

Outline for Excellence at OFS





An Outline for Excellence

*Leadership **

The facilities organization's senior leaders should set direction and establish customer focus, clear and visible values, and high expectations in line with campus mission, vision, and core values. Leaders inspire the people in the organization and create an environment that stimulates personal growth. They encourage involvement, development and learning, innovation and creativity.

- *Leadership roles and responsibilities are clearly defined.*
 - Organization charts will be published on the OFS web site and departmental web pages will be created.
- *The leadership system is understood by and communicated among all levels. The leadership system includes mechanisms for the leaders to conduct self-examination, receive feedback, and make improvements.*
 - In addition to frequent group and departmental meetings, a formal employee satisfaction survey will be taken and employee feedback will be used to identify areas of strengths and weaknesses.
- *The organization has clearly aligned its mission, vision, and values statements with those of the campus. Regularly communicates with employees, customers, suppliers, and other stakeholders.*
- *Facilities management leaders spend time on a regular basis with their customers and front-line staff.*
 - Regular meetings with the Building Monitors will be scheduled and an annual orientation will be held. In addition, regular emails sharing OFS news will be distributed and the publication of an electronic newsletter will be investigated.
 - Senior management will conduct regular meetings with key administrators to ensure that OFS is meeting the needs of the NMSU campus.
- *Performance measures at each level of the organization are clearly defined.*
 - Budgets will be created with departmental input and accountability established. In addition, management reports will be developed and distributed regularly. These reports will include such items as work order backlog and work order cycle time.
 - Performance and benchmarking data for all departments will be developed for comparison with peer institutions. Measures such as custodial FTE per square foot and grounds FTE per acre will be used to identify appropriate staffing levels. Energy efficiency at the central plant will be measured and a baseline established.
- *Senior leaders establish and reinforce an environment where shared values support self-direction, innovation and decentralized decision-making.*
- *Informed of current trends and practices in the industry.*
 - OFS will remain involved with APPA, RMAPP, ISSA, and other professional organizations and will take advantage of continuing education and networking opportunities.
- *A succession plan is in place to ensure continuity of leadership.*
 - Personnel will be developed through cross functional training, the sharing of information, and continuing education.

Strategic and Operational Planning

Strategic and operational planning consists of the planning process, the identification of goals and actions necessary to achieve success, and the deployment of those actions to align the work of the organization. The facilities organization should anticipate many factors in its strategic planning efforts: changing customer expectations, business and partnering opportunities, technological developments, evolving regulatory requirements, and societal expectations, to name but a few.

- *A strategic plan exists that includes the goals and objectives of the department.*
- *The strategic plan was developed with participation from internal and external stakeholders, approved by the administration, and effectively communicated.*
- *Customer needs and expectations serve as major drivers for setting strategic direction.*
 - *A strategic plan for OFS will be developed with input from internal and external stakeholders. This plan will be submitted to the administration and published on the website when approved.*
- *Goals and key performance measures are understood by all and periodically reviewed.*
- *Performance measures at each level of the organization are used to meet goals.*
 - *Regular management reports will be developed through the new work order system. These reports will provide Directors and Supervisors with the information necessary to make sound business decisions.*
 - *Utility plant performance indicators will be developed and used for maintenance planning, upgrade evaluation, and benchmarking.*
- *A budget is developed with input from staff that reflects historic expenditures, an analysis of needs, effective allocation of available resources to support the organization's goals and objectives, and seeks new and innovative measures to leverage resources.*
 - *OFS staff will be directly involved in the preparation of the budget. This "needs analysis" will be tied to the results of the surveys mentioned in the Performance Survey section so that the budget reflects actual, prioritized needs.*
- *Standards have been defined for overall operational performance, built environment, and landscape.*
- *A campus master plan is in place, current, and utilized for decision making.*
 - *OFS will work with OFPC to update existing design guidelines and to develop new standards as required. Sustainability will be integral throughout all standards.*
- *The operational units participate in the development of the construction program and are active participants in the acceptance of completed projects.*
 - *OFS will work with OFPC to improve communications during the construction process and to develop a smooth process for acceptance of projects.*
- *Strategies and processes are in place to ensure continuity of functions in the event of staff turnover or other disruption.*
 - *Personnel will be developed through cross functional training, the sharing of information, and continuing education.*
- *Emergency response plans are in place, current, and communicated to facilities employees and the campus community as required.*
 - *OFS will collaborate with other departments as needed to accomplish this goal.*

Customer Focus

Customer focus is a key component of effective facilities management. Various stakeholders (faculty, students, staff, and other administrative departments) must feel their needs are heard, understood, and acted upon. Various tools must be in place to ensure customer communication, assess and assimilate what is said, and implement procedures to act on expressed needs.

