The Pursuit of Excellence
in Facilities Management
OR
“World Class” Facilities 201

2015 Big XII and Friends Facilities Conference

June 2, 2015
Office of Facilities

Early History (1968-1970)
Office of Facilities

Campus Core 1983
UTSA Facilities and Student Enrollment Growth

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<tr>
<th>Year</th>
<th>GSF Total</th>
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<td>2014</td>
<td>5,432,807</td>
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UTSA Facilities Organization

Dave Riker
Associate Vice President for Facilities

Yolanda Ledesma
Administrative Services Officer II

Patty Chavez-Reyes
Administrative Services Officer I

Belinda Dovalina
Business and Customer Services Director

Paul Goodman
Assistant Vice President
Engineering & Project Management

David Oliver
Assistant Vice President
Operations & Maintenance

Enos Jones
Director - Operations & Maintenance

Ron Woltersdorf
Director - DTC Facilities Services

John Flores
Senior Facility Planning Analyst

Josie Izbinski
Housekeeping Manager

Fred Wiedner
Facilities Contract Administrator

Della Reyes
Quality Assurance Manager

Robert Espinoza
Director - Capital Projects

Rene Colunga
Director - Utility Management

Ernest Haffner
Interim Director-Facilities Planning & Development

Felix Hernandez
Stores Supervisor

Scott Reuter
Assistant Director for Customer Services

Steven Hale
Budget Analyst/Performance Management

Kathryn Pearson
Director - Institutional Projects

April 22, 2015
world-class (wûrld′kläs′) adj.
1. Ranked among the world's best; of the highest caliber: a world-class orchestra, or a world-class athlete

“An organization that is outstanding in every aspect of its performance is world class. Being world class is going beyond excellence to become great!” – Christopher Ahoy
2005 UTSA Facilities – The “Rattlesnake” Analogy

• **Major Capital Construction Program Underway**
  • Largest Capital Construction Program in School History – More than $700M

• **Significant Failures in Recently Completed Capital Projects**
  • Leaking New Main Building and Biotechnology/Science/Engineering Building
  • New Student Housing with Major Design and Construction Deficiencies
  • Scaffolding at new Downtown Campus Buildings to protect from falling stone

• **Primitive Facility Management Organization**
  • Ineffective Hiring Practices/Favoritism
  • Poor Supervisory Effectiveness & poor employee morale
  • No Preventive Maintenance Program
  • No Work Order Priority Approach
  • Very Few Performance Metrics
  • Many “One-deep” Positions and Insufficient Staffing
  • Poor Working Relationship between UT System/UTSA
  • Very Poor Communication with Customers/Stake Holders
## Survey of Organizational Excellence

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<thead>
<tr>
<th>Category</th>
<th>Constructs</th>
<th>2005 FS Composite Score</th>
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<td>11. Holographic</td>
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<td>18. Time and Stress</td>
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<td>19. Burn-out</td>
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<tr>
<td><strong>Average Score</strong></td>
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Essentially an employee satisfaction survey
- Looked at 20 constructs
- Unacceptable minimum score was set at 325
- 9 of 20 Constructs scored below 325
- 3 other constructs barely met minimums
- Required development of corrective action plan for areas with unacceptable scores
# Employee Engagement Surveys

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<th>2005 FS Composite Score</th>
<th>2007 Composite Score</th>
<th>Total Change in Score</th>
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Integrated Facility Strategic Plan
Master Planning
Processes & Procedures
Facility Planning & Development
Measurement & Analysis
Performance Results: Benchmarking & Key Performance Indicators
Human Resources: Hiring, Development, Compensation & Recognition
Leadership
Customer Focus
Project Execution
Communication
“Comprehensive” Facilities Management
Automation & Information Management
Environment, Health, Safety & Risk Management
Sustainability
Financial Management
Preventive Maintenance
Material Management
Formal Work Management
Utility Management
Quality Assurance
Space Management
Corrective Maintenance
Planned Maintenance
Creating a high performance FM organization

- Fully supports strategic business initiatives
- Enhance operational efficiencies and effectiveness
- Reduce costs
- Optimize process performance
- Maximize return on investment (ROI)
- Minimize total cost of ownership (TCO)
- Maximize asset value and life cycle
- Continuously monitor improved performance excellence
- Build pride – and attract and retain the best employees

