Facilities Management Evaluation Program

Final Report –August 2014

The Facilities Management Evaluation Program is a service of APPA: Leadership in Educational Facilities

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The appraisal of the institution is made in relationship to the criteria and guidelines of APPA’s Facilities Management Evaluation Program (FMEP). The evaluation report comments on the strengths of the institution and, when appropriate, offers suggestions and recommendations for improvements of performance. The report constitutes no endorsement or denial of endorsement, of the institution by APPA or by the members of the evaluation team. This document was created for the exclusive use of the institution named. All contents are confidential.
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Overview

The University of Wisconsin-Milwaukee (UW-Milwaukee) is a public research institution located in Milwaukee, Wisconsin. It is the largest institution of higher education in the Milwaukee area. The university has been known under several names in its history. Founded in 1885 as the Wisconsin State Normal School in downtown Milwaukee, it grew beyond its teacher preparation roots with growth of a music and liberal arts programs. The school moved to its current location in 1919 and in 1927 became the Wisconsin State Teachers College-Milwaukee. By the 1940s, it was recognized as one of the nation’s top teachers colleges. In 1951, it became known as the Wisconsin State College-Milwaukee after receiving a broader mandate from the state legislature. Then in 1956, the legislature created the University of Wisconsin-Milwaukee through a merger with the University of Wisconsin Extension, Milwaukee division. The other Wisconsin State colleges were brought into the University of Wisconsin system in 1971.

The prominence of the University of Wisconsin-Milwaukee grew in 1988 when the legislature designated eight Centers of Excellence at the campus. UW-Milwaukee was further recognized in 1994 when it became a Carnegie Foundation Doctorate/Research-Extensive campus. Today, the university comprises 14 schools and colleges with over 188 undergraduate and graduate programs. In 2014, there were 27,813 students enrolled. Of these, 23,081 are undergraduate and 4,782 graduate students. In 2005, UW-Milwaukee surpassed the Madison campus by enrolling more Wisconsin residents, the most in the state.

The campus is located in a northern neighborhood of Milwaukee just five blocks from Lake Michigan. The east-side campus comprises 104 acres of which 21.4 acres are green space. The campus has 48 buildings totaling 5,198,272 gross square feet and 3,343,178 assignable square feet. There are additional facilities located at ten areas around Milwaukee. The most important recently constructed building is the Great Lakes Research Facility on the south side of Milwaukee. It is the only such research facility in the United States and only one of three in the world.

The Facilities Planning & Management Department comprises three units and employs 251 people.

**UW-Milwaukee Vision**

We will be a top-tier research university that is the best place to learn and work for students, faculty, and staff, and that is a leading driver for sustainable prosperity.
We will accomplish this through a commitment to excellence, powerful ideas, community and global engagement, and collaborative partnerships.

**UW-Milwaukee Guiding Values**

The University of Wisconsin-Milwaukee faculty and staff during the 2012-2013 academic year drafted and approved the Guiding Values.

We value:

- Innovation, leadership, and collaboration that fosters learning through education, scholarship and research, and public service.
- Opportunities for open inquiry to support the positive transformation of individuals (students, faculty, and staff), institutions, and communities.
- A caring, compassionate, and collegial community characterized by mutual respect and safety.
- Diversity in all of its definitions, including who we are, how we think, and what we do.
- Ethical behavior, based on integrity, accountability, and responsibility
- Transparent and inclusive decision making.
- Stewardship of resources that promote sustainability, prosperity, and equity for all in the local and global communities.
- Pride in our institution, our unique qualities, and our vital role.
Introduction

This report reflects the observations and recommendations of a team of senior university facility administrators who visited the University of Wisconsin-Milwaukee campus from August 3 through August 7, 2014. The major focus of this report is the evaluation and assessment of the Facilities Planning & Management. The review was patterned after APPA’s Facilities Management Evaluation Program.

The review was conducted at the request of Greg Adams, director of Facilities Services.

The judgment and recommendations included in this report are based on the review team members’ many years of experience in college and university facilities management, combined with extensive interviews, detailed document reviews, and studied comparisons.

Members of the review team were selected to comprise higher education facility managers who are experienced in managing complex institutions. Members of the review team include the following individuals:

Ted Weidner, Ph.D., P.E., AIA, CEFP, GGP
Facility Asset Consulting

Rich Davis, P.E., Esq.
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The University of Texas at Austin

Lee Richey, P.E.
President
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Rich Robben, P.E.
Executive Director of Plant Operations
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The APPA Review Team conducted extensive interviews within the Facilities Planning & Management Department.

**Personnel Interviewed:**

- Greg Adams, Director of Facilities Services
- Dawn Aguilera, Administrative Assistant to Facility Services
- Alex Alexopoulos, Engineering Specialist
- John Bartelt, L&S Building Chair
- Kevin Blackburn, Building Chair, Chemistry
- Kristen Bornstein, Facilities, Planning, & Management Accountant
- Shannon Bradbury, Employment Relations Coordinator
- Johannes Britz, Provost & Vice Chancellor of Academic Affairs
- Custodial Supervisors: Debbie Frank, Steve Henning, Jeff Pozorski, & Dennis VanNatta
- Richard DeBerry, Preventive Maintenance Supervisor
- David Garman, Dean of School of Freshwater Sciences
- Jay Gilboy, Assistant Director of Facility Services
- Kathy Heath, Interim Administrative Services Director
- Geoff Hurtado, Associate Vice Chancellor
- Jeff Jacobs, Facilities Mechanical Shop Supervisor
- Tricia Kaminski, Custodial Supervisor
- Paul Klajbor, Assistant Dean of Engineering; Building Chair, EMS
- J. Val Klump, Associate Dean of School of Freshwater Sciences
- Rick Koehler, Shops Supervisor
- Mail Services: Tami Vogel & Lizbeth Cruz
- Mark Mone, Interim Chancellor
- Andy Nelson, Associate Director of Facilities Services
- Rob Paddock, School of Freshwater Sciences
- Molly Pappenheim, Building Chair, Honors House
- Bill Patterson, Stores Supervisor
- Mark Peters, Heat Plant Superintendent
• Sue Podgorski, Building Chair, Chapman
• Steven Premeau, Alternate Building Chair, EMS
• Paul Rediske, Director of Internal Audit
• Pat Reilly, Building Chair, Garland
• Paula Rhyner, Dean of College of Health Sciences
• Patricia Richards, Building Chair, Sabin; Associate Scientist, Anthropology
• Mark Schwartz, University Committee Chair
• Kim Silbersack, Building Chair, Golda Meir Library
• Zack Steuerwald, Associate Director of University Safety & Assurances
• Richard Suminski, Facilities Architect
• Cindy Tweedt, Custodial Services Program Manager
• Robin VanHarpen, Vice Chancellor of Finance and Administrative Affairs
• Kurt Young Binter, Facilities Architect
• Juan Zaragoza, Paint Shop and Facility Repair Supervisor
Acknowledgment

The APPA Review Team thanks all those that contributed to the review. Everyone was generous with their time and their ideas. We found the site visit well organized and although the days were long, our time was used efficiently and effectively.

