

### **1. What is the purpose of the planned change?**

The **Facilities** Division of Space Management will establish and maintain processes to collect and provide data for administrative and academic leadership, Texas Higher Education Coordinating Board, and others to be used in decision making for space allocation, planning, research, formula funding, and approval of bonds for new facilities.

### **2. Why is the change needed?**

- No clear understanding of need for a systematic space inventory system
- Currently have duplication of efforts for space inventory that use different methodologies
- Current homegrown software requires multiple data entry which increases chance for error, does not allow needed reports to be generated, and does not allow access to information by end users

### **3. What's the intended end point?**

- Accurate space data accessible to those who need it
- Space inventory is maintained accurately on a real-time basis
- Department space inventory managers have a clear understanding of process and need
- **Link human, financial and space resources**

### **4. Vision**

An accessible and accurate space inventory that supports informed decision making.

### **5. Affected Parties and Key Stakeholders**

- Executive Team
- Leadership Team
- Communications Team
- Space representatives
- Finance
- Human Resource Services
- Information Resources Technology
- Space Utilization Committee

- Facilities Management
- Executive Administrative Assistants

### **Environmental Factors**

#### **6. What are the pluses/strengths/assets that should be considered?**

- Support of institutional leadership
- Resources have been made available
- Will lead to increased accountability and require justification for space

#### **7. What are the negatives/weaknesses/liabilities that should be considered?**

- Will lead to increased accountability and require justification for space
- People with under-utilized and/or non-productive space at risk for space reallocation

#### **8. What are the threats/risks that should be considered?**

- Economic/budget constraints imposed by state

#### **9. What are the opportunities that should be considered?**

- Increased demand for accurate space inventory by THECB and other external parties
- Space inventory management software with enhanced capabilities

**Goals/Strategies/Action Plans**

**Goal 1.** Develop leadership capacity

**Strategy 1.1** Ensure effective communications to UNTHSC Executive Team, Leadership Team, and other key constituents

<b>Sponsor:</b> Operations	<b>Project Leader:</b> Stephen Barrett
<b>Project Description:</b> Develop and implement processes to ensure effective UNTHSC Executive Team, Leadership Team, and other key constituents	
<b>Action Steps:</b> 1. Identify regular means of communication 2. Provide briefings/updates as needed	<b>Project Members:</b> Stephen Barrett Terry Morgan
<b>Funding Considerations:</b>	
<b>Communication Considerations:</b> Regular and timely updates to leadership	
<b>Deliverables:</b> Briefings and reports	
<b>Timeframe:</b> Ongoing	
<b>Effective Measure(s):</b> Communications questions from Space Management Survey	
<b>How to move the initiative to action:</b> Implement monthly meetings	

**Strategy 1.2** Support and facilitate the Space Utilization Committee

<b>Sponsor:</b> Division of Space Management	<b>Project Leader:</b> Terry Morgan
<b>Project Description:</b> Provide active support and information for Space Utilization Committee	
<b>Action Steps:</b> 1. Inform Space Utilization Committee of need to be included in meetings 2. Provide reports and up-to-date space data 3. Partner with Space Utilization Committee to analyze best use of space	<b>Project Members:</b> Terry Morgan Tom Yorio Dennis Shingleton Stephen Barrett
<b>Funding Considerations:</b>	
<b>Communication Considerations:</b> Including Division of Space Management	
<b>Deliverables:</b> Reports and data	
<b>Timeframe:</b> Establish partnership with Space Utilization Committee asap	
<b>Effective Measure(s):</b> Meeting attendance, Space Utilization Committee feedback	
<b>How to move the initiative to action:</b> VP Operations needs to establish Division of Space Management as support for the Space Utilization Committee	

