WELCOME!!

Monthly Building Coordinator Meeting
Via ZOOM

September 20, 2023
Agenda

➢ **Vendor Presentation – Schumacher Elevator**: Jeff Schumacher, CEO and Ryan Hagarty, Lead Technician

➢ **Capital Renewal Block Allocations** - Julie Sychra, FM Director Operations and Maintenance and Jeff Harney, FM Assistant Director
WHO WE ARE

OUR VISION
TO BE THE PREMIER INDEPENDENT ELEVATOR COMPANY.

OUR MISSION
TO BUILD LASTING RELATIONSHIPS BY DELIVERING INNOVATIVE, RELIABLE ELEVATOR SOLUTIONS.

OUR VALUES
WE ARE CUSTOMER-FOCUSED. WE ARE COMMITTED TO SAFETY. WE OPERATE WITH INTEGRITY.

• Family owned since 1936
• 270 Current Employees

Schumacher Elevator Company
Service Branches

- Iowa
  - Iowa City
  - Cedar Rapids
  - Des Moines
  - Dubuque
  - Mason City
  - Waterloo
  - Sioux City
  - Ottumwa
  - Marshalltown
  - Fort Dodge
  - Ottumwa

- Nebraska
  - Omaha
  - Lincoln
  - Wayne

- Minnesota
  - Minneapolis
  - Rochester

- South Dakota
  - Sioux Falls
  - Pierre

- Wisconsin
  - La Crosse
  - Madison

- Illinois
  - Rockford
  - Rock Island
  - Moline

- Missouri
  - Hannibal
  - Kirksville
# Units Maintained

<table>
<thead>
<tr>
<th>State</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iowa</td>
<td>3,730</td>
</tr>
<tr>
<td>Minnesota</td>
<td>2,160</td>
</tr>
<tr>
<td>Nebraska</td>
<td>319</td>
</tr>
<tr>
<td>Missouri</td>
<td>8</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>1,253</td>
</tr>
<tr>
<td>Illinois</td>
<td>339</td>
</tr>
<tr>
<td>South Dakota</td>
<td>329</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>8,138</strong></td>
</tr>
</tbody>
</table>
Trusted Partnership Timeline

- Jacobson Building - 1991
- Power Plant - 1999
- West Campus - 2001
- East Campus - 2002
- Athletics - 2013
Iowa / Schumacher Partnership

- Monthly update meeting with Jeff and Steph
- AiM Partnership
- 358 Units maintained campus wide, including hospital
- Monthly Service / Annual Testing / Cat 5 Testing
- Callbacks Dispatched by FM@YourService through AiM
  - Technician places all updates/notes of repair response on work order in AiM
- Elevator Emergency phones called to UI DPS for entrapments
- FM Maintenance on call team triages after hours elevator emergencies to Schumacher
Questions?

Thank you!
Integrated and Strategic Building Stewardship

Building Coordinators, September 2023
A New Approach . . .

Drivers of a New Approach
They Know the Systems Best
Process Buys Ownership
Believable Data
Accurate Data
Ownership
Facilities Renewal Process Principles

Our Implementation Needs to be . . .

- A Multi Year Strategy
- Flexible, Adaptable and Replicable
- Aligned with Campus Planning and Institutional Priorities and Mission
- Data Driven by Credible In-House Expertise
Facilities Management

Establishing Strategic Groupings Frames the Conversation
The Process Didn’t Move in a Straight Line

- Getting Buy in with the Key Stakeholders
- “What Do We Need to Spend” versus “How Should We Spend What We Have”
- Alignment with Strategic Direction Requires Clarity on Strategic Direction
Facilities Renewal Plan
Planning Process allows for Strategic Investments based on University Priorities

Non-Strategic
Total Need based on Facility Condition Assessment

Master Planning Strategy
Managed by Campus Master Planning and Facilities Management

Managed by Facilities Management

Distribution Strategy
Vetted through Campus Master Planning Committee

Classrooms
Academic/Research
Multipurpose
Outside
Administrative
Service

Project Priority Strategy
Criteria Vetted through Central Administration
Project selection by FM

Asset Entitlement
Urgency
Student Success
Operational Impact
A Flexible Data Driven Scoring Matrix
Always refining and informing the Matrix
Iowa Falls Short by $49.7M to Target in FY22

While below target, Annual Stewardship dollars maintained increased level seen in FY21

Total Capital Investment vs. Funding Target

- Need to Establish Additional Factors to Prioritize with:
  - Institutional Priorities
  - Operational Costs
  - Student Impact
- Something Today is Better than the Perfect Measure Tomorrow
- Improve Data Over Time

You’re Never Going to Have Enough Funding
Net Asset Value (NAV) and what does it mean to us?

**NAV Index**

- **Capital Upkeep Stage**: Primarily new or recently renovated buildings with sporadic building repair & Life cycle needs; "You pick the projects."
- **Repair and Maintain Stage**: Buildings are beginning to show their age and may require more significant investments on a "Sample College" by "Sample College" basis.
- **Systemic Renovation Stage**: Buildings may require more significant repairs; large capital infusions; "The projects pick you."
- **Transitional/Gut Renovation/Demo Stage**: Major building components are in jeopardy of failure. Reliability issues are widespread throughout the building.

