

# Facilities & Services Strategic Planning Retreat

June 17, 2024



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UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN

# Purpose

To identify the general focus areas of the next strategic plan by reviewing where we are with the current strategic plan, the information we gathered from the surveys and strategic discussions.



# Agenda

1. Status of the current strategic plan.
2. What did we learn from the surveys and strategic discussions?
3. Review Mission, Vision, Values, & Guiding Principles.
4. Other initiatives that will likely impact the new strategic plan.
5. How we plan to move forward/next steps



# Let's Be Sure To . . .

1. Keep the focus high level and not get into the weeds by discussion specific goals and actions
2. Keep employees and customers in mind
3. Keep it simple



# Strategic Planning Overview

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# The Strategic Planning Process



# What Was Our Focus?

1. What are we already committed to doing?
2. Where does the campus want to be in 5 years?
3. What do our customers want from us?
4. What do our employees want from us?



# What Was Our Process?

1. Employee and customer surveys in 2023
2. Used information from surveys to conduct strategic discussions
3. Requested EMT submit responses to strategic discussion questions
4. Requested EMT review current strategic plan



# Current Strategic Plan



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# Strategic Themes

- People
- Project Management
- Customer & Stakeholder Relations and Communication
- Financial Accounting
- Safety & Environmental Protection
- Deferred and Preventive Maintenance
- Accessibility
- Academic Collaboration
- Space Management
- Energy Management & Sustainability



# People

P1: Develop staff: trained and continuous professional development, increase productivity and accountability

P2: Ensure staff are informed of all process and procedures and strategic initiatives

P3: Promote a diverse and inclusive workforce, with equal opportunity

P4: Value and respect all people; enhance an environment of a respectful workplace environment and culture

P5: Align/operationalize the workplace culture with our values

P6: Attract and retain high quality employees; talent acquisition

P7: Engage all employees in delivering quality results

P8: Promote an environment where employees are engaged with the community and contribute to outreach efforts

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# Project Management

PM1: Ensure timely communication

PM2: Complete 95% of the projects on time and on budget to satisfy our customer(s); set expectations, and reinforce accountability to achieve them; and manage expectations, defend the flag

PM3: Develop risk management intelligence

PM4: Simplify project delivery and workflow process

PM5: Develop standardized reporting mechanism on a regular basis

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# Customer & Stakeholder Relations and Communication

C1: Identify all Stakeholders associated with the work

C2: Increase more participation from underrepresented vendors and contractors

C3: Enhance relationships with vendors and contractor

C4: Provide opportunities for customers to provide feedback and get a response

C5: Ensure that all Facilities initiatives are communicated campus- wide; Build and enhance customer relationships and raise the awareness of F&S services and programs

C6: Ensure that university initiatives managed by F&S are communicated campus-wide.

C7: Enhance public engagement; implement public education and awareness programs

C8: Communicate F&S service levels campus-wide.

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# Financial Accounting

F1: Develop and adhere to operating budgets

F2: Develop and analyze rate structures for services

F3: Produce key performance indicators and benchmark against our peers

F4: Explore opportunities for grants, rebates and revenue generation

F5: Explore synergies/partnership opportunities for cost savings

F6: Improve operating efficiencies and effectiveness.



# Safety & Environmental Protection

S1: Properly train employees

S2: Ensure current safety manuals, training, safe work practices are in place

S3: Identify and comply with Federal, State, and Local requirements that apply to campus operations and personnel.

S4: Reduce, minimize injuries, lost time, and worker's compensation

S5: Enhance, enforce and encourage a safe culture



# Deferred & Preventive Maintenance

D1: Update the facility conditions assessment at the University of Illinois, Urbana-Champaign

D2: Develop a plan to regularly and continuously update the facility conditions assessment, based on D1.

D3: Develop a long-term Asset Management Plan (AMP)

D4: Establish a comprehensive PM plan for buildings, utilities, transportation, and the outdoor campus environment.



# Accessibility

A1: Develop an understanding of building accessibility barriers on campus

A2: Further the commitment to ADA compliance and leadership in Accessibility

A3: Improve accessibility of campus walkways



# Academic Collaboration

AC1: Contribute significantly to the research and teaching mission of the university

1. F&S professionals will contribute their industrial expertise & data to research projects, as lecturers or at special events
2. F&S will make their data available as required by researchers for data analytics and inferences purposes
3. F&S will accommodate efforts and make campus facilities available as Living Labs for research and educational purposes
4. F&S will provide tours for classes and special events



# Space Management

## SM1: Optimize Space Utilization

1. Work with the campus community to produce space allocation ratio per student by space type (lab, classroom, etc.)
2. Work with campus to develop space allocation matrix per FTE for every college.
3. Survey space utilization per use type
4. Develop improved utilization plan for underutilized spaces; work with Provost to strategize a workable plan for improved utilization of underutilized space by the middle of 2020.
5. Develop a Space Management Plan; Work with Provost to accurately record campus space and measure against space bank with searchable data in place by July 2019.
6. Maintain building demolition plan. Work with Facility Planning Committee in 2019 to prioritize future demolitions and incorporate demolition plan into Space Management Plan report to be done by December 2020.