**Goal 2.** Align use of educational and research facilities with institutional strategy

**Strategy 2.1** Align Division of Space Management operations with institutional strategic initiatives

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<b>Sponsor:</b> Operations	<b>Project Leader:</b> Stephen Barrett
<b>Project Description:</b> Ensure that Division of Space Management operations are aligned with and support UNTHSC strategic initiatives	
<b>Action Steps:</b> 1. Identify strategies and action plans for Division of Space Management 2. Link Division of Space Management strategies and action plans to UNTHSC strategic initiatives	<b>Project Members:</b> Stephen Barrett Terry Morgan
<b>Funding Considerations:</b>	
<b>Communication Considerations:</b>	
<b>Deliverables:</b> Link Division of Space Management objectives/strategies with UNTHSC strategic initiatives	
<b>Timeframe:</b> 6 mos.	
<b>Effective Measure(s):</b> Alignment with UNTHSC strategic initiatives	
<b>How to move the initiative to action:</b>	

**Strategy 2.2** Use the Integrated Workplace Management System software to link human, financial, and space resources

<b>Sponsor:</b> Division of Space Management	<b>Project Leader:</b> Terry Morgan
<b>Project Description:</b> Establish the IWMS as the standard for space management at UNTHSC	
<b>Action Steps:</b> 1. Identify reporting needs 2. Establish linkages between data sources 3. Disseminate information 4. Use IWMS to make data-informed decisions	<b>Project Members:</b> Terry Morgan Dana Perdue - Human Resource Services Bill Jones, Kelly McMillin, Bob Woelfel, Carol Yoshida - Information Technology Services Margaret ??- Financial Planning & Budget LeAnne Forsberg - OGCM
<b>Funding Considerations:</b>	
<b>Communication Considerations:</b> Establish partnerships with all project members	
<b>Deliverables:</b> List of reporting needs; linkages between data sources	
<b>Timeframe:</b> May 2010	
<b>Effective Measure(s):</b> Percent of space linked to human and financial resources	
<b>How to move the initiative to action:</b> Initiate meetings between all project members	

**Goal 3.** Meet the needs of key beneficiaries and constituents

**Strategy 3.1** Identify key beneficiaries and constituents and their needs

<b>Sponsor:</b> Division of Space Management	<b>Project Leader:</b> Terry Morgan
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<b>Project Description:</b> Identify needs of key beneficiaries and constituents	
<b>Action Steps:</b> 1. Identify key beneficiaries & constituents 2. Identify information and reporting needs of key beneficiaries & constituents	<b>Project Members:</b> Stephen Barrett Terry Morgan Tom Yorio Dennis Shingleton
<b>Funding Considerations:</b>	
<b>Communication Considerations:</b> Inclusion of all possible beneficiaries and constituents	
<b>Deliverables:</b> List of key beneficiaries and their information and reporting needs	
<b>Timeframe:</b> June 2010	
<b>Effective Measure(s):</b> Satisfaction survey of beneficiaries and constituents	
<b>How to move the initiative to action:</b> Establish meetings with key beneficiaries and constituents	

**Strategy 3.2** Establish and maintain relationships with key beneficiaries and constituents

<b>Sponsor:</b> Division of Space Management	<b>Project Leader:</b> Terry Morgan
<b>Project Description:</b> Establish and maintain relationships with key beneficiaries and constituents	
<b>Action Steps:</b> 1. Identify processes to maintain relationships with key beneficiaries & constituents 2. Establish means of communication to keep key beneficiaries informed	<b>Project Members:</b> Terry Morgan
<b>Funding Considerations:</b>	
<b>Communication Considerations:</b>	
<b>Deliverables:</b> Communication plan	
<b>Timeframe:</b>	
<b>Effective Measure(s):</b> Satisfaction survey of key beneficiaries and constituents	
<b>How to move the initiative to action:</b>	

**Goal 4.** Become data-informed

**Strategy 4.1** Purchase and implement an Integrated Workplace Management System (IWMS) for managing and maintaining space utilization

<b>Sponsor:</b> Division of Space Management	<b>Project Leader:</b> Terry Morgan
<b>Project Description:</b> Purchase and implement an Integrated Workplace Management System (IWMS) for managing and maintaining space utilization	
<b>Action Steps:</b> 1. Issue RFP for software 2. Evaluate and award bid 3. Implement and test software	<b>Project Members:</b> Terry Morgan Bill Jones, Kelly McMillin, Bob Woelfel, Carol Yoshida - Information Technology Services

