

Strategic Plan 2018 -2020



February 1, 2018

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# Executive Summary

In October 2016, James McConnell, Associate Vice President for Facilities Services (FS), joined the University with a vision to transform the way FS conducts business, improve the University’s minority and women owned business opportunities on capital projects, embark on infrastructure improvements, and obtain the APPA Award for Excellence. This project provided the framework for a broad stakeholder involvement in the collaborative development of an FS 3-year Strategic Plan.

A facilitated Strategic Plan Development Framework was utilized to develop the Facilities Services’ 3-year Strategic Plan which includes: 5 Strategic Themes (Goals), 16 – Objectives (Outcomes), 51 – Initiatives (Indicators), and 130 Measures (Deliverables). The number of FS Units involved and the number of measures identified determined prioritization of initiatives. Each of the 130 Measures has two important factors for success: (1) at least one member of the Facilities Services Senior Leadership Team (SLT) leading the deliverable to ensure success, and (2) a due date.

The Strategic Planning Working Committee provided periodic deliverables to the Steering Committee comprised of the Senior Leadership Team (SLT). This collective effort ultimately led to the development of the Strategic Plan. A broad mix of union and non-union FS staff was assembled into the 18-member Working Committee. Stakeholder groups consulted during this effort included FS staff, clients, and the SLT. The FS client group included eight individuals who engaged in the Strengths/Weaknesses/Opportunity/Threats (SWOT) activity. Many of these individuals were selected because they have decades of experience collaborating with the FS department under several leadership changes. Some of these individuals were chosen because they recently executed service level agreements with Facilities Services. All of these individuals have demonstrated that they are both vocal advocates and critics of the department.

The process to develop the Strategic Plan generated enthusiasm and at times passionate disagreements among various stakeholder groups. During the process, the commitment to open dialogues assured all voices were heard. In the end, the groups rallied around a common commitment to the University’s mission. The professionalism of all involved resulted in the comprehensive 3-Year Strategic Plan presented in this report.

# Strategic Plan Development Framework

A successful strategic planning effort requires four components: (1) A visionary leader who makes it a priority to develop a stakeholder and data-based strategic plan; (2) a committed team of competent and engaged professionals who have a firm foundational understanding of the organization’s purpose and history; (3) stakeholders and partners willing to provide an honest assessment of current realities; and (4) open minded and innovative professionals and leaders willing to envision an award winning facilities organization. This planning process included all four components.

The core ideology of an organization is made up of its mission statement, vision statement, and values. Validation of the Facilities Services’ existing core ideology took place through a survey seeking FS staff input. The survey results were generally favorable for the current mission statement: 34% “love it” and 47% “can get behind” it. The existing vision statement had similar support: 31% “love it” and 47% “can get behind” it. However, 17% of the responses declared that both the mission and vision statements “need to be changed.” The Working Committee and the SLT agreed with this assessment and concluded that the vision statement lacked compelling aspiration. The mission statement was believed to be too lengthy. The Working Committee also believed that the department’s stakeholders should be broadly defined to incorporate more than “intellectual communities.” The existing eleven core values were determined too numerous to remember; so they were distilled to six core values.

Based on the feedback from the various stakeholder groups, the Working Committee developed and vetted with the SLT, the core ideology of Facilities Services (Appendix C).

OUR MISSION: **TOGETHER, WE CREATE AND SUSTAIN ENVIRONMENTS TO ADVANCE THE MISSION OF OUR UNIVERSITY**

OUR VALUES:

**Respect | Safety | Responsiveness | Collaboration | Accountability | Quality**

OUR VISION**: BE A NATIONAL LEADER IN HIGHER EDUCATION FACILITIES MANAGEMENT.**

The Working Committee retained an important component of the previous department mission statement as

OUR MOTTO: **BUILD AND MAINTAIN EXCELLENCE**

# Strategic Plan

The chart on the following page provides an overview of the core ideology, strategic themes, objectives, and initiatives. It is intended to serve as a visual reminder and guide for the continued and collective efforts needed to achieve the vision of becoming a national leader in higher education facilities management. The full Strategic Plan with detailed measures, owners, and dates for each of the initiatives is attached as Appendix D.

(Reserved for 11x17 pull-out poster)

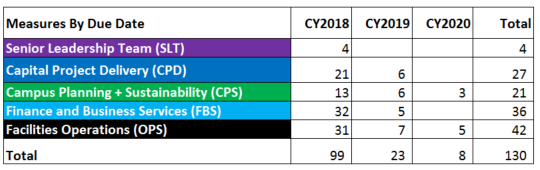
# The Process of Developing the 3-Year Strategic Plan

With the Facilities Services core ideology in place, the Strategic Plan is a collaborative process involving the collection of information/data, idea generation, disciplined organizing of ideas, and forecasting of future activities. The facilitated SWOT analysis was conducted by four stakeholder groups (Appendix E). The information was used to generate major themes that leveraged the department’s current strengths to identify opportunities to mitigate perceived or real weaknesses and threats. Through a process of hearty collaborative debates, five strategic themes (or goals) emerged as the 2018-2020 focus for the FS Team. Major objectives – which support achieving the themes – were identified and agreed upon. The Working Committee developed initiatives and measures. The 51 Initiatives and 130 Measures were further refined by distributing the initiatives over a three-year period.

# Next Steps

An electronic version of the Strategic Plan is provided with a filter function that is set up for each FS unit so the user can quickly isolate the objectives, initiatives, and measures established for their respective unit. This document can be used to track progress and to update changes to priorities as needed. A copy of the 3 –Year Strategic Plan, sorted by each of the four units of Facilities Services, is provided in Appendix D. This document will allow each unit to focus on their respective portion of the 51 Initiatives and 130 Measures without being overwhelmed by the comprehensive list.

Each unit is color coded as noted below; and the dates designated within the Strategic Plan are expressed relative to calendar years. The SLT section is a special section that should address the four initiatives and related measures that do not have owners.



This Strategic Plan and related charts, files, and “posters” should be widely communicated and discussed among the FS staff. It is important that intentional communication plans are developed to inform and involve the campus community in supporting the achievement of the 3-Year Strategic Plan. The plans should be dynamic, documented, and referred to regularly to ensure the focus of resources will end in the achievement of the 5 Strategic Themes.

Appendix A: Strategic Plan Stats & Definitions

The total number of Objectives, Initiatives and Measures is provided in the table below:



Definitions of key terms are provided below:

* Strategic Themes serve as the core focus for the Strategic Plan.
* Objectives describe how the strategic themes will be operationalized.
* Initiatives are projects/programs/significant tasks that are needed to support the objective.
* Measures are what we agreed represented success.
* Target Date is the agreed upon deadline for the initiative.