# Energy Management & Sustainability

E1: Develop Energy Conservation Plan

E2: Reduce energy consumption

E3: Increase renewable energy

E4: Reduce Water consumption

E5: Reduce vehicle emissions and fuel consumption

E6: Reduce non-point source pollutants from campus landscapes

E7: Reduce waste going to landfill

E8: Increase use of environmentally friendly procurement

E9: Decrease vehicles on campus

E10: Enhance sustainable landscapes

E11: Provide reliable, cost effective, and environmentally responsible utility service to campus

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# Survey & Strategic Discussions

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# Executive Summary: Employees

## Key Areas

- Staffing
- Vision
- Professional Development
- Accountability
- Culture
- Systems



# Staffing and Resources

- Need for More Staffing and Competitive Salaries
- Increased in-house Work Capabilities
- Support from HR for Supervisory Decisions



# Vision and Future Changes

- Proactive Operations and Better Customer Relations
- Efficient Workflows and Automation by 2029
- Emphasis on Teamwork



# Professional Development

- Cost Barriers to Accessing Opportunities
- More Development Opportunities
  - Interaction within F&S
  - Tech Classes
  - Targeted Training by Supervisors



# Accountability

- Consistent Rule Enforcement Needed
- Improved Project Completion Times
- Systems to Measure Success and Celebrate Wins



# Inclusive Workplace Culture

- Better Communication and Transparency
- Engagement Activities: Shop Tours, Kids' Day, etc.
- Ongoing inclusion and diversity initiatives



# Processes and Systems

- Consistent Work-from-Home Policies
- Compatible Software to Reduce Redundancy
- Update Mobile Timekeeping Systems
- Continued Training on Procedures and Policies



# Collaboration

- Importance of teamwork and accountability
- Providing consistent exceptional service to campus
- Need for open-minded supervision



# Executive Summary: Stakeholders

## Key Areas

- Aligning Services and Future Needs
- Transparency and Accountability
- Improving Customer Experience
- Staffing, Compensation, and Resources
- Maintenance and New Technologies
- Work Order and Project Management



# Aligning Services and Future Needs

- Continue to communicate initiatives with campus administrators
- Hold meetings regularly regarding initiatives
- Provide measurement and/or evaluation tools
- Adopt proactive approach to unit needs



# Transparency and Accountability

- Improve transparency in project time and cost
- Improve transparency in planning



# Improving Customer Experience

- Frontline staff and managers should show a commitment to improving customer experience
- Better communication between shops
- Point of leadership/contact
- Regular meetings with customers
- Service Level Agreements



# Staffing, Compensation, and Resources

- Proper compensation to retain staff
- Services affected due to staffing/compensation
- Increase staff to keep buildings clean
- Increase F&S resources to give campus more resources



# Maintenance and New Technologies

- New Buildings vs. Current Buildings
- Plan to maintain both new and current
- Complete deferred maintenance
- New technologies require ongoing trainings for both F&S and units



# Work Order and Project Management

- Work order details missed
- Improve work order closeouts
- Align service prioritization with customer needs
- Detailed invoicing
- Price schedule outlining common job costs



# EMT Results

- **Service Alignment and Coordination:** Enhance coordination with academic programs by designating a single point of contact and improving overall communication and processes to align with the university's mission.
- **Future Resource Needs:** Address the need for better project management resources, additional administrative support, and an updated payroll system to meet future demands.



# EMT Results

- **Improving Customer Experience:** Strengthen communication skills among managers and frontline staff, focus on prioritizing customer-facing services, and reduce internal redundancies.
- **Operational Efficiency:** Invest in professional development, cohesive departmental workspaces, and efficient resource allocation to boost team cohesion and productivity.



# EMT Results

- **Vision and Accountability:** Promote sustainability initiatives, secure funding for carbon-neutral projects, clearly define and enforce accountability measures, and foster an inclusive workplace culture through open discussions and respectful treatment of employees.



# Themes Discussion

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# What Themes Should We Keep?

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Trust · Respect · Accountability · Integrity · Teamwork · Safety · Perseverance

# Mission, Vision, Values, & Guiding Principles

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# How Mission & Vision Inform Strategy



# Defining Mission and Vision

Mission statements communicate the organization's reason for existing and how it will serve its stakeholders (employees, customers).

Vision statements are future oriented and communicate what the organization aspires to be.