- *Surveys, tools, and other methods are used to identify customer requirements, expectations, and satisfaction levels.*
 - Customer survey interviews will be conducted with key administrators across the NMSU campus and OFS will use this customer feedback for process improvement.
 - Periodic building surveys with OFS personnel and the Building Monitors will become a mechanism to determine maintenance activities. An annual meeting for the Building Monitors will be held to identify customer needs, to communicate the services provided by OFS, and to explain the methods used to request these services.
- *The roles, responsibilities, and services provided by the facilities department are well defined, communicated, and understood within the department and by all communities served.*
- *Levels of service are set to exceed customer expectation and are defined in terms that can be understood by the administration, building users, and facilities staff.*
- *The communities served know how to obtain, monitor progress, and evaluate the services offered.*
- *Customer feedback is used to build positive relationships, drive processes and effect improvements.*
- *Campus users have a clear understanding and positive view of the services provided by the facilities organization.*
 - The OFS mission will be clearly stated in the strategic plan and published on the website.
 - The OFS organization chart will be available on the website as will departmental information detailing responsibilities, services, work request procedures and contact information.
 - Service levels will be clearly defined. When possible, the new work order system will be integrated with the website so that customers are able to view the status of their work requests online.

Information and Analysis

Information and analysis are used to evaluate performance and drive future performance improvements. Of interest are the types of tools used (for example, peer comparative data clarified and validated through benchmarking), and how the tools are used to enhance organizational performance. Various aspects of information include facilities inspections/audits, financial/expenditure reports, utility data, and other relevant measures and indicators.

- *A systematic process is in place for identifying and prioritizing performance indicators, comparative information, and benchmarking studies for the most critical areas.*
- *Benchmarking results, comparisons, and performance indicators are tracked and used to drive action within the organization.*
 - *Benchmarking data from peer institutions will be gathered from the APPA Facilities Performance Indicator survey, by trips to other universities, through anecdotal information at conferences, and by reviewing the facilities websites of other institutions. Consideration will be given to the engagement of a firm such as Sightlines. The analysis of this data will be used to guide OFS strategies.*
 - *Operational data developed will include such items as work order backlog, work order cycle time, cost per square foot of custodial dollars, and cost per acre for grounds maintenance.*
 - *A broad range of data will be developed on construction projects, including project budget, variance, change orders, and scheduling. Trade rates will be compared annually to local competitors in the construction industry.*
- *The department ensures that data and information are communicated and accessible to all appropriate users. The required data and information have all the characteristics users need, such as reliability, accuracy, timeliness, and appropriate levels of security and confidentiality.*
 - *This data will be shared with internal users and OFS constituencies.*
- *An effective facilities inspection or audit program is in place that provides a regular appraisal of facilities conditions, identifies maintenance and repair needs, and quantifies facilities maintenance resource requirements.*
 - *Past audits and studies will be reviewed, and a regular inspection program will be established if one is not already in place.*
- *An expenditure report is available to managers on a regular basis and is used to effectively evaluate and control expenditures in assigned sub-units.*
- *An effective system of measuring and recording utility data is in place and is used to establish trends, minimize costs, promote energy conservation, and encourage environmental preservation.*
 - *Management reports will be generated that provide information BTU / GSF / YEAR although an extensive sub-metering system may have to be set in place first. Performance Contracting will be investigated as a means to accomplish both of these needs.*
- *The organization has a process to ensure that hardware and software systems are user-friendly, reliable, up-to-date, and meet the needs of all users.*
 - *Periodic reviews with ICT will be scheduled.*

Development and Management of Human Resources

An organization's success depends increasingly on the knowledge, skills, innovative creativity, and motivation of its employees and partners. This criterion addresses the ways in which the facilities organization ensures an environment of continued learning through communication, policies, recognition, training, professional development opportunities, and other methods.