# Appendix B: Strategic Themes, Objectives, and Initiatives

|  |  |
| --- | --- |
| STRATEGIC THEME - Invest in Employee Success | |
| Objective 1.1 | Invest in Training and Professional Development |
| Initiative 1.1.1 | Allocate budget and opportunities for staff to attend training |
| Initiative 1.1.2 | Leadership and staff representation at professional events |
| Initiative 1.1.3 | Development of online resources toolkit for all employees |
| Initiative 1.1.4 | Develop and implement a professional development program |
| Initiative 1.1.5 | Identify external training resources for onsite training for FS staff |
| Initiative 1.1.6 | Use CATT's or CANVAS information for validity and compliance |
| Objective 1.2 | Promote Positive Employee Morale and Engagement |
| Initiative 1.2.1 | Continue Employee Satisfaction Survey |
| Initiative 1.2.2 | Seek employee feedback |
| Initiative 1.2.3 | Recognize employees for individual and group achievements |
| Initiative 1.2.4 | Onboarding/Off-boarding of staff |
| Objective 1.3 | Provide Technology, Tools, Equipment, and Application Training |
| Initiative 1.3.1 | Update technology and software availability |
| Initiative 1.3.2 | Evaluate technology needs for hardware and software |
| Initiative 1.3.3 | Wi-Fi in mechanical spaces |
|  |  |
| STRATEGIC THEME - Impact and Engage Community | |
| Objective 2.1 | Support Local Communities and MBE/WBE Through Workforce Hiring |
| Initiative 2.1.1 | Promote hiring from the local community |
| Initiative 2.1.2 | Provide representation at workforce network events |
| Initiative 2.1.3 | Support and endorse the University’s MBE/WBE program participation goals |
| Initiative 2.1.4 | Increase impact of internship programs in local community |
| Objective 2.2 | Engage with Neighboring Communities and Organizations |
| Initiative 2.2.1 | Host regular meetings with neighbors |
| Objective 2.3 | Perform Our Civic Duty Through Community Service, Charity and Leadership |
| Initiative 2.3.1 | Initiate and participate in charity drives |
| Initiative 2.3.2 | Use our skills and resources in larger scope of civic duty |
|  |  |
| STRATEGIC THEME – Embody Sustainability | |
| Objective 3.1 | Increase Engagement, Awareness and Participation |
| Initiative 3.1.1 | Create a culture of sustainability behavior |
| Initiative 3.1.2 | Educate community about goals and policies |
| Initiative 3.1.3 | Communicate baselines and successes |
| Objective 3.2 | Reduce Carbon Footprint |
| Initiative 3.2.1 | Improve waste reduction, diversion and recycling |
| Initiative 3.2.2 | Conserve resources (energy, water, materials) |
| Initiative 3.2.3 | Develop multimodal transportation strategy |
| Objective 3.3 | Implement and Codify Sustainability Practices |
| Initiative 3.3.1 | Enhance and codify sustainability standards and practices |
| Initiative 3.3.2 | Establish Design, Construction, and O&M Standards. |
| Initiative 3.3.3 | Establish sustainability standards |
|  |  |
| STRATEGIC THEME – Promote Communication and Collaboration | |
| Objective 4.1: | Increase Collaboration Across All Units In FS |
| Initiative 4.1.1 | Use cool signs to show more information |
| Initiative 4.1.2 | Engage stakeholders for project design review |
| Initiative 4.1.3 | Conduct quarterly unit meetings and biannual all staff meetings |
| Initiative 4.1.4 | Increase CPD and Operations collaboration |
| Initiative 4.1.5 | Increase CPS collaboration with Ops/CPD and Vendors |
| Objective 4.2 | Increase Transparency Through Internal/External Communication Plan |
| Initiative 4.2.1 | Conduct surveys and client interviews |
| Initiative 4.2.2 | Develop a communications plan |
| Initiative 4.2.3 | Issue electronic (and printable) quarterly newsletter |
| Objective 4.3 | Simplify / Clarify Organizational Structure and Process |
| Initiative 4.3.1 | Obtain signed Service Level Agreements |
| Initiative 4.3.2 | Complete and publish a strategic plan |
| Initiative 4.3.3 | Centralize all policies and procedures |
|  |  |
| STRATEGIC THEME – Foster Stewardship and Organizational Performance | |
| Objective 5.1 | Manage Department Service Delivery |
| Initiative 5.1.1 | Manage contract services by KPI |
| Initiative 5.1.2 | Conduct customer satisfaction review using Maximo POS and CPD survey |
| Initiative 5.1.3 | Improve service delivery processes |
| Objective 5.2 | Consistent Reliable Data Management |
| Initiative 5.2.1 | Use data to promote safety |
| Initiative 5.2.2 | Use data to improve financial compliance |
| Initiative 5.2.3 | Use space data to encourage efficiencies. |
| Objective 5.3 | Support Department Commitment to Enhance Physical Space |
| Initiative 5.3.1 | Establish and communicate protocol for exterior design review |
| Initiative 5.3.2 | Maintain historical integrity |
| Initiative 5.3.3 | Implement turnover process |
| Objective 5.4 | Financial Integrity |
| Initiative 5.4.1 | Ensure financial accountability |
| Initiative 5.4.2 | Develop improvements for financial processes |

# Appendix C: Facilities Services Core Ideology

**FACILITIES SERVICES**

**Core Ideology:**

**OUR MISSION:**

**TOGETHER, WE CREATE AND SUSTAIN ENVIRONMENTS TO ADVANCE THE MISSION OF OUR UNIVERSITY**

**OUR VISION:**

**BE A NATIONAL LEADER IN HIGHER EDUCATION FACILITIES MANAGEMENT**

**OUR MOTTO:**

**BUILD AND MAINTAIN EXCELLENCE**

**OUR VALUES:**

**Respect | Safety | Responsiveness | Collaboration | Accountability | Quality**

Appendix D: Final Strategic Plan with Initiatives, Measures, Owners and Due Dates.



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## Senior Leadership Team (SLT): Initiatives, Measures, and Due Dates

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | | **Senior Leadership Team (SLT)** | | | | 2018 | 2019 | 2020 |
| **STRATEGIC THEME** | | | **INVEST IN EMPLOYEE SUCCESS** | | | | | |
|  | | Objective 1.1 - Invest in Training and Professional Development | | | | | | | | OBJECTIVE 1.1 - Invest in Training and Professional Development |
|  | | 1.1.5 | Identify external training resources for onsite training for FS staff | | Host a minimum of four (1 per quarter), annually on campus and provide access to staff. | June &  Ongoing |  |  |
|  | | 1.1.6 | Use CATT's information for validity and compliance | | Reliable compliance reporting is being generated and transmitted to supervisors and employees. KPI’s have been identified and are being utilized by Directors to enforce compliance. | June &  Ongoing |  |  |
| **STRATEGIC THEME** | | | **PROMOTE COMMUNICATION AND COLLABORATION** | | | | | |
|  | | Objective 4.1 - Increase Collaboration Across All Units In FS | | | | | | | |
|  | | 4.1.3 | Conduct quarterly unit meetings and biannual all staff meetings | | Plan and execute two ALL staff meetings annually for strategic communication. | June &  Ongoing |  |  |
|  | | Objective 4.3 - Simplify / Clarify Organizational Structure and Processes | | | | | | | |
|  | | 4.3.2 | Complete and publish a strategic plan that incorporates staff feedback. | | Standard Agenda format will be established and filled out at each level for monthly meetings. SLT should use format to inform and motivate - what do you want everyone to hear? | June &  Ongoing |  |  |

