CSUF Facilities Management

Improving Project Delivery

PRBC Presentation
Willem van der Pol
March 18, 2016
Agenda

• Facilities Planning & Management (FPM) Assessment
• Findings and Recommendations
• Improvement Strategies
Assessment

I. Evaluation of the Current Facilities Operations (FO) and Capital Project Management (CPM) Areas for Organization, Structure and Efficiency


III. Comparison of Current Project Metrics vs. Best-in-Class
Section I: Evaluate Organization

• Findings indicate lack of systematic approach to the following:
  – Accountability for management actions
  – Fiscal accountability for project costs
  – Transparency in operations to constituencies
  – Information dissemination to campus
Section I: Recommendations

• AVP needs solid strategy and communication plan and must market FPM responsibilities and activities aggressively and relentlessly

• Combine the FO and CPM operations into one

• FPM units must align their processes

• Other divisions need to be more involved
Section II: Review Projects

• Findings related to cost, delivery, completion time and campus satisfaction:
  – Too many variations in timeliness and costs
  – Very good at delivery and completion
  – Customers have little understanding of processes
  – No indication of capital planning process
Section II: Recommendations

• Develop capital project categories
• Establish an organizational structure and operational environment that allows efficient, timely management of the full range of projects under a single responsible Director
• Develop and execute a comprehensive communications plan that provides timely and substantive campus project management status information
Section III: Metrics

• Not much data to compare project management delivery methods due to the uniqueness of every project

• APPA service level standards
  – Custodial Level 3 Casual Inattention
  – Grounds Level 3 Moderate
  – Maintenance Level 3 Managed Care

• Key Performance Indicators (KPI’s):
  – CSUF lowest funded operation per student
Section III: Recommendations

• Task Order Construction Agreement (TOCA)
  – Delivery method for projects <$5M

• APPA Facilities Management Evaluation Program (FMEP) based on Baldrige criteria
  – Relentless focus on campus community
  – Deep commitment to institution’s values
  – Look at industry for broader trends
  – Leadership development and workforce engagement
Response

• Guiding Principles
  – What should you expect?

• Strategies
  – How will we get there?

• Assessment
  – How do you know we got there?
Principles

• Be proactive and reach out, build relationships
• Planning is the cornerstone, look far enough ahead
• Always find the simplest, most expedient way to deliver the project
• Adapt to the situation, adjust to the campus’ needs
• Be transparent, creative, inclusive, accessible and resourceful.
Campus Perspective

- FM will function as one entity with seamless internal handoffs
- Access to FM services via the web portal
- Project Managers will guide customers through the process
- Formats will be universal for all FM services
- Baseline Services will be expanded
Responding to Change

• Change in Sacramento
  – Financing Strategies
  – Title 24

• Change in Long Beach
  – Processes

• Change on Campus
  – Working within Existing Building Portfolio
Strategies

• Re-Organize Facilities Planning & Management
• Re-engineer Project Delivery
• Apply Available Tools
• Hire and Retain
• Develop and Implement FacilitiesLink
• Facilities Management Evaluation Program
Re-Organize Facilities Management

• Organization needs to reflect the intent to serve our customers better
• Better separation of responsibilities
• Fluent crossovers between the units
• Responsive to the needs of the Chancellor’s Office
• Efficiency and efficacy
• Clarity of purpose
Facilities Planning & Management

Organizational Structure December 2014:

• Capital Planning
• Building Safety Office
  – Permitting & Inspection
• Capital Project Management
  – Big Projects
• Facilities Operations
  – Small Projects
Facilities Management 2016

- Campus Planning
- Project Planning & Design
- Engineering & Sustainability
- Construction Management
- Facilities Operation
- Administrative Support
Improve Project Request Process

- Campus Outreach
- Multi-Year Planning
- Thorough Vetting Process
- Campus Interface – FacilitiesLink
- On-Line Forms
- Services “Shopping Cart”
- Timely Access to Information
Improve Project Delivery Process

• Standard Rates and Pricing
• Project and Construction Managers
• Planner/Estimators/Schedulers
• Improved Workflow Management
• Permitting and Inspections
• Front-Line Construction Teams
• Streamline Project Financials
• Project Delivery “Lanes”
## Project Delivery “Lanes”

Produce better definitions and clarity

<table>
<thead>
<tr>
<th>LANE #</th>
<th>Project Size/Type</th>
<th>Campus Planning</th>
<th>Project Planning &amp; Design</th>
<th>Construction Mgmt</th>
<th>Utilities/ENG/Sustain/CAD</th>
<th>Operations &amp; Maint</th>
<th>Budget &amp; Accounting</th>
<th>Delivery Method</th>
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<td>Simple Single Trade</td>
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<td>Fac Ops</td>
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<td>Fac Ops &amp; Construction Contracts</td>
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<tr>
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<td></td>
<td>Design-Bid-Build/Construction Mgmt -CMR</td>
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Baseline Services

• Increased Frequencies
  – Painting Interiors
  – Daily Cleaning and Floor Care
  – Landscaping Services
  – Preventive Maintenance

• Limit Project Management Fees

• Improve Project Delivery

• Increase Planning and Design Services
Baseline Services (cont.)

- New Services Added (formerly baseline)
  - Furniture Assembly and Repairs up to 3 hrs.
  - Moving Furniture up to 3 hrs.
  - Making Keys
  - Install Keyboard Trays and Computer Arms
  - Install Banners, Mirrors, Pictures and Racks
  - Install Hooks, Mail Boxes, Signs and Name Plates
  - Install White Boards and Bulletin Boards
On-Line Access

• Facilities Management Web-Site
  – General Information about the Organization, Activities and Services

• FacilitiesLink
  – Direct Access to Services
  – Specific Layers of Information:
    • Work Orders/Projects
    • Floor Plans
    • Etc.
FacilitiesLink
McCarthy Hall Room 200 Remodel

Scope of Work: Move furniture, Paint Walls, Install Carpet, Install Outlets, Install Doors

Contacts
- **Construction Manager**: Thomas French, Administrator II, Department: Maintenance & Operation Admin, CSU Fullerton, Email: tfrench@exchange.fullerton.edu, Phone: 657-278-2436
- **Departmental Contact**: Lisa Kopecky, Administrator III, Department: Academic Operations & Finance, CSU Fullerton, Email: lkopecky@exchange.fullerton.edu, Phone: 657-278-2194
- **Project Manager**: Wayne Reisdorf, Administrator II, Department: Projects and Programs, CSU Fullerton, Email: wreisdorf@exchange.fullerton.edu, Phone: 657-278-2913

Locations
- **Buildings / Grounds**: McCarthy Hall
- **Details**: Room 201B

Approvals

Schedule
- **Construction**:
  - Initial Planning
  - Close Out / Warranty

Budget
- **Labor**: $20,000 (50.0%)
- **Materials**: $19,500 (48.8%)
- **Permits**: $500 (1.2%)
- **Total Budget**: $40,000 (100.0%)

Comments: Matches 'Total Budget' figure above
Facilities Management Evaluation Program

• Criteria
  – Leadership
  – Strategic & Operational Planning
  – Customer Focus
  – Assessment & Information Analysis
  – Development & Management of Human Resources
  – Process Management
  – Performance Results

• Process
  – Self-Evaluation
  – Site Visit
  – Oral Report and Written Report
Summary

• Reorganize and Staff-up
• Re-engineer Process
• Introduce FM “Ambassadors”
• Formulate Project Delivery Lanes
• Establish Baseline Services
• Establish Rates, Price and Fee Structures
• Establish Billing and Funding Protocols
• Provide Access
Thank you