The preparation of the self-assessment by members of the Facilities Management & Planning leadership team, which was provided to the review team in advance of the site visit, was frank and informative. We found the self-assessment to be an accurate representation of the Facilities Management & Planning program as it exists. Such honesty is truly refreshing and speaks well of the extent of the department’s commitment to improve and excel.

A special thanks goes to Greg Adams for his time, organizational skills, and efforts to ensure a thorough review.

We also thank the University of Wisconsin-Milwaukee, for the opportunity to provide this evaluation report, and we acknowledge the support of APPA in developing the program by which this evaluation was conducted. The opportunity to perform this review was a most professionally rewarding experience for the team members.
Executive Summary

The University of Wisconsin-Milwaukee Facilities Planning & Management Department serves a campus of nearly 30,000 faculty, staff, and students on a compact 104 acres in a northern neighborhood of Milwaukee along with several satellite sites in the area. The department has seen significant change over the past three years in leadership, strategic planning, capital development, and operations. The result of these changes is generally positive, with campus constituents recognizing changes for the better, such as more respect for the organization’s leadership, buildings that look better, a focus on the big picture rather than chasing short-term solutions, development of effective relationships with state and system officials, and deliberate implementation of a computerized maintenance management system. The department is recognized for its initiative to undergo a peer review.

As with any external review, there are additional opportunities for improvement; they are:

- Demonstrate effective leadership in the following ways:
  - Improve communication with campus leaders and constituents: face-to-face meetings with academic leaders should occur quarterly; capital project information should be shared regularly; avoid assuming that an outside agency has the same focus on campus operational concerns; more of the TMA Systems/Maintenance Management Software implementation plan should be shared with others (the software will affect the delivery of services to the campus and constituents deserve to know more about it).
  - Develop campus design standards so campus constituents know what to expect and designers understand what should be delivered for all projects.
  - Conduct a thorough business process review (BPR) to help address challenging policies and procedures. Consider engagement of an experienced consultant to facilitate the process.
  - Create a 10-year cycle for painting of buildings to show a commitment to maintenance.
  - Cultivate an attitude in your leaders of what can be done with the available resources. Do not use excuses that a lack of authority or budget is the reason why improvement is impossible.

- Be deliberate about strategic planning:
  - Continue building on the existing strategic plan; good progress has been made.
  - Update staff about the strategic plan progress through meetings with Q&A opportunities.
  - Increase the planning effort to complete the TMA implementation and maximize efficacy.
  - Ensure the strategic plan is accepted and understood by everyone.
Focus on what Facility Services can become as a result of the strategic plan.
Involve custodial supervisors more; they provide significant front-line support.

- **Strengthen efforts to improve customer service:**
  - Provide service request verification so customers know requests have been delivered and that there is a method to track these requests.
  - Get customer feedback on every job; they may not always provide it, but they must have the opportunity to do so.
  - Know who the customers are, both external and internal.
  - Bring direct reports to meetings with external customers to strengthen their understanding of the importance of customer service.
  - Take advantage of the existing building chairs’ network to make further customer service improvements.

- **Make assessment and information analysis a habit:**
  - Conduct an annual survey that measures Facilities Planning & Management performance.
  - Increase the transparency of budgets and make supervisors more accountable for individual budget management.
  - Determine the base level of service obtainable from the resources available.
  - Repeat the work environment survey periodically to maintain a general pulse on the workforce.
  - Create a facility assessment system to document building conditions and changes over time.

- **Increase the focus on workforce development:**
  - Provide training for all supervisors to comply with the progressive discipline system.
  - Identify a custodial supervisor responsible for training all custodians campuswide for consistency.
  - Evaluate employees to include personal development plans.
  - Take advantage of free training available from vendors, particularly for new equipment.
  - Use nonmandatory training as a way of rewarding employees when other methods are not available.
  - Train at all levels of the organization to improve consistency and efficiency.

- **Improve processes through collaboration and organizational redesign:**
  - Develop a building access system with university police and others.
  - Develop a standard nomenclature for work requests to help with work allocation and to facilitate analysis.
  - Continue with building chairs as the exclusive issuers of work requests except in emergencies; this facilitates follow-up and coordination.
- Relocate a portion of the trades shop closer to campus; too much time is spent moving between the University Services Research Building (USRB) site and campus.
- Increase the efficiency of reporting employee hours by focusing in on Facility Services details and then summarizing for HR/payroll.
- Eliminate the requisition in the P-Card process.

- Focus on those areas in the strategic plan that will improve performance:
  - Develop performance indicators that are meaningful at each level of the organization; transparent indicators are the most effective.
  - Develop an attitude of individual responsibility to improve customer service and employee commitment to the organization.
  - Keep the focus of the PM shop on preventive maintenance.

- Develop other opportunities
  - Improve signage on campus; for a relatively small campus there are very few signs to help people get to the right place.
  - Locate signs at building entrances and along roadways. Many building signs are in historic locations that do not reflect the current campus organization or building entry.
  - Change work rules to encourage breaks on site and not at USRB.
  - Utilize more technology, such as handheld devices, tablets, and GPS devices on vehicles.
Evaluation Report and Recommendations

1.0 LEADERSHIP

Senior leaders in an effective facilities organization set direction and establish customer focus, clear and visible values, and high expectations in line with institutional mission, vision, and core values. Effective facilities leaders facilitate the dialogue around larger leadership issues, such as total cost of ownership (TCO), sustainability, recapitalization requirements, and facilities reinvestment. Leaders inspire the people in the organization and create an environment that stimulates personal growth. They encourage involvement, development and learning, innovation, and creativity. Leaders act as both educators and change agents.

The leadership structure within Facilities Planning & Management is generally understood within the organization but is less well understood by external stakeholders. This is not unusual at a large campus, particularly among lower level and external stakeholders. Facilities Planning & Management has attempted to simplify and improve understanding of the organization by creating a single contact point and by holding semiannual meetings for primary external contacts, the building chairs. While the semiannual meetings with the building chairs have proved effective with some, there remain some designated building chairs that do not attend meetings and thus do not have a good understanding of Facilities Planning & Management nor have they provided meaningful feedback to the leadership team about opportunities for improvement. Overcoming the uneven understanding of Facilities Planning & Management and how it serves the campus is an ongoing challenge.

There are periodic meetings between Facilities Planning & Management leadership and employees that provide opportunities for feedback. The leadership team appears to be very interested in getting this feedback and in making improvements in the organization.

