

**Facilities Planning and Design Unit**  
**Strategic Planning Document**

**Final Draft**

**June 2008**

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## **SPC Members**

The Strategic Planning Committee of the FPDU consists of the following members:

- Bassem Barhoumi, Director
- Mohammad Tassi, Project Manager
- Emilio Khoury, Project Manager
- Samiha Tannir, Executive Officer

# 1. Mission Statement

FPDU administers, through a comprehensive process, the implementation of the AUB Campus Master Plan study of 2002 and its updates to provide upgraded facilities and outdoor spaces to better serve the university mission for excellence in education and health care services.

## 2. Major Accomplishments

### Strategic Milestone Projects

- Central Cooling Plant
- Lower Campus Development.
- Enhancing of Campus life

### Project Management

- Management of international design competitions
- Outsourcing design services to international and/or specialized established design firms for the main Capital Projects on Campus and Medical Center
- Increased productivity in terms of managed numbers of projects relative to the number of staff while maintaining high standard quality product
- Legalizing and formalizing the land and building property files for the University.
- Number, size and spread of on-going main Capital Projects on Campus and the AUB-MC is a first time phenomena for the University.

### Quality Projects

- Award winning projects (Charles Hostler Center and Olayan School of Business, until now).
- Adopting the comprehensive and interrelated set of international codes and standards
- Adopting the AIA and FIDIC contract forms for the design and construction outsourcing professional services

### Initiatives

- Application of sustainability in terms of public awareness, practice and application
- Support and participate in the development of a program to protect the landscape wealth.

### Documentation

- Thorough and comprehensive survey of vegetation and plantation on Campus
- Conducting physical and historic survey studies for the heritage buildings on Campus
- Lands and buildings registry file.
- Comprehensive reporting on capital works for review and future references.

### 3. External Trends and Influences

#### Political

- Ability to attract International Consultants/Contractors to bid and sign contracts with AUB for the main Capital Projects.
- Raising the requirements for the details and desired standards attracted highly reputable and professional local Consultants and Contractors to bid on AUB works.
- Time-line/progress of works

#### Technology

- New building materials
- Enhancing environmental quality
- Import /implement new technologies
- Addressing Sustainability issues

#### Legislation

- Taxes: The continuous changes of Tax rates affect FPDU project-budget
- Permits: Governmental and Municipality permits on construction affect project schedule and budget
- Local regulations: Changes of local regulations affect project schedule, cost and availability of resources
- Construction regulations: Changes of construction regulations affect project schedule, cost and availability of resources
- Labor law: Affects the project cost and schedule

#### Economical

- Import legislation: Affects the project cost, schedule and availability of materials
- Raw materials: Availability and cost of raw materials affect the project cost and schedule

## 4. SWOT Analysis

<b>Strengths</b>		<b>Ref. Initiatives</b>	<b>to</b>
S1	Staff-Professionalism, experience & training	FPDU0501 FPDU0504	
S2	Use of specialized software applications	FPDU0501	
S3	Predicted low staff turn-over	FPDU0504 FPDU0509	
S4	Diversity of professional disciplines	FPDU0501 FPDU0504	
S5	Matrix management system	FPDU0504 FPDU0507	
S6	Update guidelines, Quality standards & procedures	FPDU0502 FPDU0506	

<b>Weaknesses</b>		<b>Ref. Initiatives</b>	<b>to</b>
W1	Lack of professional training in the locality/region	FPDU0501	
W2	Process departmental procedures, policies & archiving	FPDU0502	
W3	Department dispersed in two locations	FPDU0503	

<b>Opportunities</b>		<b>Ref. Initiatives</b>	<b>to</b>
O1	Quality training (international & qualified training)	FPDU0501 FPDU0502	
O2	Proper outsourcing	FPDU0504 FPDU0505	
O3	Motivation plans for staff members	FPDU0501 FPDU0509	
O4	Implementation of latest technologies	FPDU0502	
O5	“SELL” FPDU experience and services (similar to AUB/ REP)	FPDU0510	
O6	Introduce an effective Energy Management Plan	FPDU0511	

<b>Threats</b>		<b>Ref. Initiatives</b>	<b>to</b>
T1	Misconception & miscommunication with other AUB entities	FPDU0502 FPDU0506	
T2	High work load (given current structure)	FPDU0507	
T3	Limited number of local consultants/contractors to deliver to AUB standards	FPDU0504 FPDU0505 FPDU0508	
T4	Political & economical unrest	FPDU0509	
T5	Capital projects necessitates prompt and adequate input and management from the stakeholders for all project phases	FPDU0506	

