

**The Facilities and Services Strategic Plan  
Founded on the Outline for Excellence Created by APPA**

**The Mission**

Efficiently provide a safe, well maintained and environmentally sustainable university community.

**The Values**

- A safe environment
- A professional organization
- Integrity and accountability
- Open and respectful communications
- Teamwork and partnership

**The A&F Strategies Relevant to FS**

- Customer Satisfaction
- Communication and engagement with the campus community
- Staff Development and Empowerment
- A climate of positive tone and favorable energy

**The FS Strategic Plan**

- **The Leadership Vision:** The “Leadership System” of FS is based on modern leadership and management principles, is well defined and consistently communicated, and serves as the basis for decentralized decision making and employee empowerment.
  - Objectives:
    - The mission, vision and strategic plan of FS remain in alignment with those of the campus.
    - Metrics of performance exist from the front-line employee to the organization as a whole, and are used to drive recognition and improvement on a monthly basis.
    - Metrics of performance are routinely used to benchmark FS performance against that of peer institutions.
    - Every FS employee receives some form of relevant training and development each year based on their personal goals regarding their role in FS and the needs of the organization.
    - Self-direction and decentralized decision making have been maximized and employees trained and educated to function effectively in a self-managed environment.
- **The Customer Focus Vision:** The performance and processes of FS are viewed by customers as highly customer centric and, at a minimum, satisfy the needs of customers.
  - Objectives:
    - Customer satisfaction surveys routinely monitor the level of customer service on key criteria.

- The levels of customer service reflected in the surveys verify that FS is meeting the needs of its customers.
  - Customer survey data and feedback is used to build positive relationships, drive processes and effect improvements.
  - FS management at all levels spends time on a regular basis with customers and front-line staff.
  - Campus users have a clear understanding and positive view of the services provided by FS and their expectations are consistent with the values and resources of the organization.
  - The training and orientation and development of employees include a strong customer service ethos.
  - Communications during the construction process have been developed and provide a smooth method for acceptance of all projects.
  - Emergency response plans are in place, are current, are communicated to FS employees and the campus on an annual basis.
- **The Process Management Vision:** The processes of FS are clear and well understood by the employees and are continuously improved through a structured, effective and participative methodology.
- Objectives:
    - Processes are in place that ensure that facilities, equipment and employees can effectively meet customer expectations.
    - The work management system – including the work authorization and scheduling procedures and the estimating and PM systems have been constantly improved to support front line employee performance for the customer.
    - There is a structured and effective process that ensures the continuous improvement of service delivery and FS internal processes.
    - Financial management is performed at the lowest practical level of the organization, supporting decentralized decision making and data performance review.
    - An estimating systems is used that provides accurate estimates of labor and material requirements in order to plan and schedule the execution of work and to determine the causes of significant deviations.
    - Design guidelines that incorporate such elements as energy consumption, operating costs and environmental concerns and safety have been prepared, updated and are utilized.
- **Performance Planning and Results Vision:** FS utilizes a cascaded system of operational and unit performance dashboards to monitor performance on a monthly basis, to establish short and long term goals, to drive the delivery of appreciation, recognition and celebration, and to drive corrective action where necessary.
- Objectives:
    - Annual budgets are developed with input from staff reflecting historic expenditures, an analysis of needs and with a drive for effective allocation of available resources.

- Customer Satisfaction and Employee Satisfaction surveys are administered in full on an annual basis and quarterly using sampling.
  - The FS staff is highly motivated and demonstrates great pride in the accomplishments of their duties. They are supportive of each other and the organization's direction.
  - The appearance of buildings and grounds is in keeping with the surrounding community and the desires of the institution and are appraised routinely against APPA standards.
  - Building systems and utilities infrastructure are maintained and operated at high levels of reliability based on APPA standards and the universities expectations.
  - There is an existing capital outlay process and master plan that are maintained by FS in keeping with the university's expectations and demands
  - Available funding resources are effectively used with the intent of controlling preventative maintenance deficits
  - If the Division does not establish a social-based positive reinforcement system, to be used by all personnel, FS will design, develop and implement its own, to supplement the recognition systems that exist in 2013.
  - Managers and supervisors are in touch with the needs of the institution through routine contact with customers at all levels. The Building Monitor program has been upgraded and a higher level of the Monitors are longer term and experienced in their roles, which they are happy to exercise.
- **The FS Human Resources System:** FS ensures an environment of continued learning through communication, policies, recognition, training, professional development and other methods.
- Objectives:
    - Processes are in place to determine the effectiveness of recruitment and retention programs and to identify areas for improvement.
    - Staff positions remain well and properly classified and allocated in adequate numbers to meet the standards for the targeted level of service
    - There are routine reviews to identify essential functional and appropriate licenses
    - Training programs provide for new employee orientation and technical/professional development growth opportunities. The orientation program consists of a cascaded set of "the keys to success" at each level and for each work unit with in FS.
    - On going training and education have insured that each employees knows his or her role in the department, the role of related areas and the overall role of the organization.
    - Safety policies and procedures have been established, written and communicated to all staff. There is routine observation of safety behavior by management personnel, leading to appreciation and/or corrective action. Training Center has been fully implemented and is in use.
    - Accident records are well maintained and routinely reviewed to reduce accidents and increase attention to safe behavior. The employee hiring process includes filters

