Annual Work Plan
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What is the Annual Work Plan?

- Customer Satisfaction
- Communications
- Effective Use of Resources
- Setting, Meeting, and Possibly Exceeding Customer Expectations
- Cost
- Schedules
"Mind Map" Concept Model

- Customer Satisfaction
  - Requirements
  - Expectations
    - Set Expectation
    - Meet Expectation

- Efficient Use of Resources
  - Schedule
  - Cost
  - Resources
    - People
    - Funding
    - Technology (TMA and mobile)
    - Tools and Equipment
    - Office and Shop Space
Objective

- Develop and implement an Annual Work Plan that effectively uses resources to maximize customer satisfaction.
  - Resources are defined in this project as the people, funding, and assets under the direction of the Office of Facilities
  - Customer is defined for the Annual Work Plan as the faculty and staff of UTSA external to the Office of Facilities
Resource Planning

FTE Hours/Month
FRAMEWORK

Emergent (Unplanned/Reactive) Work

Task Planning
- Daily
- Weekly
- Monthly
- Annually

Resource Planning
- Daily
- Weekly
- Monthly
- Annually

Internal Client Communications
- Daily
- Weekly
- Monthly
- Annually

Tracking & Monitoring
- Daily
- Weekly
- Monthly
- Annually

Strategic Plans

ANNUAL WORK PLAN
## Desired State

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Pilot Scope

- PM Program selected for pilot
- Duration
  - 3 months, Jan. 5 to Apr. 3, 2015
- Personnel Resources
  - Re-prioritize the Facilities Operations Coordinator functions to accommodate pilot scheduling activities
- Customer Communication
  - Limited to activities that will have direct impact on customer
    - Similar to what is currently provided during PMs
    - Schedule and Completion notices will be sent to select customers
  - Solicit feedback from select customers during pilot period
Pilot Deliverables

- Scheduling methodology
  - Making changes to schedules because of priority changes and emergent requirements
  - Scheduling unavailable technician time
  - Scheduling around University academic calendar

- Implementation options
  - Varying in complexity, cost, and benefits

- Resource requirements
  - Refine scheduling roles for preventive maintenance
  - Project scheduling roles for corrective maintenance
Best Practice Interviews

- Eight CAPPA Universities surveyed on their methods of managing tasks and resource
  - UT Austin
  - UT MDACC
  - Texas State
  - Kansas State
  - Arkansas
  - Ohio University
  - Missouri State
  - Southeast Missouri State
Best Practices Assessment

- TMA is a good CMMS platform for Best Practice collaboration.
- Use of electronic work orders (mobile devices) is considered an advanced Task Management process.
- Monthly PM “generation” provides a good extended look for scheduling.
- Supervisors managing work order assignments and work load evaluations is common.
- Any advancement beyond Current State would be considered an “advanced” Resource Planning process.
Customer Communication Assessment

- Customers’ desire for advance communication of all Facilities work depended on the impact to the area and occupants
  - Notification that work is being done in the area for minimum impact or simple break/fix repairs
  - 7 to 14 days coordination when work will have moderate to significant impact
- Details about the Facilities work can be limited to the basic impact to the area or occupants
  - Basic Task Description for PMs
  - Justification for the expense with reimbursable customers
- Customers are willing to accept a range of days for scheduling work as long as advance notice and can accommodate the impact
- Automated work completion response (email) within a couple of days is highly desire
  - Receiving “significant” status change notifications is desired
  - The “Tech Comments” in the iServiceDesk are well received
  - An easy or more streamlined method of requesting “Call Backs” is desired
Implementation Options

- Current State – “Assignment”
- Option 1 – “Enhanced Assignment”
- Option 2 – “Planning and Scheduling”
- Option 3 – “Detailed Planning and Scheduling”

Note: Options are progressively more complex
“Assignment” (Current Process)

- Work Control issues work orders to Supervisor for scheduling
- PM inspections that identify corrective issues are either corrected within the PM work order or used to create a new Corrective Work Order
- Supervisor evaluates work orders and assigns it to technicians in TMA to accomplish work
- Supervisor and/or Technicians communicate with customer on date work will be done
- Technicians complete work, Supervisor validates completion, Work Control closes work orders
- Completion of work orders noted on iService Desk
“Enhanced Assignment”

- PM schedules for the month are communicated to Auxiliary Customers
- PM inspections that identify corrective issues are used to create “Planned Maintenance” work orders
- Work Control issues work orders to Supervisor for scheduling
- Supervisor uses improved monthly maintenance report and scheduling tools in TMA to evaluate the work orders and current level of technician work loads; then assigns the work to be accomplished
- Supervisor and/or Technicians communicate with customer regarding the date that work will be done
- Technicians complete work, Supervisor validates completion, Work Control closes work orders
- Completion of work order noted on iServiceDesk and email notification sent to Requestor
“Planning and Scheduling”

- PM schedules for the month are communicated to Auxiliary Customers
- **Planner/Scheduler develops schedule for accomplishing Planned Maintenance items.**
- **Work Control issues work orders to Planner/Scheduler for scheduling**
- **Planner/Scheduler, with Supervisor,** evaluates the work orders and current level of technician work loads; then schedules **work for the week**
- **Planner/Scheduler does communication with customer about complex maintenance events (disruption of services, etc.)**
- Supervisor and/or Technicians communicate with customer regarding the day that the work will be done
- Technicians complete work, Supervisor validates completion, Work Control closes work orders
- **Status update email notification sent to Requestor**
- Completion of work order noted on iService Desk and email notification sent to Requestor
“Detailed Planning and Scheduling”

- PM schedules for the month are communicated to Auxiliary Customers
- **Planner/Scheduler plans** and schedules Planned Maintenance items
- Work Control issues work orders to Planner/Scheduler for scheduling
- **Planner/Scheduler uses TMA plus resource availability tools** to evaluate the work orders and current level of technician work loads; then schedules work on a daily basis
- **Planner/Scheduler communicates routine and complex maintenance events to customers.** Supervisor and/or Technicians communicate with customer regarding the day that the work will be done
- Technicians complete work, Supervisor validates completion, Work Control closes work orders
- **Status update email notification sent to Requestor**
- Completion of work order noted on iService Desk and email notification sent to Requestor

*Resource planning tools include Planned Maintenance schedules and forecast*
Resource Requirements

- **Enhanced Assignment (Option 1)**
  - Current staff with reassignment of duties to support new processes and tools
  - Third party consulting services (may expedite delivery of new processes)

- **Planning and Scheduling (Option 2)**
  - Additional staff (approx. $120K in permanent funding – 2.5 FTE) to support more detailed work planning and scheduling
  - Third party consulting services ($50K one-time funds)

- **Detailed Planning and Scheduling (Option 3)**
  - Dedicated organization for planning and scheduling (Phase II plus $120K in permanent funding – 2.5 FTE for a total of 5 FTE)
  - Permanent additions to IT organization to support new tools and continue development ($50K in permanent funding – 1 FTE plus $100K in one-time funds for software)

*Note: Options can be implemented incrementally*
Questions?