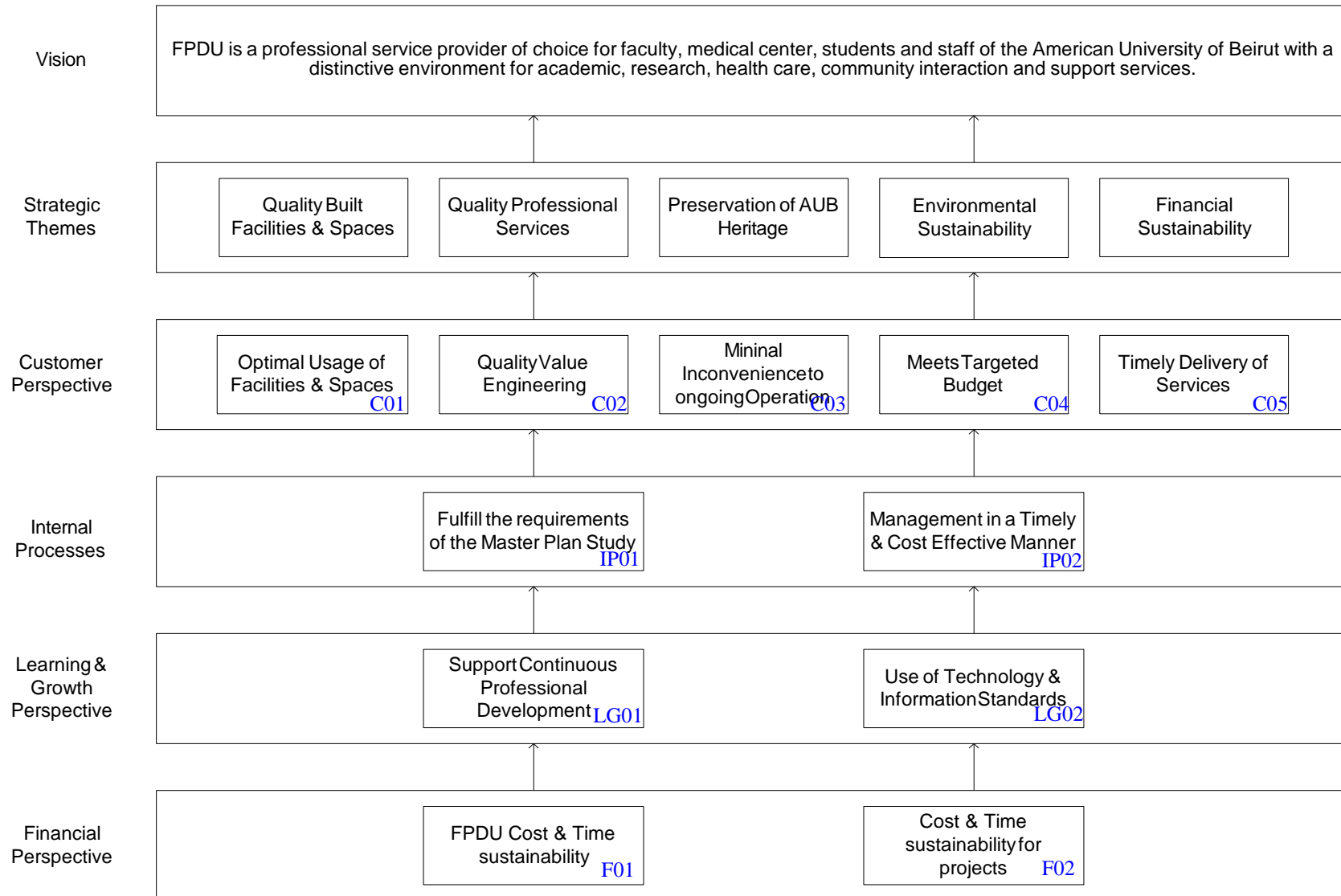
## **5. Vision Statement**

FPDU is a professional service provider of choice for faculty, medical center, students and staff of the American University of Beirut with a distinctive environment for academic, research, health care, community interaction and support services.

