Realizing the Vision

Facility Services Strategic Plan

2012-2015

PEOPLE
STAKEHOLDER RELATIONS AND COMMUNICATION
CUSTOMER SERVICE
FINANCIAL ACCOUNTABILITY
ENERGY MANAGEMENT AND SUSTAINABILITY
SPACE PLANNING AND UTILIZATION
ASSET MANAGEMENT
PROJECT MANAGEMENT

McMaster University

Created: Fall 2012
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We are pleased to provide the McMaster community with the first Strategic Plan for its Facility Services Department. Since I joined McMaster University in October 2011, I had the pleasure of working with our Senior Management, as well as frontline staff, to produce this Document. I was fortunate to work with the dedicated and enthusiastic leadership team to plan for the future of Facility Services at McMaster.

One key motivator for producing this Plan is to align the services and direction of the Department with the new direction of McMaster University as a student-centred, research-focused institution. We need to align our processes, procedures, and ourselves with this direction, which was outlined in President Deane’s letter, *Forward with Integrity*. The key principles and recommendations sketched out in this letter and in the *Emerging Landscape* document are vital to the growth of the Department and our people.

It is for this reason that our first Strategic Theme is People. This theme grew to be crucial, since the issue of staff morale became prevalent. This Strategic Theme puts staff at the forefront of Facility Service’s strategic direction. The objective is to ensure that staff are provided with necessary training and are recognized for their exemplary services to the University, while they work to support McMaster’s key principles.

In addition to staff morale issues, Facility Services faces several challenges that affect its ability to achieve its goals. These include customer satisfaction, completing projects on time and on budget, controlling and managing infrastructure assets, space planning and management, and energy conservation and sustainability. The Strategic Plan is meant to provide a clear direction for Facilities staff to deal with these issues with a high level of proficiency.

I believe this Plan adequately addresses these issues and offers effective solutions to minimize or altogether avoid conflict. Although this is a three-year Plan, the Department will supplement its effectiveness by annually reviewing its implementation and by utilizing the Key Performance Indicators, which were developed in conjunction with my Administration Department colleagues and in light of our values, mission, vision, and strategic direction. I look forward to seeing the Strategic Plan put into use and to work with frontline staff and managers to make positive changes in the University.

Dr. Mohamed Attalla, P.Eng., FCSCE
Assistant Vice-President, McMaster University
Facility Services
Facility Services (or the Department) continues to be the key contributor in providing McMaster University with the services required to build and maintain its various campuses. With a mandate to provide the best services for the University, the Department ensures that projects are contracted for, managed, completed, or resolved in the most timely, cost-effective and efficient manner, while guaranteeing excellent quality and service delivery.

The Department’s key priority is supporting McMaster’s academics, students, and core mission. While the University’s mission is to discover, communicate, and preserve knowledge, and it is committed to creativity, innovation, and excellence in teaching, research, and scholarship; the Department provides University stakeholders with the infrastructure to achieve these goals. This drives Facility Service’s work and is the foundation for the Departmental mission.

In this planning period, the Department will continue to provide high-quality custodial, design and construction, grounds work, maintenance, logistics, mail, energy management, and utilities services to the University. For over a year, Facility Services’ management team has met weekly to discuss the planning context and key risks that will affect its operations over the next few years. The possibility of physical plant failure is the highest risk faced by the University; it would have the most significant impact of any risk on the University’s ability to achieve its core mission. Thus the Strategic Plan, which minimizes the risk of failure, is crucial to Facility Services and McMaster.

The biggest risk faced by the Department is the potential for building components to fail suddenly. This is given priority because, with the current building infrastructure and deferred maintenance, there is a fairly large possibility of failure and the Department’s inability to respond. Second to this is the risk of cost overruns in the budget and low staff morale, which impacts productivity severely. This Plan has been constructed with these risks in mind, trying where possible to avoid their occurrence or minimize their impact.

Based on projections from previous years, Facility Services predicts that its funding will be consistent with previous years. The Department is funded through different pooling, including operating budgets from the University. The Ontario Ministry of Training, Colleges and Universities (MTCU) also provides funding, as do research grant organizations, such as the Canada Foundation for Innovation (CFI).

Facility Services is determined to adhere to the departmental budget and seeks ways to reduce costs and to maximize efficiencies, so that University stakeholders receive the highest value service for their money. During this period, overall staff numbers are not expected to increase or decline; the Department is both shrinking and growing in different areas.
In the upcoming years, little change is expected in the volume of Facility Services’ projects; while the Department’s stakeholders continue to change and tasks continue to vary, the amount of projects are expected to stay generally the same. However, sources of funding will continue to change: while this makes funding somewhat unpredictable, the Department anticipates that financial support will be consistent with previous years. Challenges, however, are increasing, due to the aging building infrastructure and the need to reduce energy costs and consumption.

Facility Services remains vigilant on matters of health and safety; pursuant to the Occupational Health and Safety Act, the Department continues to share good maintenance and protective practices with its employees. The Department’s Health and Safety Committee is a labour and management partnership that enforces the regulations set out by the Act. When health and safety violations or accidents occur, the Committee reviews the accidents and makes recommendation to management for follow-up.

Due to the University’s growth and significant changes in management over the past few years, Facility Services views factors such as University priorities, governmental mandates, employee satisfaction, and stakeholder needs as relevant to its strategic planning process.

The Department implemented several major changes in management structure from October 2011 to September 2012. The Department’s hierarchy was diffused between several Directors, Division Heads, and frontline managers. To better meet stakeholders’ needs, Facility Services introduced several new positions, including a Manager of Space Planning and Utilization; as well as modifying existing positions to better align them with the University’s new vision. These include a Coordinator of Space Planning and an Energy Management and Sustainability Engineer. These positions facilitate the distribution of work across the Department and the improved alignment with the University’s core mission.

Ensuring strong performance and guaranteeing results have always been important to Facility Services. During the planning sessions, Directors and managers developed key performance indicators (KPIs) to measure the effectiveness of the Department’s work and its ability to meet its goals. One of the most important KPIs is employee feedback through a large annual survey and several focus groups. Senior managers affirmed that staff input was vital to the health and improvement of the Department because its people are its biggest asset. Other KPIs included measuring newly introduced software, Facility Services’ ability to respond quickly to work requests, workplace safety and inclusiveness, and adherence to the departmental budget. These indicators offer a nuanced understanding of Facility Services’ performance.

Despite the risks and uncertainties inherent to the forecasts and projections used in this Plan, Facility Services has devised a strategy for the next few years that is adaptable, and which has streamlined and optimized processes. The Department believes it is well positioned to meet its goals of providing excellent service on time and on budget to a satisfied customer.
Dr. Mohamed Attalla, Assistant Vice-President; and Roger Couldrey, Vice-President (Administration) at the grand opening of Facility Services’ most recently completed project: the $3.3 million Phoenix project.

Organizational Profile

“Aligning our work to support the core mission of the University and the directions inspired by Forward with Integrity is the primary goal of the administrative and ancillary departments. I am very impressed by the quality of the planning undertaken by the Facilities team and congratulate all of you on this incredible accomplishment which I am quite sure will herald success for years to come. Congratulations and thank you.”

- Roger Couldrey, Vice-President (Administration)
Organizational Background

Though a form of Facility Services has existed since the inception of McMaster University in 1887, the Department gained sophistication and development as the University and campus moved into the Westdale area and continued to grow. The Department ran relatively small custodial and construction projects until the 1970s. The late 1980s saw the separation of the Department, then known as “Physical Plant,” and all construction work. The two began essentially operating as separate entities, performing seemingly related tasks while avoiding overlap between construction projects and all other utilities-related operations. This fractured approach to service provision continued until 2002, when the two departments were merged to form a more cohesive unit.

Facility Services oversees all processes that are relevant to the smooth operation of the University. To do this, the Department places an emphasis on inclusiveness and collaboration. Technological advancement, University needs, and organizational changes have been the driving forces of change in the past, bringing about newer and more efficient practices within the Department. These factors continue to shape the way Facility Services operates.

Department Overview

Within the larger University, Facility Services provides service for many specific clients; while it is the intention of the Department to aid the University at large in meeting its Vision and Mission, many other goals by specific stakeholders are met as well. Facility Services is headed by the Assistant-Vice President (Facility Services), who liaises on behalf of the Department with University executives, Deans, Chairs, and managers to provide a proactive, service-oriented approach to managing the facility and physical plant operations of the University. In so doing, Dr. Attalla ensures that the University’s senior management are satisfied with the services provided. In other cases, when tasks or projects are done for specific individuals or departments, the Department works to ensure that relevant clients are satisfied with its work.
Outside of the University, Facility Services also supports the Hamilton community, particularly in the Westdale area, by assisting in projects undertaken by the City and its inhabitants. For example, the Department helped to project manage the Ronald McDonald House Hamilton expansion from 2011 to 2012. Facility Services was eager to help support this endeavour. The University is also adjacent to the Royal Botanical Gardens, rendering sustainability a high priority for the Department. Facility Services considers these stakeholders in key decision-making opportunities, choosing to forge partnerships where possible.

As a member of the Council of Ontario Universities (COU), the Department supports the endeavours of universities across Ontario by recognizing the important work done within. Facility Services engages in these groups to show its support for educational and research institutions not only in the province or country, but across the continent. The Department is specifically tasked with the care and maintenance of McMaster’s facilities and it assists the University in improving each year to receive higher ranking in university-comparison forums; nevertheless, Facility Services engages in industry-relevant groups, such as the Ontario Association of Physical Plant Administrators (OAPPA), to share best practices that benefit the industry at large.

**Service Lines**

As the maintenance service provider for McMaster University, Facility Services (or the Department) provides a wide variety of services to the University. When external service is required, the Department contracts vendors and service providers to meet the needs of the University, trying at all times to keep workflows and research on campus uninterrupted. Facility Services handles all large construction projects, contracts, and small, day-to-day operations to ensure all fixed assets are operating smoothly.

To meet the needs of the University and various stakeholders, Facility Services has established seven (7) service lines:

**Custodial Services**: cleans all classrooms, offices, hallways, entranceways, lounges, washrooms, and laboratories; moves furniture and equipment; sets up for special occasions; maintains cleaning standards set by the Department.

**Grounds**: provides quality grounds management of approximately 300 acres of campus; designs landscapes, maintains turf, creates floral displays, performs forestry work; sets up for special, outdoor events; controls litter on campus; performs winter control operations, including snow removal; creates inspiring work, play, and study spaces, while emphasizing safety and environmental sustainability.

**Maintenance Services**: provides specialized skilled trades services to the campus, including carpentry and cabinet making, plumbing, steam fitting, electrical, the mechanical trades, and fire safety; routinely inspects, tests, and services facility infrastructure and equipment as part of a scheduled preventive maintenance
Energy management refers to our responsibility and goal to reduce or become more efficient in the way we use energy on campus. These strategies will be devised based on studies and collaboration with people within our Department, customers, and external consultants.

- Curtis Dinsmore, Operations and Relief Engineer

Logistics and Mail Services: performs shipping and receiving of goods and materials; delivers mail, parcels, Grand & Toy items, and audio/visual equipment; assists in office moves and special event set-ups.

Design and Construction: designs, estimates, tenders, and manages projects, such as minor and major renovations, alterations, and capital projects; administrates contracts with external service providers; prepares estimates, Requests for Proposals, and permit applications; monitors progress of projects and inspects to ensure conformance with building and safety codes when completed; produces computer-assisted drawings; maintains all master drawings for building and underground services; handles building asbestos and roof inventories.

Energy Management and Utilities: provides all building heating and cooling systems and services, including steam, heating, hot water, chilled water, distilled water, air conditioning, electrical power, sewage handling, gas, and compressed air; purchases electric power from the Independent Electricity System Operator (IESO), as the University is a direct connect customer on the Ontario Hydro grid, and distributes the power throughout the University by way of a University-owned hydro substation and overhead and underground distribution system; maintains the integrity of McMaster's utilities systems, including distributions and internal building systems; develops Energy Management programs that include long-range energy-use goals, temperature and lighting standards, and a facilities improvement program to modify buildings and utilities systems to improve energy efficiency.

Space Planning and Utilization: tracks and reports on all McMaster space for use/vacancy; reviews and advises on accommodation requests in the context of available space, appropriate timing, and the COU standards; develops, establishes, and implements design and space standards; maintains stewardship over the Space
Realizing the Vision

Facility services Management Plan and the Campus Plan; fosters community engagement; champions barrier-free accessibility.

Governance and Structure

Senate, Board of Governors, and Committees

McMaster University employs a bicameral system of governance, consisting of a Senate and a Board of Governors. The McMaster University Act, 1976 is an Act of the Ontario Legislature that outlines both the Senate’s and the Board’s jurisdiction and powers. The former holds a largely academia-related role in the University: it is responsible for developing academic policy and managing the system of education. Facility Services is more directly involved with the Board of Governors. The Board is the legal owner and the final authority for McMaster University, whose assets and operations the Board holds in trust. Along with the President and Senior Administrative Officers, who are the key decision-makers in policy, Board members play an important role in the governance of the University. Vested in the Board are the government, conduct, management, and control of the University and of its property, revenues, business, and affairs. The Board is responsible for the finances of the University, including monitoring and authorizing the annual operating budget, and any prudent investments and comprehensive fund-raising activities.