From: *The Best Practices in Facility Management: Creating an Environment of Operational Excellence* (Tuveson & Hodges)
Same Criteria as in Facility Management – Diagnostics (FM-D) facility management assessment software developed by Facility Engineering Associates (FEA)

From: The Best Practices in Facility Management: Creating an Environment of Operational Excellence (Tuveson & Hodges)
National Malcolm Baldrige Award Criteria

Baldrige Award applicants are judged by an independent board of examiners and award is based on achievement and improvement in seven areas, known as the Baldrige Criteria for Performance Excellence:

**Leadership:** Upper management’s leadership and organization’s leadership within the community.

**Strategic planning:** How organization establishes & plans to implement strategic goals.

**Customer-market focus:** How organization builds/maintains strong, lasting customer relationships.

**Measurement, analysis & knowledge management:** Use of data to support key processes and manage performance.

**Human resource focus:** How the organization empowers and involves its workforce.

**Process management:** How the organization designs, manages and improves key processes.

**Business/organizational performance results:** How the organization performs in terms of customer satisfaction, finances, human resources, supplier and partner performance, operations, governance and social responsibility, and how the organization compares to its competitors.
APPA Award for Excellence Program Criteria

1.0 Leadership – 150 points
2.0 Strategic and Operational Planning – 150 points
3.0 Customer Focus – 150 points
4.0 Information and Analysis – 100 points
5.0 Development and Management of Human Resources – 100 points
6.0 Process Management – 100 points
7.0 Performance Results – 250 points
8.0 Other Considerations – points as appropriate

Typically 1,000 points possible for award in APPA Award for Excellence Evaluation

Note: Same criteria used in the APPA Facility Management Evaluation Program (FMEP) “Peer Review” Program
Past University Recipients – APPA Award for Excellence

2014 - University of Michigan
    UNC, Charlotte
    University of New Mexico
    SOKA University of America
    Philadelphia University

2013 - **Texas Tech University**
    University of Arizona

2012 - University of Colorado, Boulder

2011 - No Recipients

2010 - Arkansas State University
    University of Nevada, Las Vegas

2009 - Philadelphia University
    University of North Florida
    University of West Georgia

2008 - No Recipients

2007 - Utah State University
    Cal State University, San Bernardino
    North Carolina State University
    University of Central Oklahoma

2006 - University of Michigan
    University of Alabama, Birmingham

2005 - University of Florida

2004 - Emory University
    University of Memphis

2003 - **Iowa State University**
    University of Maryland, Baltimore

2002 - No Recipients

2001 - **Texas Tech University**
    University of Cincinnati
    University of Miami (FL)

2000 - No Recipients

1999 - No Recipients

1998 - University of Georgia

1997 - University of Wisconsin

1996 - University of Oklahoma

1995 - University of California, Los Angeles

1994 - University of Southern California

1993 - University of California, Berkeley

1992 - University of California, Los Angeles

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1975 - University of California, Los Angeles

1974 - University of California, Los Angeles

1973 - University of California, Los Angeles

1972 - University of California, Los Angeles

1971 - University of California, Los Angeles

1970 - University of California, Los Angeles
“Senior Leaders in effective facilities organizations set direction and establish a customer focus, clear and visible values, and high expectations in line with the institutional mission, vision, and core values.

Effective facilities leaders facilitate the dialogue around larger issues such as total cost of ownership, sustainability, recapitalization requirements, and facilities reinvestment.

Leaders inspire the people in the organization and create an environment that stimulates personal growth. They encourage involvement, development and learning, innovation, and creativity. Leaders act as both educators and change agents.”

