

OPR Steering Report

Facilities Planning & Management

Executive Summary

December 11, 2000

FP & M Internal Review and Findings

On November 3, 1998 the FP&M Steering Committee met to plan the department's first Office Planning and *Review* (OPR) Process. Don Chrusciel, the Director of General Services and Business Manager of FP&M chaired the committee. Carla Vosburg represented FP&M office operations, Earl Gunsolus represented WSEU and General Services, Jeff Eysnogle represented the Crafts, Power Plant and Grounds Operations Steve Barnes represented Management' and Marv Hoffer represented Maintenance.

The Steering Committee's first task was to identify the customers (both internal and external) and determine what services are provided to them. The second task involved developing surveying tools to measure performance and to help identify areas for improvement. Their final task was to present the results of the surveys and to make recommendations to the Director of FP & M.

After defining a list of the customers, the Steering Committee developed one internal and two external surveying tools. The initial survey was of the FP&M internal organization. Because of concerns about confidentiality, Bonnie S. O'Neill (a doctoral candidate at UW-Milwaukee in the School of Business) was contracted to assist with preparing the appropriate questions, conducting the survey, analyzing the data and presenting the consolidated results. The OPR Project Final Report for Survey One is included in the appendix of this report.

Responses were received from 80 of the 92 employees (an 87% response rate) and provided a representative perspective of thoughts within the organization. The survey results expressed the frustration of many employees with the current culture in FP&M. This frustration is manifested in perceptions of poor communications, favoritism and less than exemplary customer satisfaction. The staff also expressed concern that the managerial staff did not value its employees. Evidence of this concern was seen by responses regarding lack of input in decision-making, inconsistent accountability between work units, inability to receive appropriate training, and an overall perception of an environment lacking in team behavior. It was recommended that the issues viewed most critical by the staff be reviewed and prioritized before any long-term change efforts begin. Also, because of the staff's anxiety over these issues, extra effort needs to be used to communicate the change process at every key step.

FP & M External Customer Survey and Findings

After completing the internal review, the Steering Committee sought information from the external customers. Two other surveys were developed to measure the quality of

service provided and the customer service orientation of FP&M's organization. The results can be found in the appendix of this report and will be used to provide a baseline for future customer surveys. The responses indicate a less than glowing picture of our customer service orientation. The written comments also identified some specific customer service issues regarding helpfulness, responsiveness, friendliness and quality of service within the General Services unit of FP & M.

The Steering Committee reviewed the results of the three surveys and developed written recommendations. These were presented to the Director on July 1, 1999 and are found in the appendix of this report. The Steering Committee also proposed that FP&M establish a group of employees to oversee the process improvement work. This group is charged with the task of reviewing the OPR materials, investigating all issues raised, and presenting detailed recommendations to FP&M administration for implementation. The Steering Committee felt that this team should include representation from all work units in proportion to their numbers within the organization. The team also stressed the need to address the issue of accountability. They stated "We suggest that any further efforts at improvement will fail unless this issue is dealt with first."

External Review Team Findings and Initial Responses

Before proceeding to implementing any of the recommendations in the Steering Committee report, the OPR process requires that an external review committee be formed to provide an outside perspective. This committee consisted of (chairman)Waldo Hagen, Director of Facilities Management in UW-River Falls, Jim Albers, Director of Facilities Planning at UW-System Administration and Mark Skutley, the Director of University Services at UW-Stout. The committee was provided with organizational charts, annual reports, survey questions and results, and the FP&M Steering Committee Final Report. After reviewing this data, the external review team visited UW-Whitewater on November 28 and 29 and interviewed over sixty people including administration, faculty and academic staff, and classified employees. The interviews were equally split between customers of FP&M and FP&M employees.

During these interviews the external review team identified the need to immediately address customer service issues with the campus mail and surplus property units. They advised during the exit conference that corrective ("fix-it") actions should not wait for the final report. Accordingly, while waiting for the external review team's report, the Director met with the General Services staff and developed a series of recommendations for remedying customer service issues dealing with delivery times, delivery accuracy, parcel delivery and outgoing mail. (See appendix) The recommendations were presented to the Chancellor's Staff and were implemented in January 2000. Mail Center staff met with representatives from each building to clarify specified issues and to educate users on process changes included in these recommendations. The mail center staff conducted follow-up surveys of mail service users at the end of the semester. The Mail Center staff will conduct informal surveys of customers throughout the year and a formal survey annually.

