QUARTERLY BUSINESS OFFICERS MEETING
SEPTEMBER 2022
I. Change Management 5 Minute Tip – Blair Wagner

II. FM Small Project Prioritization Process – Jeff Harney & Julie Sychra

III. Salesforce CRM – Jim Chaffee

IV. CRM Follow Up – Steven Fleagle
CHANGE MANAGEMENT 5 MINUTE TIP

BLAIR WAGNER, ORGANIZATIONAL CHANGE MANAGER
Most Resistant Groups

Which group is most resistant to change?

1. Executives and Directors
2. Senior-Level Managers
3. Mid-Level Managers
4. Frontline Employees
Most Resistant Groups

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- Executives and Directors: 9%
- Senior-Level Managers: 16%
- Mid-Level Managers: 42%
- Frontline Employees: 27%
- Other: 6%

Percent of Respondents
# Why Managers Resist Change

## Reasons

<table>
<thead>
<tr>
<th></th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Organizational culture</td>
</tr>
<tr>
<td>2</td>
<td>Lack of awareness and knowledge of the change</td>
</tr>
<tr>
<td>3</td>
<td>Lack of buy-in</td>
</tr>
<tr>
<td>4</td>
<td>Mis-alignment of project goals and personal incentives</td>
</tr>
<tr>
<td>5</td>
<td>Lack of confidence in their own ability to manage people side of change</td>
</tr>
</tbody>
</table>
FM Small Project Prioritization Process

Jeff Harney, Assistant Director, Facilities Management
Julie Sychra, Director, Building Operations & Maintenance
Facilities Renewal Plan
Planning Process allows for Strategic Investments based on University Priorities

Non-Strategic

Total Need based on Facility Condition Assessment

Managed by Facilities Management

Master Planning Strategy

Raze

Campus Development Plan

Managed by Campus Master Planning and Facilities Management

Remaining Campus Need

Vetted through Campus Master Planning Committee

Distribution Strategy

Classrooms

Academic/Research

Multipurpose

Oakdale

Administrative

Service

Criteria Vetted through Central Administration
Project selection by FM

Managed by Campus Master Planning and Facilities Management

Student Success

Operational Impact

Asset Criticality

Urgency
F&O Facilities Management All Funds

FM Block Funding

Purpose: To fund baseline services in custodial, building operations/maintenance, and landscape. Baseline includes preventative and predictive maintenance as well as compliance costs.


Daily Service

- Energy Conservation Projects
- GEF Energy Conservation
- GEF Capital Bldg Maint
- Energy Conservation Projects
- Daily Service

Facilities Management

The University of Iowa
Operational Savings

Purpose: Supplement block funding and future operational funding needs

Decision Making: FM and University Budget Officer through Advisory Committee
F&O Facilities Management All Funds

FM Block Allocation Funding
Purpose: Building Renewal
Leveraged with Central Block Funding
Decision Making: Campus Criteria
Integrated with Master Planning

FM Block Funding
New Building Optimization
GEF Energy Conservation
Daily Service
Energy Conservation Projects
GEF Capital Bldg Maint
Facilities Management

F&O Facilities Management All Funds

FY23
FY22
FY21
FY20
FY19
FY18
FY17
FY16
FY15
FY14
FY13
FY12
FY11

FM Block Funding
GEF Energy Conservation
New Building Optimization
Daily Service
GEF Capital Bldg Maint

GEF Capital Fund
Purpose: To mitigate risk, make improvements, improve reliability and fund studies to scope larger issues
Decision Making: FM Criteria
GEF Capital Fund Matrix

- 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
A Flexible Data Driven Scoring Matrix

Always refining and informing the Matrix—Health, Safety, & Environmental Impact

### Impact on People

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Fatality or fatal exposure (roof collapse, falling brick masonry)</td>
</tr>
<tr>
<td>2</td>
<td>Major exposure w/ long term effects (lead poisoning)</td>
</tr>
<tr>
<td>1</td>
<td>Minor injury or exposure (broken member or laceration, smoke) ADA, HVAC</td>
</tr>
<tr>
<td>0</td>
<td>No personal injury</td>
</tr>
</tbody>
</table>