Internal and external communication plans exist for Facilities Planning & Management and for units within the department that (a) educate the campus community on the department’s role in institution-wide success; (b) promote customer and stakeholder feedback; and (c) reinforce the role of front-line staff in creating a positive public impression of the quality of organization services.

There are several campus-wide committees either chaired or attended by Facilities Planning & Management leadership including: Space Planning Committee, Building Chairs meetings, Physical Environment Committee, Institutional Research Board, Emergency Operations Committee, Policy Advisory Committee, and Academic and Administrative Policy Committee. There is limited contact with communities off campus except for a local Public Policy Forum, and meetings with state agencies (mostly with the Division of Facility
Development) and the system office located in Madison. The alignment and working relations with the Division of Facility Development appear good and well coordinated thanks to leadership commitments and some recent strategic hiring.

The leadership team is recognized for their ethical approach to daily and long-term issues. There appears to be clear compliance with state and university codes of conduct and reporting of potential conflicts. The department recognizes the benefits of periodic reviews by the Internal Audit Department and has been complimented for its actions.

Recommendation 1A
Consider rotating ALL custodians to another building at least every 6 months. Rotation yields many benefits:
1) It allows more custodians to train on different surfaces and type of flooring;
2) It allows each custodian to become familiar with other buildings and spaces; and,
3) Since each custodian cleans differently, an improved more thorough cleaning of all spaces occurs periodically.

In addition, it gives each custodian experience in different circumstances and under different supervisors. This could serve as a great training opportunity and better preparation to assume more responsibilities, possibly a future promotion to a leadership role.

Recommendation 1B
Activate the new card access system installed in Engineering and Mathematical Sciences Building (EMS) significant stimulus funds were recently provided to install card access on 43 doors in EMS. No funds were provided to maintain the access system, so the system has not been activated.

Recommendation 1C
Work-order requests should initiate an auto reply to communicate verification of receipt of request and assign a tracking number. Building chairs often do not know whether a work-order request has been received, sometimes for a couple of days and sometimes for a couple of weeks. There is no way currently to track a work-order request. As an example, a customer reportedly called in a “trouble report” on a Friday. The problem was still evident on the following Tuesday. Plant staff claims the trouble report got dropped; this constitutes poor customer service if it occurs frequently or causes costly errors.

Recommendation 1D
Improve and communicate a new project planning/scheduling system for in-house projects to prevent large, last minute requests that have no chance of being completed in a customer’s expected time frame. Project planning is insufficient in
at least some instances. Facilities Planning & Management should communicate to the campus well and often the amount of lead-time required to complete an in-house project. For instance, any project costing more than $25,000 requires a 6-month lead-time. Also, if a project MUST be completed during summer months when classes are out, the departmental project request should be submitted not later than January 1 to give adequate time to estimate, design, approve funding, purchase materials, and complete work. Once a Facility Services staff member improves the process and the communications associated with this work, planning and scheduling will be much easier.

**Recommendation 1E**

Train the campus customers to use the TMA program and begin allowing work orders and trouble reports to be uploaded via the website. There is an expectation by the Facility Services staff and campus that the TMA program is up and running, but customers have had no training. Forcing customers to use the phone for trouble reports and to e-mail work-order requests is a redundant and labor-intensive operation. Each operation requires Facility Services labor and do-over. Customers should be able to submit one electronic request for all actions from receipt until completion of the project, survey and close out.

**Recommendation 1F**

Implement training for all custodial supervisors and purchase new equipment to replace worn equipment. Several customers reported that more training for the custodial supervisors would improve the performance of the custodial staff. It was also reported that staff members frequently have to use broken or obsolete equipment.

**Recommendation 1G**

Provide more snow and ice removal training for the grounds crews. Interviewees reported that the grounds crews do good work, but some need more training in removing snow and ice during cold winter weather.

### 2.0 FACILITIES STRATEGIC AND OPERATIONAL PLANNING

Strategic and operational planning consist of the overall planning process, the identification of goals and actions necessary to achieve success, and the deployment of those actions to align the work of the organization. The successful facilities organization anticipates many factors in its strategic planning efforts: changing customer expectations, business and partnering opportunities, technological developments, institutional master plans, programmatic needs, evolving regulatory requirements, building organizational capacity, and societal expectations, among other criteria.
Facilities Planning & Management has a fully developed and aligned strategic plan. The plan was developed as a subset to the Institutional Strategic Plan and the Division of Finance and Administrative Affairs. The Facility Services Plan contains all the standard elements of mission, vision, core values, and strategic goals. All components are defined in excellent detail. Each component is in alignment with the parent plans. Excellent evidence of alignment was presented.

The Facilities Planning & Management Strategic Plan is tracked to record progress, using the Hattiesburg model for designing and tracking goals. The strategic goals are specific, measurable, assignable, reportable, and time sensitive. The goals match with the institutions’ higher-level goals and are approved by higher authority.

The department supports the objectives of the Office of Sustainability and assists in achieving their goals. The department is limited in its ability to modify standard system formats to reflect the principles of total cost of ownership (TCO). The department is aware of the concept and attempts to influence capital projects accordingly.

Facilities Planning & Management has a number of other plans that can also be considered strategic for the organization that include: The Campus Master Plan that has the complementary Utilities Plan. There is also a comprehensive 10-year capital plan that is reviewed and updated annually. The Campus Master Plan recognizes that the UW-Milwaukee is in transition with the incorporation of the northwest quadrant acquisition into the campus infrastructure. The university has taken a much stronger interest in the area of sustainability through an increased focus on building renovations and remodeling, an improvement in transportation management strategies for students commuting among main campus and satellite buildings, and instituting a broad range of energy conservation strategies have been deployed as a result a large scale Energy Performance Contract (EPC) with Honeywell Corporation. The EPC is already providing substantial reductions in energy usage and cost.

Facilities Planning & Management has a Business Continuity Plan that includes hiring temporary workers, cross training of critical positions, and performance bonding of contractors. Management recognizes that this is not a substitute for the development of a complete business continuity plan and as such is in the process of developing a plan.

The department reviews strategic plans periodically and ensures coordination of capital construction plans following the system’s budgeting cycle.

Capital renewal and renovation budgets, at a local level, are determined based on historic expenditures and needs analysis. As long as the project fits within a locally authorized level and is funded locally, the project moves forward in an expeditious manner.
Similar to the process for capital renewal, capital projects are developed cooperatively on campus following the Campus Master Plan, the newly developed strategic plan, and additional input from campus constituents. After the campus has approved a project request, the process then follows a rather rigid state process for capital construction that is managed by Division of Facility Development through to completion of the project and move-in. This high-level management of capital construction on campus allows for uniform quality across the entire state but often omits desirable campus input. Revision of the process is outside the area of influence of this report and the department.

