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

Communication

- Schedule
- Cost

Efficient Use of Resources

- Resources
  - People
  - Funding
  - Technology (TMA and mobile)
  - Tools and Equipment
  - Office and Shop Space

Expectations

Set Expectation

Meet Expectation
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

PM  Planned  Project Support  Emergent  FTE Hours/Month
## Desired State

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<th><strong>Task Planning</strong></th>
<th><strong>Resource Planning</strong></th>
<th><strong>Customer Communication</strong></th>
<th><strong>Tracking and Monitoring</strong></th>
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<td><strong>Daily</strong></td>
<td><strong>• Daily Assignments</strong>&lt;br&gt;<strong>• Review Open and Closed Work Orders</strong></td>
<td><strong>• Adjust schedules</strong>&lt;br&gt;<strong>• Emergent Work Support</strong></td>
<td><strong>• “My Page” Dashboard</strong>&lt;br&gt;<strong>• Daily Logs</strong>&lt;br&gt;<strong>• Daily Trouble Calls</strong></td>
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<td><strong>Weekly</strong></td>
<td><strong>• PM Schedule</strong>&lt;br&gt;<strong>• Planned Maintenance</strong>&lt;br&gt;<strong>• Project Support</strong>&lt;br&gt;<strong>• Corrective</strong></td>
<td><strong>• Work Schedule</strong>&lt;br&gt;<strong>• Updated Assignments</strong></td>
<td><strong>• Weekly Reports</strong>&lt;br&gt;<strong>• “My Page” Dashboard</strong></td>
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<tr>
<td><strong>Monthly</strong></td>
<td><strong>• PM Schedule/Backlog</strong>&lt;br&gt;<strong>• Planned Maintenance</strong>&lt;br&gt;<strong>• Project Support</strong></td>
<td><strong>• Assignments</strong>&lt;br&gt;<strong>• Available Staff by Craft</strong></td>
<td><strong>• Ops Review Meeting</strong>&lt;br&gt;<strong>• 30/60/90 Review</strong></td>
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<td><strong>Annual</strong></td>
<td><strong>• Forecast of PM</strong>&lt;br&gt;<strong>• Estimated Corrective and Project Support</strong></td>
<td><strong>• Annual Staffing Plan</strong>&lt;br&gt;<strong>• Annual FTE Budget</strong>&lt;br&gt;<strong>• Emergent Work Reserve</strong></td>
<td><strong>• Annual Task List and Cost Estimates (SLA)</strong>&lt;br&gt;<strong>• Annual Report</strong></td>
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<td><strong>Strategic</strong></td>
<td><strong>• PM Program</strong>&lt;br&gt;<strong>• Capital Renewal Plans</strong>&lt;br&gt;<strong>• Deferred Maintenance</strong></td>
<td><strong>• Long range organizational plans</strong></td>
<td><strong>• Facilities Metrics (APPA/IFMA)</strong></td>
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</table>

- **Daily Assignments**
- **Review Open and Closed Work Orders**
- **Adjust schedules**
- **Emergent Work Support**
- **Current Work Activities**
- **Completion Notification**
- **Change Notifications**
- **“My Page” Dashboard**
- **Daily Logs**
- **Daily Trouble Calls**
- **Weekly Reports**
- **“My Page” Dashboard**
- **Ops Review Meeting**
- **30/60/90 Review**
- **Annual Task List and Cost Estimates (SLA)**
- **Annual Report**
- **Facilities Metrics (APPA/IFMA)**
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 desired
  - 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?