– APPA FMEP

“Leadership is a potent combination of strategy and character. But if you must be without one, be without the strategy.” - Gen. Norman Schwarzkopf
Office of Facilities

Leadership

- Know the Business (You do or you would not be in the job)
- Get to know your employees and give them respect
- Give them the support and “tools they need to do their job”
- Cultivate Diversity
- People Development
- Get out of your comfort zone

From Mari Kay Scott, Executive Director of Global Facilities, General Motors
Ideas to Provide “World-Class” Leadership

• Character and strategy (direction, customer focus, high expectations) aligned with institutional mission, vision and core values

• Strategic thinking around larger issues (Excellence, TCO, Sustainability, ROI, Recapitalization, and Reinvestment)

• Lead ethically and communicate transparently

• Inspiration and creation of environment that stimulates personal growth

• Educate, be a change agent, and develop people

• Establish “Areas of Excellence” within the organization

• Effective alignment of the organization and get “right people in the right jobs”
Ideas to Provide “World-Class” Leadership

• Clearly and effectively communicate roles and responsibilities and expectations to staff and the greater community at large

• Annual 360 degree leadership performance evaluation

• Develop brand promise, brand, purpose statement, guiding principles

• Establish a recognized quality improvement program

• Regular scenario planning to support updates to the strategic plan

• Build trusting relationships with executives within the overall organization

• Establish protocols for running effective meetings throughout the organization
UTSA Facilities Initiatives

- Facilities Hiring Guidelines/Hiring Matrix/Salary Review Form
- Computer Replacement Guidelines
- Building Attendant and Groundskeeper Progression Program
- Supervisor Training Curriculum
- Custodial Supervisory Training
- Quarterly “All-Staff” Meetings with Employee Awards
- Awards and Recognition
  - “Celebrating Facilities Excellence” Awards Program
  - Institutional/VPBA Awards
UTSA Facilities Initiatives

Operational Initiatives

• Annual Shop Rate Update Process

• Operations Review Meetings/Key Performance Indicators

• Work Order Priority Categories with Target Response times

• Preventive Maintenance Program

• Deferred Maintenance Project Priority Process

• As Built, Floor Plan, and Room Signage Process
UTSA Facilities Initiatives

Operational Initiatives

• Housekeeping Staffing/Workload Balance Analysis
• Zonal Maintenance Approach
• Weekly Action List
• Top 100 Priority List
• Facilities Job Families
• Archiving Storage and Retrieval Process
"Give me six hours to chop down a tree, and I will spend the first four sharpening the ax.”
- Abraham Lincoln
“Strategic and operational planning consists of the overall 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 successful facilities organization anticipates many factors in its strategic planning efforts; changing customer expectations, business and partnering opportunities, technological developments, institutional master plans, programmatic needs, evolving regulatory requirements, building organizational capacity, and societal expectations among other criteria.” - APPA Facility Management Evaluation Program (FMEP)
Example: **Institutional Strategic Initiative V: Expanding Resources and Infrastructure**

**Goal 1:** Retain and Recruit faculty and staff who are committed to our vision, mission, and values who diligently contribute to excellence.

**Business Affairs Goal 2:** Cultivating human capital that is aligned with our mission, vision, and values through the identification, recruitment, retention, management and development of our staff, and promoting an organizational culture of excellence wherein our employees might excel

**Business Affairs Goal 5:** Practicing stewardship and transparency and ensuring compliance

**Facilities Strategic Goal #6**
Develop internal hiring practices to attract, recruit and retain qualified staff committed to our vision, mission, and values, and who contribute to excellence. (SI I G 2, SI II G 4, SI V G 1, BA G 2, BA G 5)
Balanced Scorecard

A strategic planning and management system used extensively in business & Industry, government and non-profit organizations worldwide to align business activities to the vision and strategy of the organization, improve internal and external communications, and monitor organization performance against strategic goals.

Master Planning

- Must be current, well developed, well accepted, and well managed
- Need mechanism to manage the master plan and assure development consistent with master plan (UTSA uses Master Plan Management Council)
- Need strong design and construction standards, uniform sign standards, integrated wayfinding signage
- Other Master Plans, including environmental, utility, infrastructure, landscaping are important for consistent, effective campus development
Facility Planning and Development

- Understand the condition and life cycle age of campus facilities and infrastructure (Condition assessments, current replacement value, deferred maintenance/capital renewal requirements)

- Long-range capital renewal plan to address aging and failing systems

- Objective and collaborative priority system to identify the higher priority/urgency work and sustainable funding provided

- Chief Facilities Officer informs senior institutional leadership of the essential requirements and funding needed to address those requirements and impact if funding is not provided
Facilities Condition Index (FCI) History

