|  |  |
| --- | --- |
| **To**  | Michael Harwood, Campus Planning and Facilities Management |
| **From**  | Leah Rausch and Bob Parker, Institute for Policy Research and Engagement |
| **SUBJECT**  | **quest for the best session seven summary** |
|  |  |

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 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 identified several strengths and many opportunities for improvement within CPFM. There was a strong consensus that the organization should continue prioritizing professional development, continuing education, and training for staff, but there are opportunities to continue providing career mobility. Participants also expressed appreciation for the recent updates to CPFM infrastructure and efforts to centralize staff. Many felt there were ways to better maintain and honor institutional knowledge, especially through internal hiring procedures. Participants expressed support for more focus on preventative maintenance. Finally, the group expressed frustration with APPA Standards and the resulting burden and the resulting restrictions on crew capacity. Participants indicated several areas for improved efficiencies, specifically in HR practices and organizational meetings.

## What should CPFM keep doing?

* **Providing professional development & continuing education opportunities**: Participants valued training and continuing education experience that allowed them to advance and improve within their positions or trades. The small groups indicated support for allocated budget to employee training, even considering recent budget cuts. These opportunities for continuing education are critical for day-to-day operations. One group cited new campus buildings and associated complexities that require specialized trainings to operate. Another group indicated there is room to improve in scheduling and organizing the trainings, and participants felt more individuals would participate if the notification process improved.
* **Updating CPFM infrastructure:** Participants noted the improvements to infrastructure (i.e. facilities) that have occurred over the past few years. The group felt updated infrastructure would prevent too much dispersion across campus, improve the work environment, and ultimately impact staff efficiency.

## What should CPFM start doing?

* **Valuing institutional knowledge, especially through internal promotions:** Participants noted several ways CPFM could better honor and maintain institutional knowledge. One group suggested asking veteran employees to share their experience with new employees and help to document critical information that may be unique to university standards or the particular work site. There is also an opportunity to consult the more experienced staff and trades people when developing campus standards and before making major decisions about changes to policies and procedures. Finally, participants felt current hiring practices limited the continuity of institutional knowledge, specifically the difficulty in internal promotions, not filling positions when people retire, or not back-filling jobs. These issues result in obstacles to career development and hinder employee morale and effectiveness. Ultimately, participants would like it to be easier to promote from within.
* **Providing career mobility options:** Participants want CPM to invest more resources in professional development. This effort might include an apprenticeship program, journeyman program, and offering licensing and certification opportunities. Participants hope to see a more direct pathway to job growth and experience.
* **Prioritizing preventative maintenance:** Participants believe CPFM can do more to preserve equipment, tools, and resources to prevent them from failing later on. There is a desire to place higher priority on these preventative measures. Participants indicated this would require hiring additional staff and replacing vacant positions. Staff are interested in focusing on maintenance to save costs and headache down the line, but do not currently have the capacity to do so.

## What should CPFM stop doing?

* **Using APPA Standards:** One group felt APPA Labor Standards resulted in inaccurate measures of necessary resources and inadequate staffing. Specifically, APPA standards based on “minimum required quality” lead to crews producing lower-quality work than the campus standards to which they were trained. Participants felt they are not delivering high-quality results because they have to meet these arbitrary standards.
* **Running skeleton crews:** Similarly, participants felt CPFM held expectation of consistent quality when the crews are understaffed and overworked. One group felt budget cuts had a greater impact on crew members than OA staff, and indicated there were too many administrators and not enough crew members.
* **Scheduling inefficient meetings:** Participants generally felt there were too many meetings within CPFM and that these meetings are often run inefficiently. Groups cited meetings where staff are assigned more and more work rather than discussing progress. Additionally, a lack of agenda and/or meeting minutes made it difficult to follow-up on action items. Finally, participants cited various scheduling issues, including not being able to reach supervisors, lack of time-distance accounting, and conflicts with lunch breaks or staff schedules.

