

Division Finance and Administration, GMP – 11/16/2022  
Department Facilities Management and Planning  
Employee completing form Leon Crouch

Direction: Please work through the questions below and answer to the best of your ability – bullet points are perfect. Position/ function specific – not personnel management. The short-term purpose of this information is Cost Management. Your audience is campus.

1. What are the main objectives of your unit, and how do you measure success in achieving them?
  - *FMP's main goal & and purpose on campus is to provide safe, function, modern and comfortable facilities that encourage the learning process for our students, staff & faculty. This is reflected in our mission statement: "Facilities Management, Planning and Sustainability strives to expertly maintain our campus and provide exceptional services to support the education and development of our students."*
  - *Customer satisfaction: FMP conducts an annual customer satisfaction survey that goes out to requesters in our work order management system and campus building managers.*
  - *Deferred maintenance backlog is a good measure of how much Facilities is able to invest in preventative maintenance, the overall age SOU's buildings and the condition of their mechanical systems. Facilities estimates that we currently have \$140 million dollars in deferred maintenance in E&G spaces across campus. If auxiliary spaces such as the SU & Housing are included, that number rises to nearly \$200 million.*
  - *Work order completion rates: FMP monitors work order completion times in FAMIS. We have completion times assigned to each level of urgency; we use these to measure the percentage of work orders completed "on time".*
  
2. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?
  - *Facility operations*
  - *Maintenance repairs (roofing, painting, flooring, etc...)*
  - *Capital construction & planning*
  - *Landscape maintenance*
  - *Campus event support*
  - *Mail services*
  - *Utility operations*
  - *HVAC*
  - *Space management*
  - *Custodial services*
  - *Safety*

3. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours. Indicate if functionality of the position is tied to federal, state, or institutional compliance.
  - *See spreadsheet for complete listing of budgeted FMP positions*
  
4. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the university's mission?
  - *Work order management: Facilities is too thinly staffed in our business support/customer service functions, with only 1 FTE and ~40 hours of student labor. Regular tracking of open work orders and auditing of work order completion rates, proper material billing and inventory management is difficult due to the requirements of day to day business which exceed the abilities of 1 FTE. As one of the largest "spenders" on campus, it is critical that Facilities be able to properly account and document where & how our S&S budgets are being spent, especially as it relates to reimbursables from our campus customers.*
  - Motor pool van "satisfaction": Facilities currently manages (6) full size 12-passenger vans and (1) compact 5-seat passenger van. Our Fleet Mechanic must manage the van maintenance, regular cleanings, assists with van scheduling, assist with planning replacements and provide campus van awareness training. The process is cumbersome for our campus customers and there is a documented need for refinements to the driver certification. There are also standing requests to develop & manage a driver "pool" that would free up SOU Faculty & Students from the task. At this time Facilities cannot begin to explore solutions due to the lack of available labor & financial resources. The vans are frequently run past the 15 year mark due to a lack of replacement funding; the lack of funding is partially due to the desire to not increase the rental fees to a point that discourages campus trips. Huge increases in vehicle costs have also made it difficult to consistently purchase new, modern vehicles for the rental fleet.
  - Deferred maintenance backlog: Deferred maintenance accumulates each year to the lack of funding and FTE to adequately support a preventative maintenance program. Only the most basic preventative maintenance is performed at our current funding and staffing levels (HVAC filters, belt changes, roof maintenance). Maintenance walks, valve exercising, pressure gauge inspections and other preventative maintenance functions could save the campus down time and money, but cannot be afforded at this time. SOU Facilities maintains ~1.8 million sq. ft. of E&G and Housing space on campus. This translates to 1.8 million sq ft. of space for our (1) plumber ~900,000 sq ft of space for our (2) locksmiths, ~600,000 sq ft of space for our (3) electricians, ~600,000 sq ft. of space for our (3) HVAC/Utility staff and ~257,000 sq ft. for our (7) Building Maintenance staff.
  - Custodial: FMP Custodial has successfully stayed at roughly 20FTE the past few years, but the square footage maintained by each custodian is ~60,000 sq ft. (there is ~1.2 million gross sq. ft. in E&G space). APPA cleaning standards for carpeted classrooms, carpeted offices and hard surface hallways all call for a MAXIMUM of ~48,000 sq. ft. per custodian to maintain a Level 5 cleanliness. Level 5: is defined as "Unkempt Neglect" , but through a dedicated staff and extraordinary teamwork, we are attempting to

maintain at least a level 4 (moderate dinginess) in all buildings. APPA cleaning standards can be referenced here: <https://www.appa.org/bok/cleaning-operations/>