Data from UT System Facilities Resource Renewal Model

UTSA FCI

FY13 APPA FPI Survey Average – 11.45%


0% 2% 4% 6% 8% 10% 12% 14% 16%

Poor

Good

Office of Facilities
• Existing Capital Renewal Needs are $110M or 8.9% of the Current Replacement Value of the Campus.
• To maintain existing ratio of Renewal Needs to Replacement Value will require an annual expenditure of $10M
Deferred Maintenance Priority Management

Objective Project Scoring Criteria

• Human Safety
• Regulatory Compliance
• Program Support
• Asset Preservation
• Community/Sustainability
Formal Work Planning

Goal: To Optimize our ability to satisfy (and delight) our customers and assure their success.

Deliverables:

Develop and implement a formal Facilities Annual Work Plan
- Create a master schedule for aligning Facilities resources
- Create new or refine existing processes
- Maximize use of CMMS and mobile technology
- In weeks preceding to scheduled work, assure work well planned/coordinated, and materials/equipment is obtained
- Firm scheduling the week prior to the scheduled work
- Assure excellent work is delivered on time & within budget.
Example Annual Work Plan

- **DM, O&M, E&PM**
- **Planned (75%)**
- **Emergent (25%)**
- **PM**
- **FTE Hours/Month**

**FTE Hours**
- **T - 6**
- **T 0**
- **T + 6**
- **T + 12**
Office of Facilities

Ideas for “World-Class” Planning

• Facilities Strategic Plan integrated with institutional plan using balanced scorecard

• Employee and Stakeholder involvement in development of Facility Strategic Plan

• Effective master plan and mechanism to assure develop consistent with MP

• Strong design and construction, signage, & Way-Finding standards

• Environmental, Utility, Infrastructure, Landscaping, and other master plans

• Condition assessments, deficiency list, current replacement value, FCI

• Long range capital renewal and deferred maintenance plan
Ideas for “World-Class” Planning

• Objective and collaborative priority mechanism to allocate scarce resources

• Sustainable funding mechanism to address support institutional plans

• Analysis of essential requirements, funding required and impact if not provided

• Formal annual work plan and scheduling mechanism

• Emergency Management and Business Continuity Plans

• Establish furniture, fixtures, & equipment (FF&E) standards practices/procedures

• Periodic zero-based budgeting review to allocate funding priorities
UTSA Facilities Initiatives

Project Development and Management

- Special Interest Project List
- Facilities Design Guidelines
- Capital Project Development Process
- Master Plan Management Process
- Cost Estimate Development/Project Funding Process
- Job Order Contracts
- Job Order Design Contracts
UTSA Facilities Initiatives

Project Development and Management

- **Project and Budget Account Reconciliation Process**
- **Project Management Charters with OFPC and EHS&RM**
- **Monthly OFPC Project Update Meetings**
- **Project Management Staffing Approach**
- **“Swept” Deferred Maintenance Funding Process**
“Customer focus is a key component of effective facilities management.

All **Stakeholders** must feel their needs are heard, understood, and acted upon.

Various **tools** must be in place to **assure customer communication**, to **assimilate what is said**, and implement procedures to **act on expressed needs**.

To be successful, a facility department must ensure that its **customers** have an **understanding of standards, tasks, roles, frequencies of services, etc.”**

- APPA FMEP
Customer Focus

“The new Paradigm of world class to meet competitiveness for companies is customer focus. The three areas of customer focus are:

1. Customer Satisfaction (Meeting customer’s expectations)

2. Customer Delight (Exceeding customer expectations by providing goods, products & services beyond normal expectations, delighting the customer)

3. Customer Success (Going beyond exceeding expectations or delight and assuring customer success)

- Christopher Ahoy, APPA Fellow, Customer-Driven Operations Management
Creating a Customer Service Culture

According to motivational speaker T. Scott Gross:
There are only three things you can do to create a customer service culture.

1. **You can hire great servers** ("Service Naturals" = approx. 15% of population)

   Conversely he suggests not hiring (or firing) the 
   "Service Impossibles", also about 15% of the 
   population, who are toxic to any organization.

   > Never attempt to teach a pig to sing; it wastes 
   > your time and annoys the pig.” - Robert A. Heinlein

   That leaves the "Service Possibles", who make up the remaining approximately 70% of the 
   population.