## Capital Project Delivery (CPD): Initiatives, Measures, and Due Dates

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | | Capital Project Delivery (CPD) | | | | | 2018 | 2019 | 2020 |
| **STRATEGIC THEME** | | | **INVEST IN EMPLOYEE SUCCESS** | | | | | |
|  | | Objective 1.1 - Invest in Training and Professional Development | | | | | | | |
|  | | 1.1.1 | Allocate budget and opportunities for staff to attend training | | | Staff participation in training sessions/meetings/con­ventions. Track participation. | June &  Ongoing |  |  |
|  | | Create a program for quarterly lunch and learn. Internal or external presenters provide information. | September & Ongoing |  |  |
|  | | 1.1.2 | Leadership and staff representation at professional events | | | Present at regional and national conferences. |  | June &  Ongoing |  |
|  | | Objective 1.2 - Promote Positive Employee Morale and Engagement | | | | | | | |
|  | | 1.2.3 | Recognize employees for individual and group achievements | | | Recognition programs are in place for individuals and groups (may include community service) such as Safety, Spot, and Keller awards. | June &  Ongoing |  |  |
| **STRATEGIC THEME** | | | | **IMPACT AND ENGAGE COMMUNITY** | | | | |
|  | | Objective 2.1 - Support Local Communities and MBE/WBE Through Workforce Hiring | | | | | | | |
|  | | 2.1.1 | Promote hiring from the local community | | | Identify and report results on selected projects. | June &  Ongoing |  |  |
|  | | % of events to # of participants. | June &  Ongoing |  |  |
|  | | % of hire from 7 mid-south neighborhoods surrounding the campus. (Douglas, Grand Boulevard, Greater Grand Crossing, Hyde Park, Kenwood, Oakland, South Shore, Washington Park, and Woodlawn) | June &  Ongoing |  |  |
|  | | 2.1.2 | Provide representation at workforce network events | | | Leadership and staff participation, % of events to # of participants. | June &  Ongoing |  |  |

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|  | | 2.1.3 | Support and endorse the University’s MBE/WBE program participation goals | | PM participation in selection. | June &  Ongoing |  |  |
|  | | Meet 35% MBE and 6% WBE participation goals. | June &  Ongoing |  |  |
|  | | Local participation from 7 mid-south neighborhoods surrounding the campus. | June &  Ongoing |  |  |
|  | | City of Chicago residency requirements. | June &  Ongoing |  |  |
|  | | Participate in mentor protégé (capacity building partnership) programs. | June &  Ongoing |  |  |
|  | | Objective 2.2 - Engage With Neighboring Communities and Organizations | | | | | | |
|  | | 2.2.1 | Host regular meetings with neighbors | | Publish meeting minutes from Woodlawn Avenue neighbor meetings on website. | Biannual &  Ongoing |  |  |
|  | | Participate in meetings with OCE regarding Campus South | Biannual |  |  |
| **STRATEGIC THEME** | | | **EMBODY SUSTAINABILITY** | | | | |
|  | | Objective 3.2 - Reduce Carbon Footprint | | | | | | |
|  | | 3.2.1 | Improve waste reduction, diversion and recycling | | Clarify scrap/construction waste policy. | Dec |  |  |
|  | | 3.2.2 | Conserve resources (energy, water, materials) | | Participate in FS Sustainability Coordination Group and hold 3 meetings/year to create strategic partnerships and meet sustainability goals. | June &  Ongoing |  |  |
|  | | Objective 3.3 - Implement and Codify Sustainability Practices | | | | | | |
|  | | 3.3.2 | Establish Design, Construction, and O&M Standards | | Design to a minimum of LEED silver standard. | June &  Ongoing |  |  |

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **STRATEGIC THEME** | | | **PROMOTE COMMUNICATION AND COLLABORATION** | | | | |
|  | | Objective 4.1 - Increase Collaboration Across All Units In FS | | | | | | |
|  | | 4.1.2 | Engage stakeholders for project design review | | OPS and key stakeholder units (ITS, DSS, EH&S) participate in design review of 100% of identified projects, and track comments. | June &  Ongoing |  |  |
|  | | 4.1.3 | Conduct quarterly unit meetings and biannual all staff meetings | | SLT provide updates back to their respective units. | July & quarterly |  |  |
|  | | 4.1.4 | Increase CPD and Operations collaboration | | Improve design, retrain, and enforce turnover process. | June &  Ongoing |  |  |
|  | | Bimonthly meeting held between CPD and Operations. | Bi-Monthly & Ongoing |  |  |
|  | | 4.1.5 | Increase CPS collaboration with Ops/CPD and Vendors | | Augment planning process by providing input regarding budget, execution and operations. | June &  Ongoing |  |  |
|  | | Objective 4.2 - Increase Transparency Thru Internal/External Communication Plan | | | | | | |
|  | | 4.2.1 | Conduct surveys and client interviews | | CPD Client feedback is solicited, measured, and addressed. | Annually |  |  |
| **STRATEGIC THEME** | | | **FOSTER STEWARDSHIP AND ORGANIZATIONAL PERFORMANCE** | | | | |
|  | | Objective 5.1 - Manage Department Service Delivery | | | | | | |
|  | | 5.1.1 | Manage Contract Services by KPI | | Complete a vendor evaluation after each identified project. | June &  Ongoing |  |  |
|  | | 5.1.2 | Conduct Customer Satisfaction Review Using Maximo POS and CPD Survey. | | Create and distribute post-service survey. | June &  Ongoing |  |  |
|  | | Client evaluations for defined projects. | June &  Ongoing |  |  |
|  | | 5.1.3 | Improve Service delivery processes | | Incorporate cash flows into the pay application reviews. |  | June &  Ongoing |  |
|  | | Client/peer feedback through the development of 360 feedback |  | June &  Ongoing |  |
|  | | Hold sessions (maybe lunch and learns) for best practices, project debriefs, and working groups. Each unit presents once a year. |  | Quarterly |  |
|  | | Objective 5.3 - Support Department Commitment to Enhance Physical Space | | | | | | |
|  | | 5.3.3 | Implement turnover process | | 100% signed turnover sheet completed on all CPD Projects. |  | June &  Ongoing |  |
|  | | Develop and communicate the Turnover process (es). |  | June &  Ongoing |  |
|  | | Develop a workflow. |  | June |  |
|  | | Objective 5.4 Financial Integrity | | | | | | |
|  | | 5.4.1 | Ensure financial accountability | | Track value engineering decisions for future use in long-term costs saving analysis. | - | Feb & Ongoing |  |