**Investment Strategy**

The NAV Index can be calculated as:

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

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

**Iowa NAV Index**

\[ \text{Iowa NAV} = \left( \frac{\$4,259,767,899 - \$896,240,642}{\$4,259,767,899} \right) \times 100 \]

\[ \text{Iowa NAV} = 78.96\% \]

Gordian Database NAV
(FY20 / 190 Institutions)
**REPAIR & MAINTAIN STAGE**
77.41%
GEF Capital Fund

- Projects up to $100,000
- Cross-functional Committee meets regularly to rate and review new submissions
- Provides transparency and allows for employees and managers to have a voice in raising concerns
- Budget tracking evaluated throughout the year – the number of projects initiated can be adjusted accordingly, but prioritization method ensures largest needs/risks are first to be addressed
## O&M Project Prioritization Matrix

### Building
- Search by Building # or Building Name

### Title

### Project Description

In this field, provide a brief project statement and potential scope detail if available.

### ROM Cost

0.00

This is a rough order magnitude value and is only in place for planning purposes.

- Attachments

- Save

- Close
Flexible, Data-Driven Scoring Matrix

*Categories frame the Matrix—Health, Safety, & Environmental Impact*

### Impact on People

- 3 - Fatality or fatal exposure (roof collapse, falling brick masonry)
- 2 - Major exposure w/ long term effects (lead poisoning)
- 1 - Minor injury or exposure (broken member or laceration, smoke) ADA, HVAC
- 0 - No personal injury

### Impact on Environment

- 2 - Major environment impact (outside walls of bldgs - major contamination or pollution)
- 1 - Minor environmental impact (outside walls of bldgs-small amount of pollution)
- 0 - No impact
Flexible, Data-Driven Scoring Matrix

Categories frame the Matrix - Mission Impact

### Impact on Area

- 4 - No displacement opportunities (more than 250 students)
- 3 - Lab, research or IT area
- 2 - Classroom or Auditorium
- 1 - Office
- 0 - No impact

### Intellectual Property Damage

- 3 - Permanent, irreplaceable damage (long term experiments that cannot be replaced or artifacts, etc)
- 2 - Major interruption of research time (wks, months lost) or damage to artifacts and rare docs
- 1 - Minor loss of research/data (hrs or days lost) or loss of electronic data
- 0 - No intellectual property damage
Flexible, Data-Driven Scoring Matrix

**Categories frame the Matrix**: Mission Impact

<table>
<thead>
<tr>
<th>Property Damage</th>
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<tbody>
<tr>
<td>3 - 5m - 1 b</td>
</tr>
<tr>
<td>2 - 250k to 5m</td>
</tr>
<tr>
<td>1 - 5k - 250k</td>
</tr>
<tr>
<td>0 - no property loss</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time Disruption</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 - One week or longer</td>
</tr>
<tr>
<td>2 - 3 days to 1 week</td>
</tr>
<tr>
<td>1 - 1 to 3 days</td>
</tr>
<tr>
<td>0 - No disruption</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Public Image</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 - National Media - (affects university mission to the highest degree)</td>
</tr>
<tr>
<td>3 - Local Media</td>
</tr>
<tr>
<td>2 - President's Office (could result in President becoming involved)</td>
</tr>
<tr>
<td>1 - UI Alumni (results in letters, phone calls from UI alumni or other large organizations associated with UI)</td>
</tr>
<tr>
<td>0 - No adverse publicity</td>
</tr>
</tbody>
</table>
Flexible, Data-Driven Scoring Matrix

*Categories frame the Matrix* - **System Impact**

**ROI**

<table>
<thead>
<tr>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>0 to 5 yrs</td>
</tr>
<tr>
<td>2</td>
<td>5.1 to 10 yrs</td>
</tr>
<tr>
<td>1</td>
<td>&gt; 10 yrs</td>
</tr>
<tr>
<td>0</td>
<td>No measurable payback</td>
</tr>
</tbody>
</table>

**Probability of Failure**

5 - Imminent Failure/Failed – the system has failed or we are dealing with the situation on a daily consideration (daily maintenance or patches)

4 - Likely to Fail – the system has failing parts and could fail in a short amount of time. Monthly maintenance is required.

3 - Could Fail in 1 to 2 yrs – the system shows signs of wear, the possibility to fail in 1 to 2 yrs is a consideration.

2 - Could Fail in 3 to 5 yrs – the system shows no signs of wear, the system should remain in good condition for another 3 to 5 yrs.

1 - Extremely Rare – system is in new, like new or good condition and will not require attention for another 5 to 10 yrs.

0 - No probability of Failure - grandfathered code
GEF Capital Fund Matrix

IOWA Facilities Management

O&M Project Prioritization Matrix
GEF Capital Fund Example

0.6192: BSB Replace building control air compressor
0.5177: TB Mabie Theater fire curtain replacement
  • Handshake with block allocation
0.4976: IATL Distribution panel replacement
0.2247: MERF Expansion joint repairs
------------------------
0.1268: UCC Millwork repairs
0.0773:TB Repair coil door
Questions?
Building Coordinator

Next meeting:

October 18, 2023, via zoom 11 AM to 12 PM

Proposed Agenda:

- Vendor Presentation: Dryspace
- Cooling to heating switchover: Tom Moore
- Fire Life Safety: Brent Anderson, Dustin Lane, Dustin Ripley
Thank you!