Facility Services is accountable to the Board through the Planning and Building Committee. The Board created this Committee according to By-Law No. 1, section 15, sub-section 3(g). The Planning and Building Committee deliberates on all matters relating to the physical resources of the University and makes recommendations to the Board of Governors regarding authorization of such decisions. The Committee takes into account academic and other needs of the McMaster community, selects consultants, reviews financial resources, and maintains overall aesthetics of the University when making recommendations for expansion or alteration. This Committee approves all the large projects undertaken by Facility Services and advises the Department on the procurement guidelines set out in the Broader Public Sector Act.

Organizational and Executive Management Structure

Facility Services is headed by Dr. Mohamed Attalla, the Assistant Vice-President (Facility Services) of the University. He, along with the Associate Vice-President and Chief Human Resources Officer, the Assistant Vice-President (Administration) and Chief Financial Officer, the Chief Information Officer, and the Chief Risk Officer, report to the
Vice-President (Administration). The Vice-President (Administration) reports to the President, Vice-Chancellor, and Chair of the Board.

Under Dr. Attalla’s supervision, four (4) Directors oversee the smooth operation of Facility Services. These are the Director of Custodial Services, the Director of Maintenance Services, the Director of Energy Management and Utilities, and the Director of Design and Construction. There are also two (2) Managers (Space Utilization and Planning, and Business Services) and one (1) Quality Management/Administrative Support Specialist who report to the Assistant Vice-President (Facility Services).

Carlos Figueira, the Director of Custodial Services, heads all custodial works, grounds operations, and logistic and mail services. Custodial, grounds, and mail service managers report to this individual; they in turn have teams that report to them. These teams consist of custodians, cleaners; drivers, equipment operators, labourers, gardeners; and shippers, receivers, lead sorters, assistant addressors, and mail sorters.

Craig MacDonald, the Director of Maintenance Services, is responsible for overseeing all repairs, minor renovation projects, and preventive maintenance activities at McMaster. The Customer Service and Process Manager, Trades Supervisors, and Service Coordinator report to the Director. Reporting to these managers are the customer service representatives, and the skilled tradespeople of carpenters, electricians, plumbers, locksmiths, millwrights, sheet metal workers, fire technicians, facilities maintenance mechanics, and labourers.

Several Operating Engineers report to Joe Emberson, the Director of Energy Management and Utilities. The controls mechanics and utilities operators also report to the Director; furthermore, the University’s Client Service Analyst is affiliated with him.

Bob Dunn, Director of Design and Construction, oversees all large construction projects undertaken by the Department and all contracts with external service providers. Several project directors report to the Directors and this individual. Reporting to the project directors are field supervisors and project managers, who oversee specific projects in detail.

The Department also works closely with affiliated positions, such as the Management Information Specialist, the Director of Housing and Conference Services, and the Technical Support Specialist. These positions work with Facility Services very closely but do not report to the Assistant Vice-President (Facility Services).

The hierarchy established by the Department makes managing projects, processes, and operations smooth and manageable. Each unit of Directors and individual workers in the Department’s various subdivisions allows for individual accountability and team success. For the Department’s organizational chart, please refer to: [http://ppims.mcmaster.ca/pplant/documents/FSCCHART.pdf](http://ppims.mcmaster.ca/pplant/documents/FSCCHART.pdf).
Planning and Strategic Issues
Planning Process
Following the publication of President Deane’s *Forward with Integrity (FWI)* letter, which outlined some of the University’s strategic intentions, Facility Services began planning the changes to its own strategic direction. The Assistant Vice-President (Facility Services), Directors, and frontline Managers met weekly from November 2011 to August 2012 to plan for the next period. Frontline managers met regularly with staff to inform them of progress and to seek feedback. The Assistant Vice-President provided updates in the All-Staff Meetings and encouraged feedback, as well.

The planning stage consisted of identifying Facility Services’ key risks, evaluating the probability of their occurrence, and their potential impact. The parties involved then planned ways to avoid risks occurring, or to minimize their effects. These considerations were factored in during the creation of this Plan, focusing resources on high-risk areas where possible.

Aside from risks, Facility Services also considered key strategic issues in the planning stage. These were any changes or potential changes in the industrial, financial, internal, or governmental landscapes that could have a positive or negative effect on the way the Department operates. Where possible, the threats and opportunities relevant to these strategic issues have been identified and accounted for in the Plan.

Planning Context

The following were the major factors and considerations for this Strategic Plan in 2012:

*University Priorities*

McMaster’s *FWI* document outlined its strategic direction through new principles. As an administrative function, Facility Services needed to align itself with this new direction. Furthermore, as a progressive organization that wishes to conduct itself with the highest degree of professionalism, Facility Services needed to evaluate its goals, risks, and opportunities, and formalize a long-term plan. This was done with University priorities in mind, including bringing about the best possible student experience, community engagement, research facilitation, energy conservation, and sustainability and environmental consciousness.

*Governmental Mandates*

With the creation of the new *Broader Public Sector Guidelines* for procurement, it was necessary for Facility Services to consider how it would contract with the best service providers while complying with the Government’s regulations. Furthermore, the Department needed to foster a sense of fiscal responsibility. Creating a roster of pre-qualified vendors and service providers was found to be the best solution. As a result, the Department feels that it is well-positioned to meet University needs excellently, cost-effectively, and in accordance with the *Guidelines*.
Internal Concerns

At the core of this Strategic Plan was the Department’s desire to improve staff morale. By involving staff in Facility Services’ strategic direction and showing them the significance of their roles in the organization, they would be able to appreciate the work they do. Prior to the initiatives of the Department to remedy this, low staff morale was affecting employee satisfaction and productivity. This Strategic Plan outlines ways by which the Department intends to engage staff in their work and bring about satisfaction.

Internal Changes

During the planning of this Strategic Plan, the Department was undergoing several major changes. In October 2011, a new Assistant Vice-President began heading the Department. An Asset Management Plan, an Energy Management Plan, and Capital Plan, and a new process for fiscal responsibility were introduced, changing the way Facility Services functions. Furthermore, a strategy for dealing with staff changed the way the Department operates internally. Finally, a “Priority 1to5” model for work orders changed the way the Department responds to customer needs.

Several new and modified positions were introduced, including Project Directors, a Manager of Space Planning and Utilization, a Coordinator of Space Planning, and an Energy Management and Sustainability Engineer. The Department also merged with Mail Services in the spring of 2012. These changes in Facility Services were considered in the planning of this Strategy, and their potential Objectives were kept in mind when planning ahead.

Customer Needs

Because the Department had not yet done this, it was important to identify a customer and stakeholder base. That way, the input of all parties involved could be considered in key decision-making instances. Stronger communication with stakeholders could also be achieved, based on Facility Service’s detailed knowledge of their needs and concerns.

Industry Concerns

Challenges in energy and energy pricing resulted in the need for a comprehensive energy conservation plan and crucial changes in the Department’s energy management approach. In the planning stage, Facility Services considered the most cost-effective and efficient ways to provide energy to the University given these industrial challenges.

Environmental Concerns

The University and Facility Services have put an emphasis on sustainability in the last few years. Given this, the Department prioritized this in its Strategic Plan, limiting energy consumption and supporting environmentally-conscious initiatives where possible.
VALUES

- TRUST
- RESPECT
- ACCOUNTABILITY
- INTEGRITY
- TEAMWORK
- PERSERVANCE

MISSION
To deliver service excellence on time and on budget to a satisfied customer. We are committed to providing a healthy, safe, supportive, and inspiring physical environment conducive to learning, teaching, research, community partnering, and the attraction and retention of quality students, faculty, and staff.

VISION
Embracing innovation and commitment in designing, building, and maintaining facilities and grounds that ensure McMaster’s continued placement as a world-class University.

STRATEGIC PLAN
THEMES, GOALS, OBJECTIVES, ACTION ITEMS, AND PERFORMANCE MEASURES

In keeping with the University’s strategic organization, Facility Services identified 8 Strategic Themes around which to organize its goals. These are: People, Stakeholder Relations and Communication, Customer Service, Financial Accountability, Sustainability and Energy Management, Space Planning and Utilization, Asset Management, and Project Management.

Each Theme has one (1) Strategic Goal and a number of Strategic Objectives. Under these Objectives, relevant Action Items are listed: the Department aims to arrive at the Strategic Objectives by performing these Action Items. Finally, several Performance Measurements for each theme are listed. These will ensure that Facility Services stays on track on its way to achieving its objective to deliver excellence, on-time and on-budget, to a satisfied customer. To view the Department’s strategic framework, please refer to Facility Services’ website:

1. PEOPLE

As the service solution department for McMaster University, Facility Services’ most important resource is its more than 300 employees. Ensuring the satisfaction and involvement of its people remains at the forefront of the Department’s strategic goals; employees are central to the departmental mission. Accordingly, the Strategic Goal for this Theme is to **create and value a motivated, skilled, and professional workforce**. In order to do this, the People Strategic Theme endeavours to achieve seven (7) Strategic Objectives.

“In Facility Services at McMaster University, people are our most valuable assets and the backbone of our operation. The intentions of this strategic section are to ensure that our staff understand key University priorities, are trained appropriately for their job functions, and are valued and appreciated for their excellent work.”

- Dr. Mohamed Attalla, P. Eng. FCSCE
Assistant-Vice President, Facility Services
Strategic Objectives:

1. **Staff are satisfied with their work and workplace.**

Staff satisfaction with their work and work environment is vital to the achievement of all of Facility Services’ operational goals. Not only is this conducive to individual well-being, it inspires teamwork and collective productivity. To achieve this objective, it will be necessary to employ methods that will encourage staff involvement in attaining their own satisfaction.

2. **Staff are provided with the necessary tools and technology for performing their job functions.**

The value of having appropriate equipment for staff is immeasurable; without this, they cannot be expected to do their jobs effectively, nor well enough to meet standard service levels. Having the right tools can ensure efficient and safe work for staff and campus stakeholders.

3. **Staff are motivated and engaged with the delivery of the Department’s core functions and strategic direction.**

By communicating the Department’s functions and direction, it will be possible to actively engage workers in a process in which they are already invested. It is necessary to make these goals explicit in order to foster a sense of purpose and belonging. This will furthermore inspire employees to assess their own roles in bringing about the Department’s long-term goals: they will then understand their importance within the Department and the effects of the effort they make.

4. **Individuals are engaged in a culture of mutual respect and collaboration.**

Creating an environment of mutual respect within the workplace facilitates the growth and development of all teams. The Department leads by example: Facility Services does not discriminate based on race, gender, sexual orientation, age, religion, language, or disability. All individuals are enabled to engage and participate in their work more actively, because their ideas are valued. The onus falls upon each individual team member and team leader to show respect to persons and ideas. It is imperative to consider collaborative suggestions from workers to discover best practices and implement them as new standards.

“We try our best to stay positive, have fun, and have a sense of humour. It helps to work with friends.”

- Anne McMeekin and Jeannita Harfmann, Custodial Staff
5. Staff are provided with professional development, training, and mentoring opportunities to ensure a high level of knowledge and skill.

As best practices continue to be discovered and developed, it will be necessary to train employees and staff to do their jobs more effectively and efficiently. This will ensure that individuals are knowledgeable about health and safety concerns and precautions; it will also provide opportunities for innovative and creative thinking and for individuals to flourish in their fields.

6. Innovation and creative thinking is cultivated and embraced.

Pursuant to the University’s Mission to embrace innovation and creative thinking, Facility Services’ Strategic Plan has adopted similar values in its own right. Creative thinking, especially when it leads to more efficient work flows, will be nurtured through the fostering of collaboration throughout the Department and the training of staff members, as discussed in Strategic Objectives 4 and 5 respectively. Facility Services will provide opportunities to share those best practices that employees use on job sites.

7. Individual performance is high quality and each person continuously makes effort to improve.

By having an engaged and valued staff, Facility Services will encourage workers to perform tasks to the best of their abilities through encouragement and the fostering good practices. By motivating staff to get involved and to be knowledgeable about the direction of the Department (pursuant to Strategic Objective 3), Facility Services encourages individuals to desire improvement.

Action Items:

In order to achieve these seven (7) Strategic Objectives, the following Action Items have been developed:

1. Develop opportunities for formal feedback.

The Department will annually conduct a large survey, available for all staff members. This will act as a general climate check, providing teams with information about staff satisfaction levels. It will then be the responsibility of individual managers to see that good suggestions for change are implemented.

2. Develop a mechanism for staff to provide input towards departmental Mission, Vision, goals, procedures and processes, and encourage staff and management to discuss and experiment with new strategies to complete work.
Regular staff meetings will **assist in the gathering and sharing of information on the Department’s Mission, Vision, goals, policies, and procedures.** All team leads will have established agenda items of discussion, which will focus on departmental as well as University goals. Having been informed of the current position of the Department in relation to long-term goals, employees will be given the opportunity to **contribute their ideas on how best to go about achieving those future objectives.** Team leads will then communicate all good ideas to the Department’s Directors.

Each team will be tasked with experimenting with staff-driven strategies to complete work. These initiatives will be celebrated at the bi-annual All-Staff Meetings. Teams will **create opportunities for staff to be creative in their workplace.** This strategy has been successful amongst grounds-staff, who are given the opportunity to present proposals for the design of McMaster’s grounds. Staff have been demonstrably motivated by this opportunity and it has encouraged participation and engagement.