# Our Mission

Facilities & Services provides and maintains a physical environment that is conducive to supporting learning, discovery, engagement, and economic development at the University of Illinois and is an active partner in research, teaching, and learning.



# Our Vision

We will be a responsive, reliable, and highly valued service provider.



# Our Values (TRAITS-P)

- **TRUST:** We will believe in the best of everyone and treat others as we would like to be treated.
- **RESPECT:** We will value our employee and foster a work environment that promotes respect, dignity, and the worth of each individual.
- **ACCOUNTABILITY:** We will be accountable for our actions and good stewards of our resources.
- **INTEGRITY:** We will be honest, don what is right, and keep promises.



# Our Values (continued)

- **TEAMWORK:** We will work together to achieve common goals.
- **SAFETY:** We will work to ensure the health and welfare of our employees, customers, and the community.
- **PERSEVERANCE:** We will personally demonstrate dedication, tenacity, and endurance in accomplishing our work for the university.



# Guiding Principles

- **CUSTOMER FOCUS:** We will develop relationships with our customers built on trust, confidence, and reliability.
- **DIVERSITY:** We will have a diverse workforce in an inclusive workplace that unleashes the talents of employees to create value, deliver superior support, and develop innovative solutions for the customers we serve. We will treat our co-workers and customers in a manner that encourages and strengthens an environment of inclusivity.

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# Guiding Principles

- **ENVIRONMENTAL STEWARDSHIP:** We will demonstrate a commitment to health and sustainability in our stewardship of the campus environment.
- **INNOVATION:** We will continuously strive to create new and innovative solutions that bring greater value to the customers we serve.
- **OPERATIONAL EXCELLENCE:** We will empower our employees to deliver the greatest value to our customers in the most efficient and cost effective manner.

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# For Discussion

Does the current mission statement describe why we exist?

Does the current vision statement tell our stakeholders what we aspire to be?

What suggestions would you make to improve the statements (if any)?



# Sample Mission Statement

Our mission is to ensure the efficient operation, safety, and functionality of our organization's physical infrastructure. We strive to maintain high-quality facilities, provide responsive maintenance services, and promote sustainability. By fostering a collaborative environment, we aim to enhance the overall experience for our employees, visitors, and stakeholders.

Source: CoPilot



# Sample Vision Statement

Our vision is to be a proactive and innovative team that ensures the seamless operation and sustainability of our facilities. We strive to create safe, efficient, and comfortable spaces that enhance productivity, foster collaboration, and reflect our organization's commitment to excellence.

Source: CoPilot



# University & System Strategic Planning Alignment

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# Boldly Illinois: 2030 Strategic Plan

## Goal 1

### **Foster Scholarship, Discovery, and Innovation**

Scholarship, discovery, and innovation are at the heart of Illinois' local, national, and global impact. We will drive new frontiers by attracting and retaining a diverse group of faculty, students, and staff endowed with creativity and intellectual depth and breadth. Modern infrastructures, streamlined processes, and enriching interdisciplinary and convergent work will advance the university's mission.



# Boldly Illinois: 2030 Strategic Plan

## Goal 2

### **Provide Transformative Learning Experiences**

With a solid academic core, Illinois will deliver on the fundamental promise of a public university—to teach students and to pioneer the science and the art of learning. This is transformative knowledge—for the individual and, collectively, for the world in which we live and work.



# Boldly Illinois: 2030 Strategic Plan

## Goal 3

### **Make a Significant and Visible Societal Impact**

When the core foundations of unabashed discovery combine with transformative learning and teaching, the outcomes are no longer measured simply in degrees or in citations. They are seen in how the world is changed for the better through contact with the University of Illinois at Urbana-Champaign. The university lives up to its land-grant mission in many ways, and we will better organize, enrich, and value these contributions as we reach out to our local, regional, national, and global communities.

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# Boldly Illinois: 2030 Strategic Plan

## Goal 4

### **Steward Current Resources and Generate Additional Resources for Strategic Initiatives**

The University of Illinois at Urbana-Champaign has stewarded its land-grant mission and accompanying financial, human, technology, and infrastructure resources while tackling significant budgetary challenges. We need to continue to refine, coordinate, and structure our financial framework to manage all of our resources effectively and develop new lines of revenue to support our human resources, infrastructure, operating budget, and strategic initiatives. To create this framework, we must streamline our processes, reduce redundancies, and improve the quality and quantity of services throughout campus.