## Campus Planning + Sustainability (CPS): Initiatives, Measures, and Due Dates

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | | **Campus Planning + Sustainability (CPS)** | | | | | **2018** | **2019** | **2020** |
| **STRATEGIC THEME** | | | **INVEST IN EMPLOYEE SUCCESS** | | | | | |
|  | | Objective 1.1 - Invest in Training and Professional Development | | | | | | | |
|  | | 1.1.1 | Allocate budget and opportunities for staff to attend training | | Staff participation in training sessions/meetings/conventions. 80% first year, 100% second year. (2) Track participation. | June &  Ongoing | |  |  |
|  | | 1.1.2 | Leadership and staff representation at professional events | | Present at regional and national conferences. |  | | June &  Ongoing |  |
|  | | 1.1.5 | Identify external training resources for onsite training for FS staff | | Obtain training to increase skill set. | December & Annually | |  |  |
|  | | Objective 1.2 - Promote Positive Employee Morale and Engagement | | | | | | | |
|  | | 1.2.3 | Recognize employees for individual and group achievements | | Recognition programs are in place for individuals and groups (may include community service) such as Safety, Spot, and Keller awards. | June &  Ongoing | |  |  |
|  | | Objective 1.3 - Provide Technology, Tools, Equipment, and Application Training | | | | | | | |
|  | | 1.3.1 | Update technology and software availability | | Reinstitute technology committee to review requests. | June | |  |  |
|  | | 1.3.2 | Evaluate technology needs for hardware and software | | Make recommendations for funding. | March & Annually | |  |  |
|  | | 1.3.3 | Wi-Fi in mechanical spaces | | Create a needs sheet, prioritize for all of campus, and develop implementation strategy. |  | | August |  |

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| **STRATEGIC THEME** | | | | **IMPACT AND ENGAGE COMMUNITY** | | | | | | | |
|  | Objective 2.2 - Engage with Neighboring Communities and Organizations | | | | | | | | | | |
|  | 2.2.1 | Host regular meetings with neighbors | | | Publish meeting minutes from Woodlawn Avenue neighbor meetings on website. | | Biannual & Ongoing | |  | |  |
|  | Support OCE regarding Campus South. | | Biannual & Ongoing | |  | |  |
|  | Objective 2.3 - Perform our Civic Duty Through Community Service, Charity and Leadership | | | | | | | | | | |
|  | 2.3.2 | Use our skills and resources in larger scope of civic duty | | | Increase number of interns and frequency of internship opportunity. Establish practice of evaluating effectiveness of matching intern to task. | |  | | Summer Every Year | |  |
| **STRATEGIC THEME** | | | **EMBODY SUSTAINABILITY** | | | | | | | | |
|  | Objective 3.1 - Increase Engagement, Awareness and Participation | | | | | | | | | | |
|  | 3.1.1 | Create a culture of sustainability behavior | | | | AASHE STARS: complete readiness assessment and set institutional goals. | | June & Annually | |  |  |
|  | AASHE STARS: work with strategic partners to implement improvements that will result in meeting institutional goals. | |  | | June & Ongoing |  |
|  | AASHE STARS: submit for certification and publicize results. | |  | |  | June & Ongoing |
|  | Encourage zero-waste events and reduce water bottle usage. | |  | | June & Ongoing |  |
|  | 3.1.2 | Educate community about goals and policies | | | | Hold 3 meetings/year with CSL staff and support Provost's OSAC. | | June & Annually | |  |  |
|  | 3.1.3 | Communicate baselines and successes | | | | Display public dashboards of energy use by building with EMIS. | | - | | June & Ongoing | - |

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|  | Objective 3.2 - Reduce Carbon Footprint | | | | | | |
|  | 3.2.2 | Conserve resources (energy, water, materials) | | Create FS Sustainability Coordination Group and hold 3 meetings/year to create strategic partnerships and meet sustainability goals. | June & Ongoing |  |  |
|  | Complete Greenhouse Gas emissions reduction plan. | June |  |  |
|  | 3.2.3 | Develop multimodal transportation strategy | | Complete the multi modal transportation study and identify near-term and long-term strategies for implementation. |  | June |  |
|  | Objective 3.3 - Implement and Codify Sustainability Practices | | | | | | |
|  | 3.3.1 | Enhance and codify sustainability standards and practices | | Increase sustainability requirements in FS2. |  | June |  |
| **STRATEGIC THEME** | | | **PROMOTE COMMUNICATION AND COLLABORATION** | | | | |
|  | Objective 4.1 - Increase Collaboration Across All Units In FS | | | | | | |
|  | 4.1.3 | Conduct quarterly unit meetings and bi-annual all staff meetings | | SLT provide updates back to their respective units. | July & Bimonthly |  |  |
|  | 4.1.5 | Increase CPS collaboration with Ops/CPD and Vendors | | To increase the likelihood that FS2 is followed, make the document more “user friendly.” Provide checklists to augment FS2. | June 2018 |  |  |
| **STRATEGIC THEME** | | | **FOSTER STEWARDSHIP AND ORGANIZATIONAL PERFORMANCE** | | | | |
|  | Objective 5.1 - Manage Department Service Delivery | | | | | | |
|  | 5.1.3 | Improve Service delivery processes | | Hold sessions (maybe lunch and learns) for best practices, project debriefs, and working groups. Each unit presents once a year. |  | Quarterly |  |
|  | Objective 5.2 - Consistent Reliable Data Management | | | | | | |
|  | 5.2.3 | Use space data to encourage efficiencies. | | Produce annual space statistics reports. | November & Ongoing |  |  |
|  | Develop a partial space standard |  |  | June |
|  | Bring greater awareness of space usage | June & Ongoing |  |  |
|  | Objective 5.3 - Support Department Commitment to Enhance Physical Space | | | | | | |
|  | 5.3.1 | Establish and communicate protocol for exterior design review | | Complete exploratory conversations and determine if process or protocol needs to be developed/documented. | June |  |  |
|  | 5.3.2 | Maintain historical integrity | | Complete heritage surveys for buildings and major spaces. | June & Annually |  |  |
|  | 5.4 Financial Integrity | | | | | | |
|  | 5.4.1 | Ensure financial accountability | | TCO (Total Cost of Ownership) -- develop approach. | - | - | June |