2. **You can lead (Model, Example) great customer service**

3. **You can celebrate (Reward) great customer service.**
Service Starts with Relationships

1. Don’t criticize, condemn, or complain.

2. Give honest, sincere appreciation.

3. Arouse in the other person an eager want.

4. Become genuinely interested in other people.

5. Smile.

6. Remember that a person’s name is to that person the sweetest and most important sound in any language.

7. Be a good listener. Encourage others to talk about themselves.

8. Talk in terms of the other person’s interests.

9. Make the other person feel important – and do it sincerely.

- From Dale Carnegie Quick Tips for Outstanding Customer Service
  Copyright 2008 Dale Carnegie and Associates
Work Order Customer Satisfaction O & M Tri-Campus
Types 1, 4, & 6

April-2015 Data:
- 95 surveys mailed
- 18% response rate
- 1318 work orders
Survey Comments

• Electricians did a great job with this order.

• It has been a pleasure working with Brittany and Armando for all of our sign requests. They are very responsive and get the work done in a timely manner.

• I believe the charges for this request were excessive and checking with Work Control to see if we were billed correctly.
Survey Comments

• You guys rock!!

• Joe checked in with me upon arrival to determine the issue. After investigation and checking the anchor bolts, he reported back with his findings and recommendations which was most appreciated.

May 26, 2015
The work order in the iService desk shows multiple unrelated costs which have been questioned and reversed through inquiries to Work Control. I was not communicated with during this process, with the exception of pre-construction work I do not recall anyone informing me the work was complete.

This project had four project coordinators before it was complete. This excessive turn over did not make for a smooth process. Working with the JOC was challenging also - and again - the turn over of project coordinators did not ease the process. Additionally, months after the work was completed Facilities O&M conducted a final inspection and found items that had to be addressed.

After the bumpy start on this project and that of the 1st Floor Service Point, we were very happy with the project coordinator and Facilities support.
Facilities Customer Service Improvement Initiatives

Facilities Service Center
The Facilities Administration area has been renovated to create a one-stop Facilities Service Center which will integrate the various Facilities customer service functions of Work Control, Administration, Quality Assurance and Communications. We are currently recruiting a new Assistant Director of Customer Services to oversee Facilities’ customer service operations.

Dale Carnegie Training
In the spring of 2015, Facilities supervisors and direct customer contact personnel are attending a vigorous 8-week “Customer Focused” Dale Carnegie training designed to establish a Customer Service Culture and improve our overall customer service.

IService Desk Training
Facilities staff have developed an IService Desk training for the University community that is set to begin this month (March 2015). This training will also serve as a direct line to our customers where we can assess their needs and adjust our processes accordingly.
More Facilities Customer Service Improvement Initiatives

**Customer Concern Process**
We have trained all Facilities personnel on how to process customer concerns that are received through various avenues. Once the concerns are addressed, our Customer and Communications Representative follow-ups with customers to ensure that they are satisfied with the outcome.

**Customer Service Baseline Survey**
Facilities is finalizing a simple but comprehensive survey for the entire University community and we plan to distribute this survey to all of Facilities customers to establish a baseline. The survey will cover all aspects of Facilities services and will enable us to detect weaknesses and focus our improvement efforts where needed.

**Customer Care Champion Team**
We will be setting up a “Customer Care Champion Team” made up of employees from all areas of Facilities which will strengthen the idea that Customer Service is everyone’s job. This rotating team will conduct bi-annual round table meetings with various customers to discuss issues and initiatives.
More Facilities Customer Service Improvement Initiatives

**Events Services**
We are utilizing an Events calendar which is shared with necessary personnel in order to communicate all Events that have been approved. We are now establishing a process to follow-up with customers to ensure that they were satisfied with the set up and services at their event.

**Customer Service Emails**
We are utilizing automatic emails to let customers know that their Work Order is complete and will soon be adding the name of the technician who they can expect to attend to any unmet needs. The email will end with a “How are we doing?” statement identifying our new Customer Service email as the location to respond to. These responses will be added to our Monthly Operations Review Slides.