The state Division of Facility Development manages capital construction; the state holds all designer contracts. The campus Capital Planning Office provides the interface between DFD and campus constituents. While there is a formal recognition of the need for campus input during the planning and design phases, it is highly structured and slanted to the DFD goals. Significant changes to this process are beyond the scope of the campus or this report.

Campus leadership is focused on supporting the campus strategic plan and developing the staff to support the plan. In some cases, this means identification of additional personnel to meet service demands and in other cases it results in the identification of resources to implement a physical plan that addresses either the strategic or tactical plans of the campus. Facilities Planning & Management leadership identifies ways to deliver needed services to the campus.

Facilities Planning & Management leadership is working within the strictures of the system and the state to create an environment that delivers service and a high-performing staff to the campus. There are several events conducted throughout the year to bring Facilities Planning & Management employees together to keep them informed about campus initiatives and departmental goals. Many of these events are paid for through the personal resources of Facilities Planning & Management leadership.

**Recommendation 2A**

Include some of the high-level initiatives that Finance and Administrative Affairs is currently pursuing in the Facility Services strategic plan. The process used in the development of goals by Facility Services is predominantly top-down. There is some evidence that input from lower levels within the Facility Services Department was obtained during the Facilities Planning & Management plan development (reference FPM feedback sessions). Some of the goals may not be the most strategic for Facility Services. But Facility Services could benefit by including in their strategic plan some of the high-level initiatives that Finance and Administrative Affairs is currently pursuing so that they are included in the annual action plans. Some examples are: promoting Facility Services as the best place to work, providing worker training and needs assessments, considering initiatives resulting from feedback from the employee
survey, improving space utilization, and improve IT capacity to streamline work processes in Facility Services.

Recommendation 2B
Continue tracking progress on the strategic plan and delegate implementation to more people in the department. The work done on the strategic plan by the director after his arrival has built on the prior work and has added more specificity to the document. Mr. Adams has treated the plan as a living document and is tracking the implementation progress. He needs to continue this practice to delegate implementation to more people in the department and engage more stakeholders in process designs that are being implemented.

Recommendation 2C
Continue rollout of the plan. The vision of the plan and the specific goals that are being pursued need to be kept in front of stakeholders. Progress reports and stakeholder feedback on progress are important in determining the need for midcourse corrections. Develop a process that can achieve the dissemination and collection of information with stakeholders. Sell the strategic plan to the organization, paint a picture of a future state, and make a compelling case for change.

Recommendation 2D
Utilize the “Balanced Scorecard” approach for future strategic plan development. Another recommendation is to consider approaching future strategic plan development from a “Balanced Scorecard”\(^1\) approach developed by Robert Kaplan (Harvard Business School, Boston, Massachusetts) and David Norton (Renaissance Strategy Group, Lincoln, Massachusetts). Utilizing this type of approach can focus attention in the four focus areas (perspectives): people, customers, process, and financials, and thereby better define the goals and objectives, giving a context for how they fit together. This can also help conveying strategic plan information to stakeholders. UW-Milwaukee should consider a five-year plan.

Recommendation 2E
Include the principles of TCO in the Board of Regents project approval process. The principle of TCO should be included in the processes for the approval of projects by the Board of Regents and should be highlighted in the Campus Master Plan. Facility renewal costs are addressed for new construction through the TCO elements of project approval; however, a comprehensive program of facility renewal needs and funding does not exist. The Facilities Planning &

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\(^1\) The Balanced Scorecard; Robert S. Kaplan and David P. Norton 1996 Harvard Business School Press
Management Department management needs to develop a program to address this important area.

Recommendation 2F
Expand the continuity plan into an emergency response plan by building responses for various emergency conditions such as load shedding during a period of electric utility outages. Also, escalation of events and the creation of an emergency operations command center should be included.

Recommendation 2G
Facilities Planning & Management should develop a 10-year building schedule for painting the interior and exterior of buildings. Currently, there is no regular painting schedule for the interior or exterior of campus buildings. Typically, an accepted campus standard is to paint exterior surfaces about every 5 years and interior spaces every 7 years. A 10-year rotation schedule, along with estimated costs, would allow Facility Services to know the annual cost projected to maintain the campus appearance at an acceptable level.

Recommendation 2H
Facilities Planning & Management should develop an underground infrastructure replacement/repair plan. Campus utilities are aging and the campus needs to know the cost to prevent catastrophic failures of electrical/sewers/water mains, gas mains, etc.

Recommendation 2I
Facilities Planning & Management should develop a set of campus design standards. The campus does not currently have design standards to provide for future design and construction projects. It is absolutely essential that such standards that meet the campus' leadership approval be developed and posted on the website for all future designers to use in preparing plans and specifications at the UW-Milwaukee campus.

Recommendation 2J
Study and develop a key control and electronic card access control system. There appears to be a lack of campus building security. There is currently no management system for campus keys or card access and no global oversight or accountability. There are no records of who has which keys. Public Safety does not own the process, Facility Services denies ownership, nor does IT own it. IT staff members have their own keys to the IT operations center, and no one else is supposed to have one. No one can verify who has access. The locksmith cannot identify any key and does not know who has what. If staff members want a secure lock, then they must purchase a new one and have it installed on each door that needs security. For instance, keys are only identified by “UW-
Milwaukee” and “Do Not Duplicate” stamped on each one; inspection of a set of door keys does not reveal which one goes where and reportedly the locksmith cannot identify either.

3.0 CUSTOMER FOCUS

Customer focus is a key component of effective facilities management. Various stakeholders (faculty, students, staff, and other administrative departments) must feel their needs are heard, understood, and acted upon. Various tools must be in place to assure customer communication, assess and assimilate what is said, and implement procedures to act on expressed needs. To be successful, a facility department must ensure that its customers have an understanding of standards, tasks, roles, frequencies of services, etc.

Facilities Planning & Management has used a historically defined customer base. This approach works in many cases but can miss new customers or may continue to include customers that no longer exist and thus result in misdirection of resources. Most customers interviewed felt they were receiving adequate recognition; however, some customers knew little of the Facilities Planning & Management organization and hadn’t met with anyone.

Needs and expectations are identified through direct customer feedback. A major source is the building chair meeting held twice annually. This system works well as long as the building chairs have a common understanding of their duties and if the position is held by an adequately empowered individual to represent the department.

The Facility Services unit has developed a work-order center to receive calls and provide feedback on request. At the time of the site visit they were implementing a new computer maintenance management system (CMMS), TMA, which has the capability to have campus users submit work requests, track the progress, and provide feedback. The unit is putting a great deal of faith in the TMA system to address many customer service issues.

Customer feedback is reviewed and used to make changes in service delivery and how customers are made aware of the unit’s ability to respond. The latter is very important in an environment of reduced resources and external process requirements. Customers indicated that changes have been made to campus processes and/or improved communication has identified where external processes affect service delivery.

