

## Support Unit Review Executive Summary

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Facilities Services

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July 2009

### Self-Study and External Review

- 1) Annual reports and self study
  - a) Evaluation process

Facilities Services has had a history of self assessment prior to the current Support Unit Review. The 2008/09 Support Unit Review began with not only an introspective review of the current operations but also a review of two previous informal reviews and actions taken in response to those two reviews. The first was a 2002 Situation Report performed by an outside consultant and the second was a Customer Satisfaction Survey performed by the CSU Quality Improvement Program. During the review period internal focus groups discussions with Facilities associates were conducted as well as phone interviews with campus representatives.

- b) Divergence between self study and review team findings

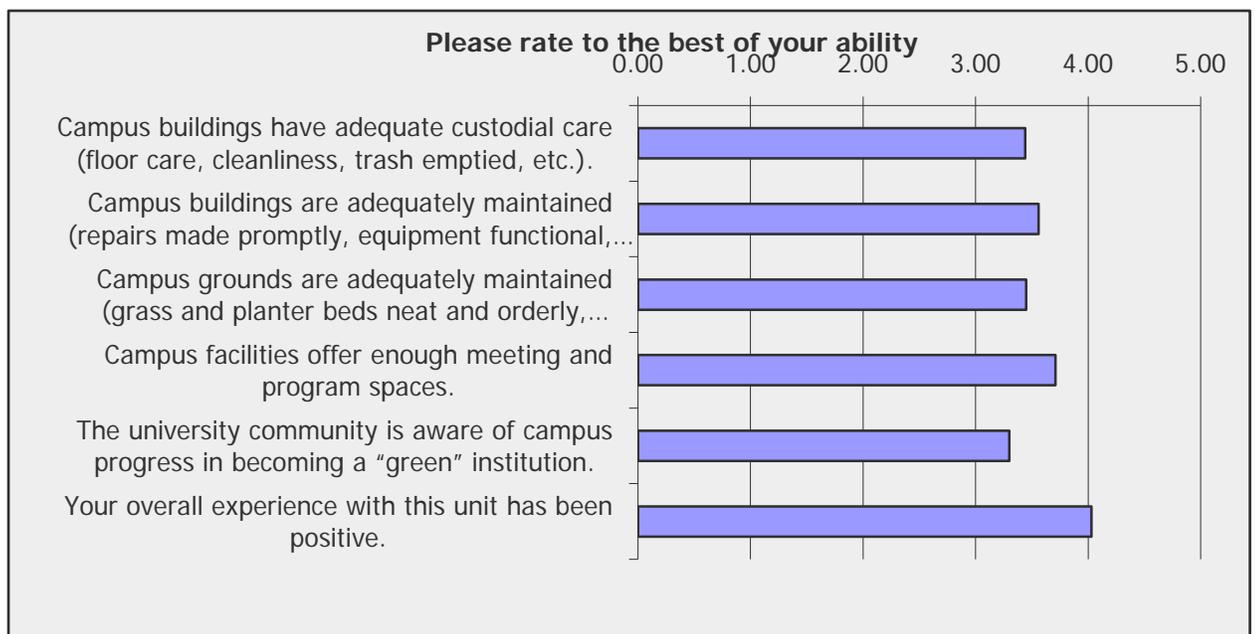
The review team report concluded with three very insightful observations:

**“Observation #1:**

*Facilities Services has pro-actively sought to maximize their financial and personnel resources. This has been done through the streamlining of reporting lines, the review of expenditures and adjustments to employee job descriptions when necessary. As a result the unit has been able to maintain a high level of service to the campus community. It is a real strength of the unit that they have been able to adapt to meet greater work demands with fewer financial resources and minimal personnel increases.”*

**“Observation #2:**

*In all three of the surveys conducted the level of customer satisfaction as it relates to interactions with facilities employees was high. This is one of the strongest areas of the unit. Employees are viewed as professionals who are competent at their jobs.” The following chart shows the satisfaction ratings:*



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**“Observation #3:**

*Communication is an on-going priority of the unit. This is both internally within the unit and to the larger campus community. The lowest scores of the 2009 survey all related to communication. “*

The review team also provided a number of recommendations indicating, as the self study had done that Facilities Services has a need to continue its efforts in self assessment, improve communications about operations and future plans with the campus community and with associates internally. As well as recommendations for Facilities Services’ involvement in student learning outcomes, suggesting Facilities involvement in student learning outcomes relating to sustainability.

### 2) Mid-year and annual budget reports

#### a) Narrative summary

During the initial budget planning process for 2008/09 Facilities Services budget structures was adjusted to include the funding for university wide Utility positions in the Facilities operations budget as well as university wide classroom furnishings, as well as experiencing the loss of one management position and one vacant staff position. During midyear, it was determined that Facilities would lose an additional management position as well as an additional staff position as a one-time reduction. Facilities finished the 2008/09 fiscal year within budget.

Both of the one-time reductions were accepted as permanent 2009/10 base line reductions as well as the transfer of four positions from the Landscape, Custodial and transportation divisions to Parking , Student Recreation complex, and one additional maintenance position to Recharge Revenue. With the 2009/10 budget still uncertain at the state level, future funding reductions for Facilities Services are expected.

With these in mind Facilities Services continues to plan for the future with the success of the students in mind. Facilities will continue to focus efforts on areas of the campus which will have the biggest impact on the Teaching, learning and work environment.