Team leads will allow staff opportunities to create and develop programs that will improve work processes within the teams. Staff will be encouraged by the celebration and recognition of all good ideas and efforts; this will encourage others to contribute their own ideas. **In all collaborative activities, every effort will be made to build relationships that are respectful and constructive.**

3. **Ensure physical work environment is safe and functional, and where possible, pleasing.**

Staff will actively participate in Health and Safety Committee meetings, either by attending or sharing information afterwards. **Team meetings will include healthy and safety regulation updates, information sharing, and a forum for staff feedback.** Employees will be encouraged to share any health and safety concerns they have with their team leads, who will take appropriate action to correct bad practices. All aesthetic concerns will be taken into consideration and, where feasible, changes will be made to ensure that work environments are as pleasing as possible for employees.

4. **Make sure that at least the minimum tools and equipment required for all staff positions are available.**

Each team will be tasked with creating the team equipment inventory, which will establish the standard equipment needed for each unit within Facility Services. This will follow a discussion of job functions, with a focus on establishing the necessity of each piece of equipment. Teams will align equipment needs with sound operational practices, so the most cost-effective, efficient equipment is purchased. The Department will **store these tools and supplies in a common, centralized area and ensure they are shared fairly among the staff.**
5. **Ensure the workplace values mutual respect, fairness and equality in all communications within Facility Services.**

All Facility Services staff will complete formal training and task-related education, including anti-violence and anti-harassment training. The McMaster policies that speak to mutual respect, anti-discrimination, anti-violence, and anti-harassment within the workplace will be communicated at team meetings.

Having shared this, each individual will be expected to respect colleagues in all acts of communication, whether oral, written, or behavioural. This will provide team leads and members with the sensitivity training needed to communicate constructively and respectfully. Thus, even when providing instruction or corrective action, team leads will **respectfully encourage staff towards improvement, rather than using intimidations, insults, coercion, or neglect.**

Any complaints about harassment, discrimination, disrespect, unfairness, or inequality will be taken seriously by team leads and Directors; these instances will be investigated thoroughly and, following the relevant McMaster policy in each case, appropriate action will be taken.

6. **Through daily interactions, team leads will endeavour to foster a sense of trust, personal connection, recognition, and teamwork amongst colleagues and coworkers, while recognizing groups and individuals.**

The importance of **staff recognition** and programs cannot be overstated: demonstrated appreciation of hard work makes individuals feel valued and provides an incentive for other employees to strive to improve their efficiency, practices, and attitudes. In order to recognize employee achievement in a formal way, several employees will be recognized at the bi-annual All-Staff Meetings. Otherwise, employees will be recognized in smaller teams by team leads and fellow employees.

As of August 2012, this approach has been tested with much success: individuals appreciate being recognized for their work, and fellow employees are encouraged by that recognition to work harder and to nominate colleagues. This has fostered a sense of teamwork vital to the smooth operation of the Department.

In order to ascertain which exceptional employees have performed work worthy of recognition, **all managers and senior leaders will be more accessible within the workplace**. Leaders will regularly visit frontline staff in their work environments. Additionally, this will provide workers with more opportunities to share their ideas with their team leads.
Facility Services implemented the Communication Plan that was developed in the summer of 2011 for staff and staff morale. The first All-Staff Meeting that occurred was a success and allowed for both a formal and an informal sharing of information. All-Staff Meetings are now a standard for the Department.

In these meetings, and pursuant to Strategic Objective 3 and Action Item 2, the Department will engage workers by involving them in larger departmental goals; this will foster a sense of belonging and purpose. Providing this sense of direction is important to align all staff with Department-wide goals.

Each unit within Facility Services has established their customer service levels or performance levels. These levels will be communicated at each team meeting and the bi-annual All-Staff Meetings. Through clear communication from Directors and team leads, staff will have a clear understanding of service level expectations and their customers’ requirements.

Team leads will work closely with their staff to design and implement team-specific training for continued support and education of their staff. Individual education or mentoring opportunities will be developed for those staff members who have specific career path interests that are align with departmental goals and objectives. Opportunities for information-sharing between coworkers will be created, so that best practices are adopted.

The sustainability of the Department can be partially attributed to the creation of opportunities for staff that have a vision to advance. Where possible, the Department will create frontline training programs and programs for apprenticeships; this will facilitate advancement by preparing employees with the required
skills to succeed in higher-level positions. Facility Services will also invest time and resources to allow technical staff to remain current with all applicable codes and standards.

9. Encourage innovation and creative approaches to work.

Where possible, team leads will allow time for the process of innovation. By having a team approach to creative problem-solving, new and better ways of handling issues that arise will be implemented.

10. Establish and communicate expected performance levels.

In order to do this, supervisors will review performance in a timely manner and offer appropriate feedback. The results of these reviews will then be measured against established benchmarks and service levels. Not only will this help keep the Department on track, but the review will be opportunities for continuous improvement for staff members.

After discovering the position of the Department’s performance vis-à-vis its established service levels, Facility Services can make changes to improve its performance. For example, the Department will provide training to employees on how to respond to competing priorities for both unplanned and small, ad hoc work requests. When these changes occur, Facility Services will keep its people and how they are affected by change in mind. Team leads will work hard to empower employees to be accepting of change and develop a cross training schedule to help create job stimulus. Cross training is when staff are trained on different schedules or for different tasks than that which they usually perform, which helps to ensure consistency in service delivery. It will also assist employees in adapting to change.

Performance Measurement:

To monitor the success of this theme’s Actions Items in leading the Department towards the seven (7) Strategic Objectives, Facility Services developed several Performance Measurements.

1. Employee feedback.

Following the annual employee feedback survey introduced in Action Item 1, the Department will track changes over time to see if employee satisfaction levels are improving. Furthermore, Facility Services has held, and will continue to hold, focus groups to gain qualitative data on the issues faced by employees. Employees and focus group facilitators will brainstorm ideas for improvement together. The data obtained from the survey and focus groups will be preserved so that longitudinal trends can be identified; it will then be possible to see if there have been significant improvements.

2. Supervisors’ timely revision of individuals’ performance.
This will necessitate regularly scheduled reviews and inspections. These, however, will be opportunities for improvement, as employees will be reminded of departmental goals. Furthermore, they will be opportunities for team leads to check in with employees to see that satisfaction levels and job efficiency are improving. This type of information-gathering is convenient to obtain more nuanced descriptions of employee satisfaction, partly because these check-ins will occur more frequently than the aforementioned annual employee feedback survey. The information, furthermore, will be received directly by team leads, who will be the ones to make necessary changes.

3. **Frequency of discussions of Mission, Vision, goals, procedures and processes at team meetings for staff engagement and input.**

It is the goal of the Department to place a greater focus on its Mission, Vision, and Values. An increase or decrease in the discussion of these important keystones will indicate whether Facility Services is emphasizing their significance. These discussions will furthermore be opportunities for staff to provide their input on the Department's direction.

4. **Frequency and activeness of participation in Health and Safety Committees; inclusion of health and safety as agenda items at all team meetings.**

The Department will use the frequency of discussions about health and safety and its own involvement with Health and Safety Committees as indications that Facility Services is employing the most up-to-date practices and, as much as possible, guaranteeing the wellbeing of its employees.

5. **Relevancy of inventory of tools.**

To be effective, this inventory must be updated continually, particularly as obsolete tools are disposed of and replaced. This Measurement will ensure that the Department continues to provide necessary tools for employees and that more efficient and cost-effective tools and equipment are sought.

6. **Number of staff recognized for their excellent work.**

This Performance Measurement has a dual purpose: firstly, it will demonstrate that the Department is recognizing staff where appropriate. Secondly, it will indicate that staff are performing increasingly more effectively and deserve to be recognized for their work. Both of these are vital to the Department’s success.

7. **Staff completion of respectful workplace training program.**

Having all staff complete this training will propel Facility Services in a positive direction. Staff will be more aware of respectful behaviour and individually accountable to bring it about by implementing the strategies learned in this training.

8. **Precedence and focus given to discussions about respect in team meetings.**
Because the Department wants to focus on mutual respect in the workplace, the frequency of these discussions will indicate that these issues are in the minds of staff members and team leads.

9. Development and number of team-building initiatives for each unit.

The amount of initiatives that are created by each team will indicate how much team leads are incorporating the ideas of staff to encourage engagement and participation. Facility Services believes it is important for staff to contribute to their own growth; this can be accomplished through investments from all team members in creating initiatives that promote teamwork and collaboration.

10. Sharing and preservation of institutional knowledge established through a plan, which allows senior and long-term staff to mentor new staff.

Creating this forum is imperative for the Department’s continual improvement. As employees retire and new staff is hired, the sharing of best practices will become invaluable. This Measurement determines Facility Services’ ability to provide mentoring for new staff.

11. Creation of staff forum for innovative ideas.

This Measurement will indicate how much Facility Services is fostering creativity and innovation in the workplace. The creation of such a forum will indicate that the Department is indeed interested in the ideas of its staff in improving its functions.

12. Measurement of performance against established benchmarks and service levels.

Teams will have developed performance measurements systems against service standards. Systems may take into consideration customer feedback, employee feedback, meeting deadlines, aesthetically-pleasing work, or use of creativity and innovation at work. Each team will celebrate their performance successes and will share them with campus stakeholders, primarily via the Department’s website.


The rapidity of the response to work order requests (where applicable) will gauge the effectiveness of staff training. If they are able to better respond to work requests, quickly and with more accuracy, the Department will know that training has been appropriate. When responses are either slow or inaccurate, more resources or time need to be invested into better training to correct the problematic areas.

This is a partial list of the Department’s Performance Measurements for this Theme. For a full list, please visit: http://ppims.mcmaster.ca/pplant/documents/strategicplanframework.pdf
The Stakeholder Relations and Communication Strategic Theme reflects the importance of understanding who Facility Services’ internal and external stakeholders are. By doing so, the Department can gauge who needs to be considered and consulted in key decision-making instances and which relationships can be used for mutual benefit. Furthermore, communication can be clarified and tailored to suit the needs of individual stakeholders. The Goal of this Strategic Theme is to align the direction of Facility Services to reflect the value of stakeholder relations.

"Facility Services recognizes the importance of its stakeholders and partners in assisting the Department with its Strategic Plan, goals, and objectives. Our academic stakeholders assist Facility Services in shaping our service delivery, while our external stakeholders help us align our services to meet academic priorities. Both are vital to our growth."

- Carlos Figueira, Director of Custodial Services
Strategic Objectives:

Oriented toward the objective of this Strategic Theme, the following six (6) Strategic Objectives have been developed:

1. *The Department frequently interacts with stakeholders.*

Facility Services will create opportunities to engage stakeholders in dialogue to gain feedback and better understand their needs. These meetings and informal interactions will ensure that the Department is able to position itself vis-à-vis its goals. These interactions will furthermore make mutually advantageous opportunities possible because of the increased engagement with groups and organization that can provide services, resources, funding, and work opportunities to Facility Services.

2. *Facility Services has strong and sustained communication with other institutions.*

These institutions include academic organizations, such as other colleges and the Council of Ontario Universities (COU); and industry-related groups, such as the Ontario Association of Physical Plant Administrators (OAPPA). The former type is beneficial to the Department because they help rank McMaster among comparable universities. It is thereby easier to see how far McMaster has come in achieving its goal of being a world-class university. Conversely, the latter type keeps the Department up-to-date on industrial standards, while providing opportunities to network with service providers. This is beneficial because these service providers and contractors can be added to the Department’s roster of pre-qualified vendors, as discussed in the Project Management Theme’s Action Item 4.

3. *The Department understands and supports academic priorities and research strategies.*

Facility Services aims to develop and participate in collaborative efforts to support teaching material to students. The Department will supervise and mentor students through the learning and research process.

4. *Community relationships and engagement are fostered.*

The Department appreciates the importance of involvement with the Hamilton community at large. In order to build mutually beneficial relationships with Westdale-area stakeholders, it is vital for Facility Services to increase its interaction and engagement with key figures and groups in the community.

5. *Internal and external partnerships and community relationships are developed to further McMaster’s strategies.*

Pursuant to Strategic Objective 3, Facility Services will support the University’s goals by providing the best service possible. To this end, the Department will work to establish good communication between stakeholders on and off-campus. This will ensure that partnerships
are developed that create an environment of diversity and opportunities for learning about best practices.

Furthermore, the Department will seek ways to obtain mutual benefit from these relationships: where it is possible for Facility Services to engage in community- or industry-related groups, every effort will be made to network and market. This has the added benefit of keeping the Department abreast of the latest industry trends and technologies, while also examining the University’s impact on the larger, Hamilton-area community.

6. *Facility Services effectively promotes and communicates its services, activities, and initiatives with stakeholders.*

As the list of the Department’s successes continues to grow and the projects undertaken diversify, Facility Services will need to be creative about how it will keep its stakeholders up-to-date on its activities. One of the Department’s best assets for doing this is its website: as discussed in Action Item 6, the website will become a dynamic marketing tool to engage the current stakeholders and to draw in new members of the community.