## Finance and Business Services (FBS): Initiatives, Measures, and Due Dates

|  |  |  |  |  |  |  |  |  |
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|  | | **Finance and Business Services (FBS)** | | | | **2018** | **2019** | **2020** |
| **STRATEGIC THEME** | | | **INVEST IN EMPLOYEE SUCCESS** | | | | |
|  | | Objective 1.1 - Invest in Training and Professional Development | | | | | | |
|  | | 1.1.2 | Leadership and staff representation at professional events | | Present at regional and national conferences. |  | June & Ongoing |  |
|  | | 1.1.3 | Development of online resources toolkit for all employees | | Have framework in place in order to support documents. | June |  |  |
|  | | Rebrand, advertise. Benchmark current traffic, the goal is to increase traffic. | June |  |  |
|  | | Training resource guide has been developed, posted, and advertised. | June |  |  |
|  | | 1.1.4 | Develop and implement a professional development program | | Deliver Policy, develop toolkit, advertise, and train on programs that includes policies/practice around formal education, training, and on-the-job training such as rotational assignments, internships, or job exchange programs. | June |  |  |
|  | | 1.1.5 | Identify external training resources for onsite training for FS staff | | Increase the number of trainings offered and conducted. Increase the number of trainings offered on training resource guide. (i.e., APPA Facilities Management Institute, APPA Leadership Academy, etc.). | June & Ongoing |  |  |
|  | | Objective 1.2 - Promote Positive Employee Morale and Engagement | | | | | | |
|  | | 1.2.1 | Continue Employee Satisfaction Survey | | Employee Satisfaction Survey is initiated annually and historical trends are tracked. | June & Ongoing |  |  |
|  | | Make results available to staff provide strategic recommendations regarding resolution/recognition of trends. | June & Ongoing |  |  |
|  | | 1.2.2 | Seek employee feedback | | Creation, development, and advertisement of a virtual and physical employee suggestion box. Commit to provide follow-up, track and provide responses. | June |  |  |
|  | | 1.2.3 | Recognize employees for individual and group achievements | | Recognition programs are in place for individuals and groups (may include community service) such as Safety, Spot, and Keller awards. | June & Ongoing |  |  |
|  | | Provide recognition for participation in Ronald McDonald House, Build for Chicago, and other community engagement efforts. | June & Ongoing |  |  |
|  | | Provide information for other community involvement programs like coat, toy and food drives, etc. | June & Ongoing |  |  |
|  | | 1.2.4 | Onboarding/Off-boarding of staff | | Every employee arrival receives orientation and every departure is announced. Exit interview feedback is shared with supervisor and unit head. | June & Ongoing |  |  |
|  | | Develop and implement a new employee orientation. Recommendations: tweak the previous version, have the AVP do a video; identify a book as gift for new employees. | June |  |  |
|  | | All staff are provided with Mission/Vision/Values/Motto. | June |  |  |
| **STRATEGIC THEME** | | | **IMPACT AND ENGAGE COMMUNITY** | | | | |
|  | | Objective 2.1 - Support Local Communities and MBE/WBE Through Workforce Hiring | | | | | | |
|  | | 2.1.4 | Increase impact of internship programs in local community | | Participate in mentor/protégé capacity building partnership programs in the 7 mid-south neighborhoods surrounding the campus. |  | June & Ongoing |  |
|  | | Contingent upon funding, provide internships and mentorships geared towards students who have an interest in the disciplines represented in FS. | June & Ongoing |  |  |
|  | | Objective 2.3 - Perform our Civic Duty Through Community Service, Charity and Leadership | | | | | | |
|  | | 2.3.1 | Initiate and participate in charity drives | | FS Coat Drive - obtain 50/60 coats. | November & Annually |  |  |
|  | | Ronald McDonald House - FS department hosts three evening dinner meals. | January-March & Annually |  |  |
|  | | Food and Toy Drives - Increase participation and number of meals/toys donated. | November-  December & Annually |  |  |
|  | | Make contact with Civic Engagement for initiative(s) that could be publicized within FS. (example school supply drive with CPS) |  | June |  |
| **STRATEGIC THEME** | | | **EMBODY SUSTAINABILITY** | | | | |
|  | | Objective 3.2 - Reduce Carbon Footprint | | | | | | |
|  | | 3.2.2 | Conserve resources (energy, water, materials) | | Participate in FS Sustainability Coordination Group and hold 3 meetings/year to create strategic partnerships and meet sustainability goals. | June & Ongoing |  |  |
|  | | Objective 3.3 - Implement and Codify Sustainability Practices | | | | | | |
|  | | 3.3.3 | Establish sustainability standards | | Add available information to cool signs. | June & Ongoing |  |  |
| **STRATEGIC THEME** | | | **PROMOTE COMMUNICATION AND COLLABORATION** | | | | |
|  | | Objective 4.1 - Increase Collaboration Across All Units In FS | | | | | | |
|  | | 4.1.1 | Use cool signs to show more information | | Advertise new hires. | June & Ongoing |  |  |
|  | | Use highlights from quarterly newsletter. | June & Ongoing |  |  |
|  | | 4.1.3 | Conduct quarterly unit meetings and bi-annual all staff meetings | | SLT provide updates back to their respective units. | July & Quarterly |  |  |

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|  | | Objective 4.2 - Increase Transparency Thru Internal/External Communication Plan | | | | | | |
|  | | 4.2.1 | Client feedback is solicited, measured, and addressed | | Ops (MAXIMO) client feedback is collected and distributed weekly. Negative feedback must be responded to and reported to unit leader. | Weekly & Ongoing |  |  |
|  | | 4.2.3 | Issue electronic (and printable) quarterly newsletter | | Complete, post (on website) and distribute electronic and print document. | June & Quarterly |  |  |
|  | | Objective 4.3 - Simplify / Clarify Organizational Structure and Processes | | | | | | |
|  | | 4.3.2 | Complete and publish a strategic plan | | Completed Strategic Plan that incorporates staff feedback. | June |  |  |
|  | | 4.3.3 | Centralize all policies and procedures | | Create links to policies (on website, once policies are identified by business unit). | June |  |  |
| **STRATEGIC THEME** | | | **FOSTER STEWARDSHIP AND ORGANIZATIONAL PERFORMANCE** | | | | |
|  | | Objective 5.1 - Manage Department Service Delivery | | | | | | |
|  | | 5.1.3 | Improve Service delivery processes | | Incorporate ageing invoices reviews during monthly BTA meetings. | June & Ongoing |  |  |
|  | | Incorporate cash flows into the pay applications reviews |  | June & Ongoing |  |
|  | | Hold sessions (maybe lunch and learns) for best practices, project debriefs, and working groups. Each unit presents once a year. |  | Quarterly |  |
|  | | Objective 5.2 - Consistent Reliable Data Management | | | | | | |
|  | | 5.2.2 | Use data to improve financial compliance | | Create communication/tracking tool/system for employee loans, pay applications, invoices, and change orders. | Quarterly |  |  |
|  | | Transition energy data into an EMIS for improved reporting and to increase user access. Ensure there are 3 years of history and a process of setting up recharges from prior month’s data. |  | June |  |
|  | | Objective 5.4 - Financial Integrity | | | | | | |
|  | | 5.4.2 | Develop improvements for financial processes | | Create automated notifications of ageing invoices. Success measure: tool is functional and has been advertised. | June |  |  |
|  | | Create account set up and budget revisions through e-builder for ledgers. | June |  |  |
|  | | Work with BSD and Procurement to revamp the BSD contract through payment process. | June |  |  |
|  | | Update financial policy and procedure manual. |  | June & Annually |  |
|  | | Ensure all financial models reflect the recharge system of the new budget model. Budget model and recharging systems align and are timely and accurate. | June & Ongoing |  |  |