Leadership meets with customers on a periodic basis and conveys to front-line staff customer service needs. While some front-line employees meet with customers directly, there is no formal process for this kind of interaction.

Recommendation 3A

Identify the Facilities Planning & Management customers and develop strategies to serve those customers. Mr. Hurtado and Mr. Adams expressed a desire to
move to a stronger focus on customer service. In doing so, it is critical that all customer groups, both internal and external, be identified. There are many customer groups including administrators, faculty, building chairs, campus staff, auxiliaries, and Facility Services staff, etc. Identification of these groups could take place through discussions with leaders in the organization. Once identified, strategies should be developed to meet the needs of these various groups.

Recommendation 3B
Share key performance indicators and other metrics with staff and customers. While TMA will help to provide some key performance indicators and metrics, there are some that can be collected now. Determine what is important to the department and to each of the smaller units. Metrics can be specific to individual shops and can be used to improve those shops. As metrics are collected, make sure to share them with staff members and the campus community. Also, discuss them with staff members and develop strategies to improve in areas where improvement is needed. Finally, key performance indicators and metrics should be reviewed continuously. If you ask yourself “how can I use this metric to improve service,” and you don’t have an answer, then you probably don’t need that metric.

Recommendation 3C
Develop a “one stop shop” call/service center. As indicated in the documents forwarded to the team, Facility Services is interested in this concept. It will provide a wide range of benefits to the campus community and the department. The call/service center must be adequately staffed and processes for operating be developed. The planning and development of the call/service center may take as long as one year before it can go live. Benchmark with other institutions and with campus departments such as IT that already have call/service centers.

Extensive outreach to customers should take place during the planning period as well as development of process maps. The center should utilize one number for all services, 24 hours per day, and appear seamless to the customer. Written procedures and instructions are critical to its success. Once firmly established, a call/service center becomes the communication hub of Facility Services and possibly Facilities Planning & Management. Simplifying communications will be a big win in customer relations.

Recommendation 3D
Redesign the Facility Services website to be more customer friendly. The Facility Services website is static and provides little information. The assistant dean of the School of Information Studies indicated a willingness to work with Facility Services on information projects such as websites and online tutorials. This is an excellent opportunity to engage the students and faculty as well as revamp
the current website. The website should be designed to be easily, quickly, and frequently updated. Appoint someone or a team to be responsible for doing this. Areas for customers and staff should be targeted for these groups.

Recommendation 3E
Consider using social media. Communication is always a challenge. In today's workplace, with several generations working side-by-side, there is no one best way to communicate. Social media could be used to provide updates to customers and staff. A Facebook page offers an opportunity to showcase the department. Twitter could be used for emergency notifications. Instagram provides a means to share photos. Establish a YouTube channel. Yammer could be used to engage internal staff in discussions on innovation and creativity. Using social media also provides an avenue to connect with younger faculty and staff who are more comfortable with this means of communication. It is also another avenue to connect with students.

One mistake to avoid is not involving someone from the younger age groups to help guide this process. The School of Information Studies is again a place that you can go to for assistance. Take advantage of what this highly ranked school has to offer.

Recommendation 3F
Collect customer feedback and distribute it to shops and other units. It is apparent through discussions with trades personnel and at least one trades supervisor that the trades are still in a union-centric mindset. One tool that should help in developing a customer service mindset is discussion of customer feedback. TMA will assist in providing a database for such feedback; however, it shouldn't be used as the only source of information. Once that feedback is received, the supervisory chain should review it. Selected positive and negative feedback, especially customer comments, should be discussed with the groups responsible for providing the service; for example, discussion of electrical feedback should be shared with the electrical shop, etc.

The information gathered can also be developed into a metric, but discussion of the feedback and why it is important will go a long way in developing the customer service centric organization desired. The discussion should be done in a nonconfrontational way and used as a tool for continuous improvement. The information should not be used as a performance management tool. Over time, the staff should become more engaged in improving service and develop a better understanding of customer service.

Recommendation 3G
Develop and deploy a formal, annual customer survey. Measuring customer
satisfaction is an APPA key performance indicator. A short annual survey that is broad in scope can provide a benchmark by which improvements can be made. A separate survey could be used for maintenance projects, chargeback projects, or small construction projects. Make sure to discuss the results of the survey with the entire staff at an all staff meeting. Post the results on your website for the campus to see. If there are areas of concern, develop strategies to deal with those and make sure everyone knows what those are.

Recommendation 3H
Use TMA to survey customer satisfaction. TMA can be used to send out a short satisfaction survey upon the completion of any work order. It can be as simple as “Where you satisfied with the service you received on this work order?” Make sure to allow room for comments. This data differs from the annual survey in that it is more specific and timelier. It can be used to make corrections before issues get too big. Again, make sure to share this information with the entire staff at an all staff meeting.

Recommendation 3I
The director of Facility Services and his direct reports should meet with key external customers on a regular basis. Meetings should include deans, directors, and other key individuals that are not part of the building chair program. There were some individuals interviewed that knew little about Facility Services and its relatively new director. They were all interested in meeting with Mr. Adams and talking more about what Facility Services is doing. Bringing staff members along helps the customers get to know the staff as well as emphasize to the staff members the importance of customer communication. By making these types of meetings part of his routine, Mr. Adams will be able to leverage the respect he already has on the campus and develop new relationships that will become mutually beneficial. It also humanizes Facility Services so that is no longer just a big faceless department.

Recommendation 3J
Develop communication plans for the customer base, recognizing that the communication needs of each of these groups may vary. It was a common theme in interviews that various customer groups from building chairs to Facility Services staff want improved communication. Working with the customer base, jointly develop a communication strategy that meets the needs of the campus community for information but does not overload the system with redundant or unneeded information. Also, seek to maximize the use of the TMA customer access portals for self-service information. Finally, the strategies and communications plans need to be distributed to all members of the team and discussed on a regular basis. Training may be necessary to provide a foundation for the plans. Defining customer groups will help focus the department on its
customers and will improve relations with each of the customer groups.

Recommendation 3K
All Facility Services staff members working on a work order or trouble report should report in to the building chairs and inform them immediately when each work order is completed and closed out. In some cases there is virtually no communication or feedback on project work or completion until well after the fact. Workers frequently enter a building to perform work without the knowledge of the building chair. It may be several days before the building chair is made aware that work has even started, much less know that the work is complete.

Recommendation 3L
Engage with faculty by assisting them in their classes. Offer to talk about facilities management in engineering, landscaping or sustainability in architecture, or education facilities management in education. There is nothing to be lost by engaging others across the campus. This raises Facilities Planning & Management’s visibility and provides an avenue to display the many talents the department’s members have.