**Operations Review Slides**
Selected Performance metric results from our Monthly Operations Review Meetings will be posted quarterly on our website in order to communicate our services.
More Facilities Customer Service Improvement Initiatives

**Facilities Guide**
We will disseminate a Facilities Guide, both in hard copy and also on our website, which will describe Facilities’ services.

**Annual Survey**
Facilities is planning to develop an annual survey that is not tied directly to a work order, but instead inquires how we are doing in general.

**Town Hall Meetings**
Facilities staff will conduct an annual “Facilities Partnering” Town Hall Meeting which will be used to engage our customers in conversations that will enhance our relationships. This forum will serve to ensure that our customers understand our processes and also to gather feedback to be used in making improvements.

**Day Two Training**
Facilities plans to develop a “Day Two” orientation for new employees which will impress upon them the customer service vision that we have in Facilities. This time will also be used to train new employees on various Departmental policies and processes such as timekeeping, Iservice Desk, I drive, mobile devices, uniform policy, etc.
UTSA Facilities Customer Services Initiatives

• Customer Service Guidelines and Employee Training

• Regular Customer Meetings
  – Academic Affairs, Student Affairs, Research, Lab Safety, Auxiliary Council, Athletics

• Formal Notification Processes (Emergency and Non-Emergency)

• Developed Facilities Web Site

• Customer Satisfaction Surveys (Work Order and Project)

• i-Service Desk Automated Work Request Process

• Service Level Agreements with Auxiliaries/Fee Funded Organizations
Communicating with Campus/Clients

- Formal Process for Emergency and Non-Emergency Notifications
- Facilities Web-Site Notifications
- Regular meetings with Prime Customers
- "UTSA Today" (Campus Newsletter) Articles
- Surveys (Work Orders, Projects, Overall)
- Town Hall Meetings with Customers
- Dale Carnegie Customer Focused Training
Ideas for “World-Class” Customer Focus

• Leadership conveys an attitude of service leadership to all

• Culture of delighting the customer and helping to assure their success

• Customer service strategy that includes communications strategy

• Great value on customer service attributes in annual performance evaluations

• Formal communications policies for emergency and non-emergency work

• Regular meetings with major customers

• Customer town halls to obtain improvement advice and understand their needs

• Employee Customer Service Training (ie. Dale Carnegie, HR/In-house Facilities)
Ideas for “World-Class” Customer Focus

• Variety of tools to capture the voice of the customer (surveys, customer advisory groups, service reviews, employee field reporting)

• Manage the total customer experience from service/project inception to close-out

• Talk with and listen to the customers and follow-up to resolve concerns

• Communicate standards, tasks, roles, frequencies of service with customers

• Customer service guidelines

• On-line service desk for work requests
“Workforce development is a strategic approach focusing on people rather than operations. It is essentially a human resources strategy… evolved from a problem-focused approach… to a holistic approach considering participants’ many barriers and overall needs… While Facilities budgets are notoriously tight, proper investment in continuous development of FM staff is vital to achieving the mission of the organization. Effective workforce focus and development includes employee job descriptions and succession planning, training and professional development, employee recognition & rewards, and employee performance & feedback.”

- Facility Management – Diagnostics (Facility Engineering Associates)

“Having the right people on the bus with the right skills, experience, and depth is one of the critical elements.” - James Collins, *Good to Great*
Ideas for “World-Class” Workforce Development

- Comprehensive and objective Hiring Process – hire the right people first time
- Career paths/job families, job descriptions, needs assessments
- Survey of employee engagement
- Effective Staff recognition and awards program
- Supervisory Curriculum/Mandatory training
- Employee language training (Rosetta Stone, “Erlinda’s Wish” Computer training)
- Dale Carnegie Training for direct Customer staff
Ideas for “World-Class” Workforce Development

- Employee technical, compliance, ethics training
- New employee orientation for Facilities employees
- Benchmarking staffing levels
- Effective occupational health and life safety training program
- Opportunities for employees to share experiences at trade conferences
- Employee Progression guidelines
- Succession Plans for key positions in the organization
UTSA-Office of Facilities Supervisor Training

Goal: 100% Supervisory and Fundamental

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“Effective process management addresses how the facilities organization manages key product and service design, delivery processes, and continuous improvement. Process management includes various systems or “core competencies” such as work management, performance standards, estimating systems, planning, design, and construction of new or renovated facilities, space management, event management, and other key processes that affect facilities functions.”