## Facility Operations (OPS): Initiatives, Measures, and Due Dates

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|  | | Facilities Operations (OPS) | | | | 2018 | 2019 | 2020 |
| **STRATEGIC THEME** | | | **INVEST IN EMPLOYEE SUCCESS** | | | | |
|  | | Objective 1.1 - Invest in Training and Professional Development | | | | | | |
|  | | 1.1.1 | Allocate sufficient budget and opportunities for staff to attend training | | Staff participation in training sessions/meetings/conventions. 80% first year, 100% second year. (2) Track participation. |  | June &  Ongoing |  |
|  | | 1.1.2 | Leadership and staff representation at professional events | | Present at regional and national conferences. |  | June &  Ongoing |  |
|  | | 1.1.4 | Develop and implement a professional development program | | Develop job ladder/apprenticeship program for 1 trade per year. |  | June & Ongoing |  |
|  | | 1.1.5 | Identify external training resources for onsite training for FS staff | | 5 staff members will become certified or re-certified each year with a target of 20 certified by FY 2020 For example, the goal is 7 staff members by June 18, 14 staff members by June 19, and 20 staff members by 2020. | December & Annually |  |  |
|  | | 1.1.6 | Use CATT's or CANVAS information for validity and compliance. | | Input employees in CATT's or CANVAS to track all training attended by staff members and set annual technical training goals for all frontline workers. | June & Ongoing |  |  |
|  | | Objective 1.2 - Promote Positive Employee Morale and Engagement | | | | | | |
|  | | 1.2.3 | Recognize employees for individual and group achievements | | Recognition programs are in place for individuals and groups (may include community service) such as Safety, Spot, and Keller awards. | June & Ongoing |  |  |
|  | | 1.3.3 | Wi-Fi in mechanical spaces | | Create a needs sheet, prioritize for all of campus, and develop implementation strategy. |  | August |  |

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| **STRATEGIC THEME** | | | **IMPACT AND ENGAGE COMMUNITY** | | | | |
|  | Objective 2.3 - Perform our Civic Duty Through Community Service, Charity and Leadership | | | | | | |
|  | 2.3.2 | Use our skills and resources in larger scope of civic duty | | Rebuilding Together – Chicago Increase participation from all units through video production. | Each April |  |  |
| **STRATEGIC THEME** | | | **EMBODY SUSTAINABILITY** | | | | |
|  | Objective 3.1 - Increase Engagement, Awareness and Participation | | | | | | |
|  | 3.1.2 | Educate community about goals and policies | | Hold 3 meetings/year with CSL staff and support Provost's OSAC. | June & Annually |  |  |
|  | 3.1.3 | Communicate baselines and successes | | Display public dashboards of energy use by building with EMIS. |  | June & Ongoing |  |
|  | Conduct annual waste audits and reports. Deliverable is an annual waste audit targeting facility type with defined after action plan (e.g. Green Labs Effort). | June & Annually |  |  |
|  | Objective 3.2 - Reduce Carbon Footprint | | | | | | |
|  | 3.2.1 | Improve waste reduction, diversion and recycling | | Incorporate double barrel system to separate trash, deliverable will be % of Waste Diversion. Establish baseline for 2018 and then will establish annual diversion% goal. | December & Ongoing |  |  |
|  | Develop cooperative effort between ABM/DFS and Lakeshore, Inventory and Shops to improve diversion rate. Diversion rate for 2018 will be provided then will establish % goal. | June & Ongoing |  |  |
|  | 3.2.2 | Conserve resource (energy, water, materials) | | Create FS Sustainability Coordination Group and hold 3 meetings/year to create strategic partnerships and meet sustainability goals. | June & Ongoing |  |  |
|  | Complete Greenhouse Gas emissions reduction plan. | June |  |  |
|  | Reduce Green House Gas emissions by 3% annually. | June & Annually |  |  |
|  | Monitor refrigeration and loss closer. Create a policy for tracking. |  |  | June |
|  | Define bulb, ballast and battery recycling process. Establish baseline metrics and determine if improvement can be implemented. | June & Ongoing |  |  |
|  | Implement Solar Power PM’s. |  | June & Ongoing |  |
|  | Develop a plan to increase central plants efficiencies. | December |  |  |
|  | Objective 3.3 - Implement and Codify Sustainability Practices | | | | | | |
|  | 3.3.2 | Establish Design, Construction, and O&M Standards. | | Increase preventative maintenance (PM) and use accurate data and KPI’s to measure and develop target. | June & Ongoing |  |  |
|  | 3.3.3 | Establish sustainability standards | | Increase Green Seal Certified chemicals usage for janitorial. The target will be defined as % of spend that is Green. |  |  | June |
|  | Implement CRI certified equipment. The target will be defined as % of equipment that is CRI certified. |  |  | June |
|  | 100% of vendor staff retrained in proper cleaning procedures. |  |  | June |
|  | Review all shop materials and equipment for Green options. |  |  | June |
| **STRATEGIC THEME** | | | **PROMOTE COMMUNICATION AND COLLABORATION** | | | | |
|  | Objective 4.1 - Increase Collaboration Across All Units In FS | | | | | | |
|  | 4.1.3 | Conduct quarterly unit meetings and biannual all staff meetings | | SLT provide updates back to their respective units. | July & Quarterly |  |  |
|  | 4.1.4 | Increase CPD and Operations collaboration | | Improve design, retrain, and enforce turnover process. | June & Ongoing |  |  |

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|  | Objective 4.2 - Increase Transparency Thru Internal/External Communication Plan | | | | | |
|  | 4.2.1 | Client feedback is solicited, measured, and addressed | Ops (MAXIMO) client feedback is collected and distributed weekly. Negative feedback must be responded to and reported to unit leader. | Weekly & Ongoing |  |  |
|  | Objective 4.3 - Simplify / Clarify Organizational Structure and Process | | | | | |
|  | 4.3.1 | Obtain signed Service Level Agreements. | Make the basic SLA available for client review on the FS website. | July |  |  |
|  | 4.3.2 | Complete and publish a strategic plan that incorporates staff feedback. | Director(s) will develop a shop communication plan and implement plan for their teams in collaboration with each direct report. | June | - | - |
|  | Objective 5.1 - Manage Department Service Delivery | | | | | |
|  | 5.1.1 | Manage Contract Services by KPI | The vendor must conduct Janitorial inspections. The KPI target is 80% score and 100% complete. | Monthly |  |  |
|  | FS staff will conduct 15 random Janitorial validation inspections. The target is 80%. | June & Ongoing |  |  |
|  | Review Pest Control KPI monthly. The measurement is multiple KPI's reported and action plans developed. | June & Ongoing |  |  |
|  | Elevators managed by KPI reviews monthly. Target metrics to be identified and reported. | June & Ongoing |  |  |
|  | Waste management - Diversion rate, also review weight by collection point to determine service level increase or reduction. | June & Ongoing |  |  |
|  | Grounds inspection KPIs will be developed and implemented. |  | July & Ongoing |  |
|  | Building inspections KPIs will be developed and implemented. |  | July & Ongoing |  |

