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| **To**  | Michael Harwood, Campus Planning and Facilities Management |
| **From**  | Leah Rausch, Institute for Policy Research and Engagement |
| **SUBJECT**  | **quest for the best session Three summary** |
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Campus Planning and Facilities Management (CPFM) wants to understand and enhance the experience and effectiveness of the approximately 300 employees within the Division—a project CPFM is calling “Quest for the Best.” The “Quest for the Best” seeks to identify key issues and strategies to improve the culture of collaboration and customer service at CPFM.

The Institute for Policy Research and Engagement team members conducted ten focus groups with approx. 30 CPFM staff members. CPFM and IPRE leadership began the session by sharing project objectives, agenda, and ground rules. Participants were then divided into three small groups representing a mix of departments. Within each small group, IPRE team members moderated a discussion to respond to three questions:

* What should CPFM keep doing?
* What should CPFM start doing?
* What should CPFM stop doing?

Each small group identified top themes from each of the three questions to report out to the larger group. Finally, participants voted on their top “theme” from each question. This memo summarizes the top themes from the first session. Appendices I-III provide full session notes; Appendix IV presents the top themes and the results of the dot voting process.

# Key Themes

Participants indicated several strengths as well as opportunities for improvement at CPFM. The organization provides clear project direction through several effective standard operating procedures, including the campus notice process, and generally hires quality staff members. CPFM could improve team dynamics by providing more training opportunities and cultivating systems knowledge. Participants suggested a revenue generating surplus system and continued updates to campus standards. Finally, participants felt they are not adequately involved in decision-making and desired new strategies to address staff capacity—a theme that has emerged in several of the sessions.

## What should CPFM keep doing?

* **Providing clear direction through standard procedures:** CPFM has some organizational procedures and tools in place which participants felt improved clarity and direction. One group discussed the safety meeting each week where they identify priorities across projects. This meeting provides a valuable understanding of what is coming up and doesn’t feel like a “meeting for meetings sake.” Another group referenced new software that encourages collaboration across teams and helps to break down silos.
* **Using the campus notice process:** The group felt campus notifications for major projects such as renovations worked well and help to maintain occupant focus.
* **Hiring quality staff:** Participants noted hiring panels serve as an effective tool in recruiting top quality talent. Participants felt CPFM generally hires high quality workers who take pride in their work. One group specifically discussed recent improvements to the capacity of the shop team. The group was encouraged by the growth in shop teams and investments in equipment. Participants indicated they felt united through team building activities, good working relationships with partners across campus, and an atmosphere of comradery.

## What should CPFM start doing?

* **Build systems knowledge and training opportunities:** Participants indicated there are opportunities to increase training available on software, equipment, and pathways for professional growth. Improved training could help to build institutional knowledge retention, avoid gaps when someone leaves, and enhance organizational resilience. One group thought there should be mandatory training on required operational systems, software, and purchasing. Supervisors should participate in the trainings in the early stages to help with communication and crew member assignments. Another group felt CPFM could offer more support in cultivating professional growth, helping employees to discover their strengths, and how to pursue additional certifications and training. Participants felt career advancement opportunities should be communicated more frequently to staff and the reclassification process needs to be streamlined.
* **Develop a revenue generating system for surplus equipment:** One group suggested commodifying and selling surplus CPFM property, which other universities have done successfully. This would dispose of things in a useful way, potentially through an auction, events, or sales to other institutional buyers.
* **Update and enforce policies and procedures:** Participants specifically referenced the poor use of campus standards guidelines. The guidelines are out of date and not followed closely. Some felt this, combined with a lack of involvement from trades people, resulted in the use and purchase of “cheap parts.” Other opportunities to improve standardized policies include an introduction for new employees, third-party exit interviews, standardized electronic time tracking, and engaging trades people in price bidding.