- *Staff positions are properly classified and allocated in adequate numbers to meet the standards for the targeted level of service.*
 - OFS will continue to work closely with Human Resources to ensure that positions are properly classified.
- *Training programs provide for new employee orientation and technical skills enhancement for all staff.*
- *An effective communication system exists within the department to ensure that each employee knows his or her role in the department, the role of related areas, and the overall role of the department.*
 - Training programs that promote diversity and opportunities for advancement will be developed.
 - A "New Facilities Employee Orientation" will be developed and provided to each new OFS employee. An excerpt from the new employee orientation that was developed at the University for North Texas follows in the Appendix.
- *Safety policies and procedures have been established, written, and communicated to all staff.*
- *Accident records are maintained and used to reduce accidents and identify needs for special attention.*
 - The safety program will be reviewed.
- *The organization promotes employee development and professional development through formal education, training, and on-the-job training such as rotational assignments, internships, or job exchange programs.*
- *Career development is supported through involvement in job-related and professional organizations, and opportunities to advance within the department.*
 - OFS will stay involved with APPA, RMAPPA, ISSA, and other professional organizations and will take advantage of continuing education opportunities.
- *Work performance and attendance tracking measures are in place, are understood by staff members, and are used by supervisors to assess performance.*
 - Development of these measures will be a goal for the Administration department.
- *The organization utilizes both formal and informal assessment methods and measures to determine employee well being, employee satisfaction, and motivation. Assessment findings are linked to performance results to identify priorities for improving the work environment, employee support climate and the supervisor's effectiveness (coaching).*
 - A formal employee satisfaction survey will be conducted.
- *Employee recognition programs are in place for individuals and groups (may include community service).*
- *Processes are in place to determine the effectiveness of recruitment and retention programs and to identify areas for improvement.*
 - OFS will continually review these programs and processes with Human Resources.

Process Management

Effective process management addresses how the facilities organization manages key product and service design and delivery processes. Process management includes various systems such as work management, performance standards, estimating systems, planning and design of new facilities, and other key processes that affect facilities functions.

- *Processes are in place to ensure that departmental facilities and equipment are adequate for the provision of effective and efficient services.*
 - Historical data, customer feedback, management reports, benchmarking results, and anecdotal information (“management-by-walking-around”) will be used to continually evaluate service delivery.
- *An effective work management system is in place to identify, report, correct, and document substandard conditions and maintenance requirements.*
- *Work authorization and scheduling procedures have been established that are consistent with the identified role of each work unit and achieve an equitable distribution of resources.*
- *An effective preventive maintenance (PM) program is in place to provide regular inspection and servicing of facilities equipment to assure maximum service life, reliability, and operation.*
 - The new work order system will be used to establish and refine preventative maintenance procedures. All OFS work groups will have input to the development of the new work order control and preventative maintenance (PM) system. Input from the trades is critical to the establishment of an effective PM program.
- *An estimating system 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 between actual costs and estimated costs.*
 - The project estimating system will be reviewed. A business model using “firm estimates” will be reviewed for applicability at NMSU (this was instituted at the University of North Texas and presented at CAPPa).
- *Design guidelines that incorporate such elements as energy consumption, operating costs, environmental concerns, maintainability, sustainability, accessibility, and safety have been prepared, updated, and are utilized.*
 - The design guidelines will be reviewed with OFPC and updated when necessary to accurately reflect OFS and NMSU requirements. Life-cycle cost analysis will be emphasized.
- *The delegation of budgetary responsibilities for management of sub-units of the budget is effective in controlling expenditures.*
 - Accountability will be developed for Directors and Supervisors by requesting their input early in the budget cycle and through regular budget reviews.

Performance Results

The facility organization's performance can be assessed through campus appearance; employee satisfaction and motivation; effectiveness of systems operations; customer satisfaction; financial results; and, supplier/business partner results. Where feasible, it is helpful to have measurement tools in place to assess performance in these areas.

- *The appearance of the buildings and grounds is in keeping with the surrounding community as well as the desired image of the institution.*
- *The condition and cleanliness of facilities are in keeping with the image and standards adopted by the institution as well as activities associated with its mission and programs.*
- *Building systems and infrastructure are maintained and operated at a level of reliability that contributes to the successful implementation of the institution's mission and programs.*
 - Regular meetings with key administrators will be held to ensure that the OFS initiatives are aligned with the NMSU mission and that OFS is meeting the departmental needs.
 - Efficiency and performance measures will be developed for the central utility plant and the delivery of utilities.
- *Funding resources are effectively used and are adequate to support a level of facilities maintenance that prevents the deferral of major maintenance and repairs.*
 - The APPA Facilities Performance Indicators will be used for comparisons with peer institutions. Engagement of an outside firm such as Sightlines will be investigated although funding will need to be identified.
- *Staff is highly motivated and productive, taking pride in the accomplishment of their duties.*
 - An employee satisfaction survey and frequent contact with employees through meetings and shop visits will be used for the measurement of staff morale.
- *Customer satisfaction measures ensure that the levels of service are consistent with customer needs and requirements and within the facilities department's capability.*
- *Managers and supervisors stay in touch with the needs of the education enterprise.*
 - Communications with the campus community will be emphasized at all levels. This communication will take place through formal surveys and regular informal meetings with the OFS constituency.