- Landscape: FMP Landscape is staffed with (5) FTE with all vacancies filled. SOU has ~100 acres of maintained space, equaling ~20 acres per FTE. Based on APPA Landscape service levels, we fall between a 3.5 & 4: <https://facilities.nmsu.edu/wp-content/uploads/sites/57/2017/10/Appendix-F-APPA-Grounds-Level.pdf>
- Internal non-capital construction project team: Facilities' Building Maintenance team can barely keep up with the reactive work orders generate by the ~1.8 million sq. ft. of Housing & E&G spaces. There are simply not enough FTE on staff to support small internal remodels and projects properly. Ideally, projects under \$50K could be handled by Facilities personnel to reduce contracting time and private sector contractor delays.

5. How could the university help your unit do its job better?

- *Technology: A modern, integrated work management system that was compatible with the main campus financial software (Banner, soon to be Workday) would reduce the amount of time spent by our FMP business functions staff massaging data into proper acceptable formats.*
- *Training: More funding for training for classified staff and management would allow the introduction of fresh ideas and processes.*
- *Staff (fill vacancies): Filling vacancies would be a great start, but realistically that is not enough to move the needle in any area in terms of the service levels provided. FTE would need to be added to each section of FMP to improve the level of service.*
- *Custodial: Either the campus becomes comfortable with a Level 4, we increase FTE significantly to provide a better service level or significant amounts of maintained square footage must be eliminated.*
- *Internal non-capital construction project team: Facilities would need to hire 2 additional FTE in trades maintenance in order to support a small (under \$50K) in-house projects team.*

6. In what ways does your unit relate to other units of the university, academic and non-academic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?

- *Facilities provides maintenance, HVAC, lock, electrical, plumbing, painting, fleet maintenance and landscape services to all units of SOU and custodial services to all E&G spaces at SOU. In addition, our Custodial team provides surge support to auxiliary functions such as Housing, Student Apartments and the Stevenson Union as needed.*
- *Facilities receives support from IT, Business Services, Service Center and all other units under Finance & Administration.*
- *Facilities collaborates with the Service Center & Business Services on procurement & contracting and with the above mentioned auxiliary units on custodial maintenance.*
- *Space Management and Utilization: technical support to FPUC chairs and customers*

7. What skill sets and resources does your unit possess that can be shared with other units at slack times?

- *Facilities trades workers use the very few slack times available to address deferred maintenance needs in E&G and Housing spaces, as funding is available. Otherwise there are no areas that have slack times and skills that can be utilized elsewhere on campus.*
8. Which individuals in your unit are cross-trained and in what areas?
- *Facilities classified staff in the various trades are cross trained to a “fill-in” level, e.g. the painter can unclog a drain and the plumber can clean a roof, etc...*
  - *Facilities supervisors are cross trained provide guidance and leadership on any trades crew, utilizing the expertise of the members of that crew.*
9. What resources do you need to improve your services to a superior level?
- *Facilities would need an across the board increase of ~10-20% of FTE to make a noticeable improvement in service levels*
  - *Facilities would need roughly a 50% increase in S&S budget to enact proper preventative maintenance programs and invest in campus buildings & infrastructure to help slow the growth of deferred maintenance.*
  - *A work management system that seamlessly integrates into Workday, with no “work-arounds” or additional FTE to help manage this workload.*
  - *A funded position and proper software and detailed inventory for campus-wide space management and utilization functions.*
10. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?
- *Integrated work order management system*
  - *Space management and capital asset management system that integrates with campus WMS (improved Real Property system of record)*
  - *Expanded use of the work order management system app could drive some efficiencies in work assignments and work order completion times. Facilities has many employees unfamiliar & uncomfortable with smart-device technologies, so there can never be enough training in this area.*
11. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?
- *If Facilities had a true business manager, a work management specialist and a office specialist prior to the creation of the Service Center. This was an appropriate level of staffing to support FMP with procurement, contracting, work order management, financial analysis & auditing, budget analysis and forward facing customer service support. The Business Manager and work management specialist were moved to the Service Center with the belief that FMP would receive the equivalent 2FTE of support. While the contracting and procurement support has been good, FMP has received nowhere near 2FTE of services. A Facilities Business Manager position needs to be recreated to provide a layer of back-up to our single customer service FTE and to relieve the director of that backup role. At this time the director is the only backup to that office position and is the only staff FMP performing budget analysis & projection and the*

*director must serve as the audit function to help ensure business functions are meeting basic needs.*