## What should CPFM stop doing?

* **Overloading existing staff:** As one participant stated, “we have too many captains and not enough crew.” Several participants felt there was a focus on middle management rather than crew level staff capacity and gaps. They felt this focus resulted in overloading staff rather than hiring more. One group specifically referenced they lost eight custodians in six years but have more buildings to service. Some felt a source of this limited capacity were many unfilled positions and difficulties in attracting and retaining talent. Limited capacity also resulted in lead workers performing supervisory tasks without just compensation. Overall, there was dissatisfaction on the division between supervisors and crew staff, who are often asked to do additional work but not adequately engaged in decisions.
* **Making changes without adequate involvement:** Participants stated that current project planning does not engage stakeholders at all levels early or often enough. For example, construction staff are not involved until it is time to actually begin work, resulting in the underutilization of staff knowledge. Another group indicated there was an opportunity to implement a review process prior to organizational restructuring to gather input on what is working well before changes are made.

## Additional Comments

The small groups identified other top themes from their discussions, including:

* **Honoring time-off and leave policies**: Participants appreciated the consistent and supportive environment surrounding time off and leave policies.
* **Focusing on one project at a time to completion:** Participants in one group suggested CPFM start focusing on projects and changes one at a time so they are advanced more efficiently. Some staff felt they regularly revisited decisions and changed directions mid-project.
* **Valuing employees and building trust:** Participants felt that the staff are competent in their roles and tasks and should be trusted more to do their work. Some felt there were opportunities to share more information across the organization on the different roles and tasks in order to avoid judgement from colleagues.
* **Ignoring campus community:** One group suggested that CPFM could do more to tap into student expertise. They may be able to train them or involve the campus community more.
* **Providing disinformation and being disingenuous:** Participants felt there should be more transparency and honesty, especially related to recent fiscal challenges and cutbacks. Some suggested management should be more explicit if they don’t know the reasons for change.

# Appendix 1. Table 1 Notes

* One word to describe your ideal work environment
	+ Well trained
	+ Cooperative
	+ Care
	+ Cooperation and communication between departments
	+ Team, we’re all trying to look out for each other
	+ Productivity
	+ Compartmentalization/Cooperation between different departments
* Continue – What should CPFM keep doing?
	+ Team building, and keep communication with other departments
	+ Quarterly gatherings, fun events (this is something new, some feel it creates more work though), it was fun to go bowling.
	+ Events and activities that are open to all staff in CPFM
	+ I feel like there are lots of things going well. I’m especially valuing leave time and knowing the coworkers will take care of CPFM. Having policies in place for these things.
	+ Leave/Time off policies are supported and followed
	+ Understanding the leadership team.
	+ Starting the week with a safety meeting and identifying what the priorities are among all the projects we’ve got going. Knowing what’s on the horizon so I’m not surprised. Not meetings for meetings sake though.
	+ The new software is making CPFM staff interact. Silos are breaking down. Forcing an understanding that we need to communicate between modules to get things done.
	+ Getting a better idea of interconnections between the departments.
	+ Use of organizational tools and software that forces and promotes collaboration.
* Start – What should CPFM start doing?
	+ Start looking at a surplus program that can be revenue generating
	+ Start commodifying and selling our surplus property (desks, equipment, chairs, extra stuff after demos) Other universities are doing this and its really successful. Some do auctions, have events open to the public, put stuff online for institutional buyers. This would dispose of things in a useful way.
	+ Start training from the top down when we change anything. The supervisors should be trained with the workers.
	+ Start building institutional knowledge retention systems when we lose the institutional knowledge. We need twice as many people to make up for losing one.
	+ There needs to be mandatory training for required operational systems, software, purchasing
	+ A digital clock-in and clock-out system. Digital timekeeping will save almost 2 hours of staff time who has to enter into AIM. But also standardized time keeping to ensure everyone is on the same system
	+ Start completing more projects, following them through to completion. The orders from the top are not coming down efficiently. Start focusing on projects/tasks one at a time (hopefully) so projects are completed, and we don’t have to go back and remember what we were doing.
	+ Start assigning parking spaces when necessary. Some crews need parking to get into their job, it’s a necessary job function. Staff might take more time than they actually need to leave campus during the day, because they won’t be able to get back and park. Buses are only periodically reliable, and some people don’t live near buses.
	+ Staff need their own parking areas
	+ Start encouraging more cross-department, cross team collaboration and team building. Build those relationships.
	+ Start trusting that people know their roles and tasks, and educate across the department what people’s roles/tasks are, to avoid judgement
	+ Start using the knowledge and students that are here at the university to fix things, like computer science, stuff like that, train them/ask them to do what you want/need.
* Stop – What should CPFM stop doing?
	+ Stop changing procedures without first getting input from who it’s going to affect
	+ We have too many captains and not enough crew. Can we hear about hiring new employees instead of just hiring managers?
	+ Stop overloading existing staff instead of hiring more
	+ We’ve lost at least 8 custodians in 6 years but have many more buildings to service.
	+ Stop overlooking where our work has holes in it now, and focus more on fixing that, instead of focusing on middle management.
	+ We have several broken rungs in communication. Stop ignoring communication problems and address them.
	+ Stop discounting the willingness of student and campus involvement to help out
	+ Stop changing the software platforms. When we finally learn the program, it changes.