## 6. Student Learning Outcomes

Not applicable to FPDU

## 7. Strategy Map



## 8. Summary of KPIs

Objectives	Ref	Performance Indicator
Optimal Use of Facilities & Spaces	C1a	# of student hours/m2
	C1b	# of FTE faculty hours/m2
	C1c	# of non-academic FTE/m2
Quality Engineering Value	C2a	# of design related complaints by end users in the first year
	C2b	Cost of repairing <b>design-related</b> defects in the first year as a % of total project cost
	C2c	Cost of maintenance in the next four years as a % of total project cost
Minimal Inconvenience to On-going Operations	C3a	# of suspensions to construction activities due to complaints by end user
	C3b	# of work day interruptions in constructions activities due to complaints by end users
	C3c	# of work hour interruption to "end user" due to repairs during the first year
Meet Targeted Budget	C4a	% variation by End-user
	C4b	% overall variation
Timely Delivery of Service	C5a	% of delays in the delivered projects over 3 years
Fulfill requirements of the Master Plan Study	IP1a	No. of projects not compliant with updated master plan
	IP1b	% of compliance with performance criteria ffor campus green
	IP1c	# of new standards adopted and included in the master plan to total new standards issued
Management in a Timely & Cost Effective Manner	IP2a	Time required to produce tender documents starting from RFP phase by project category
	IP2b	% of overrun between project estimate and actual cost
	IP2c	Project manning - to be defined
Support Continuous Professional Development	LG1a	% of staff completing 20 hours of training per year
	LG1b	# of continuous subscriptions to professional associations

Objectives	Ref	Performance Indicator
	LG1c	# of continuous subscriptions to technical publications
Use of Technology & Information Standards	LG2a	# of introductions/updates to technical software applications
	LG2b	See Reference IP1c: # of new standards adopted and included in the master plan to total new standards issued
FPDU Cost & Time Sustainability	F1a	Balance between Allocated budget for each fiscal year and Actual Expenditures during same year.
	F1b	Percentage of the FPDU operating cost in the last 3 years to the budget of the completed works in the same period of time
	F1c	Percentage of the FPDU operating cost in the last 3 years to the number of handled projects in the same period of time
Cost & Sustainability project	F2a	See C4a - Variations requested by FPDU as a % of allocated budget
	F2b	Time required to produce tender documents by project category

## 9. Summary of Strategic Initiatives

ISN	Initiative Statement	Criticality	Short / Long Range	Ref to SWOT	Ref to Strategy Map item #
FPDU0501	Attend/conduct continuous professional international/local training program	8	O	S1, S2, S4, W1, O1 & O3, O6	LG01& LG02
FPDU0502	Finalize documentation & update of FPDU policies & procedures by end of 2007	9	S	W2, O1 & O4	C01 & IP01, IP02,
FPDU0503	Improve office communication & coordination support procedures	7	S	W3	IP02 & F01, F02
FPDU0504	Keep a team of highly professional staff members with multi-functional skills while maintaining internal team work spirit.	8	O	S1, S3, S4, S5, O2 & T3, O6	C02, C04, IP02, F01 & F02
FPDU0505	Initiate evaluation procedure for all outsourced Consultants/Contractors	6	S	O2 & T3	C01, C02, C04 & F02
FPDU0506	Initiate coordination forms and procedures with other AUB entities	7	S	S6, T1 & T5	C03 IP02
FPDU0507	FPDU to revisit the schedule of projects when additional projects are introduced	8	O	S5 & T2	C05, IP02 & F01
FPDU0508	International outsourcing when needed	6	L	T3	C02& LG01 & LG02
FPDU0509	Initiate effective incentive plan for staff members based on their performance.	7	S	S3, O3 & T4	IP02, LG01 & F01
FPDU0510	Coordinate with AUB upper management (on REP example)	5	L	O5	LG01 & F01
FPDU0511	Initiate guidelines and implementation procedures for Energy Management	7	L	O6	C02, IP02, LG01, LG02 & F02

## 10. Planning Templates

Initiative Statement No. (ISN) <b>FPDU0501</b>		Criticality Rating: Least Critical                      Most Critical 1 2 3 4 5 6 7 <b>8</b> 9 10								Total cost of initiative: <b>\$105,000</b>		
Initiative Statement : <b>Attend/conduct continuous professional international/local training program</b>												
#	Key Implementation Step	Implementing Work Unit	Act. (1)	Starting Date (2)	Exp. (3)	Incremental to Current Year Funding Levels						
						FTE	Year 1	Year 2	Year 3			
1	Attend & participate in professional international conferences, seminars and exhibitions	FPDU	O	Oct. 2006	O	0	\$30,000	\$30,000	\$30,000			
2	Attend & participate in professional local conferences, seminars and exhibitions	FPDU	O	Oct. 2006	O	0	\$5,000	\$5,000	\$5,000			
3	Arrange visits to major suppliers & manufacturers	FPDU	O	Oct. 2006	O	0	-	-	-			
Notes/Comments/Explanations:												

