacted by the recommendation
- Benefits – Anticipated benefits associated with the recommendation – linked to goals and objectives, if possible
- Risk – Known risks associated with implementation of the recommendation



	High-Level Areas of Consideration	Questions to Inform Recommendations
<p>Facilities and Infrastructure Working Group</p>	<ul style="list-style-type: none"> <li>• Facilities assets across all entities, including affiliates</li> <li>• Deferred maintenance</li> <li>• Construction projects</li> <li>• Campus safety/security</li> <li>• Other infrastructure (property and equipment)</li> <li>• Shared services</li> <li>• Space utilization</li> <li>• Bond and debt optimization</li> <li>• Public-private partnership potential</li> </ul>	<p><b>Priority 1 Items</b></p> <ol style="list-style-type: none"> <li>1. Identify the specific classroom utilization patterns for each campus and provide to Academic working group for their use in program array evaluation.</li> <li>2. Determine the needed physical plant improvements required to support the recommended academic program offerings at each campus and across all campuses.</li> <li>3. 3, Identify and implement optimize facility maintenance methodologies across the campuses.</li> <li>4. Develop/evaluate various staffing support models revolving around distributed, centralized, team and hybrid combinations of such.</li> <li>5. Assess potential of centralization of support services (staff) and systems (software) such as work requests, scheduling, event requests, fire alarm monitoring, after hours response dispatch.</li> <li>6. Identify existing service, maintenance and other outsourced contracts in place that can be optimized for use on all campuses.</li> </ol> <p><b>Priority 1 Questions – Critical Path (What design assumptions must be determined for the combined function/one University?)</b></p> <ol style="list-style-type: none"> <li>1. What other considerations will require cross Working Group discussions (i.e., Financing)?</li> <li>2. What are the infrastructure elements with high likelihood of failure including correction timeline and cost?</li> <li>3. What are the building system elements with high likelihood of failure that are also necessary for academic program support with correction timeline and cost?</li> <li>4. Are there buildings that have excessive operating costs (utilities, insurance, and other maintenance) that should be targeted for demolition or re-use?</li> <li>5. How do we ensure consistency in the use / application of the capital expenditure budget and Key 93 money across the three locations?</li> <li>6. What is the expectation of creating an integrated master plan? Based on program array, reprioritizing the capital needs based on integrated goals and expectations.</li> <li>7. What is the space utilization plans and guidelines that should be adopted across each university to standardize needs on campuses?</li> <li>8. In developing recommendations, consider:             <ul style="list-style-type: none"> <li>• Is there an inventory at each location of all facilities' assets?</li> <li>• What are the approved and pending Commonwealth funded projects including project value and planned approval year?</li> <li>• What facilities service/maintenance activities exist at each campus?</li> <li>• What is the status/inventory of in-process construction projects?</li> </ul> </li> <li>9. What other deadlines and time dependent issues need to be addressed by August 2022?</li> </ol> <p><b>Priority 2 Considerations – Implementation Considerations and Any Known Prerequisites</b></p> <ul style="list-style-type: none"> <li>• Contrast current facilities staffing levels with Association of Physical Plant Administrators staffing recommendations and reconcile differences</li> <li>• Determine the needed improvements required to correct shortfalls identified required workplace safety programs at each campus.</li> <li>• Determine the needed physical improvements required to correct identified campus exterior physical security shortfalls at each campus and across all campuses.</li> <li>• What are the physical plant improvements required to support the recommended academic program offerings at each campus and across campuses?</li> <li>• What is the deferred maintenance by cost and priority at each campus? Data not priority – included in items above</li> <li>• Contrast current facilities staffing levels with Association of Physical Plant Administrators staffing recommendations – reconcile differences</li> <li>• Optimize facility maintenance operating methodologies across the campuses.</li> <li>• Develop/evaluate various staffing support models revolving around distributed, centralized, team and hybrid combinations of such (O&amp;M)</li> <li>• Assess potential of centralization of support services and systems such as work requests, scheduling, event requests, fire alarm monitoring, after hours response dispatch</li> <li>• What service/maintenance and other outsourced contracts exist that can be optimized for use on all campuses?</li> <li>• What workplace safety programs exist at each campus? Consider the status of current campus security/safety elements including lighting, emergency all stations, security cameras, building security, ADA compliance, emergency evacuation, fire alarm/sprinkler systems, etc.</li> <li>• What is the status of current accident/illness programs?</li> <li>• Contracted work and scale (facilities)</li> <li>• What assets have potential for public-private partnership revenue production or sale (work with Athletics Working Group)? What restrictions on real property exist including deed restrictions, leases or zoning limiting?</li> <li>• What is the nature of campus security/police operations at each campus and what are the community/municipal considerations?</li> </ul>