# Appendix II. Table 2 Notes

* Continue – What should CPFM keep doing?
	+ Hiring process, 7 or 8 on a panel
	+ Looking for opportunities to improve
	+ Keep hiring appropriate staff
	+ Special group meetings, diversity group, step committee
	+ Events, picnics, winter celebration, bowling (team building)
	+ Clean offices weekly instead of monthly
	+ Taking pride in your work
* Start – What should CPFM start doing?
	+ Allow the trades people to do their own bids and votes. They were taken away and they would like to have that back
	+ This is a policy that snuck through. You have people who are in the wrong management rolls trying to price different projects
	+ Cheap products are being brought in
	+ Start following campus standards again
	+ Updating the campus standards. Cheap parts
	+ Keep management accountable for these improvements
	+ The employees feel like they are the enemy, especially as they apart of the union
	+ Some of the vehicles are pretty underused, they have a lot of vehicles sitting around
	+ Past few years, there has been a lot of talking around certain thinks, but not a lot of decision making
	+ There are policies and procedures, they have them, but people don’t know what they are
	+ If they had new employees, there is not an introduction
	+ There used to be a monthly safety class – the trainings can be repeats
	+ You have to go into “my tracks.”
	+ Work control – you don’t know what the other departments
	+ Sometimes its technical, sometimes its who that person
	+ Getting the trades together, to explain what things are in order to increase collaboration
	+ Retaining talent – how to keep good people
	+ They could recruit quality people for the middle levels
	+ Discount lunch meals
* Stop – What should CPFM stop doing?
	+ New in-house new construction
	+ They are having maintenance people doing construction
	+ They set expectations up way to high.
	+ Allowing groups outside of CPFM what you can accomplish. You have non-experts trying to direct projects. Outside influence, inside too
	+ Stop using non-qualified trades. Unqualified trades being on call
	+ Parking tickets
	+ Weird shifts – we have people starting at different times of the day.
	+ There is some distrust – there is an assumption of laziness.
	+ A few bad apples
	+ Building trust and relationships – non-experts being allowed
	+ Parts of CPFM telling others what to do
	+ There is a lot of top down disrespect across different trades
	+ Custodial has a negative stigma – even from other campus groups
	+ On call system – Used to be a day to day plumber
	+ Cheaper short cuts – its hurting the longevity of the buildings
	+ Shoot from the hip mentality instead of deliberation