12. How do you review and evaluate your department's yearly performance?

- *FMP conducts an annual customer satisfaction survey sent to active requester in our work order system and building managers.*
- *Our work order management software reports work order completion rates.*
- *Regular FMP leadership team meetings include discussion of service excellence and customer service; both successes & failures are discussed.*

13. Explain how your unit could function with:

- a. A 10 percent reduction to staff: This scenario would require eliminating (2) custodial staff, (1) Trades Maintenance Worker, (1) Landscape Maintenance Worker and the Assistant Director.
- b. A 20 percent reduction to staff: There is no practical way to reduce FMP staff to this level and maintain campus spaces to any sort of acceptable standard.
- c. A 30 percent reduction to staff: There is no practical way to reduce FMP staff to this level and maintain campus spaces to any sort of acceptable standard.
- d. A 10 percent reduction to non-personnel resources: This scenario would stop all landscape beautification applications (bark & mulch), all but critical tool purchases would be stopped, funding for vehicle replacement reserves would stop, contracted pest control services would be reduced to critical cases, contracted tree maintenance services reduced to critical needs (dead trees would stay standing on campus until they are a safety hazard), maintenance painting reduced to areas older than 10 years, no exceptions.
- e. A 20 percent reduction to non-personnel resources: All landscape plantings stop, no bark mulch, no contracted tree services, maintenance paint only in areas over 15 years old, no carpet replacement in any E&G space, no funding for vehicle reserves, no tools purchased for any reason, vehicles allowed to fall into disrepair for non-critical safety items (torn seats, broken HVAC, oil leaks, etc...), employees walk to jobs to save fuel.
- f. A 30 percent reduction to non-personnel resource: There is no practical way to reduce FMP funding to this level and maintain campus spaces to any sort of acceptable standard.
- g. What would be the consequences or other effects on service delivery in each case?
  - None of these scenarios are practical assuming that Facilities continues to maintain the square footage we have today or the acreage that is currently maintained on campus. ~\$1.8 million of Facilities ~\$3.2 million Service & Supplies budget is non-utility related (water, electricity, natural gas, sewage).
  - Therefore, any across the board percentage cut would be far worse than it initially looks, as a 10% (\$310,000) cut would be immediately deducted from the \$1.8 in "discretionary" S&S...we can't not pay the utility bills.

- The 30% cut would reduce discretionary S&S to under \$1million and there is simply no fathomable way we can keep the campus facilities running at that funding level.
- The huge cuts in S&S that Facilities has absorbed in the past 20 years of budget difficulties have resulted in a budget that is already a massive challenge due to how lean it is...these scenarios would force FMP to simply choose areas of service to stop providing, yet we've already eliminated just about every non-essential service as we've dealt with the past 20 years of cuts.

Overall:

- *Increased backlog: Deferred maintenance would increase at a dramatic rate as only the essential repairs would be made.*
- *Higher stress levels: Remaining staff would have less resources to deal with increasingly bad equipment and building failures, resulting in high levels of stress and worker burnout.*
- *Degraded customer satisfaction: Facilities would not be able to meet the needs of our campus customers in any meaningful way, so customer satisfaction would obviously diminish dramatically.*
- *Decrease in staff morale: Facilities staff take great pride in their jobs and the quality of their work; these envisioned scenarios would drive morale down and result in poorer work performance and likely cause terrible employee retention.*

14. What opportunities exist for greater collaboration and team approaches in the delivery of services?

- *Frontline trades maintenance staff are already stretched too thin. Perhaps some of Facilities business offices needs can be addressed through "creative" use of and possible reassignment of our existing Service Center Accountant. Our current accountant is very familiar with Facilities business practices and could help us fill many of the gaps in our business functions.*

15. How many "middle managers" do we have? Are there opportunities to reduce middle strata in the organization and expand the span of control?

- *Over the past 15 years, Facilities management structure has collapsed to its current condensed form...one supervisor now covers Utilities, Lock & Electrical, one supervisor manages mail service and campus support services, one supervisor manages Environmental Health & Safety & Custodial Services and the director currently supervises building maintenance, fleet services and acts as a business manager. We have a capital projects manager and a landscape supervisor...this structure has eliminated solitary lockshop supervisor, business manager, operations manager, custodial supervisory and building maintenance supervisory positions.*

16. What technological improvements could be made that would result in labor savings?

- *The use of a comprehensive space management, work order management and asset management software could save some labor.*