- to avoid hiring those who have physical attributes that could lead to accidents or unhealthy conditions in the job for which the interview is being considered.
- Career development is integrated with succession planning, and it is supported through involvement in job-related and professional organizations, as well as opportunities to advance in FS.
  - Work and attendance performance are included as elements of each individual's annual review, as are data that builds the dashboards used to oversee and guide the organization.
- **Information and Analysis:** data from AIM and the customer and employee surveys is used to build the dashboards through which the organization is managed, all of which supplements the financial data gathering and reporting provided through the A&F division.
- Objectives:
    - Financial performance data (expenditure reports for example) are communicated and accessible to all appropriate users so that more informed and meaningful employee level decision making can be achieved.
    - The Facilities Condition assessment module in AIM has been fully implemented and is in use to achieve a regular appraisal of facilities conditions and to identify maintenance and repair needs.
    - Utilities performance is closely tracked and aggressively managed. Energy effectiveness is a strong and clear message and goal of the organization.
    - FS works with FSA and ICT to assure that hardwired and software systems are user friendly, reliable, up to date, meet the needs of the users and have adequate backup in case of disasters.

#### Guiding Strategies:

- A thorough, meaningful and linked performance data gathering and reporting system will be designed, developed, implemented and continuously improved to support decision making and continuous performance improvement throughout the organization. (The Balanced Score Card is one option for the framework of such a system).
- The FS strategic plan will be reviewed and updated annually.
- FS employees will receive annual development and training to reinforce the customer centric ethos of FS, and to support their goals and the needs of FS.
- A structured framework will be developed and continuously used to drive self-direction and decentralized decision making.
- A structured methodology to drive process improvement will be developed and implemented so that all employees can participate in process and organizational improvement on an ongoing basis. Continuous improvement will be one of the performance criteria for all employees.
- The organization will be 'designed' to optimize customer service.

## FS Dashboard Metrics

- I. Customer Satisfaction: once per year
  
- II. Employee Satisfaction: (once per 2 years)
  
- III. Process Performance Measures
  - A. Time to close work orders
  - B. Injury rate (OSHA reportable per work hours)
  - C. Amount of safety training
  - D. Percent inspections completed
  - E. Budget vs. actual (monthly)
  - F. Hazardous waste disposal cost per ton
  - G. Estimate turn time (percent done within target)
  
- IV. Internal
  - A. Percent attendance

## Strategic Actions

- 1. Measurement
  - Customer satisfaction (annual/work orders)
  - Employee satisfaction: cultural once per 2 years
  - Need for a dashboard for use of KPIs
  
- 2. Training about
  - Change processes
  - Management theory/practice
  - Strategic issues
  - Leadership
  - Employee orientation
  - Organization function

## Priorities

1. Values
  - a. Integrity and accountability; involving the whole person
2. Communication
  - a. clarity and thoroughness appropriate to the situation and individuals
3. Attitude/intent
  - a. continue to develop

## KPIs

- Customer satisfaction
- Number of work orders generated
- Response time (fire department)
- Employee satisfaction
- Injuries
- Individual safety training
- Number of inspections
- Equipment certification
- Budget vs. Actual
- Waste management cost
- Attendance
- Open phases on work orders
- Cycle time on work orders
- Estimated turn time
- Actual vs. estimated labor hours on projects (management labor)
- Utilities (consumption costs)

**Record of FSO Strategic Planning Meeting**  
**September 23, 2013**

**FSO Potential Dashboard Metrics**

- I. Customer Satisfaction: once per year
  - A. Some greater frequency at department level might be wise
- II. Employee Satisfaction: (once per 2 years)
  - A. Plan execution at work unit level in annual reports
- III. Process Performance Measures
  - A. Time to close work orders
  - B. Injury rate (OSHA reportable per work hours)
  - C. Amount of safety training
  - D. Percent inspections completed
  - E. Budget vs. actual (monthly)
  - F. Hazardous waste disposal cost per ton
  - G. Estimate turn time (percent done within target)
- IV. Internal
  - A. Percent attendance

**Strategic Actions**

- 1. Measurement
  - .. Customer satisfaction (annual/work orders)
  - .. Employee satisfaction: cultural once per 2 years
  - .. Need for a dashboard
    - use of KPIs
- 2. Training about
  - .. Change processes
  - .. Management theory/practice
  - .. Strategic issues
  - .. Leadership
  - .. Employee orientation
  - .. Organization function

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## **KPIs**

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