The External Review Team report (see appendix) was received in January 2000. Copies of this report were circulated to the FP&M staff. The report recommended that the Director "take immediate visible steps to provide consistent organizational focus" and "FP&M should give serious thought to separating the planning and the implementation phases of construction projects with all project crew and electric shop employees reporting through the same organization, specifically the Building and Grounds Operations area."

In response to the recommendation on organizational focus, in January the Director circulated to the staff at FP&M the following clarification of FP & M's mission:

"FP& M's primary function is the maintenance of facilities and grounds at UW-Whitewater; to accomplish this we need to concentrate on customer service to students, faculty and staff. The secondary function of FP&M is to develop, plan and coordinate projects to meet the programmatic and facility needs of our campus. To be successful, these functions cannot operate in conflict."

This statement serves as the foundation for the development and implementation of future action steps in response to the OPR recommendations.

OPR Implementation Group

The Director then formed an OPR Implementation Group following the guidelines outlined in the Steering Committees' report. Membership included Dean Look representing WSEU, Jeff Eysnogle, Bryan Bidwell and Torn Krummel representing Crafts, Pat Jankowski and Steve Barnes representing supervision, Dan Forman representing General Services, Carla Vosburg representing the office staff and Richard VanSchoonhoven representing CMMS activities. The goals for the Implementation Group were to review the survey results, the Steering Committee recommendations and the External Review Team report, to develop a composite list of issues, and to provide guidance to the Director for steps to be included in the CPR Action Plan. The initial review produced the following list of issues:

1. Utilize talents -avoid duplication of efforts
2. Employee morale
3. Better organization of workers and time
4. Initiate teamwork
5. Develop FPM focus and communication
6. Long-range focus for change
7. Develop standards for accountability during implementation
8. Management support for decisions made by staff
9. Develop communication between FP&M and .our customers so they understand what we are doing and why

10. Develop a plan to make management skills compatible with what working staff is doing
11. Determine positive and negative aspects of zone management and enhance it
12. Maintenance and project support for zones and recommend changes
13. Develop chargeable maintenance project management at FP&M -authority over project -not customer driven
14. Communication of project status to customer
15. Productivity of construction crew
16. Changes in Utilization of TMA
17. Verify charges for chargeable work order's completed.
18. Upgrade CMMS System
19. Development of Call Center -Customer directly calling FP & M employees

The Implementation Group then established two sub-groups. The first group reviewed the differing viewpoints and recommendations regarding Zone Maintenance and Project Management. The second group looked at the Computerized Maintenance Management System (CMMS) and how it interfaced with the maintenance warehouse, business office and maintenance operations. The sub-groups reported back to the Implementation Group, and from those discussions the issue list was refined into the following four categories:

1. Organizational Structure and Accountability
2. Communication Process
3. CMMS
4. Business Office Process

1. To address the issues of organizational structure and accountability, FP&M in March 2000 restructured the Central Maintenance and Project units and reassigned them to the Engineering Specialist, Ken Kramer. Ken was then reassigned into the unit supervised by Pat Jankowski, Superintendent of Buildings and Grounds. The purpose of assigning the Central Maintenance and Project units under the same supervisor as the Power Plant, Zone and Grounds Maintenance units is to provide consistent leadership, accountability and to address the perceived issue of favoritism. This structural change also provide increased opportunity for soliciting input and promoting communication between units and to focus on the maintenance mission of FP&M. With Ken's additional role as the campus construction representative, this restructuring also provides a direct communication link between FP&M staff and DFD construction contractors.

In conjunction with the above restructuring, the Grounds Maintenance Supervisor position was redesigned. The central maintenance staff was reassigned to the Engineering Specialist which allow the Grounds Maintenance Supervisor to focus on managing campus grounds operations. This change is consistent with Grounds policies which were developed by the Cross Campus Work Team.

The third area of restructuring addresses the campus planning process. The Campus Planner position was upgraded to a full-time position and the Campus Engineer's supervisory responsibilities were reassigned to the Engineering Specialist. This separates the planning and implementation processes for construction projects, removes communication barriers and provides an emphasis on customer dialog for project planning. This also supports FP& M's effort in the development of a long term planning process.

During the first week in March 2000, the Director met with the supervisors and conducted two group meetings with the day shift and the night shift staff to communicate these organizational structure changes to all FP&M. The feedback from these meetings indicated that the staff understood the purpose of the changes but expressed concerns about over-loading the Engineering Specialist. The Director and the Superintendent will monitor this issue and will re-evaluate the organizational structure by March 2001.