#### b) Assessment of resource allocation and effectiveness

Facilities Services has continued to operate within budget while increasing the scope of maintained square footage and student population in the midst of planning for future space needs. All customer satisfaction ratings from both a 2007 Chancellor’s Office Quality Improvement Program Survey and the 2009 External Review team survey indicate positive average ratings. However the results of diminishing resources with expanded square footage have not gone unnoticed by the campus community. While Facilities has maintained satisfactory average ratings they have dropped between the 2007 survey and the 2009 survey by the External Review teams as indicated below:

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|                                                                           | 2007 Survey | 2009 Survey |
|---------------------------------------------------------------------------|-------------|-------------|
| Custodial (floor care, cleanliness, trash emptied, vacuumed floors, etc.) | 4.28        | 3.44        |
| Landscaping and grounds                                                   | 4.49        | 3.45        |
| Building Maintenance                                                      | na          | 3.56        |

Note: ratings based on a maximum score of 5.

### c) Adequacy of resources allocated to perform mandated functions

Resources allocated to Facilities continue to shrink along with the State of California and the CSU. Facilities Services fiscal resources have been particularly vulnerable during budget reductions. Operating Supplies, deferred maintenance and vacant positions have been the primary areas reduced in the past in order to preserve the existing team members during prior budget reductions. Recharge revenue traditionally used for operating supplies and maintenance projects is being taxed at greater levels to sustain previously base general fund positions. Executive orders 847, indicates both the responsibility to “ensure the appropriate resources are directed toward meeting the requirement of proper operations and maintenance of the campus physical plant” and directive that funding resources be “reimbursed the actual direct costs plus indirect cost associated with requested non-maintenance services provided by the facilities department.”

### 3) Effectiveness of the unit in supporting the mission of the university

#### a) Mission, goals, and values

Facilities mission was established through a consultative process in 2005 and continues to be:

*“Maintaining, Supporting and Building for the Future”*

Facilities associates are strongly committed to serving its mission and the University mission. The 2009 survey, conducted by the external review team, supported that commitment with responses indicating that the average rating for the Facilities unit serving the University mission was 4.36 out of a possible 5.

Facilities goals developed during the 2005 process to “Have nationally recognized facilities by 2012” have been achieved by the recognition in the Princeton review as one of the “top 300 sustainable campuses” and the Leed Silver rating of the Naraghi Hall of Science by the US Green Building Council in 2008. In addition, Facilities Services continues to look at opportunities on campus to continue with sustainable practices such as photovoltaic power, alternate modes of transportation, implementing use of green cleaning products and practices, planting of drought resistant landscaping, storage of reclaimed water in detention ponds tied to irrigation systems, energy conservation projects for lighting and HVAC equipment, as well as recycling resources used on campus.

#### b) Processes and assessment

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Facilities Services has maintained a successful record of continual evaluation of internal process and assessments. This Support Unit Review marks the third review of the unit since 2002. The first two were informal, self imposed reviews, but informative and necessary for the Facilities understanding of both the culture within the department and the campus community. Various changes were made to both processes and the organizational structure of Facilities as a result.

### c) **Special issues**

The current budget climate will afford Facilities Services with both the greatest challenges and opportunities for innovation in maintenance and operations of the campus. As indicated by the External Review Committee Report, "this is a time when managers and staff can work together to gain insight into what processes, procedures and structures will best serve the unit in the next 1-3 years."

### **Strategic Implementation Plan**

#### **1) Identify and prioritize the goals of next five years**

Facilities Services will continue its history of self assessment and improve upon areas addressed in this Support Unit Review

- Improvement of internal and external communications.
- Review of Facilities Mission, vision and goals in relation to current budget climate.
- Continued improvements in sustainable campus features and activities and involvement of the campus community, particularly students.

#### **2) Identify the strategies which will be used to accomplish those goals (e.g., state what actions are to be taken by whom and include deadline)**

- The AVP of Capital Planning and Facilities Management , Director of Facilities Planning and Finance, Director of Design, Construction and Maintenance and Director of Landscaping, Transportation and Custodial will take the lead roles in accomplishing the improvement of internal and external communications as well as a review of Facilities Mission, vision and goals. This process will also touch the various divisions within the organization to include associates from each unit as well as the external campus community. The process is an ongoing process which will require establishment of significant milestones, but also mechanisms for assurance of continued emphasis on self improvement.
- The AVP of Capital Planning and Facilities Management , Director of Facilities Planning and Finance, Director of Design, Construction and Maintenance and Director of Landscaping, Transportation and Custodial will take on the lead roles in accomplishing continued improvements in sustainable campus features and activities and will find a way to involve the campus community and students.

#### **3) Identify the expected outcome or results of the strategic implementation plan**

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- Improvements in communication and enhancement of the campuses understanding of Facilities Services and the changes necessary to continue operation in these challenging fiscal times. While also providing Facilities Services the necessary feedback to ensure that desired results are being achieved.
- The review of the Facilities mission, vision and goals with associate involvement will solidify the direction of the Facilities team and assist the division to continue to operate at the highest level available within current resources.
- Improving the campuses sustainable features and practices has changed from an idealistic goal to a requirement for reaching carbon neutrality mandates. Facilities efforts in applying and improving sustainable features and practices on campus will bring us closer to these mandates. In addition, bringing in more campus community involvement, particularly students will assist Facilities in contributing directly to student learning outcomes related to sustainability.