4.0 ASSESSMENT AND INFORMATION ANALYSIS

Assessment and information analysis describes how your organization uses information and analyses to evaluate and drive performance improvements. Of interest are the types of tools used and how the tools are used to measure and enhance organizational performance.

Assessment and information analysis is being developed but is limited at this time. There are standard metrics used by the state and system to assess facility performance and needs. However, these measures are not effective from an operational perspective and do not address specific UW-Milwaukee customer service issues.

Facility Services is using the APPA Facility Performance Indicators (FPIs) as key performance indicators at this time. The data were first gathered in the 2011-12 cycle, and the abbreviated survey data were submitted. Data for the following year, 2012-13, were not submitted, but there are plans to submit data in the 2013-14 survey.

The APPA FPI Survey can be overwhelming to some organizations when campus facility data are distributed across several departments, including those not closely aligned with Facilities Planning & Management. While response to the survey is more difficult as a result, gathering the data across several parts of the campus can prove beneficial to make interdepartmental connections and to investigate metrics that may not have been considered previously on campus.
Recommendation 4A
Explore the possibility of grant funding for energy conservation work through your serving utilities, various state offices, and private sources. High need, scarce state funding, and declining tuition revenue all suggest the need to find new ways to meet institutional needs in general, and facility needs specifically.

Recommendation 4B
Use return on investment and other tools to identify feasible projects. For example, is it cost-effective to change larger motors that are operated many hours per year to high efficiency? We saw a high number of very old motors that appeared to create opportunities for savings with a good financial return. Even if funding is not yet available, knowing where financially sound opportunities exist is very important.

Recommendation 4C
Develop a system to report to the APPA FPI annually. Given that facility data may be in several departments or locations, it is essential to create a “wiring diagram” or process that will make gathering and reporting FPI data almost automatic. Development of the process is difficult and requires a knowledgeable person’s time and support to accomplish it. Once done, the process or routine can be used by nearly anyone to collect the data in future years and report it quickly and efficiently. It may also be possible to have the data uploaded automatically once the fiscal year books are closed.

Recommendation 4D
Review and improve TMA input and output procedures. Reduce the paperwork required by the trades so that their productive time can increase. For example, craft trades were inputting their hours of work three times: on the work-order printed page, on their individual TMA time sheet, and again for the payroll system. This activity has since been corrected. Continue looking for duplicative steps and eliminate them.

Recommendation 4E
Change the UW-Milwaukee paradigm for requesting work from Facility Services. All service requested should be entered as a work request. Once funded and scheduled, the work request becomes a work order. All work orders should have a priority, whether emergency, urgent, or routine. Management can establish criteria for the time of accomplishment. Other sorting criteria include whether the department is paying or whether the Facility Services maintenance funds will be used. Emergency work requests should be permitted by telephone or other means in order to expedite the needed task.
Recommendation 4F
Establish a deferred maintenance system. All work requests for maintenance and repair that are not issued due to lack of funding, postponed for bidding with other similar work, or otherwise delayed, should be entered as deferred maintenance. All managers in Facility Services must have ready access to the information to answer questions such as, "How much will it cost to replace all roofing that is due for replacement?" and "Which buildings does this include?" and "What will be the cost?" This follows the theme of being ready with projects when funding improves. The deferred maintenance plan can be a spreadsheet that can be sorted by type of work, estimated cost, building, and priority. It could be a standard database program. Consider making it available to deans, budget managers, and building chairs so that it is common knowledge that Facility Services knows how to plan for the future and needs money to do so.

Recommendation 4G
Increase cooperation of workers and management for implementation of TMA. Create a small committee for the implementation and refinement of TMA. Participation might include at least one director, the craft trades supervisor, clerical staff, and a craft trade worker. Perhaps an IT person would be willing to help out. Invite vendors for discussions of opportunities to improve the TMA process. This is a low-cost approach to learn of ways to improve practices.

Recommendation 4H
Increase the number of leaders and managers familiar with key information. Few, if any, staff members knew the energy utilization index (EUI) for the campus before and after the recent energy services company (ESCO) project. Knowledge of key information, such as EUI and maintenance budgets should be numbers many staff members can recite.

Recommendation 4I
Assure that the preventive maintenance group can perform their core work. Because these workers report to work at the main campus, while others report to USRB, they are often asked to look at problems that are the focus of other shops. This changes their work from planned and preventive to a “do it now” orientation, which is fundamentally antagonistic to their mission of preventive maintenance. This practice is a logical mitigation for the travel-time from the facilities office at USRB to the main campus, but it is nonetheless inappropriate, especially if other groups are not helping with preventive maintenance work.
5.0 DEVELOPMENT AND MANAGEMENT OF HUMAN RESOURCES

An organization’s success depends increasingly on the knowledge, skills, innovation, creativity, and motivation of its employees and partners. The following criteria address the ways in which the facilities organization ensures a continuous learning environment and a positive and progressive workplace.

As a public institution, UW-Milwaukee’s Facilities Planning & Management Department follows job descriptions consistent with the state system. Annual evaluations ensure employees are performing as required and that they meet departmental performance expectations. The department has several recognition programs, including length of service awards. Goals are more departmental based rather than individual employee based. While this approach engenders a clear team approach, it can allow a single employee to slide while the rest of the team pulls to accomplish the goal. Eventually, employees without individual goals and participation in the team goal can start to drag down the entire team as some team members will see limited contributions from one or more team members.

The department holds periodic events to bring different units within the organization together to foster comradery. These events are best attended by the nonskilled and administrative groups, due to ongoing animosity among the skilled trades.

Some supervisors interviewed are successful in achieving and maintaining a highly functional workforce while others express frustration with the system for corrective discipline. While some of the attendance problems can be attributed to employee frustrations with changes in statewide labor relations, the success of some supervisors indicates there are areas for improvement by cross-training supervisors.

University system methods are available for career development through educational benefits. The department also uses its flexibility to advance candidates within the organization to support strategic goals and needs. Employees have access to external professional development programs and the administration encourages application for the various grants/scholarships available to stretch operational budgets. There are a variety of events used to assess the well-being of employees. While existing approaches work with some employees, there is a cadre of employees that are slow to embrace a more customer-focused approach.

**Recommendation 5A**

Develop an “on the spot” recognition program. During tough budgetary times it is difficult to adequately recognize those that go above and beyond. However, this is especially the time to do so. One method would be an on the spot program that recognizes staff members when they do something extraordinary. In this kind of program, supervisors are authorized to recognize employees through a limited number of on the spot awards. The program could consist of a small gift.
that could be given to the employee, formal recognition at a staff gathering, 
and/or a day off. No matter what is selected, a note should go in the employee’s 
personnel file that they won such an award. Also, note it on their performance 
evaluation. Be careful not to allow too many awards or the program becomes 
less meaningful.

