

**STRATEGIC FACILITIES INSTITUTE 1**  
**December 11 – 13, 2017**  
**Hanover, MD**  
**COURSE SCHEDULE**

| <b>Monday, December 11<sup>th</sup></b> |  |
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| 7:30 – 8:30 am                          | <b>Breakfast and Registration (2<sup>nd</sup> Floor)</b>   |
| 8:30 – 9:00 am                          | <b>Introductions &amp; Institute Overview: TBD Room (2<sup>nd</sup> Floor)</b><br>Participant introductions and review of the key concepts of Strategic Procurement and how they link to the Strategic Facilities Institute  |
| 9:00 – 10:00 am                         | <b>The Construction &amp; Facilities Spend Cube</b><br>What does analysis of construction and facilities spend patterns reveal about the opportunities to increase value? Does it make sense for Procurement to collaborate in managing this spend? Observations from experience and facilitated small group discussion.   |
| 10:00 – 10:15 am                        | <b>Break</b>   |
| 10:15 – 12:00 pm                        | <b>Lifecycle of Constructed Facilities</b><br>Introduction of the framework to be used throughout the Institute. What are the key objectives and management priorities for each segment of the lifecycle and what role can Procurement play? Presentation of research findings, observations from client experience and facilitated small group discussion.  |
| 12:00 – 1:00 pm                         | <b>Lunch (2<sup>nd</sup> Floor) – Location TBD</b>   |
| 1:00 – 1:45 pm                          | <b>Strategic Facilities Vision &amp; Building Demand</b><br>There are significant cost implications to build v. renovate decisions. The ability to impact construction & facilities spend strategically starts with a clear understanding of the capital project pipeline. Presentation of higher education building trends and what procurement should be aware of in the development of space and campus master plans. Key lessons learned from experience and class discussion. |
| 1:45 – 2:30 pm                          | <b>Planning &amp; Feasibility Study</b><br>What does procurement need to know about feasibility studies, program planning and financial pro forma work that results in ‘go’ or ‘no go’ decisions?  |
| 2:30 – 2:45 pm                          | <b>Break</b>   |
| 2:45 – 3:45 pm                          | <b>Design &amp; Engineering</b><br>Design choices drive significant costs. From field experience, what do we know about the selection, negotiation and management of A&E professional fees? Is there an opportunity to impact these costs and if so, what role can procurement play? Case study material and small group discussion.   |
| 3:45 – 5:00 pm                          | <b>Panel Discussion: CPO Perspective</b><br>An interactive Q&A session with selected chief procurement officers. A portion of the time will be moderator facilitated and the balance reserved for participant questions. The focus of the session will be on actual experience and the prospect for further impact and collaboration with the facilities and construction teams from the CPO’s viewpoint.  |

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| <b>Tuesday, December 12<sup>th</sup></b> |  |
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| 7:30 – 8:30 am                           | <b>Breakfast (2<sup>nd</sup> Floor)</b>  |
| 8:30 – 9:30 am                           | <b>Capital Procurement &amp; Construction: Major Capital Projects</b><br>There are multiple contract vehicles used to arrange for major capital projects. Through class discussion and exercises we will review and summarize the pros and cons of each contract type. Does it make sense for procurement to play a role in these bidding events and if so what is it?   |
| 9:30 – 10:00 am                          | <b>Capital Procurement &amp; Construction: Minor Capital Projects</b><br>The amount of spend associated with ‘minor’ capital projects can be larger than most people understand. A typical bidding strategy for these projects involves getting at least 3 bids and taking the low bid. Is this the best approach? Understanding the future pipeline for these projects is a key element in managing the spend more strategically.   |
| 10:00 – 10:15 am                         | <b>Break</b>   |
| 10:15 – 11:00 am                         | <b>Capital Procurement &amp; Construction: Minor Capital Projects (continued)</b><br>The class will explore alternative approaches and leading practices based on field experience through small group discussion and in-class exercises.  |
| 11:00 – 12:00 pm                         | <b>Capital Procurement &amp; Construction: Owner Supplied Materials &amp; Strategic Suppliers</b><br>There may be a business case for the University to supply more of the materials used in major capital projects than occurs today. The class will explore this potential and discuss the pros and cons of greater involvement as well as the role procurement might play. Additionally, there are likely to be a few ‘strategic’ suppliers providing materials and/or services to the Facilities & Construction groups where the contractual relationship could be improved and the subsequent contract management enhanced. We will explore this idea with case study materials and class discussion. |
| 12:00 – 1:00 pm                          | <b>Lunch (2<sup>nd</sup> Floor)</b>  |
| 1:00 – 1:30 pm                           | <b>Startup for Occupancy</b><br>What does procurement need to know about the commissioning, warranty and asset management processes?   |
| 1:30 – 2:30 pm                           | <b>Building Operations &amp; Maintenance: Part 1</b><br>In Part 1, we will focus on the topic of ‘Facilities Conditions Assessment’. What is it, why is it important and what role can procurement play in this process. What are the end products that result from a well-managed process and how does it facilitate a greater procurement to facilities collaboration?   |
| 2:30 – 2:45 pm                           | <b>Break</b>   |

**Tuesday, December 12<sup>th</sup> (continued)**

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| 2:45 – 3:30 pm | <p><b>Building Operations &amp; Maintenance: Part 2</b><br/>In Part 2, we will focus on ‘Asset Management’. What is it, why is it important and what role can procurement play in this process. What are the end products that result from a well-managed process and how does it facilitate a greater procurement to facilities collaboration?</p>        |
| 3:30 – 4:45 pm | <p><b>Panel Discussion: Chief Facility Officer Perspective</b><br/>An interactive Q&amp;A session with selected chief facilities officers. A portion of the time will be moderator facilitated and the balance reserved for participant questions. The session will focus on where spend management opportunities reside and how procurement can help.</p> |

**Wednesday, December 13<sup>th</sup>**

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|------------------|---|
| 7:30 – 8:30 am   | <p><b>Breakfast (2<sup>nd</sup> Floor)</b></p>  |
| 8:30 – 10:00 am  | <p><b>Results Tracking, Data Analysis &amp; Technology Support</b><br/>The Construction and Facilities teams may collect a lot of data, but still be information poor. We will explore key elements of goals, scorecards, data analytics and technology support based on field experience and discuss ways that procurement might bring value to these areas.</p> |
| 10:00 – 10:15 am | <p><b>Break</b></p>   |
| 10:00 – 11:00 am | <p><b>Participant Experience</b><br/>A facilitated class discussion to identify current participant experiences, challenges they faced with dialog on how to resolve them.</p>  |
| 11:00 – 11:30 am | <p><b>Conclusion: Closing Remarks, Lessons Learned, Action Items</b><br/>A brief review of key concepts and learning points from the Institute.</p>   |