(1) **Type of Activity:** 'S' for Short-Term (< 3 years); 'L' for Long-Term (≥3 years); 'O' for On-going activity

(2) **Starting date of the step:** YY/MM

(3) **Type of Expenditure:** 'C' for Capital Expenditures; 'O' for Operating Costs

Initiative Statement No. (ISN) FPDU0502		Criticality Rating: Least Critical                      Most Critical 1 2 3 4 5 6 7 8 <b>9</b> 10								Total cost of initiative: \$30,000	
Initiative Statement : Finalize documentation & update of FPDU policies and procedures by end of 2007											
#	Key Implementation Step	Implementing Unit	Work	Act. (1)	Starting Date (2)	Exp. (3)	Incremental to Current Year Funding Levels				
							FTE	Year 1	Year 2	Year 3	
1	Follow up the schedule with Consultant to achieve the above on time	FPDU		S	Oct. 2006	O	0	-	-	\$30,000	
Notes/Comments/Explanations:											

(1) **Type of Activity:** 'S' for Short-Term (< 3 years); 'L' for Long-Term (≥3 years); 'O' for On-going activity

(2) **Starting date of the step:** YY/MM

(3) **Type of Expenditure:** 'C' for Capital Expenditures; 'O' for Operating Costs

Initiative Statement No. (ISN) FPDU0503		Criticality Rating:   Least Critical                      Most Critical 1 2 3 4 5 6 <b>7</b> 8 9 10								Total cost of initiative: \$45,000	
Initiative Statement : Improve office communication & coordination support procedures											
#	Key Implementation Step	Implementing Unit	Work	Act. (1)	Starting Date (2)	Exp. (3)	Incremental to Current Year Funding Levels				
							FTE	Year 1	Year 2	Year 3	
1	Improve mail delivery procedures	FPDU		S	Oct. 2006	O	0	\$15,000	\$15,000	\$15,000	
Notes/Comments/Explanations:											

(1) **Type of Activity:** 'S' for Short-Term (< 3 years); 'L' for Long-Term (≥3 years); 'O' for On-going activity

(2) **Starting date of the step:** YY/MM

(3) **Type of Expenditure:** 'C' for Capital Expenditures; 'O' for Operating Costs

Initiative Statement No. (ISN) FPDU0504		Criticality Rating: Least Critical				Most Critical				Total cost of initiative: \$9,000	
		1 2 3 4 5 6 7 8 9 10									
Initiative Statement : Keep a team of highly professional staff members with multi-functional skills while maintaining internal team work spirit											
#	Key Implementation Step	Implementing Unit	Work	Act. (1)	Starting Date (2)	Exp. (3)	Incremental to Current Year Funding Levels				
							FTE	Year 1	Year 2	Year 3	
1	Maintain extra-curriculum activities for staff members	FPDU		O	Oct. 2006	O	0	\$3,000	\$3,000	\$3,000	
Notes/Comments/Explanations:											

(1) **Type of Activity:** 'S' for Short-Term (< 3 years); 'L' for Long-Term (≥3 years); 'O' for On-going activity

(2) **Starting date of the step:** YY/MM

(3) **Type of Expenditure:** 'C' for Capital Expenditures; 'O' for Operating Costs

Initiative Statement No. (ISN) FPDU0505		Criticality Rating: Least Critical                      Most Critical 1 2 3 4 5 <b>6</b> 7 8 9 10								Total cost of initiative: \$		
Initiative Statement : Initiate evaluation procedure for all outsourced Consultants/Contractors												
#	Key Implementation Step	Implementing Work Unit	Act. (1)	Starting Date (2)	Exp. (3)	Incremental to Current Year Funding Levels						
						FTE	Year 1	Year 2	Year 3			
1	Form a team for setting Consultant/Contractor evaluation & database	FPDU	S	Oct. 2006	O	0	-	-	-			
Notes/Comments/Explanations:												

(1) **Type of Activity:** 'S' for Short-Term (< 3 years); 'L' for Long-Term (≥3 years); 'O' for On-going activity

(2) **Starting date of the step:** YY/MM

(3) **Type of Expenditure:** 'C' for Capital Expenditures; 'O' for Operating Costs