## Additional Comments

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

* **Hiring quality staff:** Participants felt satisfied with the quality and competence of new hires. Participants also mentioned new hires are able to get up to speed quickly because of the work atmosphere.
* **Coordinating social gatherings:** Participants appreciated opportunities to interact with other employees. One group expressed interest in more on-campus tours offered to encourage a campus community that is inclusive of all employees. For example, not all participants knew museum tours were offered but expressed interest in the future.
* **Cultivating a culture of collaboration:** Participants enjoyed opportunities to share resources, knowledge, and capacities within their department. Collaboration allows staff to problem solve and feel empowered to help each other out. One example cited was the integrative work between facilities and utilities. This aligned with participants desire to further break down silos and establish more cross-functional teams based on talent rather than job title. Similarly, participants noted an opportunity for improved communication, specifically in project scheduling, which could be addressed using AIM.
* **Supporting more efficient processes:** Participants cited various opportunities for improvement, including the GIS call log integration, communication systems, and AIM. Additionally, participants desired cross-training on how other staff use systems like AIM so they can better communicate and work efficiently across departments.
* **Increasing transparency between supervisors and crews:** Participants expressed that supervisors and management have done a better job of communicating with crews, offering more transparency in decision-making, listening to input, and keeping the lines of communication open. Participants felt these were positive changes that they would like to see continue, and also be expanded to all teams within CPFM.
* **Improving the HR practices:** Participants indicated a need to partner with FASS/HR and communicate the importance of an efficient hiring process in order to compete in the tight trades labor market. Another area of dissatisfaction was the long reclassification process. Additionally, participants felt current time tracking and leave request practices were inefficient.
* **Conducting annual 360 reviews**: Participants desired the opportunity to provide annual reviews for supervisors. A more formal review process that would allow staff to be candid in a “safe” environment and know there would not be a punitive response. Collecting input from employees on an annual basis would send a signal that management cares and has a desire to address issues.
* **Starting projects without appropriate planning**: Participants indicated they are sometimes assigned to projects which they then cannot complete due to delays or lack of funding. In addition to building and construction projects, participants cited new offices and layouts for CPFM employees.
* **Mandating uniforms:** Some participants felt those that work outside in all seasons should have more flexibility in their required work wear. Specifically, they should only be held to standards necessary for their position.
* **Reorganizing groups:** Participants expressed dissatisfaction with the practice of breaking groups up and then not aligning groups goals. The “pool resource” approach does not recognize specific individual skills. The group did acknowledge the new system helps new hires to cross-train and be exposed to other work.
* **Empower more on the ground decision-making:** One group felt staff should be empowered to make more decisions based on their qualifications. They often need to wait until management weighs in and the current management structure requires moving decisions several “rungs up the ladder.”
* **Ignoring campus standards:** Participants indicated that when new buildings are planned, campus standards are not always followed, which can have a costly impact on CPFM crews. More and more there are exceptions for sites that are “unique,” which is not always communicated to crews. This gap in communication can result in crews being ill-prepared for the site.