### Impact on Environment

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Major environment impact (outside walls of bldgs - major contamination or pollution)</td>
</tr>
<tr>
<td>1</td>
<td>Minor environmental impact (outside walls of bldgs - small amount of pollution)</td>
</tr>
<tr>
<td>0</td>
<td>No impact</td>
</tr>
</tbody>
</table>
A Flexible Data Driven Scoring Matrix

Always refining and informing 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
# A Flexible Data Driven Scoring Matrix

*Always refining and informing the Matrix - Mission Impact*

## Property Damage

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>5m - 1 b</td>
</tr>
<tr>
<td>2</td>
<td>250k to 5m</td>
</tr>
<tr>
<td>1</td>
<td>5k - 250k</td>
</tr>
<tr>
<td>0</td>
<td>No property loss</td>
</tr>
</tbody>
</table>

## Time Disruption

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>One week or longer</td>
</tr>
<tr>
<td>2</td>
<td>3 days to 1 week</td>
</tr>
<tr>
<td>1</td>
<td>1 to 3 days</td>
</tr>
<tr>
<td>0</td>
<td>No interruption</td>
</tr>
</tbody>
</table>

## Public Image

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

Always refining and informing the Matrix- System Impact
## GEF Capital Fund Workflow Example:

<table>
<thead>
<tr>
<th>Building</th>
<th>Abbr.</th>
<th>Title</th>
<th>Project Description</th>
<th>ROM Cost</th>
<th>Request Source</th>
<th>Proposed Funding Source</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>0090</td>
<td>VAB</td>
<td>Visual Arts Building Ice Build Up at ENT1</td>
<td>Adjust slope on panels and install interior gutter to divert water to the east side of Entrance 1. This is a safety issue due to ice build up and constant dripping.</td>
<td>SHOP 204</td>
<td>GEF CAPITAL PROJECTS</td>
<td>Not Scared</td>
<td></td>
</tr>
</tbody>
</table>

### Study Report

**DATE:** 03/30/2021

**PROJECT:** GEF DESIGN MUSEUM VISUAL ARTS DIVERT WATER AT ENT 1

**EXECUTIVE SUMMARY**

The goal of this study was to evaluate options to divert water that begins on the sidewalk and goes into a grate located on the north side of the building. Design engineers, in conjunction with BMH engineers and the owner, reviewed options that will help address the issue while having minimal impact to the existing building systems. Two options were originally evaluated. The first was to install a gutter system and place the water over the exterior of the building to prevent the building storm system. The second option was to install a gutter system and place the water over the exterior of the building to prevent the building storm system. The second option was selected as it was determined to be the best solution. Following the initial review of the options, it was decided to use the second option. The second option was selected as it was determined to be the best solution. Following the initial review of the options, it was decided to use the second option. The second option was selected as it was determined to be the best solution.

The estimated construction and project costs for this solution are summarized in the table below. Project cost is based on the construction cost to account for design and management fees and other soft costs.

<table>
<thead>
<tr>
<th>Solution</th>
<th>Construction Cost</th>
<th>Project Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Option 1: Gutter &amp; Drain Pan</td>
<td>$20,000</td>
<td>$25,000</td>
</tr>
<tr>
<td>Option 2: Gutter &amp; Drain Pan</td>
<td>$25,000</td>
<td>$30,000</td>
</tr>
</tbody>
</table>