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|  | | 5.1.2 | | Conduct Customer Satisfaction Review Using Maximo POS | | Publish results in annual report to campus colleagues by type. | |  | June & Ongoing |  |
|  | | Conduct annual Residential Properties (RP) housing satisfaction survey. | | April & Annually |  |  |
|  | | Conduct annual Residential Housing and Dining (RHD) student survey (CSL). | | June &  Annually |  |  |
|  | | 5.1.3 | | Improve Service delivery processes | | Hold sessions (maybe lunch and learns) for best practices, project debriefs, and working groups. Each unit presents once a year. | | Quarterly |  |  |
|  | | Establish an equipment inventory. | | June & Ongoing |  |  |
|  | | Improve Aging of Priority 1 work. | | December & Ongoing |  |  |
|  | Objective 5.2 - Consistent Reliable Data Management | | | | | | | | | |
|  | 5.2.1 | | Use data to promote safety | | Safety training compliance reporting (% Complete). | | June & Ongoing | |  |  |
|  | Stretching programs or other safety incentive programs. | | June & Ongoing | |  |  |
|  | Near miss log and debrief sessions. | | June & Ongoing | |  |  |

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|  | Objective 5.3 - Support Department Commitment to enhance Physical Space | | | | | |
|  | 5.3.3 | Implement turnover process | 100% signed turnover sheet completed on all CPD Projects. |  | June & Ongoing |  |
|  | Develop a workflow. | June |  |  |
|  | 5.4.1 | Ensure financial accountability | Ensure actual expenses do not exceed budgets either by income improvements or cost saving/avoidance efforts. | June & Ongoing |  |  |
|  | All new facilities and or remodels are reviewed annually by the operation leadership team and submitted to Finance for consideration to inform new or remodeled emerging cost development. | June & Ongoing |  |  |
|  | Advocate effectively for capital investment by contributing to the planning model and annual condition assessments. The measure is % of FS recommendations by priority approved vs rejected or postponed. | June & Ongoing |  |  |

Appendix E: SWOT Analysis

1. Working Group –Facilities Services professional representing various levels and departments.

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| **Strengths** | | |
| Internal:  Leadership & Resources | | * We have resources. * Commitment to staff support. * FS facilities / work space / equipment. |
| Internal:  Staff | | * We have a diverse team. * Our staff has pride and dedication and commitment. * Our team is responsive, adaptable, and innovative. * We have staff that has unique & varied skillset (2) and expertise. * We are problem solvers. * We have deep and broad institution knowledge (3). * We are effective and resourceful. * We work well w/ our university. |
| Internal:  Product, Services, Processes | | * We bring new ideas to the table. * We make outreach efforts. * We have a problem solving approach – can do attitude. * There’s growing collaboration. * We have/provide stellar technology. |
| External:  Support | | * Key contract / business partners. |
| **Weakness** | | |
| Internal: Processes &  Communication | | * We have too many and inefficient systems/process. * Silos are being rebuilt. People are holding on to information. There’s a non-sharing of information. * Getting people to stay in swim lanes. We need role clarity. * Double standard among units. * We talk the talk, but don't walk the talk. * Perception of “ivory tower” (People of 12th and 10th floor – off campus). * We don’t collaborate enough. |
| Internal:  Staff | | * We need thoughtful investments in staff – ask what the expected outcome is? * There’s lack of training (2). * Need to celebrate success (of each other). * Disassociation w/ leadership (they don’t know me, I don’t know them. * Non-acknowledgement of staff change/turnover *(Is this is a past issue or still an issue)?* |
| Internal:  Resources | | * We are underfunded and under resourced (2). Is this a perception or reality? * Not enough of us and turnovers (causing more work, more often). * Think about the impact to the team. * Our technology needs integration among systems and alignment. |
| External: Relationship & Communication | | * We don’t collaborate enough. * We need to improve communication challenges across units departments. * We need to finish or need more service levels agreements. * We need to better manage and influence customer perspectives. |
| **Opportunity** | | |
| Internal:  Leadership & Resource | * Specific to roles and functions. * New Budget Model – greater ownership and control of funds by the user group. * Trust in the team and staff empowerment. | |
| Internal:  Staff  Development | * Comprehensive training approach. * Leverage outside organizations for training. (APPA, Local 399 etc.). * Team building activities: On and off campus. During and after work hours | |
| Internal: Product, Services,  Processes | * Develop/Implement a strategic communication plan – Staff to SLT; SLT to staff. Provide transparency through technology & Communications. Newsletter system. * Better utilize /integrate technology. * Complete the service level agreements. * Identify area of improvements with partners: Service groups, service users. * Develop affiliation to best in class association (peer interaction). * Understand the process of other areas. * Integrate staff team/function by restacking offices. | |
| External:  Communication  Credibility | * Leverage closer access to President's office – seat at the table. * Enhance community engagement: Hyde Park. City of Chicago proximity/opportunity. * Leverage OPC – Obama Presidential Center. * Clarify customer expectations. | |
| **Threats** | | |
| External - Campus | * Previous and past perceptions. * We don’t have architect so no design ownership. * Obama Presidential Center may use up a lot of neighborhood good will. * University culture is overly process driven at the expense of the people – we need to be more people driven. * Fear of engagement by the staff. * Current White House Administration’s view on title IX, DACA, etc. may pose threat to higher ed. | |
| External – Economy / Market | * Budget constraints. * Cost of living near campus. | |

1. SWOT Analysis – Senior Leadership Team

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| **Strengths** | | |
| Internal:  Leadership | | * AVP’s leadership emphasis on leadership engagement. SLT is well supported by AVP. AVP simplified many things. AVP is direct and fosters ownership. SLT roles & responsibilities are clearer. AVP has the president’s confidence. * High expectations set by AVP. Goal of AFE is rallying people around a common goal. The SLT are expected to work together. SLT are given credit and held accountable for their area. |
| Internal:  Staff | | * We have technical expertise. * We are learners, making changes from past projects/situations * We have dedicated, reliable staff. * We deliver good capital projects. * We have a good team and good team collaboration. |
| Internal:  Product, Services, Processes | | * We are well aligned structurally. * We have good budget of $125MM annual operating. $180 M capital. * Some good processes and collaboration in place:   + Working smarter and greater customer service focus (2).   + Folks are teaming up – for example on sustainability projects and capital project delivery.   + Team members are talking things through with others.   + Systems are in place – for example: zone managers, and predictive management program being developed. * We provide good customer Service:   + We have project delivery guide. Capital project delivery.   + We provide good custodial value. Grounds too. |
| External:  President & Support | | * President has had strong initiative and will takes risks – for example, his courageous decisions led to removing cars from the quad. President is future thinking and has the Board’s support. As a result, we have made major changes to city with positive impact. * There’s lots of pride in our facilities (2). There’s respect for the heritage of our campus * We get positive customer feedback. We understand our clients. We have made improvements in communication. |
| **Weakness** | | |
| Internal: Processes &  Communication | | * We are too busy. * Campus priorities shift and we are reactive. * We send mixed message from and to FS Staff. * Operations – not working. * We have metric gap. Some metrics are not strong: FTE/Supervisor, FTE/Student, Material costs. Cost is higher per sf- perhaps the age of building. |
| External: Relationship & Communication | | * FS is criticized for heavy cost. * We are often not the first-choice partner. People feel they have to use FS. * Shifting campus priorities * Connecting with customers * We need to improve communications: FS to clients and clients to FS. |
| **Opportunity** | | |
| Internal:  Leadership | * Clarify some overlapping roles (2). * Improve communication. * Provide/get 360 feedback. Learning & counter support. * Empower the staff. | |
| Internal:  Staff  Development | * Educate FS: Sensitive team beyond their own units to recognize each have limited expertise. Talking things through. * Provide/get 360 feedback. Learning & counter support. * In-house training programs * Cross train. Recognize talent. | |
| Internal:  Staff Recruitment & Retention | * Alignment of system and people. Clearly defined roles & responsibility. Promote within. * Retention program. * Attracting talent. Attract high caliber leadership. | |
| Internal: Product, Services,  Processes | * Get Preventative Maintenance program in place. * Create a center of shared resources. * Be more open to allow and sustain creative working environment. * Integrate technology in all areas (campus systems). * Secure donors/supporter for *Odyssey Programs (?)* * Do projects well. | |
| External:  Communication  Credibility | * Educate campus to the value FS adds. Get campus support by building credibility & value so we will be seen as the go to unit. * We can do expectation management to get campus confidence of in our processes. * We need to educate the campus community and get FS people to the table. * We need a single executive project sponsor instead of several with different expectations. * We need to build campus confidence in FS and get the AVP to the table (or provide more leverage. | |