Initiative Statement No. (ISN) FPDU0506		Criticality Rating: Least Critical                      Most Critical 1 2 3 4 5 6 <b>7</b> 8 9 10								Total cost of initiative: \$	
Initiative Statement : Initiate coordination forms and procedures with other AUB entities											
#	Key Implementation Step	Implementing Unit	Work	Act. (1)	Starting Date (2)	Exp. (3)	Incremental to Current Year Funding Levels				
							FTE	Year 1	Year 2	Year 3	
1	Form a team for setting the proper coordination forms & procedures	FPDU		S	Oct. 2006	O	0	-	-	-	
Notes/Comments/Explanations:											

(1) **Type of Activity:** 'S' for Short-Term (< 3 years); 'L' for Long-Term (≥3 years); 'O' for On-going activity

(2) **Starting date of the step:** YY/MM

(3) **Type of Expenditure:** 'C' for Capital Expenditures; 'O' for Operating Costs

Initiative Statement No. (ISN) FPDU0507		Criticality Rating: Least Critical                      Most Critical 1 2 3 4 5 6 7 <b>8</b> 9 10								Total cost of initiative: \$10,000	
Initiative Statement : FPDU to revisit the schedule of projects when additional projects are introduced											
#	Key Implementation Step	Implementing Unit	Work	Act. (1)	Starting Date (2)	Exp. (3)	Incremental to Current Year Funding Levels				
							FTE	Year 1	Year 2	Year 3	
1	All additional new projects shall be inserted in FPDU schedule for evaluation prior to approving commitment dates.	FPDU		O	Oct. 2006	O	0	\$5,000	\$5,000	-	
Notes/Comments/Explanations:											

(1) **Type of Activity:** 'S' for Short-Term (< 3 years); 'L' for Long-Term (≥3 years); 'O' for On-going activity

(2) **Starting date of the step:** YY/MM

(3) **Type of Expenditure:** 'C' for Capital Expenditures; 'O' for Operating Costs

Initiative Statement No. (ISN) FPDU0508		Criticality Rating: Least Critical                      Most Critical 1 2 3 4 5 <b>6</b> 7 8 9 10								Total cost of initiative: \$	
Initiative Statement : International outsourcing when needed											
#	Key Implementation Step	Implementing Unit	Work	Act. (1)	Starting Date (2)	Exp. (3)	Incremental to Current Year Funding Levels				
							FTE	Year 1	Year 2	Year 3	
1	Set international outsourcing procedures	FPDU		L	Oct. 2006	O	0	-	-	-	
Notes/Comments/Explanations:  FPDU sends recommendations for international-outsourcing to CMPSC on project basis											

(1) **Type of Activity:** 'S' for Short-Term (< 3 years); 'L' for Long-Term (≥3 years); 'O' for On-going activity

(2) **Starting date of the step:** YY/MM

(3) **Type of Expenditure:** 'C' for Capital Expenditures; 'O' for Operating Costs

Initiative Statement No. (ISN) FPDU0509		Criticality Rating:   Least Critical                      Most Critical 1  2  3  4  5  6 <b>7</b> 8  9  10								Total cost of initiative: \$120,000		
Initiative Statement : Initiate effective incentive plan for staff members based on their performance												
#	Key Implementation Step	Implementing Unit	Work	Act. (1)	Starting Date (2)	Exp. (3)	Incremental to Current Year Funding Levels					
							FTE	Year 1	Year 2	Year 3		
1	Introduce staff motivation incentive plans	FPDU		S	Oct. 2006	O	0	\$40,000	\$40,000	\$40,000		
2	Clarify FPDU grading system	FPDU		S	Oct. 2006	O	0	-	-	-		
Notes/Comments/Explanations:  For item# 2, FPDU is to coordinate with AUB upper management												

(1) **Type of Activity:** 'S' for Short-Term (< 3 years); 'L' for Long-Term (≥3 years); 'O' for On-going activity

(2) **Starting date of the step:** YY/MM

(3) **Type of Expenditure:** 'C' for Capital Expenditures; 'O' for Operating Costs

Initiative Statement No. (ISN) FPDU0510		Criticality Rating: Least Critical                      Most Critical 1 2 3 4 <b>5</b> 6 7 8 9 10								Total cost of initiative: \$	
Initiative Statement : Coordinate with AUB upper Management											
#	Key Implementation Step	Implementing Unit	Work	Act. (1)	Starting Date (2)	Exp. (3)	Incremental to Current Year Funding Levels				
							FTE	Year 1	Year 2	Year 3	
1	Work towards adopting REP procedures	FPDU		L	Oct. 2006	O	0	-	-	-	
Notes/Comments/Explanations:											