**Action Items:**

In order to arrive at the described Strategic Objectives, Facility Services developed the following eight (8) Action Items:

1. *Identify and meet regularly with key stakeholders.*

While the Department’s key stakeholders have largely been identified (and consist of campus, academic, and industry stakeholders), Facility Services’ growth means that new stakeholders are frequently added to the list. It is imperative that new stakeholders are identified so that they can be considered in key decision-making instances. Furthermore, their feedback can be obtained after changes in the Department have been implemented; widening the scope of who is asked for feedback will be beneficial in receiving well-rounded and diverse criticism.

2. *Identify and actively participate in organizations that are relevant to the core function of the Department.*
In line with Strategic Objective 4, Facility Services participates in organizations relevant to the various industries to which the Department belongs. These include facilities management, construction, custodial care, landscaping and related industry groups. There is much benefit in belonging to those groups, because best practices are shared amongst members and networking is facilitated. The Department intends to actively participate in such groups so that the most is made of these opportunities for education and growth. Directors and senior leadership are already involved in several of these groups: the crux of this Action Item is that interest, participation and engagement will be more vigorously sought.

3. Establish departmental Mission, Vision and values pursuant to that of the University and internally communicate these with all academic and departmental stakeholders.

The way to best understand the University’s values is to establish relationships and partnerships with academic leaders. The Department will provide opportunities for undergraduate and graduate research projects. Facility Services can participate in coaching and mentoring students by serving as guest-lecturers in relevant courses and by collaborating with students, researchers, and professionals.

Furthermore, by showing leadership in the academic planning process through committee participation, Facility Services can take a more active role in planning for the future of the University, and consequently, the Department.

The bi-annual All-Staff Meetings facilitates regularly updating staff on academic priorities and departmental goals. Keeping staff and workers up-to-date on McMaster’s needs and goals facilitates stakeholders orienting themselves and their work around the same goals. This communication is vital to engaging staff and reinforcing their roles as key stakeholders to the overall function of the Department.

4. Identify and liaise with key community stakeholders.

Not only is it necessary to do this for campus stakeholders, it is also import to identify community stakeholders and explore a relationship with the City of Hamilton and other relevant municipalities and organizations. As the needs and goals of the city changes, McMaster's (and consequently, the Department’s) goals will necessarily also change. Facility Services will seek a relationship with the city and McMaster community that is mutually beneficial; while performing the services required by the University, the Department will be conscious of the effect on the community and try to minimize any inconveniences that make occur.

5. Create and implement partnership opportunities.

Facility Services will leverage its strengths, knowledge, and expertise to foster external relationships. Having done this, the Department will also seek revenue-generating opportunities. This will necessitate conferring with groups and organizations, determining what services can be provided from the Department, and what services McMaster needs to have provided by external partnerships. Using these to the best advantage, Facility Services will employ and be employed by organizations that have proven to be reliable.
6. **Improve website to make it a dynamic marketing tool.**

Facility Services’ website needs to become an interactive, engaging tool wherein the Department’s achievements and successes are shared with stakeholders and interested parties, as well as a medium to receive feedback. The website will **report on Facility Services’ active involvement in community engagement.** It furthermore needs to engage new or returning customers so that they see the benefit in retaining the Department’s services. The website will become more aesthetically pleasing, user-friendly, and interactive.

7. **Improve new staff orientation.**

Each division within Facility Services takes responsibility for the training of staff. For staff that are new to the Department and the university, this will involve an orientation to the functions and operations of other areas within McMaster. Following this training process, the Department can facilitate the adoption of new staff members into Facility Services’ organizational culture and that of McMaster. New staff will better and more quickly understand the important role they play as internal stakeholders and will become more engaged in a culture that encourages staff participation. This time investment in staff results in an increased value to the operation that cannot be overstated. The Department will work with Human Resources to achieve this plan.

8. **Celebrate successes in All-Staff Meetings.**

The Department’s most important stakeholders are its staff. These internal stakeholders require feedback from the Department, and these meetings will continue to serve as the best forum to motivate and encourage change and productivity within Facility Services. The biannual All-Staff Meetings are specifically effective as a place where department members can be recognized in front of their colleagues for outstanding contributions to the University.

**Performance Measurements:**

1. **Measurement of the identified stakeholder list against the involved stakeholders in a given project or initiative.**

The Department will have a comprehensive list of building occupants for the purpose of providing notification for pending work, emergencies, or general updates from Facility Services. The list will be used for communicating electronically with building occupants. Facility Services will continue to use notice boards in the building for paper notification of projects or alerts. In the day-to-day completion of its work, the Department contacts many key individuals both within and outside the University. Maintaining a central listing of these individuals, which includes their contact information and the nature of their relationship with Facility Services is vital.
2. *Communication with stakeholders.*

When completing repairs, renovation projects or new construction, the Department will document and track communication activities with stakeholders and ensure information sharing with all relevant groups or individuals. This will include, but is not limited to, taking minutes at meetings and electronic communication records. This Measurement will determine if Facility Services’ communication is as frequent and detailed as it should be.

3. *Frequency of stakeholder interactions.*

*(Individuals, community stakeholders, organizations etc.)*

To measure how well Facility Services is interacting with stakeholders, the Department will produce an annual report detailing interactions with external bodies and organizations. This will include participation in business meetings, conferences, technical presentations, career development, and training opportunities. Participation in these activities works to develop stakeholder relationships, but it is also beneficial to the training and education of the Department’s staff, as discussed in the “People” Strategic Theme.

4. *Frequency and activeness of participation with relevant organizations.*

Facility Services will measure the initiatives the Department takes in improving its function by participating in academic and industrial organizations. These organizations are beneficial because best practices are shared among members. Therefore, the more seriously the Department takes its involvement in these organizations, the more its practices will improve.

5. *Development of Mission, Vision and Values statements and communication to all staff.*

While the Department’s Mission, Vision, and Values have been determined and are herein included, it is important to continually re-evaluate their appropriateness in guiding the Department forward. Having the most suitable, relevant guiding principles will indicate that Facility Services is aware of and satisfied with the direction it is headed in. It will then be necessary to share (and continue to share) this direction with staff, so they can orient their work around it.

6. *Frequency and number of academic involvement.*

This can be measured in several specific ways: the Department can keep track of the number of guest-lectures given or the number of courses supported. The frequency of involvement with student research can also be quantified and used as a gauge for the Department’s involvement in academic pursuits and priorities.
7. Annual documentation of key initiatives with academic leaders.

This Measurement ensures that the Department frequently interacts with academic leaders, and that these interactions are recorded for future reference. It furthermore ensures that the University’s academic priorities are being met, because these leaders are being referred to, where possible.

8. Frequency of meetings with front-line staff.

One of the Department’s most important stakeholder groups is its front-line staff. The more frequent the interactions with this group, the more feedback and improved relations Facility Services gains. This Measurement indicates Facility Services’ move towards collaboration and inclusiveness in the workplace. (For more on this, see the “People” Strategic Theme.)

9. Annual documentation of key initiatives with community leaders.

Similarly to Performance Measurement 6, this Measurement ensures that the Department frequently interacts with community leaders, and that these interactions are recorded for future reference. This will indicate that Facility Services is fostering relationships with community stakeholders and that, where appropriate, their input is requested and considered. This will confirm that the Department and the City are working together to achieve collective goals.

10. Annual documentation of all partnership opportunities.

To ensure that the Department is investigating and following up on partnership opportunities, the Department will record them for future reference. Furthermore, this Measurement guarantees that Facility Services is seriously pursuing these opportunities and forging new relationships where possible. When new relationships are established, it will be an indication that Facility Services is achieving its goals.

11. Use of website as a communicative tool, measured through website traffic.

Having a functional website that allows campus stakeholders access to information pertaining to all facets of Facility Services’ operation is critical. The Department will use its web presence to provide information on major construction projects of the campus as well as smaller activities that generally go unnoticed by the University community and other stakeholders. Increased website traffic will be an indicator of success. The Department is committed to staying abreast of new and improved ways to communicate with its stakeholders and to improve relations through various media.

This is a partial list of the Department’s Performance Measurements for this Theme. For a full list, please visit: http://ppims.mcmaster.ca/pplant/documents/strategicplanframework.pdf
Facility Services strives to ensure that customers and stakeholders are always considered in planning and processes. To this end, a strong customer service delivery model has been developed to guarantee success in the Department’s mission.

The Goal for this Strategic Theme is **to ensure satisfied customers by meeting efficient, prompt, and high-quality service delivery standards.** By establishing service levels for all divisions within Facility Services, the Department is able to measure the effectiveness of its service and strive for excellence in all its work. Facility Services intends to monitor its performance by continually checking established service levels against customer feedback and making adjustments where necessary.

“Each of us in Facility Services may have a different set of duties; however, the common theme we all share is our commitment to Customer Service. We are privileged to take care of this great campus, and we do so knowing that our collective efforts positively impact the entire McMaster community.”

- Craig MacDonald, Director of Maintenance Services
Strategic Objectives:

Facility Services has developed five (5) Strategic Objectives for its customer service. They are as follows:

1. *Established and publicized service levels and standards.*

All divisions and areas within Facility Services have legal and departmental regulations with which they must comply; likewise, service levels guide each employee’s customer service. These service levels are created in light of a building’s function and purpose; the use and clientele of each building will determine the custodial and maintenance work that must be done within.

The Department’s aim is to improve the response times for general work on campus as requested by customers. By broadly publicizing work standards, all staff can be aware of the expected service levels for the Department; they will know what is required of them to perform their tasks effectively. Furthermore, making these service levels universally available will allow customers to know what to expect from the Department.

2. *A service delivery model that is aligned with the needs of the Department’s diverse customers and multiple sites.*

With operations off-site, Facility Services takes an active role in ensuring the expected service at all facilities remains at a consistently high level. Where service is not provided directly by Facility Services (e.g. when contractors are hired), the Department will share the expected services levels with these service providers, regularly reviewing and monitoring progress to ensure established standards are being met.

3. *Service performance is continually being measured.*

With an established level of service, it is imperative to measure performance in order to report on successes and the Department’s ability to meet expectations. These evaluations are shared with management and staff and are an opportunity to celebrate performance successes, and to seek opportunities for improvement. As of August 2012, Facility Services’ senior leadership regularly and frequently evaluate performance and will continue to do so; the information gleaned from these performance measurements will then be used as a basis for planning operational improvements within the Department.

"We use a team approach to provide the best customer service to the campus on a daily basis. Our goal is to adapt to the changing campus environment and prioritize the customer needs."

- Raquel Gavey,
  Customer Service and Process Manager
4. **Facility Services provides a forum for customer feedback.**

Internally reviewing the performance of the Department will provide but one view of service delivery; it will be equally important to seek input on service provision from the Department’s customers. Through a formal, annual survey, Facility Services can obtain feedback on its performance from this group of key stakeholders.

Currently, Facility Services continuously gathers feedback through informal methods, such as phone solicitation, emails, and conversations with customers. However, it is the intention of the Department to formalize feedback by asking customers to engage in careful, honest, and detailed review of its work performance. Instead of analyzing casual comments made by customers, a formal survey will ask customers to take the time to consider and appraise the quality of the services received, while providing the Department with enough detail to know what specific areas need improvement.

5. **The Department responds to customer feedback in a timely, positive, and effective manner.**

After requesting feedback, Facility Services must be prepared to act on the information received. The Department believes in providing the highest quality of service possible, and this can only be done by adapting services to meet the needs of each customer. As far as possible, teams will respond to the suggestions provided by customers and adjust base service levels to meet those expectations. The process towards improvement involves a cycle of obtaining feedback, retraining staff in new methods, creating new service levels, and then seeking more feedback on the effectiveness of the changes implemented.

**Action Items:**

To achieve the Strategic Objectives, the following action plan has been established.

1. **Determine the legislative requirements, safety regulations, and best practices for facilities management and construct service levels around them.**

There will be a detailed inventory of facility assets, as well as a consultation of the existing relevant legislation, with the purpose of matching service level requirements with governmental, customer, and University expectations. Each
service level will be refined to fit the needs of key stakeholders; once complete, Facility Services will communicate and make available the expected service levels for all divisions and areas to the campus stakeholders.

2. To ensure consistency, collect service level documents from contractors providing services at off-site locations.

After the Department has performed an initial review of an off-campus facility, Facility Services will meet with customers to better understand their expectations and to adjust service level requirements to address unique business needs. The Department will then enter into negotiation with contractors to ensure that service levels are being met; the most suitable and cost-effective solution will be arrived at and implemented. In the same way, the Department perform gap analyses of on- and off-campus serve levels, and adjust them to meet each business units’ needs.

3. Adjust service levels and refine benchmarks to ensure a satisfied customer.

Coupled with Facility Services’ gap analyses and continued benchmarking, the Department will adjust its service levels to align them with customer expectations.

4. Perform regular analyses of Key Performance Indicators (KPIs) for all measurable benchmarks.

When deadlines and service levels are predetermined, team leads will measure the quality of work based on customer satisfaction. Furthermore, Directors will perform regular performance reviews on approximately a monthly basis. Results from these reviews will be shared amongst managers and frontline staff, and when required, corrective action will be taken. These results will also be shared within the Department at large to seek improvement opportunities and to celebrate departmental successes.