Recommendation 5B
Develop a method through the annual evaluation to have individual employee 
goals. Individual goals can be as simple as committing to help the team achieve 
its goal and to actively participate in achieving the team goal. The aim here is to 
use the annual evaluation as an improvement tool rather than a cudgel. The 
annual evaluation should encourage whatever behavior the department wishes 
to foster. Including goals in the annual evaluation helps set clear deadlines and 
responsibilities of both parties in the evaluation (employee and supervisor). 
Individual goals may be established here too. Regardless, goals should be 
arrived at mutually, agreed to, and deadlines/expectations set.

Recommendation 5C
Identify a custodial supervisor who has additional duties to provide custodial 
training campuswide. While all facilities appeared cleaned to an APPA Level 3 
or above, the service delivery varied between buildings and supervisors. 
Consistency is important for any large organization; one way to achieve 
consistency is to have a single person delivering the training. Given the limited 
staffing flexibility, it should be possible to identify an interested supervisor with 
prior experience who can train all custodial employees and ensure consistent 
training.

Recommendation 5D
Utilize free training from vendors. All facility organizations struggle to identify 
training, particularly for new equipment and or tools. Vendors, as a basic 
service, usually provide training for the equipment and tools they sell. Require 
training for equipment or tools as part of construction and procurement 
contracts.

Recommendation 5E
Use nonmandatory training as a way of rewarding employees. Off-campus 
training that might advance the goals of Facilities Planning & Management is 
often part of a conference or seminar. Utilize off-campus training as a subtle 
way of rewarding employees, which is an appropriate secondary goal. APPA has 
several training and educational programs that may provide suitable training.
Recommendation 5F
Train at all levels. Educational facilities organizations seldom have enough money to spend on training. It is surprising given the mission of the institution. However, regular, focused, training creates greater efficiency, consistency, and customer service rather than ad hoc training. Once there is a clear training program for all levels in the organization, customer service and employee performance will improve.

6.0 PROCESS MANAGEMENT

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

The Facility Services core processes that are being put into place will ensure that the department takes a unified approach to process management and customer service. The numerous processes that are necessary for the daily conduct of the different facility responsibilities are in some areas well developed and in other cases not so. As gaps in service levels are discovered, metrics for these deficiencies need to be developed and monitored for improvement.

The CMMS system (TMA) is the heart of work management and will be used to dispatch, schedule, and track operations maintenance and preventive maintenance work, financial operating budget performance, customer satisfaction, staffing levels, energy and resource conservation, capital project budgets, project progress, and to schedule event set ups and moves. The utilization of the TMA work management system provides the framework for creating metrics and tracking improvements.

The Facility Services Department is structured in a traditional central shops/skilled trades configuration. It is based several miles from campus; the majority of the skilled trades employees travel back and forth, possibly several times during the day in order to accomplish work assignments. This situation introduces a great deal of nonproductive travel time as mentioned previously.

The nature of the work being done by Facility Services falls into two major categories: paid for by the schools and colleges (project work) and paid for by the administration (maintenance). These efforts compete for resources (priority, labor, and administrative support). This budget model also creates conflict with customers and stakeholders when it is not clear which organization should be charged for work.
The centralized ship concept is an outmoded organizational structure for a facilities department that needs to be “fleet of foot” and lean if it is to serve two major needs. A centralized shop serving both project work and maintenance overtaxes the capabilities of both the trade foremen and workers and results in poor performance for both. A project delivery group should be structured to have both coordinators and schedulers in sufficient numbers to assist in managing and communicating all activities. This may allow for a more efficient allocation of supervisor resources and vastly improved efficiency, productive time, and cost. The maintenance group should be comprised of maintenance minded individuals and supervisors who will become experts in the use of the TMA CMMS tool to maximize proactive maintenance approaches. Additionally, the maintenance group will have trades assigned to support high technical needs, and more importantly, be home-based on campus in an available space. This will eliminate a large amount of nonproductive travel time and vehicle demands while increasing productivity and efficiency.

**Recommendation 6A**
Develop an organizational model that supports the division of major work products. Divide the trades into project delivery (reimbursable) and maintenance and operations (general fund) groups. This will create a dedicated focus on both of the important missions of Facility Services.

**Recommendation 6B**
Develop an operations and maintenance engineering group of one or two technicians to support the maintenance group. These engineers should be mechanical and electric, both with an appropriate controls orientation and in-depth familiarity with the university plant. Their purpose is to assist in the most complex maintenance issues, with knowledge of pump selection and electrical distribution, for example.

**Recommendation 6C**
Review the supply chain system to ensure it adequately supports the redefined structure and the use of TMA for inventory and purchasing actions. In a high performance organization, the ability to match labor and materials at a scheduled time is critical to efficient execution. The work-order system should be designed so that this process is optimized without excessive levels of inventory.

**Recommendation 6D**
Maximize the use of technical tools to reduce manual interactions and improve information flow. This ranges from the use of handhelds to the implementation of software links between TMA and PeopleSoft. Make certain that necessary IT interfaces are developed between PeopleSoft and TMA to allow for a smooth effortless interchange of financial data, i.e., payroll, purchasing, service unit billing, and HR data on attendance. Handhelds can provide detailed information to workers in the field and can improve efficiency if used to disseminate...
information about the job assignments and to collect labor hours and material charges. Develop a working group to explore where effort should be invested to get the highest return.

Recommendation 6E
Challenge the work rulebooks, especially for worker assignments and worker job description work overlap. The trades-dominant mentality that is project oriented needs to be channeled into both the project and maintenance missions. Many of the work rules as to who should be doing what types of work need to be revisited, and a cadre of trades skilled workers that are focused on maintenance only need to be developed. This may change some of the rules that currently restrict the maintenance workers. This is also true for the custodial side of the department but in a slightly different way. Seniority rules that govern assignments are an artifact of a contract that no longer exists. These rules restrict the efficient use of the workforce. They should be revisited and eliminated.

Recommendation 6F
Distribute the department budget accordingly between each of the Facility Services Departments. This empowers middle management and allows for better planning at the local level. The practice of balancing budgets at the end of the fiscal year by taking from one group to subsidize another should be minimized. Budgets should be properly established and managers held to them. This is a basic of zero-based budgeting and should be an elemental part of the direction of the Facility Services Department.

Recommendation 6G
Develop a facility condition assessment program. A needs based assessment program should be developed that catalogues the project needs, cost, and time frame to keep the campus facility condition needs index in a good range. This is a valuable planning tool and one that provides irrefutable evidence of funding needs to maintain a campus infrastructure that supports the university mission.

Recommendation 6H
Develop asset-based maintenance and decision making that will be integral to the work management system. This will allow for future expansion of the CMMS in support of more sophisticated and efficient maintenance models such as predictive maintenance (PdM) and reliability-centered maintenance.