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| **Threats** | |
| External - Campus | * We are held to high standards and unrealistic campus expectations. * Budget/funding constraints * Concern of vote of no confidence with FS. * Demanding environment. * Board and SR Leadership priorities are unknown. * Perception that FS does not add value. |
| External – Economy / Market | * P3 Work assignments can bypass FS. * Outsourcing. * Talent retention. Turnover (from competition). No career path leading to retention issues. Budget cuts * Economy * Costs of goods/services |

(c) SWOT Analysis – External Stakeholder representing broad campus community.

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| **Strengths** | | |
| Internal:  Leadership | | * AVP’s response is great. Taking time to align the team and make changes is good a good idea. * Larry (ED) is an improvement over his predecessor. Good communication. * Senior Director is the “greatest asset” responsive, knowable, great team member/ respected, and straightforward, “he gets it.” He is spread way too thin * Willingness by leadership. They are willing to make improvements. |
| Internal:  Staff | | * FS did a good job training Bldg. Service Managers, although these positions no longer exist. * South campus engineer is very helpful. * FS has internal experts who have great outlook. * Several line staff are fantastic. * FS has a diverse team with skills, knowledge, pride, and dedication. Some are innovative & adaptive. * Staff is committed to supporting what we do. * Staff have great attitude. |
| Internal:  Product, Services, Processes | | * Quality of work is good – they have professionals in the shop. We seldom have issues once the work is finally done. * Campus is beautiful – the grounds, the buildings, the composition and how the environment feels. It’s very welcoming architecturally. Great visual impact. The care and attentiveness is noticeable. * FS does a remarkable job maintaining the campus. * Campus has lots of new and beautiful building. * Quad is nice – really opened up the campus (2). * Assignment of specific personnel who know their buildings is nice. * Isolated incidents of collaboration. Asking the clients what the customer’s needs/perspectives are. Example 1: Money left from project Reynolds Club was used to for a painting project. Example 2: cost sharing, a 50-50 split project hot water tap bottle refill station with student government. * Energy team is being proactive. |
| External:  Communication | | * FS appears to be more willing to communicate. * FS does communicate, but usually after the decision are made and not before. We, the customers, have to adjust after the fact! * Advance communications on major capital projects. * FS is appreciated by some customers. “FS has a huge job and they are an important, high value organization.” * FS has good business partners (outsourced) services. |
| **Opportunity** | | |
| Internal:  Leadership & Resource | * Changes in the FS has caused confusion of who does what. * Clarity of role. * Have the team feel valued. They are under appreciated. Educate the campus community so they can appreciate what FS does. * Changes in the org has caused confusion of who does what. | |
| Internal:  Staff  Development | * Team needs coaching to be effective with executives. * Be more effective | |
| Internal: Product, Services,  Processes | * Communicate effectively what’s happening. Better communication! * FS need to include the customers in planning so we understand what’s going on. * We have to call a number of times to FS to get information, follow up. * Need more frequents project updates. * Noticeably more trash, weeds, graffiti. Clean up graffiti better. * Need more customer focus- look at FS from the customer perspective * Communication needs to be more proactive. * FS needs to increase in coordination Streamline coordination of work. Being more detailed. Making sure who is in the building, tell us when you are done. Creates unnecessary. Place a note. * The new budget model could open doors to funding. * FS needs a structured approach. * Residential site needs better service. | |
| External:  Communication  & Coordination | * Need to partner with Stakeholders. * Frustrations of customer feeling like they are to nag. * Educate the campus of what FS does Engagement with clients in a way – customer driving conversation. It’s “ONE WAY.” * Communication – contact person. Should be one person, but even two would be okay. Difficult to know whom to contact. * Relating through techs is okay for continuity, but for customers they see lack of ownership. Supervisors are spread thin. Worked at FS sr. client services – doesn’t exist anymore. Liaisons between shops are missing. Seeking customer feedback – communicating wins. Getting out there to meet face to face with. Education. Marketing. * Work coordination is missing. Each shop represents their own shops. No central contract person – not convenient for customers. Team is not coordinating or communicating how they do things. Need more process. * A shift in how business is done. Make communicating everyone’s job. At the shop level/supervisor level. Coordination missing. COMM should be everyone’s job. | |
| **Threats** | | |
| External - Campus | * Not familiar with FS – least familiar – need more communication. * Team is in the dark. FS might lose some because people don’t like unknowns. * Budget (4): Budget structure, new budget model Budget cuts. * Outsource. * Who controls what work gets done? * Lack of technology integration. * Loss of ownership. | |
| External – Economy / Market | * Lack of Funding - they will need to be nimble. | |

1. SWOT Analysis – Facilities Services Line Staff

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| **Strengths** |
| * We have a good team. We are professionals and we get along. * The skill level of staff. * We provide quick, reactionary response time. * We have process for handling urgent requests. We call out on radio and the person who can take care of it responds. * Work prioritizing by foremen and work center. * We are getting better at what we do by learning from our past. * We try new and innovative products (locks, access control systems). * We are successful. * We are surviving the leadership change. * We survived the budget cuts & CFO. |

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| **Weaknesses** |
| * Low morale resulting from uncertainty and lack of information. * Being constantly asked to do more with less. * Transitioning the internal campus systems. * People / departments varying from Campus standards * Little communication leaders. * Sharing feedback. * Seeking feedback. |
| **Opportunities** |
| * More $ * Improve communication – monthly update? * Transparency – budget, for example |
| **Threats** |
| * Outsourcing * Other jobs are more attractive. |