<b>Funding Considerations:</b>
<b>Communication Considerations:</b> Establish regular lines of communication with vendor, ITS, and Space Management
<b>Deliverables:</b> System implementation
<b>Timeframe:</b> May 2010
<b>Effective Measure(s):</b> IWMS purchased and implemented
<b>How to move the initiative to action:</b>

**Strategy 4.2** Maintain an accurate space utilization inventory through department accountability

<b>Sponsor:</b> Division of Space Management	<b>Project Leader:</b> Terry Morgan
<b>Project Description:</b> Maintain an accurate space utilization inventory through department accountability	
<b>Action Steps:</b> 1. Disseminate reporting requirements 2. Communicate needs to space coordinators 3. Establish process to check adherence to reporting requirements	<b>Project Members:</b> Terry Morgan Departmental space coordinators
<b>Funding Considerations:</b>	
<b>Communication Considerations:</b>	
<b>Deliverables:</b> Space utilization inventory database	
<b>Timeframe:</b>	
<b>Effective Measure(s):</b> Percent accuracy of space utilization inventory	
<b>How to move the initiative to action:</b>	

**Goal 5.** Organize and train workforce

**Strategy 5.1** Train department space coordinators

<b>Sponsor:</b> Division of Space Management	<b>Project Leader:</b> Terry Morgan
<b>Project Description:</b> Develop and provide IWMS orientation and training for departmental space representatives	
<b>Action Steps:</b> 1. Develop training materials 2. Provide initial training for IWMS 3. Provide continuous refresher training as needed (changes in system or space representative)	<b>Project Members:</b> Terry Morgan
<b>Funding Considerations:</b>	
<b>Communication Considerations:</b> Establish regular lines of communication with space representatives	
<b>Deliverables:</b> Training materials	
<b>Timeframe:</b> July	
<b>Effective Measure(s):</b> Percent of departmental space coordinators trained	

<b>How to move the initiative to action:</b>
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**Goal 6.** Sustain effective and efficient work processes

**Strategy 6.1** Ensure accurate alignment and integration of space allocation and operation costs

<b>Sponsor:</b> Division of Space Management	<b>Project Leader:</b> Terry Morgan
<b>Project Description:</b> Develop processes to ensure accurate alignment and integration of space allocation and operation costs	
<b>Action Steps:</b> 1. Review and revise key work processes to align with IWMS 2. Communicate changes in work processes 3. Establish means to measure accuracy of space allocation and operation costs	<b>Project Members:</b> Terry Morgan Stephen Barrett Bob Short Jason Hartley
<b>Funding Considerations:</b>	
<b>Communication Considerations:</b>	
<b>Deliverables:</b>	
<b>Timeframe:</b> July	
<b>Effective Measure(s):</b> Percent accuracy of space allocation and operation costs	
<b>How to move the initiative to action:</b>	

**Strategy 6.2** Ensure coordination of building projects with UNT System

<b>Sponsor:</b> Operations	<b>Project Leader:</b> Stephen Barrett
<b>Project Description:</b> Develop processes to support and facilitate coordination of building projects with UNT System	
<b>Action Steps:</b> 1. Develop processes to support decision making and reporting processes required by UNT System, Board of Regents, THECB, and others 2. Ensure accuracy of data for THECB space projection model	<b>Project Members:</b> Stephen Barrett Terry Morgan
<b>Funding Considerations:</b>	
<b>Communication Considerations:</b> Establish effective lines of communication with UNT System	
<b>Deliverables:</b> Annual Space Inventory, Annual Master Plan Report, Deferred Maintenance Reports, other reports	
<b>Timeframe:</b> July	
<b>Effective Measure(s):</b> Percent on-time for building projects	
<b>How to move the initiative to action:</b>	