2. Improved communication and the need to develop a strong sense of team are seen as core to achieving the improvement initiatives outlined in the OPR. The communication issues identified in this report and the proposed solutions can be categorized into internal and external. The structural changes and the Action Plan Goals on accountability focuses on internal communications. In addition, the FP&M Director has included feedback goals in the Action Plan including annual and random employee and customer surveys and interviews. The purpose is to determine FP & M's performance in service delivery including timeliness, responsiveness to customer issues, quality, and professionalism of staff. The Director will work through the management staff to address issues identified in these surveys and interviews. The Director, in collaboration with the Director of Human Resources and Diversity, will also research alternative approaches to addressing the communication and teamwork issues, including engaging outside assistance to facilitate the process.

3 & 4 The FP&M process review team and the external review team pointed out issues with our CMMS including proper utilization, functionality and report generation. To address these issues, FP&M has instituted changes in the Central Stores unit including focusing on the mission of supporting maintenance operations, The warehouse has begun expanding the maintenance inventory, overseeing the purchase of all construction supplies and coordinating these costs electronically with the Business Office operations. The Action Plan also includes a goal to implement a bar code and electronic inventory control system.

To address functionality and program issues, the Director is working with eight other campuses to develop a project to upgrade our CM:MS system to an ORACLE/SEQUEN operating system. This will provide greater report capabilities, increase the database capacity and improve the electronic interface with the PeopleSoft financial system. In the interim, FP&M has purchased the Crystal

Report System and is training staff to develop ad hoc reports from our CMMS and Mail Center databases. In addition, software and equipment has been purchased to electronically record and track the fuel system charge-back information.

In January 2000, the Business Office began working on development of a Call Center to address customer service issues. The office staff has been cross-trained and the office area itself will be remodeled to facilitate operations.

Finally, the specific issue of availability of training was address by a Training Process Team headed by Steve Barnes. The Team reviewed the OPR issues including the lack of awareness of the program, the role of the Supervisor, the length of the process and the perception of inequality/favoritism. The Team redefined the training process established goals and criteria for measuring performance. (see appendix)

Action Plan

The Director and his management staff met to complete the final step in the OPR process. They developed an OP response matrix to address accountability issues with work order reporting, work scheduling, staff meetings, project planning and employee work time. The results of these meetings are included in the attached Action Plan.

The Action Plan provides an outline for future OPR related actions. The Plan provides for assessment and accountability procedures for all FP&M management and staff. The Action Plan presents a Goal, series of methods to accomplish each Goal, assigns responsibility and a target completion date. This Action Plan also provides several different assessment processes to assist FP&M in evaluating their progress on improving internal and external customer service. The following methodology will be used:

1. The internal customer survey will be repeated annually each spring and will be evaluated by the management team and the results will be shared with all FP&M staff.
2. The Mail Center will conduct a customer survey each spring using the spring 2000 statistics (4.27 out of 5.00) as the baseline. The goal is to improve on the rating each year.
3. Starting in December of 2000, random surveys will be sent to work order requestors by the Director asking for their evaluation of the services provided. Statistics will be generated and reviewed by the management team on a quarterly basis. The goal is to establish a baseline by spring 2001 and improve on it annually.
4. The Director will conduct interviews with Deans, Directors and Department Heads on an annual basis to discuss FP & M's performance on all major remodeling projects. The results will be reviewed by the management team and changes will be incorporated into our construction planning process.

5. The FP&M Training Coordinator will annually compile statistics on the number of staff who received training each fiscal year. The goal is to have one third of the staff members receive job proficiency or career development training each year.

Annually the Director will graph the results of the various assessments in the form of an OPR Implementation Progress Report, meet and discuss the results with the Assistant Chancellor of Administrative Affairs and then share this information with the FP & M staff through a series of meetings. In addition, the Assistant Chancellor will be provided a monthly update as part of their regularly scheduled monthly face-to-face meeting.