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# Other Considerations



# Peer Review Purpose

- Guide the future direction and priorities for the programs and the institution
- Identify areas for improvement and development
- Promote goal setting within the departments as well as across departments
- Identify potential opportunities to redirect existing resources or to generate and use incremental resources
- Assure institutional quality to students, faculty, parents, alumni, and other stakeholders

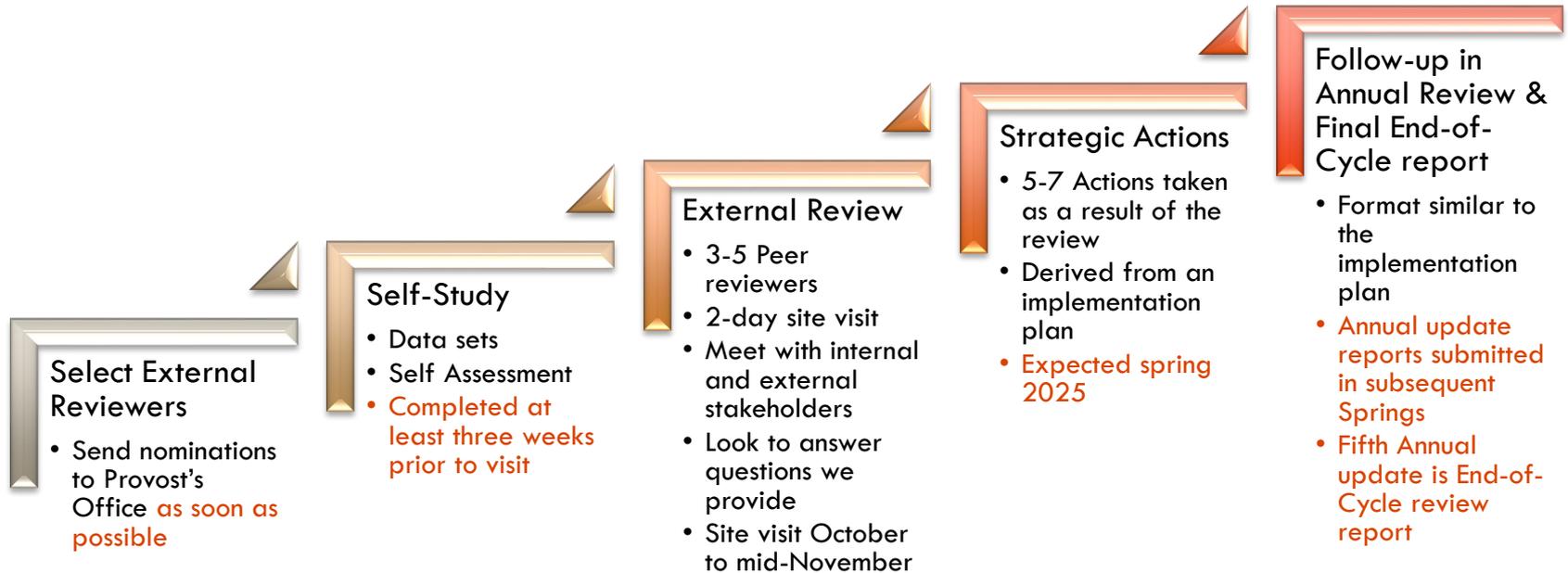


# Peer Review Process

- Self-assessment
  - Response to narrative questions (about 20 pages)
  - Data driven
- External reviewers
  - 3-5 reviewers visit campus for about 2 days or visit virtually
  - Write a report that responds to questions and delivers 5 action items (about 10 pages)
- Follow-up reports, annual reports and an End-of-Cycle report
- Conducted in partnership among Provost's Office, Dean's Office, Department, and Program Review Council
- 8-year cycle



# Peer Review Timeline



# Operational Excellence – Project Delivery

- Purpose Operational Excellence @ Illinois is to "streamline, innovate, and improve administrative services and processes..."
- Morgan is Functional Sponsor with Mohamed, Jim, and Brian Bundren as Co-Leads
- Functional Design Team consisting of F&S and stakeholders will meet 3 times in July and August with first meeting on 7/11.
- Currently reviewing process flows, conducting interviews & assessing data



# Operational Excellence – Project Delivery

- Opportunities for improved efficiency will be looked at in the following areas:
  - Organizational model composition
  - Process efficiencies
  - Service delivery and tracking/reporting/communicating (internally and externally)
  - Limited policy review
  - Enhance F&S staff experience
- Prioritized recommendations and opportunities to Mike D., Paul Redman, and Functional Sponsors by end of August.

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# Communication



# What Should We Communicate to Employees & Customer Stakeholders?

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# Next Steps



# What's Next?

- Phase 1: Plan to Plan – February
- Phase 2: Analyze Internal Capacity and External Influences - March
- Phase 3: Plan for the Strategic Planning Retreat – April/May
- Phase 4: Strategic Planning Retreat for EMT & Committee – June/July
  - Review Phase 2 results and develop strategic priorities
- Phase 5: Review and Approve the Strategic Plan – August/September
  - Review and approve the strategic plan
- Phase 6: Write, Design, and Distribute – October/November
  - Write, design, distribute the strategic plan