### Leadership Architecture

Stage	Who (Person/Team)	Task(s)	Timeframe
<b>Attention</b>	Stephen Barrett Terry Morgan	Communicate implementation of IWMS software to Executive & Leadership Teams, ITS, HRS, Finance, & Departmental Space Representatives	March-April
<b>Engagement</b>	Stephen Barrett Dennis Shingleton Tom Yorio Terry Morgan ITS, HRS, Finance	Identify information and reporting needs of deans and other key stakeholders IWMS set-up and implementation	April-May
<b>Commitment</b>	Scott Ransom Steve Russell Space Utilization Committee	Disseminate information and reporting needs Seek commitment from faculty and staff	May-June
<b>Action</b>	Space Utilization Committee Terry Morgan	Provide orientation and training for departmental space representatives	June-August
<b>Integration</b>	Scott Ransom Steve Russell Space Utilization Committee	Use space utilization data to make data-informed decisions that are aligned with UNTHSC strategic plan Recognize and reward innovators Assess strengths and areas for improvement Implement changes	September-December

### Communication Guide

Stage 1 – Attention					
Audience	Intended Outcome	Resistance	Message	Communication Channel	Message Source
Executive Team Leadership Team Communication Team Executive Administrative Assistants	Continued support Dissemination of the message		IWMS implementation as best practice	Meetings Cascade briefings	Stephen Barrett Terry Morgan
ITS, HRS, Finance	Buy-in, understanding of need, support for	Unknown	Support is needed for set-up and implementation	Meeting E-mail	Stephen Barrett Terry



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	implementation		of IWMS		Morgan Bob Woelfel
Departmental Space Representatives	Knowledge of IWMS and upcoming training	Additional responsibility and accountability related to space inventory	IWMS implementation, training, role of space representative	E-mail	Terry Morgan
<b>Stage 2 – Engagement</b>					
<b>Audience</b>	<b>Intended Outcome</b>	<b>Resistance</b>	<b>Message</b>	<b>Communication Channel</b>	<b>Message Source</b>
Deans and other key beneficiaries and constituents	Needs of beneficiaries and constituents	Time to meet Additional responsibility and accountability related to space inventory	IWMS will assist them with accurate information	Meetings	Stephen Barrett Terry Morgan Jason Hartley
IRT, HRS, Finance, Research, Facilities	Initial set-up & implementation of IWMS	Integrating all pieces of data	Data is critical to space projection model, formula funding, and F&A funding	Meetings	Stephen Barrett Terry Morgan
<b>Stage 3 – Commitment</b>					
<b>Audience</b>	<b>Intended Outcome</b>	<b>Resistance</b>	<b>Message</b>	<b>Communication Channel</b>	<b>Message Source</b>
Executive Team Leadership Team	Commitment to IWMS as a space management tool	More software <b>Additional responsibility and accountability related to space inventory</b>	IWMS will be used as institutional standard for space management	Meetings	Scott Ransom Steve Russell Stephen Barrett Thomas Yorio
<b>Stage 4 – Action</b>					
<b>Audience</b>	<b>Intended Outcome</b>	<b>Resistance</b>	<b>Message</b>	<b>Communication Channel</b>	<b>Message Source</b>
Departmental Space Representatives Leadership Team Communication Team Executive Administrative Assistants	Accurate space inventory	Transparency	Data is critical to space projection model, formula funding, and F&A funding	Training Sessions Walk-throughs	Terry Morgan Patricia Dossey
<b>Stage 5 – Integration</b>					
<b>Audience</b>	<b>Intended Outcome</b>	<b>Resistance</b>	<b>Message</b>	<b>Communication Channel</b>	<b>Message Source</b>

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All faculty and staff	Optimal use of space in alignment with UNTHSC strategic plan	Territorialism	Space is allocated for the betterment of the overall institution	Meetings E-mail Training Daily News Campus Connection	Executive Team Leadership Team Comm Team Facilities Mgmt
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### Cultural Guide