- APPA FMEP

“If you can’t describe what you are doing as a process, you don’t know what you’re doing.”

- W. Edwards Deming

“Excellent firms don’t believe in excellence, only in constant improvement and constant change.”

- Tom Peters
Ideas for “World-Class” Process Management

• Lean systems analysis to improve existing processes
• Develop new processes as necessary to assure effective service delivery
• Annual shop rate analysis and updating
• Project management fees analysis and updating
• Master Plan Management Process
• Formal Preventive Maintenance program with mechanism to update as necessary
• Service Level Agreements (SLAs) with fee funded customers
• Job Order Contracts and Job Order Design Contracts
• Formal Hiring Process
Ideas for “World-Class” Process Management

- Project management charters with Construction agents/EHS&RM
- Capital Renewal Planning process
- Construction Management training and “lessons learned” reviews
- Automation improvements (mini-iPads, wireless assignment of work)
- Funding mechanisms (“Swept” deferred maintenance funds, utility reinvestment)
- Annual Work Plan
- Condition Assessment Process
- Computer Replacement Guidelines
- Archiving and Storage Retrieval Process
Assessment and information analysis describes how your organization uses information and analyses to evaluate and drive performance improvements. Of interest are types of tools used, and how the tools are used to measure and enhance organizational performance.

- APPA FMEP

“When you can measure what you are speaking about and express it in numbers, you know something about it; but when you cannot express it in numbers, your knowledge is of a meager an unsatisfactory kind…” - Lord Kelvin
“The performance of a facilities organization can be assessed in a number of ways: campus appearance, customer satisfaction, employee satisfaction, effectiveness of systems operations, financial results, and supplier/business partner results. Having measurement tools in place to assess such performance is critical in an environment of continuous improvement.” – APPA FMEP

“If you are not getting better, you are getting worse.” – Tiger Woods

“It is not necessary to change. Survival is not mandatory.” – W. Edwards Deming
Ideas for “World-Class” Measurement & Analysis/Performance Results

- Key Performance Indicators and benchmarking with other institutions
- Benchmarking with professional trade organizations (APPA, IFMA)
- Focus on key business metrics (those critical to your success)
- Upgraded web-based Computerized Maintenance Management System (CMMS)
- Operations Review Meetings to discuss performance results
- Analysis of work order information to address emergent issues (elevators, fire and life safety concerns)
Ideas for “World-Class” Measurement & Analysis/Performance Results

- Productivity Analysis
- Third Party Analysis of Key Metrics
- Engagement of key stakeholders in what metrics they feel are important
- Emergency Response and Business Continuity metrics
- Quality Assurance Program and regular assessment process
- Standards for design, construction, maintenance, operations, other critical areas
Operations Review Meeting

April 2015

Data

Facilities……..Your Partner for Successful Solutions
Free Balance Forecast
Downtown, Hemisfair, & Main Campus

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<th>Nov</th>
<th>Dec</th>
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April 2015 Data
Preventive Maintenance Schedule Compliance - Tri Campus
(Excludes Vehicle Maintenance)

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Preventive Maintenance Backlog – Tri-Campus
(Excludes Vehicle Maintenance)

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Corrective Maintenance Schedule Compliance - Tri Campus
(Excludes Vehicle Maintenance)

![Graph showing maintenance compliance over months]

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Zone Maintenance Work Order Compliance
Corrective Maintenance – Type 4

Work Order Aging - Tri-Campus
Corrective Maintenance & Departmental Requests

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Deferred Maintenance Remaining Balances

FY15: $3,000, $1,979, $1,979, $1,782, $1,769, $1,769, $1,769, $1,769, $1,769, $1,769, $1,769, $1,769
FY13: $1,823, $1,823, $1,831, $1,831, $1,604, $1,604, $1,471, $1,471, $900, $1,466, $1,154, $1,154, $838, $838, $714, $714, $710, $710, $708, $708, $708, $708, $708, $708, $708, $708, $708, $708, $708
FY12: $427, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390, $390
FY10: $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56, $56
FY09: $12, $11, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10, $10

Total: $5,878, $5,793, $5,504, $5,319, $4,998, $4,745, $4,702, $4,329, $4,329, $4,834, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033, $5,033