# Appendix 1. Table 1 Notes

* One word to describe your ideal work environment
	+ Clean
	+ Comfortable
	+ Collaborative
	+ Calm
	+ Productive
	+ Upbeat
* CONTINUE – What should CPFM keep doing?
	+ Collaboration
	+ Integrate work across departments
	+ Facility service and utility depts have similar traits, and recently we’ve been doing more integrative work. It’s been great
	+ All-inclusive CPFM-wide events
	+ Social events help break down the barriers between employees
	+ Just getting together is a nice thing
	+ Integrating our processes with units outside of CPFM
	+ Ex: GIS call log integration (continue to leverage this), communication systems, AIM – continue process improvements
	+ Job specific trainings
	+ Supporting continuing education
	+ Professional development
	+ Maintaining the training budgets
	+ Even with budget cuts, it was important to keep the training budgets
	+ Newsletter
	+ A way of really trying to understand what’s happening
	+ Personal stories that pop up, an employee’s trip, who they’ve helped, you also get to know new people when they’re introduced in the newsletter, we used to have pictures with them
* START – What should CPFM start doing?
	+ Internal staff development options
	+ Apprentice programs
	+ Journeyman program, even if it’s an admin related job
	+ People should always be progression and job growth
	+ Start offering more licensing opportunities, like back-flow certification
	+ Start more direct communication with upper management, not just my boss.
	+ Start an AVP advisory committee, people could cycle on and off. All employees, a mix of staff should be able to have ongoing input
	+ Now, there’s a communication breakdown between
	+ Start hiring more people
	+ More mechanics, plumbers, AIM will eventually start telling the story
	+ Start more cross-functional teams based on talent rather than job title
	+ Now, we’re keeping things siloed
	+ Intermittent cross-functional teams
	+ Do walk throughs with staff between design and construction. Collaborate with building
	+ We have projects all the time and the staff doesn’t know what’s going on
	+ How to prioritize the survey coming back from AIM.
	+ Start doing Preventative Maintenance (PM)
	+ Improved communication
	+ Work tickets come up for a noise complaint, when it was just from construction next door. It’s a waste of our time to go check on that. We need to know what projects are going on.
	+ AIM process improvement 🡪 under construction vs. under warrant
	+ More cross-training with AIM
	+ See what other people are seeing on the same program
	+ Start settling departments down
	+ Many people have moved multiple times, some people have been told they were going to move and haven’t. It’s uncomfortable and might be wasteful. It wastes time when you have to walk around and find people because they have a new office location.
	+ Start removing older staff names from the drop-down list in AIM. It takes too long to scroll through people that don’t work here anymore.
	+ Start using electronic leave slips
	+ Start scoping projects better so we don’t have unfinished projects all over the campus.
	+ Start making accommodations for custodians or others that are forced to do their jobs quickly because they have mandatory meetings. To get their jobs done in less time, they can’t be as effective or efficient.
* STOP – What should CPFM stop doing?
	+ Stop double timesheet entry
	+ Stop reorganizing and physically moving people around.
	+ Stop requiring the same policies regardless across all departments
	+ We should acknowledge seasonal clothing
	+ Stop starting projects that we can’t finish
	+ Stop having unproductive meetings
	+ Inefficient and too many items to cover in meetings makes them inefficient
	+ Workers also can’t get ahold of their bosses because they’re in meetings
	+ There are no agendas or follow up notes from the meeting, so we don’t know what was talked about or what decisions were made
	+ Stop scheduling meetings that are too close together, causing employees to leave early or arrive late to meetings that are back to back.
	+ Stop making it hard for new employees because of legacy issues. We should be a team, not blame each other or put each other down for not have institutional knowledge.

# Appendix II. Table 2 Notes

* One word to describe your ideal work environment
	+ Respectful, positive, happy, efficient, happy
* Continue – What should CPFM keep doing?
	+ Gatherings. Kickball, bowling, activities.
	+ Integration with other teams
	+ Lunchtime tours offered for CPFM
	+ More transparency from the top, improving cohesion on the team (doesn’t happen in all teams)
	+ Skill and Safety trainings and certifications
* Start – What should CPFM start doing?
	+ Better organize trainings, track attendance and send out notifications
	+ Expand on transparency
	+ Annual 360 reviews, feedback from staff to supervisors
		- Safe space for people to voice concerns
	+ Collecting input before decisions are made from people who are more knowledgeable
	+ Communicate changes to policies to all people who are impacted (change to custodial procedures, but bldg. managers aren’t aware and unsatisfied)
	+ Make mistakes teachable
	+ Standardize training – different coordinators provide difference in quality
	+ Standardize expectations. Too many exceptions. Customer driven makes it impossible to work towards a campus-wide standard.
		- Also important for job coverage/back-up
	+ Valuing institutionalize knowledge
	+ When developing Campus Standards
	+ Knowledge management process/programs so there can be knowledge transferred to new hires
	+ Mentorship Program
	+ Incentive programs that motivate employees (not gold ducks)
	+ Empower employees to make decisions (break down the hierarchy)
	+ Management needs to trust employees, look to trades and experts for guidance.
	+ Create internal metric designed for UO CPFM rather than using a system from another school or industry standards.
		- Utilize institutional knowledge to set standards:
			* How hours should be distributed
			* Skills and resources needed
	+ Factoring in the total projected costs in the budgets for new buildings
* Stop – What should CPFM stop doing?
	+ Top-down organizational structure
	+ Overworking employees
	+ APPA Labor Standards manpower by square foot. 1.5 FTE is used as the base for 1.0 FTE
	+ Running skeleton crews if you expect quality standards to be met
	+ Exploiting the passion of employees
		- Asking people to do so much with too little
	+ Stop using metrics to staff CPFM – imbalanced.
	+ Hiring administrators
	+ Forcing systems that don’t work
	+ Adding buildings to campus when there isn’t the staff and resources to maintain the buildings. Renovate before building.
	+ Ignoring campus standards when new buildings are planned