5. To ensure a formal acquisition of customer feedback, develop and conduct an annual customer satisfaction survey.

Facility Services wishes to create an excellent relationship with its customers built on collaboration and demonstrated through its positive action after feedback. While the Department will continue to develop methods that seek informal and random feedback from customers via various platforms (e.g. telephone, email, and in-person communication), its intention is to obtain formal feedback by asking customers to provide detailed, considered evaluations. Directors and team leads will seek out and

“Giving our customers the best service possible is a team effort, and we have a great team in Mail Services.”

- Mail Services Staff
create opportunities to engage customers, acting on suggestions where possible.

6. Employ a Plan, Do, Check, Act (PDCA) system to drive improvement in customer satisfaction and to appropriately respond to customer feedback.

Using customer feedback, the Department will adjust its work procedures and service levels. The PDCA system allows Facility Services to carefully map out its intentions and benchmarks for various projects, perform its work according to these plans, monitor progress and effectiveness using KPIs and customer feedback, then make the requisite changes to improve its processes and procedures. These changes will be based both on the self-evaluative KPIs and the external suggestions made by customers; this will ensure that the Department’s standards for itself are being met, and that customers continue to be satisfied. To be successful, these processes and procedures must be well-documented, and all stakeholders must be educated and trained on new service levels. Facility Services will continue to perform KPIs and share the results of these audits with the campus community.

Performance Measurements:

Facility Services will be evaluating its Customer Service with reports, documents, ratings and KPIs. The following Measurements represent the key strategies for this purpose.

1. Contemporariness of building audits and listing of university assets associated with the building infrastructure.

There will be a list of service requirements for all of the assets and space categories, including the service levels required to meet customer-requested work. The Department will also publish service levels that address all building components and space. As a KPI, Facility Services will track its effectiveness in meeting these service levels. It will thereby be possible to monitor progress in customer satisfaction over time.

2. Publication of service levels that address all building components, space, and expected service delivery.

Sharing these service levels with the McMaster community guarantees that Facility Services is held accountable to the standards it sets for itself. The Department desires that all stakeholders have easy access to these service levels; it will encourage new groups to utilize the Department because excellent service is ensured.

3. Standardization of all required service levels, on- and off-campus.

These documents will be part of a larger plan that reflects the expected service delivery for all McMaster space. With these documents, Facility Services will ensure managers, frontline staff or contracted service providers are trained in and understand the expected levels. This will also be the means through which the Department ensures as much consistency as possible in customer service across sites.

4. Training of Facility Services managers and staff on expected service levels.
It is most important to have internal stakeholders who are well-versed in the service levels offered to customers. By educating staff in these standards, employees can audit their own work (in addition to the reviews of their team leads) to see if they are providing service that meets the standards set out by the Department.

5. **Measurement of benchmarks against established standards.**

The Department will participate in the Association of Physical Plant Administrators’ annual benchmarking survey and compare McMaster’s service levels with other Ontario universities, namely the ‘G6’ (Ottawa, Queen’s, Toronto, Waterloo and Western). Facility Services will publish its KPI and benchmarking results for the campus community and will document staff meetings and training sessions where KPIs and performance are part of the agenda. Furthermore, Facility Services will be transparent and accountable to our stakeholders on the Department’s service levels and performance.

This has proven to be an effective tool in the past; the Department has become aware of its successes through this KPI. For example, a dramatic improvement has been noted for the performance of service levels by the Department’s own evaluations between the 8-month period between November 2011 and July 2012. In November 2011, only 51% of “Priority 1” work requests received an “achieving” evaluation (while the rest received a “fail” status) but by July 2012, 89% of those Priority 1 work requests were “achieving.” The determination of achieve or fail is based on and attributed to Facility Services’ ability to respond to work requests in the time outlined in our service levels. The noted improvement over this 8-month period has indicated that the implementation of several strategies – notably the “Priority 1 to 5” model – have been successful.

6. **Incorporation of customer feedback into service levels.**

Upon review of the formal customer satisfaction survey and informal feedback received through Customer Service, revised service levels will be established. These service level revisions will be shared with managers and frontline staff and training on the new service levels and associated expectations will be provided. Through workplace inspections and KPI reviews, retraining, where necessary, will occur as we seek to achieve the highest level of performance. The new service levels will be made widely available and accessible to all stakeholders. Results of the KPIs and customer satisfaction surveys based on the revised service levels will be shared with the department as well as campus stakeholders.

The Department will produce a formal report with the findings and results from its annual customer satisfaction survey. Random feedback surveys and interactions with our customers through the Customer Service Centre will continue to be conducted and documented in order to receive feedback information more frequently than annually. Feedback received through unsolicited emails or phone calls will also be tabulated and incorporated in our customer feedback report.

*This is a partial list of the Department’s Performance Measurements for this Theme. For a full list, please visit:* [http://ppims.mcmaster.ca/pplant/documents/strategicplanframework.pdf](http://ppims.mcmaster.ca/pplant/documents/strategicplanframework.pdf)
4. FINANCIAL ACCOUNTABILITY

One of Facility Services' key areas of accountability is the use and management of its funding. Underlying the Department's budgeting structures is the idea that the plans set in motion now will continue into the future. It is therefore necessary to ensure that all financial strategies be sustainable in the long-term.

While adhering to University and Government regulations, the Department is always seeking new ways to succeed by improving old practices. The Strategic Goal of Financial Accountability is to foster an environment of fiscal responsibility that allows the Department to realize its own vision and mission in accordance with that of the University.

"Within Facility Services, we have many competing priorities for our funding. Our challenge is to direct funding to the areas of greatest need and to ensure the available funds are utilized efficiently and effectively. We continually update our processes and seek out new opportunities that enable us to provide optimum service to the campus community with the dollars available."

- Julie Gienuisz, Manager of Business Services
I am happy that we now have a Strategic Plan. Going through this plan, I can see that it includes all aspects of our business, and touches all areas of Facility Services. Having a strategic plan ensures that each area of Facility Services works cohesively to achieve our goal, which is to offer a safe, clean, comfortable learning environment for our students.

- Janice Flynn, Service Manager

Strategic Objectives:

Facility Services’ success is defined by the following six (6) Strategic Objectives:

1. The Department employs an effective budget to meet service levels commitments.

Facility Services continually strives to improve its commitment to excellent operations. Given the Department’s various service level commitments, Facility Services must align funding with the most important budget items. In order to ensure that these commitments are met, it is necessary for the Directors to carefully plan and focus funds on agreed-upon key priorities.

2. By continuously monitoring expenditures within planned budgets, Facility Services fosters an environment of fiscal responsibility.

A well-planned budget is the first step to financial success. As well, on-going monitoring and adjustments as conditions change are required for the Department’s financial goals to be met. In order to meet financial goals, careful monitoring of cost centres (i.e. various accounts, including maintenance, custodial, etc.) must be carried out throughout the fiscal year. It is the Department’s goal to stay abreast of all spending and budgeting changes so that funds are used effectively and responsibly.

3. The Department has explored revenue-generating opportunities and has created new partnerships to this end.

Opportunities may exist for Facility Services to provide services to the campus community and to work in partnership to meet specific objectives. Furthermore, there may be work in and around the Hamilton-area amongst community stakeholders that could be completed by the Department. Facility Services will look for opportunities to generate additional income where possible, while continuing to meet the needs of current stakeholders.

4. The service model most suited to increasing revenues is selected by the Department for use.

The Facility Services’ model has always been one of cost recovery. Over the years, however, the Department has recovered only partial costs for some services. For example, in Logistics, there is no system that will easily allow the Department to charge customers for the capital and operating cost of vehicles, meaning that Facility Services loses money on these items. It is therefore necessary to re-evaluate the current models that are in place and maintain only those that are effective. Other opportunities also need to be investigated and a plan developed to implement a new model.
5. *Facility Services delivers greater efficiency and effectiveness.*

In order to increase its efficiency and ensure the entire Department is working as effectively as possible, Facility Services needs to determine best practices and see that they are implemented and followed; the Department needs to develop new strategies that will not only assist in meeting its goals but also save staff time and effort. For example, new methods of streamlining the purchasing process must be explored and a better model must be implemented.

6. *The Department adheres to the University’s and the Government’s procurement guidelines.*

The Government’s Broader Public Sector Guidelines regulate how the University purchases and procures goods and services. It furthermore determines a process to establish the contractors, vendors, and service providers with whom the University can work. Just as University policies have been revised to comply with the Government’s Guidelines, Facility Services must also revise its own procedures to adhere to these policies.

**Action Items:**

Facility Services has identified seven (7) Action Items that relate to the theme of Financial Accountability:

1. *Determine priorities that support the Department’s Vision and Mission.*

Facility Services has created its own Mission and Vision that is in line with and supports the overarching University mission. The Mission and Vision orient the Department’s efforts towards key priorities. These priorities will be clearly documented to keep the focus of the Department on its goals for the future.

2. *Develop a budget based on priorities.*

Funding has been stagnant or declining over the past few years. As resources are tighter, it is imperative that the work of the Department is focused on its priorities. **Funding will be directed toward priorities** and key areas of concern as annual budgets are created.

3. *Prepare reports that track current and projected costs.*

In order to assist Directors and others responsible for spending, **monthly updates will be generated to monitor current spending and estimate future spending.** By forecasting future costs on a monthly basis, directors and managers will get an understanding of where they can expect to be in the future. Should spending be unsustainable in the long-term, adjustments can be made now to ensure that they can be maintained.

4. *Report quarterly to staff on the state of the Department’s financial health.*

To achieve the departmental objective of staying within budget, all managers must be aware of Facility Services’ spending and progress. They will then be able to tailor their
actions to support the Department’s goals. This will also ensure that all staff are kept abreast of the changes that affect the entire Department; as new and better models of budgeting are implemented, staff will be aware of Facility Services’ financial health and which issue each change hopes to remedy.

5. *Identify the needs of stakeholders that could be met by the Facilities department.*

Through a range of contacts on campus, the Department will determine if the various stakeholders on and off-campus have work that could be performed by Facility Services staff. Once potential needs have been identified, *investigative meetings will determine if it is feasible for Facility Services to take on these new projects.* Where it is possible, these projects will be an additional source of revenue for the Department.

Furthermore, it is necessary to see if there are more efficient and cost-effective ways for the Department to provide its current services for stakeholders. *Where possible, changes must be made to recoup costs that have previously been lost due to the limitations inherent to the Department’s current system.* This will be communicated to affected customers, so that stakeholders are up-to-date on departmental changes.

6. *Develop a template for Request for Expression of Interest (RFEOI) and Request for Proposal (RFP).*

Contractors, service providers, and vendors have to submit RFEOIs and RFPs to the Department when bidding on outsourced work for the University. In order to simplify this process, it would be beneficial for the Department to create standard templates that make the information most needed easily accessible. Having these standard templates will also ensure the University’s interest is protected, while saving staff time, as it will no longer be necessary to create new documents for each new request.

7. *Determine which products and services are needed, and develop systems contracts for ordering, where possible.*

Systems contracts allow managers to order goods and services quickly from the same suppliers, without having to worry about competitive pricing. This is a convenient method of ordering from suppliers with whom the Department often works. Therefore, where possible, the Department will develop systems contracts with suppliers; this will help to streamline and optimize purchasing processes.

However, the Department will continue to *establish procurement processes and procedures that comply with the Broader Public Sector Guidelines.* All purchases of goods and services will comply with the guidelines set up in this document. This includes the Department’s practice of *prequalifying contractors and consultants* (for more information, see “Project Management” Theme, Action Item 4). To assist with this process, the Department has *retained a Procurement Specialist,* who helps to simplify the process of ordering goods and services.

**Performance Measurements:**

1. *Effectiveness of key priority and financial health communication.*
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Key priorities of the Department will be clearly documented and costs will be projected on a monthly basis. A quarterly report will be sent to staff regarding the Department’s financial health. When internal and external stakeholders understand Facility Service’s spending and see what changes need to be made, this communication will be deemed effective.

2. **Facility Services’ ability to limit spending to funding provided by the University.**

Other sources of funding, though they exist, are not consistent or reliable. As the only source of funding the Department can rely on receiving consistently, spending should be limited to funding from the University. Not only will this result in sustainable, long-term spending practices, it also indicates that the other budget strategies herein devised are effective.

3. **Efficiency of processes following the implementation and usage of RFEOI and RFP templates.**

Templates for Request for Expression of Interest (RFEOI) and Request for Proposal (RFP) will be developed and fully documented, pursuant to Action Item 6. All staff will use the approved templates, where applicable. If processes are quicker and more efficient, it will indicate that the templates have been created well. If not, they will have to be modified to better suit the Department’s needs.

4. **Increased revenue generation through revised service model.**

All revenue-generating opportunities will be explored. Possible savings for each viable opportunity will be documented, including the method of recovery. An increased number of these opportunities and the Department’s involvement in them will indicate that Facility Services is doing all it can to generate more revenue, which will assist in keeping projects on budget.

5. **Increased usage of systems contracts.**

The use of systems contracts for applicable contractors/suppliers will be documented and contracts will be set up. An increase in their usage will measure how streamlined the procurement process has become. The more efficient the Department becomes in this matter, the faster products and services can be procured, leading to quicker work output.

6. **Adherence to the University’s and the Government’s procurement guidelines**

Procurement processes will be fully documented, audited and followed. Pre-qualified contractors and consultants will also be documented. A procurement specialist will be hired to assist with this process.