Stage	Issue	What Needs to be Done?	Who Does It?
<b>Attention</b>	Communicating the importance of space management	Communicate the implications of effective space management, e.g., what is in it for them, funding implications, space for new faculty, etc.	Space Utilization Committee
<b>Engagement</b>	Importance of integrating financial information Understanding benefits of space management system	Achieve buy-in from data owners to share data Communicate the implications of effective space management, e.g., what is in it for them, funding implications, space for new faculty, etc.	Stephen Barrett Terry Morgan
<b>Commitment</b>	<b>Additional Accountability and Responsibility</b>	<b>Communicate and Educate</b>	<b>Executive Team Communication Team</b>
<b>Action</b>	<b>Promote Importance</b>	<b>Obtain Buy-In</b>	<b>Leadership Team</b>
<b>Integration</b>	Territorialism	Communicate the implications of effective space management, e.g., what is in it for them, funding implications, space for new faculty, etc.	Space Utilization Committee

### Assessment Guide

What Will be Assessed?	Measure?	Method?	Criteria Satisfied?	Who Does It?
Leadership knowledge of space issues	Percent satisfied or very satisfied	Communication questions from Space Management Survey		Division of Space Management supported by OSM
Support and information for Space Utilization Committee	Meeting attendance Space Utilization Committee Feedback	Meeting minutes Interviews with Space Management Committee members		Division of Space Management supported by OSM
Alignment of Division of Space Management operations with UNTHSC strategic initiatives	Percent of objectives aligned	Review of Facilities Department		Division of Space Management supported by

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<b>What Will be Assessed?</b>	<b>Measure?</b>	<b>Method?</b>	<b>Criteria Satisfied?</b>	<b>Who Does It?</b>
		performance assessment information		OSM
Ability of IWMS to link human, financial, and space resources	Percent of space linked to human and financial resources	Review of IWMS database		Division of Space Management
Extent to which needs of key beneficiaries and constituents are met	Percent satisfied or very satisfied	Beneficiary and constituent satisfaction survey		Division of Space Management supported by OSM
Relationships with key beneficiaries and constituents	Percent satisfied or very satisfied	Beneficiary and constituent satisfaction survey		Division of Space Management supported by OSM
Implementation of IWMS	Percent of space linked to human and financial resources	Review of IWMS database		Division of Space Management
Accuracy of space utilization inventory	Percent accuracy of space utilization inventory	Review of IWMS database		Division of Space Management
Department space coordinator training	Percent of departmental space coordinators trained	Review of training attendance		Division of Space Management
Efficiency and effectiveness of IWMS	Percent accuracy of space allocation and operation costs	Review of IWMS database		Division of Space Management
Coordination of building projects with UNT System	Percent on-time for building projects	Review of building project schedule		Facilities Department
<b>Stage 1 – Attention</b>				
<b>What Will be Assessed?</b>	<b>Measure?</b>	<b>Method?</b>	<b>Criteria Satisfied?</b>	<b>Who Does It?</b>
<b>Stage 2 – Engagement</b>				
<b>What Will be Assessed?</b>	<b>Measure?</b>	<b>Method?</b>	<b>Criteria Satisfied?</b>	<b>Who Does It?</b>

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<b>What Will be Assessed?</b>	<b>Measure?</b>	<b>Method?</b>	<b>Criteria Satisfied?</b>	<b>Who Does It?</b>
<b>Stage 3 – Commitment</b>				
<b>What Will be Assessed?</b>	<b>Measure?</b>	<b>Method?</b>	<b>Criteria Satisfied?</b>	<b>Who Does It?</b>
<b>Stage 4 – Action</b>				
<b>What Will be Assessed?</b>	<b>Measure?</b>	<b>Method?</b>	<b>Criteria Satisfied?</b>	<b>Who Does It?</b>
<b>Stage 5 – Integration</b>				
<b>What Will be Assessed?</b>	<b>Measure?</b>	<b>Method?</b>	<b>Criteria Satisfied?</b>	<b>Who Does It?</b>