ACTION PLAN-FP&M

GOAL	METHOD	RESPONSIBILITY	TARGET
Provide an accurate, up-to-date work order report to maintenance managers.	1. All paperwork for work performed in a week will be turned into the last working day of that week.	All Supervisors	Nov 2000
	2. Supervisors turn in paperwork by 10 a.m. in the first working day of the week.	All Supervisors	Nov. 2000
	3. Updates entered into TMA by the end of the first working day of the week.	Business Office/Director	Nov. 2000
	4. A combined PC/PP report will be printed and distributed by the end of the first working day of the week.	Business Office/Director	Nov. 2000
	5. Review process to determine if additional changes are necessary.	Business Office/Director	Feb. 2001
Accurate scheduling of work	1. Supervisors meet with workers to develop schedules for outstanding work.	All Supervisors	Nov. 2000
	2. Supervisors meet weekly to provide scheduling information.	All Supervisors	Nov. 2000
	3. Clerical staff provide updated schedule.	Business Office/Director	Nov. 2000
Provide an accurate accounting of employee worktime	1. Develop blanket orders for routine tasks like training, locating underground electric line, project support/planning, etc.	Business Office/Director	Nov. 2000
	2. Supervisor reviews job tickets to insure accurate use of blanket orders.	Supervisors	Nov. 2000
	3. Develop on-line TMA reports to assist supervisors in tracking employee work time.	TMA Coordinator/ Director	Nov. 2000
	4. Office staff to enter all leave balances into TMA on a monthly basis.	Business Office/Director	Nov. 2000
	5. Quarterly starting in January 2001, meet to review FP&M employee worktime hours.	Supervisor/Director	Jan. 2001
Have relevant, regularly scheduled staff meetings	1. Schedule Coaches Meeting on every other Monday morning from 10:00 a.m.-11:15 a.m.	Director	Nov. 2000
	2. Develop a standing agenda (i.e. personnel changes) for each meeting.	Director/Building & Grounds Supervisor	Nov. 2000
Accurate project planning and scheduling	1. Develop an electronic project checklist.	Office Leadworker/ Director	Nov. 2000
	2. Solicit feedback using project checklist.	Supervisors/ Business Office	Nov. 2000
	3. Electronic distribution of project punch list items to FP & M	Engineering Specialist	Jan. 2001
	4. Expand project checklist too other interested campus organizations.	Engineering Specialist/ Director	Feb. 2001
	5. Electronic distribution of plan review.	Campus Planner/ Engineering Specialist	Mar. 2001

GOAL	METHOD	RESPONSIBILITY	TARGET
Incorporate all maintenance/project purchasing into the Maintenance Warehouse	1. Inventory and purchase all electrical parts.	Purchasing Agent/Director	Dec. 2000
	2. Inventory and purchase all fasteners.	Purchasing Agent/Director	Nov. 2000
	3. Inventory and purchase HVAC controls and steamfitter/heating plant maintenance components	Purchasing Agent/Director	Jan. 2001
	4. Convert warehouse inventory and chargeable work order system to a barcode system.	Purchasing Agent/Director	Mar. 2001
	5. Convert non-chargeable work order system to a bar code system.	Purchasing Agent/Director	Oct. 2001
	6. Review maintenance warehouse performance	All Supervisors/ Director	Nov. 2001
Develop a Campus Planning Operation	1. Hire a full-time Campus Planner to coordinate planning/construction activities.	Director	Dec. 2000
	2. Reassign responsibility for All Agency Requests, Campus Engineer and Dix-Year Capital Plan to the Campus Planner.	Director	Feb. 2001
	3. Integrate FACMAN database with project development planning.	Campus Planner	July 2001
Improve CMMS functionality	1. Implement web based TMA talk work order system.	TMA Coordinator /Director	Nov. 2000
	2. Provide Campus wide training on use of the TMA talk system.	TMA Coordinator /Director	Jan. 2001
	3. Provide in-house user training on TMA including warehouse information.	TMA Coordinator/Purchasing Leadworker/Director	Feb. 2001
	4. Upgrade TMA to a SEQUEL Operating System and convert the database.	TMA Coordinator /Director	Sep. 2001
	5. Integrate non-chargeable work orders with warehouse chargebacks.	TMA Coordinator/Purchasing Leadworker/Director	Oct. 2001
	6. Update CMMS reports for warehouse and maintenance operations.	TMA Coordinator /Director	Dec. 2001
Provide grounds organizational changes in conjunction with the Grounds Standards	1. Hire a full-time Grounds Supervisor	Building & Grounds Supervisor/Director	Dec. 2000
	2. Develop a campus grounds maintenance plan including a litter control program.	Building & Grounds Supervisor/Grounds Supervisor	May 2001
	3. Develop financial/staffing resources to implement the plan.	Director	July 2002
Establish a routine customer feedback system	1. Director will interview customers for all large FP & M projects.	Director	Dec. 2000

GOAL	METHOD	RESPONSIBILITY	TARGET
	2. Implement a random customer survey generated from a list of all completed work orders.	TMA Coordinator/Director	Dec. 2000
	3. Review results of surveys on a quarterly basis beginning next April.	Supervisors/Director	April 2001
Implement staffing/service and supply changes in response to the Maintenance DIN	1. Review employee worktime and workload data to establish staffing/S&S requirements	Supervisors/Director	July 2001
	2. Hire identified staff	Supervisors	Jan. 2002
	3. Purchase equipment	Supervisors	June 2002

C:Goals & methods 2000