*This is a partial list of the Department’s Performance Measurements for this Theme. For a full list, please visit:* [http://ppims.mcmaster.ca/pplant/documents/strategicplanframework.pdf](http://ppims.mcmaster.ca/pplant/documents/strategicplanframework.pdf)
5. SUSTAINABILITY AND ENERGY MANAGEMENT

The purpose of the energy management strategies is tri-fold: firstly, they present an opportunity for significant financial savings; secondly, they reduce energy consumption by improving efficiencies in buildings; and thirdly, they encourage users to be more conscious of energy consumption. Changes in the latter can contribute to a climate of sustainability, responsible corporate citizenship, and environmental awareness across campus.

Along with energy management, the Department will take measures to reduce the negative impact on the environment by recycling, water management, gardening, and other environmentally-conscious practices. Facility Services will encourage campus stakeholders to do the same.

The Goal for this Strategic Theme is to reduce energy costs and consumption across campus and promote environmentally sustainable practices. To this end, an energy Management Plan will be created, implemented and monitored. Setting challenging conservation targets and consistently monitoring and evaluating progress will better enable Facility Services to achieve its goals.

“To have a successful Energy Management Plan, we will need to engage all energy users and provide them with the tools and support to make informed decisions. We will also continue to engage our researchers and students in order to employ the most up-to-date energy saving and sustainable innovations. We need to identify, educate, listen, accommodate, and show that we can produce results if we are to be successful.”

- Joe Emberson, Director of Energy Management and Utilities
Strategic Objectives:

In order to reduce energy costs and consumption, Facility Services has developed four (4) Strategic Objectives:

1. **An Energy Management Plan (EMP) is created, implemented and monitored.**

In order to successfully plan, implement and achieve energy and cost saving strategies, Facility Services will compose an Energy Management Plan that will outline historical and current consumption trends and utility prices. The Department will then use this data to set ambitious and measurable conservation targets and benchmarks. The plan will also outline the University’s procurement policies, progress assessment procedures, occupant comfort standards, and user awareness campaigns. Finally, the Plan will outline all energy and cost savings initiatives currently in progress and explain how they will help in achieving the conservation targets set forth.

2. **The Department has discovered and continues to seek opportunities to reduce the cost of procurement of utilities.**

In order to reduce annual energy costs, it is necessary to reduce both consumption and the unit price of purchasing utilities. The latter requires Facility Services to partner with experts to continuously monitor market rates; and federal, provincial, and municipal energy programs. This will help to ensure that McMaster University can meet its energy cost-reduction targets.

3. **Facility Services explores initiatives to reduce consumption of energy on campus.**

In order to achieve the targets set forth in the Energy Management Plan, stringent measures must be taken to reduce water, gas, and electricity usage across campus. This can be achieved by pursuing sustainable projects that take advantage of energy-efficient technology, encourage users to modify their behaviour and take initiative in reducing their own energy consumption, and enable the development of cogeneration endeavours and renewable energy facilities on campus. These strategies will help to ensure a sustainable and energy-efficient campus.

4. **The Annual Waste Reduction Work Plan is implemented with the goal to divert and reduce general waste on campus.**

"As a custodian at McMaster University, I help save and manage energy. I reduce and minimize the necessary amount of products I use, make sure I turn off lights when rooms are not being used, use only as much water as I need, and make sure I report any leaking faucets and pipes. I do these things not only because it saves money, but because it is the right thing to do."

- Danielle Campbell, Custodian
In conjunction with the Office of Sustainability, Facility Services will work to monitor the waste generated across campus. Thereafter, the Departments will develop new strategies to mitigate the volume of waste by ensuring that recycling facilities are available, accessible, and well-known by campus stakeholders.

**Action Plan:**

To achieve the Strategic Objectives associated with this theme, the following Action Items have been established.

1. *Establish realistic targets in an energy consumption reduction plan, and make steps towards implementing this plan.*

This implementation will involve developing a framework of using *energy-monitoring tools to evaluate progress towards the reduction targets*; thereafter, the Plan will be constantly re-evaluated to determine progress and areas of improvement. It will necessarily involve contribution from campus stakeholders; through this, a feasible solution for all may be arrived at and sustained.

2. *Consistently monitor the variances in the electricity, gas, and water markets, thereby enabling the identification of optimal prices.*

This Action Item will be beneficial in finding opportunities to reduce the price of purchasing utilities. Pursuing relationships with market experts, member organizations, and other networking opportunities to identify price trends and analyze energy pricing strategies will also allow the University purchase utilities at an equitable rate. This will also assist the Department in establishing procurement strategies that will optimize the procurement process.

3. *Reduce Campus-wide energy consumption by pursuing a series of energy management projects and communicating and emphasizing energy consumption trends and patterns to the McMaster community.*

In order to encourage energy-efficient behaviour, Facility Services will develop a framework for recognizing and rewarding users. Additionally, Facility Services will create an inventory of energy-intensive equipment and facilities across campus and will work with the Procurement Strategies department regarding the purchase of more energy-efficient equipment. Some example of energy management projects include building retrofits, campus co-generation facilities, installation of energy efficient lighting, the refurbishment of campus HVAC systems and small scale renewable energy installations.
4. **Waste reduction programs will be explored and the most feasible ones will be implemented.**

These programs will reduce the general waste on campus as well as increase the volume of recyclables (such as paper and plastic), by educating campus users and making recycling facilities more easily available. It will make campus stakeholders (students, professionals, and visitors) more responsible for their own waste and its reduction. The Department will **monitor the program through service provider a volume reporting mechanism** and see if there is a reduction in waste.

5. **Use the Annual Waste Reduction Work Plan to monitor and report on the volume of waste generated on campus and aim to reduce it through a variety of innovative strategies.**

This plan will be developed with the Office of Sustainability, which is comprised of students, sustainability professionals, and several faculty and departmental groups. It aims to communicate, facilitate, and manage sustainability on campus; furthermore, the Office produces reports on initiatives and develops projects to engage the McMaster community in creating a sustainable campus. Recycling awareness and educational strategies will be shared with the McMaster community, and the Department will increase the number of facilities for recycling. These strategies amongst others, still in development, will enable Facility Services to **divert and reduce significant volumes of garbage.**

**Performance Measurements:**

Facility Services will be tracking the performance on its Energy Management Plan (EMP) with an advanced energy metering system that has already been implemented on campus. It allows for real-time collection and analysis of water, heating and cooling, and electricity consumption on site. The following monitoring systems and procedures will be used to determine progress:

1. **Effectiveness of the EMP.**

Facility Services will monitor energy consumption and prove to stakeholders that the implemented Energy Management Plan met established targets. The Department will use historical and current energy data to generate consumption trends and project future energy costs. This data will also be checked against targets to determine if consumption patterns are in compliance with the Energy Management Plan.

2. **Reductions in consumption and cost.**
The Department will use consumption and budget data to gauge progress. Using the consumption and budget information, Facility Services will determine whether there has been a reduction in the cost of procurement of utilities and in overall energy consumption across campuses. This will gauge the effectiveness of various price- and energy reduction initiatives described in the Energy Management Plan.

Each building’s energy usage will be monitored and users who show significant improvement in reducing their energy consumption will be identified and rewarded. This system of recognition and reward will encourage others to follow suit and reduce their own energy consumption.


Equipment delivered and used on campus will be inventoried and energy-intensive equipment will be identified and monitored with Procurement Strategies. Careful monitoring will help in determining at what point energy-intensive equipment is no longer sustainable. Where possible, energy-intensive equipment will be replaced by conservative equipment, which is better suited to long-term, cost-effective use.

Facility Services believes that a commitment to Energy Management, along with monitoring strategies, awareness and recognition campaigns will help to generate significant savings in energy costs for the university and reduce energy usage and waste generation across campus. This commitment, in addition to reducing the University’s operating costs and creating a more competitive business model, will also contribute to the larger climate of sustainability and responsible citizenship on campus.


Pursuant to Action Item 5, the Plan will monitor and report the volume of waste generated on campus and aim to reduce it through a variety of innovative strategies. Recycling awareness and educational strategies will be deployed to the McMaster community along with increasing the number of facilities for recycling. The measure of success will be a decrease in overall campus waste as methods of recycling and reusing are utilized by University patrons.

*This is a partial list of the Department’s Performance Measurements for this Theme. For a full list, please visit: [http://ppims.mcmaster.ca/pplant/documents/strategicplanframework.pdf](http://ppims.mcmaster.ca/pplant/documents/strategicplanframework.pdf)*
6. Space Planning and Utilization

As a compact campus with attractive open spaces and a balance of academic facilities and campus life amenities, McMaster has the opportunity to grow into an environment for a full variety of learning, working, living, and recreational activities. Facility Services wants to develop new learning space standards that support different teaching modes as well as new and innovative pedagogical styles.

The campus can become a place that serves many communities in different ways, while continuing to be a resource for different groups who may use facilities, such as the athletic complex or the daycare. The Department seeks to find a balance between the academic life of the University and its recreational, green space on campus to provide a full and rich experience for students, faculty, staff, and neighbours. The Goal of this Strategic Theme is to optimize space utilization on McMaster’s multiple sites in an approach that aids the University in achieving its core mission.

"As an architect, I am passionate about space. At Facility Services, every consideration to reorganize, reconfigure, or renovate existing space represents a fresh opportunity to demonstrate in a tangible way McMaster’s commitment to enhanced learning, research, and community engagement through exceptional planning and design."

- Robert Craik, Coordinator, Design and Space Utilization
Strategic Objectives:

1. *The Department continues to rework a well-developed Campus Plan.*

The McMaster University Campus Master Plan, originally prepared in 2002 and updated in 2008, provides an overall physical framework for campus growth and renewal, outlining a 30-year vision for the campus. Specifically, it establishes a framework for future development that extends the structure of the campus’s historic core to its periphery while respecting the surrounding built- and open space context.

Although the Plan does not advocate for growth, it identifies approximately 1,506,947 gross square feet of space (1,001,044 net assignable square feet) for potential new development, with supporting open space amenities and infrastructure initiatives. As outlined in the Plan, the physical capacity on McMaster’s main campus has been largely determined by its physical structure, which contains a well-established hierarchy of streets and natural features. This clear structure has provided a strong setting for development and infrastructure investments to continue to evolve in an integrated manner.

The Campus Master Plan is intended to be flexible, to accommodate the changing needs of various departments and Faculties, and to enhance learning by providing the physical environment in which to learn, work, and live. The Department will continue to rework the Plan to ensure that it remains flexible.

2. *Facility Services establishes and implements learning space standards that enhance the student experience and support faculty.*

Facility Services is currently developing a set of learning space design standards, which will assist the University in its goal of having ideal, modern classrooms for different faculties. This will include the incorporation of new learning spaces that support different teaching modes and pedagogies, which will be directed by feedback from faculty. These design standards will inform all future construction and will thereby be beneficial in the long-term.

3. *Campus space is used efficiently and effectively.*

Facility Services will gather information on the needs of campus stakeholders to ensure that they are being met. Furthermore, the Department will implement space planning technology that supports the effective utilization of space.

4. *Information is gathered and guidelines established through the Functional Plan process.*

The Functional Plan process is one of the earliest steps in the construction or renovation process, outlining in detail the physical needs of the users. This provides the design consultant with an understanding of what components need to be included to make the building function. It includes a statement of the qualitative features and objectives of the
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Facility services proposed facility; the number and approximate size of the program, housekeeping, washroom, storage, and exterior spaces; circulation (corridors, elevators, stairs etc.), walls, and utility space; a description of the group to be served, the number of users, including staff and client groups; activities that occur in and outside the building and the relationship of these activities to each other; and confirmation that the space complies with Ontarians with Disabilities Act, 2001. This process will considerably streamline the design process.

5. Facility Services has fostered community engagement and inclusiveness, championing a barrier-free and accessible campus.

In January 2012, the McMaster Accessibility Council (MAC) published the McMaster University Accessibility Plan (2011-2025) in order to comply with the evolving (AODA). The Built Environment Standard of the AODA is currently under revision: it will address different aspects of the built environment, such as common access and circulation, interior accessible routes, exterior spaces, communication elements and facilities, and plumbing elements. Until it is finalized and the requirements and compliance dates are released by the Minister of Community and Social Services, McMaster continues to address accessibility issues on an as-needed basis. It is anticipated that the Standard will set firm timelines for the completion of accessibility initiatives that McMaster is already in the process of implementing.

Approximately 44% of McMaster buildings have a barrier-free entry, and 68% have a barrier-free interior. Facility Services is working on the development of a Campus Accessibility Action Plan (CAAP).

Actions Items:

1. Retain a Manager of Space Information and Planning Systems.

As of September 2012, Facility Services is still in the process of retaining a Manager, Space Planning and Utilization, as well as a Coordinator, Design and Space Management. The former is responsible for all university space information, space utilization, space need requests, as well as the, associated tools, systems and database; he or she will develop and implement programs and strategies using an integrated space planning and management framework.

Working under the Manager, the Coordinator is responsible for applying engineering principles to draft, design, and modifying drawings for the development of new facilities and systems, while ensuring all work completed is in compliance with established governmental and departmental standards.