17. How can a service be more efficiently or effectively delivered?
- *Active learning and Universal Design SDs and Program Management (KPIs, consistent reviews, etc.)*
  - *A cleaner, more integrated work management system would reduce the computer time of our trades maintenance staff.*
  - *Universal design standards would streamline the number of products, finishes and systems that Facilities supports.*
  - *More consistent analysis and reaction to work order completion rates would drive customer satisfaction*
  - *Training on new building technologies and construction standards would improve trades worker efficiency.*
18. What processes do we have that can be streamlined or eliminated to improve service delivery?
- *The overall work order management, work order billing and inventory tracking process is very cumbersome as it stands...an improved system that is more intuitive and requires less user input would be welcome.*
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19. Restructuring: What efficiencies might be gained by consolidating similar entities?
- *Facilities absorbed the Housing Maintenance crew in 2012, taking on responsibility for trades maintenance across all 1.8 million sq ft of campus building space. Several positions were eliminated at that time, so I see nothing else to be gained here.*
  - *Housing runs a standalone custodial crew; perhaps this could be absorbed into FMP's custodial crew. The Housing custodial crew has completely different set of expectations & workload though, so I'm not at all convinced that this would net any real savings. What it would do is formalize the process for shifting resources from E&G functions to Housing functions as surge labor was needed.*
20. Personnel: Have we worked around or structured around non-effective personnel and other personnel issues, and is this the time to stop indulging and start confronting the issue(s)?
- *I do not believe Facilities has done this. Each employee at Facilities performs a critical, necessary function.*
21. Outsourcing: Are there other opportunities to outsource non-mission-critical services to private contractors who could do it better, faster, cheaper?
- *Opportunities exist... but they are not a value add due to (small) scale and limited workforce in our location in Oregon (multiple vendors were contacted to explore options, it doesn't make sense in a traditional sense)*
  - *SOU has a history of attempting to outsource some traditional facilities functions, particularly landscape and custodial services at Housing. Both experiments failed and were brought back onto campus, largely due to a lack of savings and a lack of customer satisfaction.*
  - *The overall perceived savings gained by contracting service from Facilities are minimal due to the already lean operations. A contractor would not be able to maintain campus with the depleted staff levels that Facilities has, therefore more assigned employees*

would be needed, driving up the costs. The staff at FMP are here because they are invested in the success of SOU and its students; this results in an employee effort that far exceeds what a contractor can provide.

22. Customer focus: How might our services be structured or delivered to meet the needs of students, faculty, staff, donors, and others better?

- This area would need more study and perhaps some survey data.
- Most of our annual survey data indicates a broad understanding that “Facilities is doing the best that they can”, but the lack of adequate personnel & funding is the main limiting factor.

23. Benchmarking: Compare your unit with similar units at other institutions or national norms.

- APPA: See the links provided above for tables & service levels.
- NACUBO benchmarks

For context, the full article which focuses on a best practices is available online at the link below:

<https://www.fm-house.com/wp-content/uploads/2014/12/The-Best-Practices-in-Facility-Management.pdf>

Although every organization is different, and each organization will have to develop track and use metrics appropriate for their campus environment, many of the metrics, below, will look familiar. Some are strategic annual measures like FCI and DM backlog, and others are more tactical monthly measures with associated standards. Despite our best efforts we never reached a 70/30 PM/CM ratio. Some of them are metrics, but not Key Performance Indicators, and all metrics should be tied to and integrated with your greater organization’s strategic plan goals, but the list below is a good place to start.

Metric Description	Std.	Metric Description	Std.
Facility Condition Index (FCI)	<0.05	Stockroom Turns / Year	2 - 3
Deferred Maintenance Backlog	Trend	Annual Training Hours	>40 hrs.
On-the-job Wrench Time	>60%	Maint. Cost / Replacement Cost	3 - 4%
PM / CM Ratio	70 / 30	Percent Return Work	<5%
Unscheduled Maintenance Downtime	<2%	Mean Time Between Failures	Trend
PM Schedule Compliance	>95%	% Failures Assessed: Root Cause	>75%
CM Schedule Compliance	>90%	Maintenance OT Percentage	5-15%
Unscheduled Man-Hours	<10%	% WO Covered by Estimates	>90%
WO Turn-Around Time	Trend	On-Site Supervisor Time	>65%
Emergency Response Time	<15 min. <sup>2</sup>	Stockroom On-Time Delivery	>97%
Stockroom Service Level	>97%	Material / Part Performance	>98%



24. What can we stop doing? Our campus customers (faculty, staff, students) aren't willing to give up anything. Everyone expects when they come to campus that the buildings are clean, trash is emptied, lawns are mowed, leaves are removed, buildings are at a comfortable temperature, the paint is nice, the floors are waxed...basically that the university looks like a maintained university. Short of a massive change in our customers' expectations & needs, there is nothing that Facilities can stop doing.