# Appendix III. Table 3 Notes

* Continue – What should CPFM keep doing?
	+ Communication is an open channel. Team is well united
	+ Team building activities (kick-ball, frisbee, picnics). Got to see people that would’ve taken months to meet.
	+ Campus notifications are working well. When doing renovations they have to notice utilities. Occupants can stay focused on projects.
	+ Keep equipment/capital/investment (new trucks) in work equipment. It’s improved dramatically.
	+ Keep good working relationships with partners (stakeholders). Work with people all over campus
	+ Keep building the facilities team (mechanical / the support for campus) Build the shops with more support. Build shop teams.
	+ Keep access to trainings – attractive.
	+ Comradery on the jobsites – good thing / more professional
	+ Emphasize collaboration.
	+ Information sharing / meetings
* Start – What should CPFM start doing?
	+ Personnel updates. So many people have left and no idea who fills that role. These are people they interact with. Tell people how/where their role shifts.
	+ Bring people into the planning phase of projects at the worker level
	+ A lot of resources there that are not being engaged
	+ Bring them on-board at
	+ Plan review process needs to be rebolstered
	+ Current project planning team does not engage others timely – not during construction.
	+ Assessing WHY people are leaving.
	+ Is it support?
	+ Conduct exit-interviews done by third-party
	+ Take the feedback serious
	+ Be told about advancement opportunities // Just like to know
	+ Currently they say “go to the website”
	+ Career Development
	+ Identify pathways for growth
	+ Help employees find what their good at
	+ Discover our talents events
	+ Offer trainings/certifications
	+ Info on other related
	+ Used to get a list of people who were off for the day
	+ Save time spending an email/calling
	+ Become aware of employee benefits (discounted law services)
	+ Encourage innovative/out-of-the-box ideas
	+ Some channel to express innovative idea to improve
	+ If you need something, then there is a route for you to get it.
	+ Start valuing the input from people who’ve been there for awhile
	+ Currently have meetings to discuss process.
	+ Things in the past that haven’t followed through
	+ Committee system is random, ad hoc.
	+ After organization, a lot of changes. There were things that worked in the past, we need to revisit those.
	+ Review process to identify what worked well in the past. Lost because of no trainings / power grab.
* Stop – What should CPFM stop doing?
	+ Stop treating the “tradesman”/ standard employees less than management position
	+ Allow constructive input
	+ Lack of follow-up on decisions made. There needs to be stronger communication.
	+ Stop reorganizing
	+ Entire CPFM
	+ Stop breaking up shops that are effective
	+ Happens because of a management issue
	+ Manager only had a few people to manage so it was a fiscal responsibility
	+ Stop having estimators act as project managers
	+ Stop having Lead Workers doing the work of a Supervisor without just compensation
	+ Stop making reclassification hard/burdensome
	+ Why are there fiscal responsibility issues?
	+ Need more transparency
	+ More information
	+ Stop lying in general and about cutbacks
	+ If you don’t know, say I don’t know

# Appendix IV. Dot Voting

* Continue
	+ Procedures and organizational tools in place providing clear direction (9 votes)
	+ Campus notices process (4 votes)
	+ Hiring appropriate staff (3 votes)
	+ Team building and open communication (2 votes)
	+ Honoring time-off and leave policies (2 votes)
	+ Strategic planning processes (0 votes)
	+ Building up shop teams (0 votes)
* Start
	+ Building systems knowledge and trainings (4 votes)
	+ Revenue generating surplus system (4 votes)
	+ Updating policies and procedures (4 votes)
	+ Bring workers into planning process at appropriate times (3 votes)
	+ Make staff aware of personnel changes – third party exit interviews (3 votes)
	+ Focus on one project at a time to completion – start to finish (2 votes)
	+ Review process of things that worked well before restructuring (1 vote)
	+ Valuing employees (1 vote)
	+ Holding management accountable (0 votes)
* Stop
	+ Overloading existing staff – address capacity issues (9 votes)
	+ Changing procedures without input from those affected (8 votes)
	+ Setting unrealistic goals (2 votes)
	+ Restricting effective teams (1 vote)
	+ Reclassification of jobs (1 vote)
	+ Ignoring campus community who are willing and able to help (0 votes)
	+ Distrust of employee ability (0 votes)
	+ Non-expert decision-making (0 votes)
	+ Providing disinformation and being disingenuous (0 votes)