2. Conduct space audits to establish a space inventory, confirm building use, and perform space comparatives with COU guidelines.

The Space Inventory is updated every three (3) years for the COU Triennial Space Report. The report provides:

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• An overview of the planning directions and policies that impact opportunities for growth and related transportation capacity at McMaster;
• A summary of the key messages learned through consultation events;
• A physical assessment of McMaster’s existing facilities;
• A review of the utilization of all instructional spaces on campus in order to assess use of current classrooms by the amount of hours of weekly room use, seat occupancy, and room capacity; and,
• A summary of recommendations for how physical capacity issues can be balanced with academic and other University objectives both in the short- and long-term.

3. **Update Floor Plans.**

With every renovation or new construction on campus, the Co-ordinator, Design and Space Management will create and update quick reference Floor Plans showing room numbers and areas. This will facilitate easier future reference.

4. **Document a Space Management Plan in accordance with the COU space utilization standards.**

Similar to the Department’s Asset Management Plan, the Space Management Plan will organize and arrange for the effective use of campus space, collaborating with faculty to map out the standards that must be maintained in space utilization and the projected financing of that maintenance. The COU publishes clear categorizations of use and type of space, and standard areas for any given use of space, taking into consideration the student population. This Plan will take all this into consideration and provide a feasible, practical route for effective space utilization. It will then be communicated to the Department’s community stakeholders.

5. **Use Space Request Forms to facilitate communication with campus stakeholders.**

In summer 2012, there was no clear process for a campus stakeholder (professor, researcher, staff member, etc.) to request new or extra space. Since then, a pilot program has been introduced, wherein the requesting person is to fill out and submit the Space Request Form for review and consideration. This will enable the Department to organize and prioritize space requests, while making sure requests handled in a timely fashion.

6. **Implement a software program to support space management.**

In regard to implementing space management software, the Department is considering two approaches to making improvements: either introducing Vision FM software, which has a variety of programs that enable facilities management; or adding a component to the existing AiM software.

7. **Develop space standards to be community-friendly in conjunction with faculty.**
Using a village model will build on the important sense of community spirit within the campus and promote inclusiveness and connection with the immediate neighbourhood and the larger district. This principle also involves strengthening partnerships with the local neighbourhood and the wider community, committing to openness in communication, providing opportunities for neighbourhood input into campus planning efforts, and sharing facilities and amenities. Groups such as the President’s Advisory Committee on Community Relations and the Campus Town Association have been established to provide opportunity for open dialogue with the community.

This Action Item involves the creation of multipurpose rooms, benches, and other space that is community-inclusive. It furthermore necessitates the **development of partnerships with the City of Hamilton and other community stakeholder groups to see what space they require.** This is a desirable endeavour because it is mutually beneficial: it will promote campus visiting and increase community stakeholder investment in the University, while reaffirming McMaster’s important function in the community.

8. **Participate in the McMaster Accessibility Council (MAC).**

By participating in the Council, Facility Services can take a more active role in ensuring an accessible, barriers-free campus. In conjunction with this, the Department will **incorporate the AODA guidelines into space standards.**

**Performance Measurements:**

1. **The retention of a Manager of Space Information and Planning Systems.**

This is an effective gauge of the Department’s move toward achieving its goals because the Manager will be responsible for the completion of many of the Action Items listed above. In retaining this Manager, Facility Services will be making considerable progress in obtaining many of the aforementioned Strategic Objectives, as well.

2. **The auditing of spaces and the creation of a database.**

Auditing campus space will assist the Department in monitoring how effectively space is being used. By storing this information in a database, Facility Services can easily access it and monitor its success over time; longitudinally, it will be possible to see if the audits are reflecting more effective and better campus space.

3. **The development of the Space Management Plan.**

Once this Plan is developed and implemented, many more of the Department’s processes will be optimized. However, developing the Plan itself will be an indication of Facility...
Facility Services | Realizing the Vision

Services’ move towards successful organization: the Space Management Plan will indicate that the Department has streamlined its goals and is working towards more efficient space management.

4. **The development and use of a Space Request Form.**

A Space Request Form has been developed and is being used in pilot form. Its effectiveness can be determined by its ability to streamline space requests; based on customer response, the Department will be able to evaluate whether timely response rates are improving.

5. **Population of software with campus data.**

Each space on campus has a large amount of information associated with it, including but not limited to: how it looks in the planning stage, the building name and number; each room’s name and number; person, dean, faculty, or department to which the space is assigned; size; floor; usage; category, etc. The Department has worked hard to put most of this data into an Excel spreadsheet, but more appropriate software, like Vision FM or AiM, will allow for more capabilities, such as automating the process of producing reports. The data needs to be put into, or to populate, this software. This will be a good indication that the Department is optimizing its processes.

6. **Training of staff in software usage and their reporting through it.**

The new Manager and Coordinator will need training on the use of new software, and they will then be required to produce reports with it. They may report on how much space McMaster has by category, by building, or by department, for example. The better software should be able to produce these reports automatically on request. The key is entering the data upon which the report can be generated. The ease with which this is done will be a good indication of the effectiveness of the software; should it prove to be ineffectual, better software can be chosen.

7. **Community utilization of space.**

The 6th principle of the Campus Master Plan requires that the campus functions as a village and a partner within the larger community. In accordance, Action Item seven (7) suggests that the Department devise methods to become useful to the community at large. The gauge of the success of this endeavour will be an increased visitor or community-stakeholder presence on campus. The more useful the University becomes to the immediate and larger community, and they invest in McMaster, the greater the Department’s success.

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The value of McMaster University’s physical assets, which are its buildings, is approaching $2 billion. As the site for the delivery of the core teaching mission of the University, the buildings are often the lasting visual image that faculty, staff, students, and visitors associate with McMaster. Managing, enhancing, and preserving the physical campus speaks to the core function of Facility Services; it is the Department’s commitment to provide a healthy, safe, supportive, and inspiring physical environment for McMaster’s students and professionals.

The Goal for this Strategic Theme is to ensure that physical building assets are maintained following a strategic plan that supports the core mission of the University. The management of the physical assets for the campus must be carefully planned. Both the provincial government and internal operating budgets provide the funding for reinvestment in infrastructure. As one of the University’s most critical assets, the utilities infrastructure must also be given special consideration in this Strategic Theme. Having a well-documented, detailed Asset Management Plan (AMP) considering future costs, building condition implications, backlogs, as well as health and safety, will support and sustain campus buildings, which are vital to the achievement of the University’s core missions.

“The Asset Management component makes Facilities Management proactive rather than reactive. It is a balancing act. The Deferred Maintenance backlog needs to be prioritized based on system life-cycle and available budget, then converted to projects for execution, prior to system failure. This will ensure the continuity of University operations.”

-George Vadakken, Asset Management and Environmental Coordinator
Strategic Objectives:

In order to ensure that physical building assets are maintained, Facility Services has developed the following five (5) strategic Objectives:

1. *Facility Service provides an asset and infrastructure base that supports the core academic mission of the University.*

The buildings on campus must provide the space and functionality to meet all the endeavours of the University. Facility Services must ensure the right buildings are constructed, that they are equipped with the appropriate features to perform their intended functions, and that they are maintained so that building components do not fail. Building needs and required features vary from faculty to faculty and even between and departments; these requirements speak to the practical and operational uses to which each building will be put. It is imperative to the success of the University to ensure that the required facilities exist and that this infrastructure is aligned to meet future requirements.

2. *The Department has a clear understanding of the condition and functional performance of the University assets.*

Documenting the physical condition of the assets is the first step in organizing and managing campus space. McMaster is comprised of buildings that have been constructed over a period of almost 100 years. As both the historical and modern buildings age, their components reach the end of their intended service lives. In order to ensure that each building continues to operate effectively, the Department must monitor the performance of all building components; by being proactive, Facility Services can ensure that components are replaced just as they reach the end of their service lives and not after; waiting can lead to the failure of a building’s operation, jeopardizing health, safety, and the important work done within.

3. *The value and integrity of the University’s assets are preserved through sustainable, cost-effective maintenance practices.*

Using operational resources to extend the life of building components is an important part of the Department’s asset strategy. Guiding staff through a pragmatic preventive maintenance plan and having the necessary resources to respond to general building maintenance will enhance the condition of the buildings for all campus stakeholders. Facility Services intends to pursue novel, sustainable, and environmentally-conscious ways
The Facility Services Maintenance Project Group supports internal renovation and construction work. Excellence of workmanship and customer satisfaction in the electrical, plumbing, carpentry, sheet metal, millwrighting and locksmith trades are a result of an extremely strong group of talented tradesmen. Our work shows our commitment to helping the University achieve its goals.

- Scott Simpson, Trade Supervisor

4. **The Department maintains an effective utilities network that supports the campus facilities.**

With distribution of the utilities located both in service tunnels and buried below ground, having an effective auditing- and monitoring process to track conditions remains a top priority to ensure utility supply. Guaranteeing the sound operation of the campus’ generation and distribution network means that building users can conduct their business without interruption. With a centralized heating and cooling plant, the majority of campus buildings rely on Facility Services’ continued professional management of these critical assets; campus stakeholders and the Department itself expect nothing short of perfection in the organization and maintenance of these resources.

5. **Funding levels are sustained through the development and maintenance of an Asset Management Plan (AMP) and accompanying rationale.**

Having a formal AMP benefits the university in steering both the maintenance and renewal activities; it is, in fact, required both as a planning tool and as a vehicle to share the current, projected, and desired conditions of the campus buildings with all University stakeholders. The AMP works in conjunction with the Capital Plan, and it is the principle of the two that drives day-to-day maintenance activities and the Annual Renewal Program. One of Facility Services’ top priorities is ensuring the details in the AMP are current and that the report is shared with the senior leadership of McMaster.

**Action Plan:**

To achieve the Strategic Objectives associated with this Theme, the following action plan has been established.

1. **Collaborate with campus stakeholders to review the space needs for the campus.**
Campus stakeholders include students, professionals, the University’s senior leadership, as well as a number of frequent visitors. Collaborating with key stakeholders will ensure the space available in the existing buildings meets the core academic and research mission of the University. From this review, a plan will be developed to address facility shortcomings and future space requirements. This information will then be formulated into a plan for the University’s long-term future.

2. Audit the facilities to have current data on building components that can be quantified and documented.

Having a current audit of the facilities is necessary to ensure the efficient management of the assets. With the details from the audit, the facility condition can be determined; the Department will plan the expenditure of Deferred Maintenance funds and the Capital Renewal program more effectively by factoring in the condition of the facilities. With the audits in a database, it will also be possible to report longitudinally on how the funding of Deferred Maintenance and other renewal programs have affected (and how they continue to affect) the condition of the assets.

3. Following Action Item 2, design a Preventive Maintenance (PM) program, the primary function of which will be to enhance and prolong the life of building components.

Facility Services’ ability to do Preventive Maintenance (PM) is dependent upon available resources; it is therefore necessary to organize PM work so that priority is given to those systems that are required by codes and policy, that are approaching end of their lifecycle, or that would be particularly detrimental should they fail. In order to gauge the effectiveness of operational maintenance and the PM program, the Department will conduct annual condition assessments and make changes accordingly.

4. Create and implement a PM program for the utilities network.

Similar to the AMP for campus buildings, it will be possible to design a PM program after the audit of the utilities network. This program will focus on the equipment used for the generation and distribution of the campus utilities. An annual condition assessment will be conducted to gauge the effectiveness of this program.

“...and that encompasses many roles here at the university. My colleagues and I support the preservation of the campus for the benefits of its stakeholders. We are committed to helping the University improve each year.”

-Vince Heczko, Electrical Specialist
5. **Retain an Environment/Asset Management Systems Coordinator, who will have experience performing audits and building systems.**

Facility Services will create a position called the Environment/Asset Management Systems Coordinator, the primary function of which will be to arrange for the audit of the campus buildings, become familiar with the software used to track the audited data, and update the building systems as Deferred Maintenance work is completed. From this, a **multi-year continual building audit program will be developed.** Alongside aiding in the creation of an AMP, the Coordinator will also assist in calculating the campus’ **Facility Condition Index (FCI) and Requirements Index (RI)**, both of which are formulas for determining building conditions. This individual will use this information to compare McMaster to other Ontario Universities. The AMP will then be used to **create a five (5) year Deferred Maintenance strategy.**

**Performance Measurements:**

Facility Services will be tracking its Asset Management with reports, documents, rating indices, and the AMP. The following measurements outline the key documents and systems that will be used for measuring performance.

1. **Effectiveness of the Capital Plan in supporting the core academic mission of the University.**

Facility Services will have a Capital Plan that will adequately support the core academic mission and the AMP for the campus buildings. This document will essentially delineate the University’s long-term plan for its assets. Facility Services will use the data gathered from the campus stakeholders during the review of the existing space to develop a Space Utilization and Needs Plan for the campus. The Department’s ability to create these plans demonstrates its successful planning and allocation of resources.

2. **Implementation of a Deferred Maintenance Plan.**

This Performance Measurement will indicate Facility Service’s ability to handle its deferred maintenance, which continues to be a major concern for the Department. Where possible, this Plan will allocate funds and time to respond to deferred maintenance needs. Its implementation and use will show that the Department is managing its resources and time effectively. It will also demonstrate that the implementation of all relevant strategies has led to positive changes in the Department’s practices, which benefit the University and its stakeholders.