* The categories and the italicized text are the published criteria for the APPA Award for Excellence.

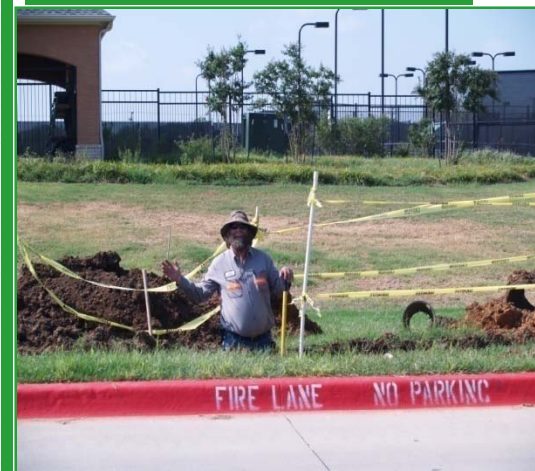
<http://appa.org/recognition/awardsforexcellence.cfm>

Appendix

The following appendix contains an excerpt from the University of North Texas new facilities employee orientation. Of particular note and pride is the emphasis on quality, customer service, ethics, and integrity.

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Facilities New Employee Orientation



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Interesting Facts



- UNT owns 850 acres of which 140 is occupied by buildings and half is maintained by Facilities
- Facilities maintains 135 structures, (4,013,000 SF) plus utility systems and pavements
- Facilities maintains 254 vehicles and 170 pieces of equipment
- Facilities has 269.5 FTE employees



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More Interesting Facts



- Facilities budget totals about \$20,400,000
- Utilities are budgeted at \$8,930,000 or \$24,500 a day
- Salaries are budgeted at \$7,962,000 or \$21,800 a day
- Contracts/materials are budgeted at \$3,830,000 or \$10,500 a day
- Revenues of \$2,052,000 must be earned to meet budget



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Some Other Interesting Facts

Stores issued 13,516 fluorescent tubes that someone replaced in a light fixture and someone else ground and disposed of the old tubes.

In FY2007

Recycling Services collected and sold 107.9 tons of cardboard for \$8,292.55.

Automotive Services sold 94,162.4 gallons of gasoline to University users



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Another Very Interesting Fact



Custodial Services replaces 5,372.72 miles of toilet paper a year. That is enough to stretch from UNT to London, England.... with many rolls to spare!

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Point to Ponder

This is a multi-million dollar business...
we must run it that way.



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UNT Facilities Mission Statement



“Our mission is to provide an excellent physical environment in support of instruction, research and public service.”



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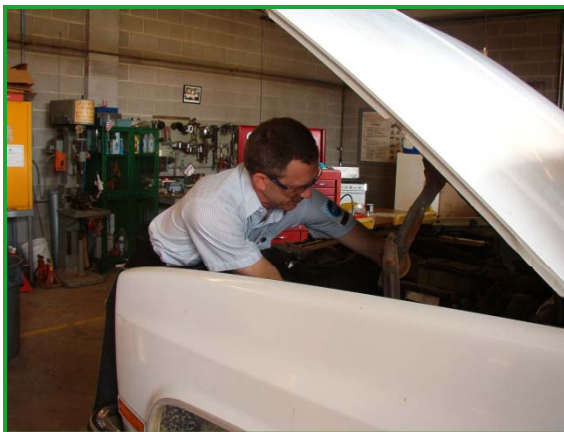
UNT Facilities Vision

Be.....

THE LEADER

among Texas institutions of higher education in terms of:

- Facilities Condition
- Campus Appearance
- Campus Development
- Construction Quality
- Customer Satisfaction



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Core Values

Our Core Values are:

- Integrity
- Excellence
- Professionalism
- Continuous Improvement
- Relationships



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Core Values

Ethical behavior is the responsibility of every UNT employee. Each one of us has a personal obligation to report any activity that appears to violate applicable laws, regulations, rules, policies, and/or procedures.



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YOU as a Professional

Professionalism has little to do with technical skills or your level of expertise. It's not related to your education level or grade point average, and it is not exclusive to certain types of jobs or occupations. So what is it?

- Professionalism is the act of being the very best you can be;
- Your attitude about life and work;
- The way you treat others;
- Showing respect;
- Maturity, regardless of experience; and,
- Often referred to as "a class act."



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YOU as a Professional

Characteristics of a Professional

- Appearance
- Dependability
- Pride in your work
- Human Relations
- Response to Criticism



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Customer Service

- Customer focus
- Who are our customers?
- Want vs. Need
- Communicate
- Educate