### Matrix

**Recommended**
**GEF Capital Fund Workflow Example:**

<table>
<thead>
<tr>
<th>Building</th>
<th>Abbr.</th>
<th>Title</th>
<th>Project Description</th>
<th>ROM Cost</th>
<th>Request Source</th>
<th>Proposed Funding Source</th>
<th>Status</th>
<th>Priority Score</th>
<th>Created Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>0204</td>
<td>BSB</td>
<td>Air handler heating valve replacement</td>
<td>Heating valves on the glycol hot water system need to be changed. The existing valves are not controlling properly because they are oversized due to installation of the heat recovery system. The current valves create overshooting of heating temperature inside the unit and also creates issues: with valve control at the heat exchanger. 21 valves need to be replaced. I would suggest having Design Engineers size the new valves as part of a small project coordinated through D&amp;C since I suspect that valves will be smaller to the point of piping reductions at each valve. These were not changed as part of the recent project.</td>
<td>$80,000.00</td>
<td>SHOP 214</td>
<td>GEF CAPITAL PROJECTS</td>
<td>Matrix Recommended</td>
<td>0.1955</td>
<td>4/4/22</td>
</tr>
<tr>
<td>0447</td>
<td>MERF</td>
<td>MERF Condensate Pump/Motor Replacement</td>
<td>Replacement of two condensate pumps and motors. These are original to building and are on the last year for life expectancy. $17,383.00 Pumps and motors can’t be purchased separately. Added 40% to cost for construction cost allocation although this will likely be funded by building money since it is under $25k and less than 8 hours per pump. Increased estimate to $50,000 to account for inflation and outsourcing (April 2022).</td>
<td>$50,000.00</td>
<td>SHOP 205</td>
<td>GEF CAPITAL PROJECTS</td>
<td>Matrix Recommended</td>
<td>0.1887</td>
<td>4/23/20</td>
</tr>
<tr>
<td>0090</td>
<td>VAB</td>
<td>WT #3 (Visual Arts Building- Divert water at EN1 ) FY22 - 0902301</td>
<td>Adjust slope on panels and install interior gutter to divert water to the east side of Entrance 1. Caitie McClurg has the work task and other related documents. Jeff Horsey was also involved in discussions. This is a safety issue due to ice build up and constant dripping.</td>
<td>$75,000.00</td>
<td>SHOP 204</td>
<td>GEF CAPITAL PROJECTS</td>
<td>Matrix Recommended</td>
<td>0.1185</td>
<td>3/29/22</td>
</tr>
<tr>
<td>0003</td>
<td>CB</td>
<td>CB - Air Compressors</td>
<td>It has been determined that the current compressors that support building central systems and also lab air are obsolete and becoming very difficult to find parts for repairs. The compressors are believed to be &quot;unsafe&quot; according to Compressed Air during their inspection. I have attached quotes from Ohio Medical and also Compressed Air for replacement of the compressors.</td>
<td>$120,000.00</td>
<td>SHOP 201</td>
<td>BLOCK ALLOCATION</td>
<td>Matrix Recommended</td>
<td>0.3581</td>
<td>3/17/21</td>
</tr>
</tbody>
</table>

These are the current top-scoring needs in Matrix Recommended status and will move forward with our FY23 Q1 requests for the GEF Capital Fund.

The Matrix also helps to inform Block Allocation priorities, in addition to the Sightlines Data.
Questions?
SALESFORCE CRM

JIM CHAFFEE, CHIEF OPERATIONS OFFICER
SALESFORCE CRM

- Started in 2015
- Have 2 full time staff devoted to administration
- Multiple users in units at varying levels of competence
- CRM is our future – not a MAUI replacement but enhancement
- We want to stay connected from the very first interaction (a 360 view)
GRADUATE PROGRAM

- Recruiting (prospects, campaigns, Pardot)
- Admissions (includes SMS messaging)
- Scholarships
- FT placement data
Includes contacts who have any affiliation to the college, such as a degree or certificate, event attendance in last 5 years, gift in last 5 years.

- Degree information
- Speaking engagements
- Webinar attendance
- Board memberships
- Awards and Honors
- Student org involvement
- Employment history
- Mentors and mentees
- Recruiting (prospects, campaigns, Pardot)
- Admissions (includes SMS messaging)
- Post-Admission
- Partner school contacts and details
EXPERIENTIAL LEARNING

- Course Projects
- Competitions
Entrepreneurs and their companies
Venture School participants
Founders Club information
Scholarships
STRATEGIC PARTNERSHIPS

- Corporate Engagement Opportunity tracking
- Company notes and communications
TIPPIE ACTION PORTAL

- Replacement for APR
Constituent connections

Communications
CAREER SERVICES – STARTING JAN 2023

- Relationship & Affiliation tracking
- Events & Workshops
- Engagement
- Internships
- Interviews
COST OF LICENSES & SALARIES

- Salesforce (50 users)
- Pardot Communication
- Texting
- Document Generator
- Backup

- $64,200 per year licenses
- $165,270 (+ fringe) Total Salaries for 2 people