Recommendation 6I
Employ an appropriate consultant to assist Facilities Planning & Management with a thorough business process review of all current policies and procedures.
UW-Milwaukee has not ever conducted a business process review of business practices. All processes from purchasing materials, flow of work orders, flow/storage of materials, and HR processes, etc., to cover every entity/internal/external agency and customer who does business with the department should be reviewed and those final accepted business processes loaded into the TMA and other software.

Recommendation 6J
Communicate the difference between a work order and a trouble report to the campus at large. Apparently there is a difference in a trouble report and a work order or work request: the customer must pay for a work-order request while a trouble report is “on the house.” Communicate clearly (and frequently) to the customer what the difference is and explain why the trouble report has to be placed via telephone, while a work-order request is made via e-mail.

7.0 PERFORMANCE RESULTS

The performance of a facilities organization can be assessed in a number of ways: campus appearance, customer satisfaction, employee satisfaction, effectiveness of systems operations, financial results, and supplier/business partner results. Having measurement tools in place to assess such performance is critical in an environment of continuous improvement.

Although it is important to respond to work requests and to customer needs within Facility Services, it is also essential for Facility Services to accomplish core work that meets the goals of an informed administration and prevents the future growth of complaints by customers. Listed are a few examples of opportunities to begin establishing a longer vision.

- Continue preventive maintenance and consider increasing responsibilities to reliability-centered maintenance and predictive maintenance, as appropriate, by adding testing for vibration in bearings, heat in electrical panels, and other more advanced methods to prevent failures in electrical and mechanical systems.
- Establish a standard of quality you desire for the condition of sidewalks on campus and a date when you wish to meet the standard set. Then review current funding (approximately $40,000 per year) and determine whether the goal will be met. Communicate with the Division of Facility Development and management on the additional funding needed to meet the goal if current funding is inadequate. If current funding is insufficient, the funding will need to increase, the goal will need to be postponed, the quality standard lowered, or the cost-effectiveness of the method chosen for improvement will need to be increased.
- Expand communications and continue the collaboration with the Division of Facility Development on basic infrastructure needs. UW-Milwaukee does not control funding, scheduling, design choices, nor does it manage certain utility and
other infrastructure work. It is critical to have a collaborative and constructive relationship with the Division of Facility Development to ensure the best results for the university. UW-Milwaukee should have written assessments of the condition of systems under the purview of the Division of Facility Development that include future needs, appropriate solutions, and target dates for completion.

- Transition some portion of maintenance from complaint-driven to planned maintenance immediately. Examples of this include repairing duplex pumping systems where one pump motor has failed, eliminating the cause of repeated basement flooding where it occurs, and eliminating other repetitive problems where possible to prevent wasting time and money on mitigating the same old problems.

**Recommendation 7A**
Set specific, measurable, achievable, realistic, and time-constrained (SMART) goals annually for the department, the leaders, and the workers. This increases the recognition that some portion of Facility Services work must be driven by Facility Services, not solely by customer complaints. The goals can be core work, but should also include perhaps one goal toward excellence, customer service, or operational excellence. Facility Services have already learned this by applying SMART methodology in the development of their first set of goals. Continue using SMART and make it a leadership habit to let all staff members know what they do well and how they contribute to the university. A culture of excellence must be nurtured and must grow.

**Recommendation 7B**
Be a team with building chairs. Building chairs want to know when work was completed, so they can inform deans and others on the status of repairs and projects. Communication with these chairs will help them in their work and build their confidence in Facility Services. If building chairs exaggerate a problem to expedite their work request, meet with them and build a trusting relationship. Just as Facility Services must provide excellent service, you must have quality information coming into your work-order system.

**Recommendation 7C**
Trade and craft supervisors and workers must coordinate work with building chairs. Supervisors should coordinate with building chairs so that work is scheduled to prevent noise and other disruptions to academic and research activities. Workers should notify building chairs when work is complete.

**Recommendation 7D**
Notify budget managers prior to performing work that is in excess of cost estimate. Work with building chairs and other budget managers so that exceeding the estimate by a set amount (perhaps 10%) is acceptable without
notification. But notify chairs prior to work that will result in charges substantially exceeding estimates.

Recommendation 7E
Improve interdepartmental invoices. Invoices should reference a work-order number in all cases and should make determining what was done easy for the building chair to see. Partial billings should note the percent completion so the building chair can calculate the amount yet to be invoiced.

Recommendation 7F
Remind anyone who remains for only the pay and benefits of their duties to UW-Milwaukee by the decision they made to continue as employees. We did not hear the “golden handcuffs” expression frequently, but we did hear it. It is of utmost importance that all employees are working together to create success for the organization. Most are. Perhaps some are not.

Recommendation 7G
Assure that building automation systems meet BACnet protocols at all levels. Consider Tridium or other solutions while continuing contractual relationship with Johnson Controls, Inc. (JCI). This approach will assure that control hardware and software meet current industry standards as UW-Milwaukee moves to the future. This keeps JCI as the controls contractor, but assures an industry standard platform is installed.

Recommendation 7H
Make sure that staff members have the tools to work effectively and efficiently. Some staff members have computers that are not working well. Custodians are spending time going to other areas for equipment that works. This wastes time and increases frustration.

Recommendation 7I
Develop maintenance funding standards based on APPA Facilities Performance Indicators (FPIs). Predominate indicators should be maintenance cost per gross square foot, with adjustment upward for better than average space utilization. Key administrators knowing this target can help improve future budgets for Facility Services.

Recommendation 7J
Communicate with staff members. Associate Vice Chancellor Hurtado should meet with the entire facilities staff to share university and budget updates, promote employee recognition, etc., without fear of crossing hierarchical lines.
Recommendation 7K
Improve the number of projects that are supported with adequate and timely plans and sketches. There were several comments from the trades staff that plans arrived too late for the work or left basic questions unanswered. Improve the communication between the planners and the trades. Field meetings or phone calls may mitigate some of these concerns.

Recommendation 7L
All personnel evaluations should include ratings or comments on customer service. Employees should understand that customer service is an essential part of the job and one where there is an expectation they will exhibit continuous improvement as documented through annual evaluations (at a minimum).
Conclusion

It has been a beneficial professional experience for each of the APPA team members. As we said at the exit interview, we all learned some valuable things from the site visit. We appreciate the hospitality and professionalism that exists on the University of Wisconsin-Milwaukee campus. We are grateful for the time and effort spent preparing for and engaging in this evaluation process. The willingness to engage and learn helped us know more about the University of Wisconsin-Milwaukee, Facilities Management & Planning organization. A careful review of the findings and recommendations will aid in your journey of continuous improvement and the goal of achieving your greatest potential. We hope this report will motivate the Facilities Management & Planning organization and that the positive changes already underway will continue. If so, then all of our effort will have been for the good.