(1) **Type of Activity:** 'S' for Short-Term (< 3 years); 'L' for Long-Term (≥3 years); 'O' for On-going activity

(2) **Starting date of the step:** YY/MM

(3) **Type of Expenditure:** 'C' for Capital Expenditures; 'O' for Operating Costs

Initiative Statement No. (ISN) FPDU0611		Criticality Rating: Least Critical                      Most Critical 1 2 3 4 5 6 <b>7</b> 8 9 10								Total cost of initiative: \$50,000		
Initiative Statement : Initiate guidelines and implementation procedures for Energy Management												
#	Key Implementation Step	Implementing Work Unit	Act. (1)	Starting Date (2)	Exp. (3)	Incremental to Current Year Funding Levels						
						FTE	Year 1	Year 2	Year 3			
1	Initiate "Energy Management Team" to set policy and plan-of-action	FPDU	S	Oct. 2006	O	0	\$10,000	\$10,000	\$5,000			
2	Perform "Energy Audit" on existing facilities	FPDU	L	Oct. 2007	C	0	-	\$7,500	\$7,500			
3	Plan and Design for corrective measures based on economical feasibility studies	FPDU	L	Oct. 2008	C	0	-	-	\$10,000			
Notes/Comments/Explanations: #1 includes consultancy fees #2 includes implementation cost #3 includes consultancy fees												

(1) **Type of Activity:** 'S' for Short-Term (< 3 years); 'L' for Long-Term (≥3 years); 'O' for On-going activity

(2) **Starting date of the step:** YY/MM

(3) **Type of Expenditure:** 'C' for Capital Expenditures; 'O' for Operating Costs

## **11. Mechanisms and Activities to Secure Faculty/Staff Input in Planning Process**

1. Post on the shared server (FPDU Working) the following documents:
  - Briefing on university-wide initiative
  - Process for developing and implementation of SP
  - Guide for developing SP
  - FPDU SP Document
  
2. Based on the amount and nature of raised issues, an FPDU Team meeting could be arranged to communicate final adjustment to the manual.
  
3. The FPDU-SPC team will gather and agree on all review comments and amend the final document accordingly. The final draft will be posted on the common server.

## **12. Mechanisms and Activities to Foster Interdisciplinary, Cross-University, Cross-Unit and Cross Functional Programs**

Since the mission of FPDU is to provide upgraded facilities and outdoor spaces to better serve the university mission for excellence in education and healthcare services; this clearly means that FPDU has to interact with various departments within the University Campus and the Medical Center for providing such services, all within the framework of the Master Plan.

The above is applicable both “upstream “, .e. towards E/Users and also “downstream “, .i.e. towards entities in charge of operation and maintenance of the projects after hand over.

Consequently, the plan of action is to address both Users and O & M bodies.

### **1- Customer oriented mechanisms and activities – Current:**

- Thorough and comprehensive review of the needs, in terms of space, function and technical requirements.
- Coordination with various other concerned departments to satisfy the above needs, especially in the field of Safety, utilities and infrastructure. To mention a few, EHS & RM, Power Plant, CNS etc...
- Phasing of works in certain cases, especially remodeling works within operational units. This will establish an adequate time frame for the Works.
- Establishing a budgetary envelope to suit the above, in order to make sure that the set budget satisfies the formulated requirements.
- As far as O & M entities are concerned, a continuous coordination effort to make sure that standard materials and /or equipment are to be used; in addition to simple maintenance requirements.
- Hand over process to O & M entities to include all data which would be helpful in troubleshooting and repair.

### **2- Customer oriented mechanisms and activities – Planned:**

- Establish a “questionnaire” to make sure of getting a comprehensive list of all requirements, from the E/Users perspective.
- Ditto, from the concerned collaborating department(s), including O & M entities.
- Publishing an “Operations Manual” which explains and regulates the interaction with different parties.
- The said manual shall also govern the responsibilities and jurisdiction of different entities.
- After a set period of time, re-assess the procedures and update.

### 13. Schedule of Strategic Management Reviews

The regular reviews of actual performance against plans are scheduled as follows:

<b>Review Date</b>	<b>Attendees</b>
Last week of September	FPDU Team
Last week of March	FPDU Team