# Appendix III. Table 3 Notes

* Continue – What should CPFM keep doing?
	+ Gold Duck
		- Recognition quarterly
		- Peer-nominated
		- Process and people are chosen
		- Fun to nominate someone for a Gold Duck
	+ Work-Control setup is really effective, great experience
	+ Types of people being hired – confident, if not then people are helpful to get people up to speed.
		- Hiring process has been effective.
		- People are decent, helpful, polite
		- General introduction around campus, people are courteous
		- Good results from hiring process
	+ Year-end celebration, in particular because of the slideshow. Connects people, greatest turnout. prizes
		- Picnics
		- Team-building events
		- Number of years you’ve worked there is recognized
		- Opportunity for the administration to give back, recognize work
		- Do an event at both day and night
	+ Keep updating CPFM’s infrastructure (facilities/work environment)
		- Spread out, by updating in infrastructure will allow people to be consolidated.
	+ Continuing education for trades workers
		- The need for training to operate the new buildings is high because of the new technology included
* Start – What should CPFM start doing?
	+ Start putting a higher importance on preventive maintenance
		- More staff necessary
	+ Positions have gone away when people retire or leave for another jobs
		- Kills preventive maintenance
	+ Start back-filling jobs
		- UofO have tradesman that stay for 20-30 years.
	+ Allow job shadowing to occur because there will be a high return on investment.
		- Has to do with information sharing, not “education” per se
		- Applies to all
	+ Communication in our department
		- Sometimes supervisor doesn’t communicate information she is receiving to her staff. As a result, people are missing critical information on a day-to-day basis
		- Not everyone has routine access to computers/email
		- Lack of computer/work space
		- People are sharing
		- Supervisor has a meeting with staff everyday but she doesn’t share all the relevant information she gets
		- Work-control center is a work around
	+ Communication between different groups between CPFM
		- Some groups do better with correspondence
		- Previous employers, Disney, staff has a 3-day reply policy
		- UO currently has no policy related to email replying
	+ Start internal promotion
* Stop – What should CPFM stop doing?
	+ FASS contracts with CPFM for IT, HR, and support.
		- There is an extremely slow response time and level of service
		- Ridiculous red tape
		- Another layer, twice
		- This used to be done in-house
		- There have been IT problems that they can’t figure out what the problem was. Before FASS, problems used to be solved write away.
	+ Everyone is going around FASS to get things done – avoiding the FASS support.
		- At the end of the day, it is about the students
	+ Purchasing process is a nightmare
	+ Reclassification process has taken over 8 months
		- Have growth – grow within a department. Can’t just get a promotion. The job has to be posted and interviewed.
		- SLOW
	+ FASS is disassociated and unaware of day-to-day the organization it serves
		- Forced to close work orders
	+ Stop breaking people up and not aligning goals
		- They operate it as a “pool” resource of workers into categories but there are further specific skills they each have.
		- There’s a difference between task and skill. We need to recognize this inherent difference.
		- Used to be internal development where people
	+ The pool system is helpful for new hires because there is a cross-training

# Appendix IV. Dot Voting

### Continue

* Professional development opportunities (12 votes)
* Trainings – safety and skill (3 votes)
* Continuing education for employees (2 votes)
* Updating CPFM infrastructure (2 votes)
* Integrating work internally (1 vote)
* Conversations about transparency (1 vote)
* Cross-department work (0 votes)
* Social gatherings (including on-campus tours) (0 votes)
* Hiring polite, competent people (0 votes)

### Start

* Preventative maintenance – more hiring (7 votes)
* Internal promotions should maintain institutional knowledge (3 votes)
* Providing career mobility options (3 votes)
* Value institutional knowledge – developing standards and decision making (3 votes)
* Review supervisors annually (1 vote)
* Awareness of policy changes and updates (1 vote)
* Mistakes are teachable moments (0 votes)
* FASS/HR understands trade conditions (0 votes)
* Prioritize – project management (0 votes)
* Breaking down silos (0 votes)

### Stop

* Overworking employees through APPA standards (6 votes)
* Running skeleton crews (4 votes)
* Excessive and unproductive meetings (3 votes)
* Starting projects without planning and scoping (2 votes)
* Mandating uncomfortable and unseasonable uniforms (2 votes)
* Extensive process for hiring new people (2 votes)
* Burdensome purchasing processes (1 vote)
* Top-down approach (1 vote)
* Inefficient leave and payroll accounting (1 vote)
* Using standardized metrics for UO (0 votes)
* Reorganizing groups (0 votes)