April 2015 Data
### MMBTUs per GSF
(Energy Use Index)

<table>
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<tr>
<th></th>
<th>Sept</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
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<td>2015</td>
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<td>0.0090</td>
<td>0.0098</td>
<td>0.0115</td>
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<tr>
<td>2014</td>
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<td>0.0119</td>
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<td>2013</td>
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<td>0.0096</td>
<td>0.0120</td>
<td>0.0115</td>
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<td>0.0102</td>
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### GALs per GSF
(Water Use Index)

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<tr>
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<th>2013 Gal per GSF</th>
<th>2015 w/o P.W.</th>
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<td>4.20</td>
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<td>3.18</td>
<td>3.44</td>
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<td>Dec</td>
<td>2.55</td>
<td>2.04</td>
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<td>Jan</td>
<td>2.52</td>
<td>2.06</td>
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<td>Feb</td>
<td>2.33</td>
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<tr>
<td>May</td>
<td>2.74</td>
<td>3.24</td>
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<tr>
<td>Jun</td>
<td>3.32</td>
<td>3.51</td>
<td>3.51</td>
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<tr>
<td>Jul</td>
<td>3.92</td>
<td>3.60</td>
<td>3.72</td>
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<td>Aug</td>
<td>4.30</td>
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Actual vs Budgeted Utility (x1000)
(E&G Only)

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<th>Estimated</th>
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<td>$888</td>
<td>$907</td>
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<tr>
<td>Oct</td>
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<td>Nov</td>
<td>$2,474</td>
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<td>$3,281</td>
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<td>Jan</td>
<td>$4,114</td>
<td>$4,442</td>
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</tr>
<tr>
<td>Feb</td>
<td>$4,807</td>
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<td>$5,444</td>
</tr>
<tr>
<td>Mar</td>
<td>$5,630</td>
<td>$6,219</td>
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<tr>
<td>Apr</td>
<td>$6,476</td>
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<td>$7,259</td>
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<tr>
<td>May</td>
<td>$7,996</td>
<td>$8,885</td>
<td>$8,166</td>
</tr>
<tr>
<td>Jun</td>
<td>$9,773</td>
<td>$10,662</td>
<td>$9,981</td>
</tr>
<tr>
<td>Jul</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Aug</td>
<td>$10,662</td>
<td></td>
<td>$10,888</td>
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### Security & Life Safety

**April 2015**

<table>
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<th>Open</th>
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</thead>
<tbody>
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</tr>
<tr>
<td>Gates</td>
<td>5</td>
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<tr>
<td>Alarms</td>
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<td>7</td>
<td>0</td>
</tr>
<tr>
<td>Evacuations</td>
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<td>2</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Created</th>
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<th>Open</th>
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</thead>
<tbody>
<tr>
<td>E-Phones</td>
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</tr>
<tr>
<td>Gates</td>
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<td>5</td>
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</tr>
<tr>
<td>Alarms</td>
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<td>7</td>
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<tr>
<td>Evacuations</td>
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Security & Life Safety-Impairments
April 2015

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May 26, 2015

April 2015 Data
Yellow Tag Deficiencies

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State Fire Marshall Findings
Operations & Maintenance

Unresolved Findings

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State Fire Marshall
E & PM Bundled Projects

April 2015 Data
# Lab Inspections/Deficiencies
as of April 30, 2015

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<th>Opened</th>
<th>Closed</th>
<th>Details</th>
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<tbody>
<tr>
<td>MS 3.02.22</td>
<td>09/16/14</td>
<td>Still Open</td>
<td>Room continues to be positive pressured to the hallway.</td>
</tr>
<tr>
<td>SC 1.01.02A</td>
<td>12/02/14</td>
<td>Still Open</td>
<td>There are a few holes in ceiling insulation.</td>
</tr>
<tr>
<td>AET 1.230</td>
<td>04/06/15</td>
<td>Still Open</td>
<td>Eyewash station by sink next to shower needs to be inspected.</td>
</tr>
</tbody>
</table>
UTSA Workers' Compensation Insurance
Count of Claims with Costs (Losses)

- Facilities
- UTSA other than Facilities

April 2015 Data