3. **Frequency and contemporariness of audits.**

Facility Services will conduct an audit of campus buildings for any building whose current audit is older than five (5) years. Once completed, the Department will audit 20% of the campus assets on an annual basis. This will ensure that no building data is older than five (5) years. The results of these audits help the Department to refine the AMP each year, to reprioritize replacement of critical building systems, and to make it easier to prioritize
building operations and the deferred maintenance backlog. The AMP will also suggest funding models to address the backlog.

4. **Documentation and communication of the preventive maintenance requirements for campus facilities.**

It is vital that the Department and internal stakeholders are aware of the preventive maintenance requirements for the University's assets. Communicating these requirements will help anticipate component failure; it will facilitate planning to avoid failure and to ensure that everything possible is done to keep the University running normally.

5. **Documentation and communication of the maintenance levels and priorities to address facility breakdown requirements.**

Similar to Performance Measurement 4, the Department will share its standards and methods for addressing facility breakdown with campus stakeholders and all other relevant parties. This will ensure that relevant parties are aware of the level of service they can expect from Facility Services for a given project. It will also explain how the Department organizes and prioritizes work orders so that urgent work is handled as soon as possible.

6. **The frequency and accuracy of the tracking and reporting on the Facility Condition Index (FCI) and Renewal Index (RI).**

As discussed in Action Item 5, these are calculations that determine building conditions. These need to be as accurate and relevant as possible in order to be effective. They will guide the way Facility Services distributes resources among assets because they will indicate which assets require the most attention. These calculations need to be performed frequently as building conditions continue to change.

7. **Effectiveness of the Preventive Maintenance Plan.**

The building audits and Deferred Maintenance plan can be used to create the Preventive Maintenance Plan. Facility Services will also produce a document that lists the repair maintenance levels. The priorities associated with the maintenance levels will use a “Priority 1 to 5” model and will be used to categorize all instances of breakdown. With the operational maintenance and preventive maintenance program, it will be possible to track and report on the FCI and the RI (discussed in Performance Measurement 6) for all campus buildings.

8. **Effectiveness of the utilities network's maintenance plan.**

Operating the utilities network requires a continued maintenance and preventive maintenance plan that is different to that of the campus building. While both documents are detailed and nuanced, the utilities network requires specific protocols and instructions on how it is to be maintained. A documented plan for preventive maintenance will be created, as well as a “Priority 1 to 5” system for utility breakdown maintenance. With these
With the successful hiring of an Environmental/Asset Management Systems Coordinator, the AMP will ensure the Department’s success in managing campus assets. The AMP will be continually updated as building condition data changes, and the AMP will be shared broadly with senior leadership of the University. The Coordinator will also assist in evaluating the progress and success of the Deferred Maintenance strategy used in both building and utilities network maintenance.

Facility Services understands that the campus stakeholders rely on its team of professionals to maintain the campus facilities on a daily basis and to plan effectively to ensure the University’s buildings are in optimal condition to support the core mission of the University for the future. Continually auditing the campus facilities will allow the Department to dedicate operational dollars to prolong the life of the campus assets, and to plan for the replacement of systems that have reached the end of their usability with the available deferred maintenance funds.

This is a partial list of the Department’s Performance Measurements for this Theme. For a full list, please visit: [http://ppims.mcmaster.ca/pplant/documents/strategicplanframework.pdf](http://ppims.mcmaster.ca/pplant/documents/strategicplanframework.pdf)
8. Project Management

Facility Services’ Project Management framework is designed to support the collective goal of delivering excellence, on-time and on-budget, to a satisfied customer. Specifically, this Strategic Theme addresses the effective prioritization and organization of Facility Services’ projects. On any given day, the Department is managing over $100 million in construction by supervising approximately 40 large and small projects, consisting of new buildings, renovations, mechanical, electrical, and maintenance jobs across the University’s various campuses.

The Goal of this Strategic Theme is to develop and maintain sustainable structures, tools, teams, and practices of project management. The Department’s goal is to guide customers through each phase of its projects, and to complete phases by set deadlines. This necessitates the adherence to carefully constructed strategies that prioritize work flows to employ the Department’s time and resources most effectively.

“The technical expertise and guidelines developed through the implementation of the Project Management Methodology manual will ensure all projects meet the highest standards of construction. It will also support the delivery of excellence, on-time and on-budget, to a satisfied customer.”

- Bob Dunn, Director of Design and Construction
Strategic Objectives:

To achieve the strategic objective of the best project management practices, the following six (6) Strategic Objectives have been developed:

1. The optimization of project delivery by the Project Management Methodology (PMM).

The Facility Services team is committed to effectively managing projects from initiation to completion by standardizing common operations. Through the development and implementation of a Project Management Methodology, the Department will lead stakeholder groups through the various phases of a project to ensure effective and clear communication. These phases include initiation, planning, execution, pre-construction, construction, post-construction, control, and closure. The manual will act as a checklist and reminder of what each phase entails. This will enable all team members of the Design and Construction group to follow the status of each phase of a given project. By standardizing the process of project management, work flows become more efficient and effective.

2. Projects are delivered on time and on budget to a satisfied customer.

The Facility Services department manages approximately $100 million in projects on an annual basis and strives to meet the Department’s high standards with each task. Staff are committed to working with all stakeholder groups to ensure that the scope of each project meets the needs of the client and is executed consistently in a cost-effective, timely manner. The retention of three (3) Projects Directors has enabled the Department to excel in this area. The Project Directors, Project Managers and Field Supervisors plan to implement consistent service levels to ensure efficient and effective service delivery.

3. The University is aware of and appreciates the competitive advantage of an in-house project management service, which is defined and articulated in a detailed Methodology document.

Project management service levels are compared against industry standards: Facility Services regularly surveys the construction environment to analyze best practices and to ensure the Department is meeting and exceeding expectations. As a result, internal policies, practices, and performance levels are evaluated and adjusted continually to meet stakeholder expectations.
4.  **Project managers and field supervisors’ skill sets are enhanced to support project management methodologies.**

Facility Services takes an interest in human resources issues; its priority is to continuously try to enhance its training opportunities for employees. The Department is implementing a major initiative focused on people, which ranges from initial training to professional development. (For more information, see the “People” Theme.) Continuous training based on the Ministry of Finance’s Broader Public Sector (PBS) procurement guidelines remains a priority and the Department is moving forward by implementing project management software to enhance tracking and reporting requirements. This document chronicles the procedures and regulations with which Facility Services is mandated to comply in the procurement of products and services. It is therefore vital that employees are kept up-to-date on the changing governmental requirements.

5.  **The Department continuously measures service performance.**

One of Facility Services’ intentions is to be self-evaluative and adaptable. This necessitates constant measurement of the Department’s project team and their performance, which has been considerably facilitated through the implementation of the PMM. Standardizing project operations has made it easier to evaluate Facility Services’ performance. Through the PMM process, projects can be audited upon completion. This is a mechanism to evaluate how well the Department meets its objectives.

6.  **Facility Services delivers the highest quality construction through its building standards.**

The Department sets high expectations for its service levels, which necessitates hiring the best people for the job. Through the retention of a Design Standards/Quantity Surveyor Coordinator, Facility Services makes constant refinements to the University’s Construction Standards, which is a technical document that specifies the materials and systems to be implemented in all new construction and renovation projects. This individual will furthermore review projects and collect cost-per-square-foot data for benchmarking and future reference. This makes estimating costs for future projects easier and more efficient.
Furthermore, the Department has developed an effective risk-management framework that is integrated into its strategic planning process. The project management framework identifies the risks associated with each project and its main milestones, evaluates the probability and potential impact of those risks, and defines mitigation factors. As a result, risks are factored into project plans, thereby making the plans as effective as possible.

The Department will continually review and audit projects to ensure compliance with University procedures and policies. It will furthermore observe best practices that meet or exceed the standards of the Ontario Occupational and Safety Act, the Ontario Building Code, Environment Protection Act, and other applicable statutes and their regulations.

**Action Items:**

In order to achieve the Strategic Objectives, the following seven (7) Action Items were developed:

1. *Develop and implement the Project Management Methodology (PMM) manual.*

It is the goal of the Department to implement project management practices and policies to ensure efficient and effective service delivery. Having a document that standardizes the various tasks in a large project streamlines the process by ensuring that all project staff are aware of the status of each phase of the project. This document makes measuring the success of a project simpler, as well.

2. *Retain Projects Directors.*

Projects Directors will oversee the work of the Project Managers. These individuals are accountable to the Director of Design and Construction, Bob Dunn. This diffusion in the hierarchy of project management will lead to increased supervision on the projects undertaken by Facility Services.

3. *Implement project management software to track projects and monitor schedules.*
Similar to the PMM, this software will assist the Department in staying organized. Rather than a physical document, however, it will be easier for multiple parties to access this information. Storing data in this software also lends itself to longitudinal analysis of the Department’s work; tracking these trends over time will help Facility Services understand what areas of the Department’s work need improvement. This will also help the Department compare its project management service levels against industry standards.

4.  **Retain a roster of prequalified vendors and service providers.**

Having this list readily available and easily accessible renders hiring contractors a simple matter: all the vendors and service providers on this list will be tested and proved to be reliably effective. It also means that the Department is giving opportunities to a variety of companies.

5.  **Provide continuous training based on the Broader Public Sector Guidelines.**

As discussed in Strategic Objective 4, it is imperative that all employees are trained in and aware of these governmental mandates. The Department will re-train employees when changes are made to the policy, in order to ensure that Facility Services is following the most up-to-date requirements while maintaining best practices.

6.  **Conduct regular reviews of projects.**

In order to keep the Department on track, the Projects Directors and Project Managers will regularly review the progress of all projects. This will be facilitated by the PMM, which will assist in organizing projects so check-ins are detailed, quick, and all-encompassing.

7.  **Retain a Design Standards/Quantity Surveyor Coordinator.**

This individual will regularly update the Construction Standards documents. He or she will furthermore provide cost estimates for projects based on databases of past project and
their cost-per-square-foot. He or she will also be able to determine the expected timeframe of the project, given what has been typically the case in the past. To get more detailed, nuanced estimates, this individual will perform periodic reviews of ‘project types’ and verify square-foot costs.

Performance Measurements:

In order to track Facility Services’ progress in achieving the Strategic Objectives, the following eleven (11) Performance Measurements will be employed:

1. *Use of the Project Management Methodology (PMM) manual as a tool for measuring and tracking projects.*

The PMM will be the most progressive tool when measuring the success of a specific project. It will keep all projects measurable within their set schedules and budgets. However, it will also be useful in helping the Design and Construction team become aware of the project risks and the point at which projects go off-track or encounter difficulty. It will then be possible to come up with strategies to avoid common problems and to ensure that projects are managed smoothly.

2. *Frequency of reviews and updates to project schedules and budgets.*

The Department has the capability to determine if workflows are improving by measuring its scheduling and budgets over time. Regular site inspections are performed and progress on site is documented. The Department is successful when the scope of the project is delivered as expected to a satisfied customer.

3. *The speed and response rate to deficiencies, warranties and project closeouts.*

Procedures for implementation of construction processes are in place and followed to ensure rapid project closeout. Deficiencies are corrected and warranty calls are dealt with promptly. The measure of success is the efficiency in which Facility Services responds and takes appropriate action to correct deficiencies in a timely fashion.


The Department will identify and compare project management services with sister Universities and external specialists in this field. This Measurement compares data as it relates to service costs against performed services.

5. *Implement regular training to enhance the skills of the Design and Construction team.*

Project staff continually receive the necessary training to improve project management skills and processes. The Department will create training opportunities, especially in the area of project management software systems, and continue with BPS procurement process training, as this is a departmental priority.
6. **Continuous measurement of service performance.**

Project staff review projects on a bi-weekly basis during staff meetings to ensure service levels are meeting expectations of stakeholders. Continually reviewing projects ensures that staff are on track and aware of the state of the project. They can also ensure that customers and stakeholders are satisfied with the services provided by the Department.

7. **Quality of construction delivery.**

Similarly to Performance Measurement 6, this Measurement will use different means to gauge the quality of construction delivery. Facility Services sets for itself high standards; to make sure these are being met, both internal audits (see Performance Measurement 11) and stakeholder feedback will be necessary.

8. **Adherence to Broader Public Sector Guidelines.**

The Department will guarantee it is complying with the Guidelines by continually monitoring its work. It will also standardize procurement practices that meet these requirements.

9. **The retention of Design Standards/Quantity Surveyor.**

This measurement is met by the retention of a Design Standards/Quantity Surveyor to constantly review and update building standards. In addition, the Coordinator is responsible for maintaining a database of information readily available for providing estimates, and will also be able to identify longitudinal trends to check if Facility Services is working efficiently and more cost-effectively.

10. **Continuous refinement of Building Standards Document.**

The necessary refinements are made to improve on the specifications of materials and building systems. This measurement allows the Department to meet new building standards and sustainable targets. As discussed in Performance Measurement 9, these refinements will be done by the Design Standards/Quantity Surveyor.

11. **Internal auditing after each project.**

McMaster’s internal Audit Committee performs regular review of projects. The Committee ensures that the Department complies with all phases of the PMM manual from initiation to project closeout and ensures that governmental regulations on procurement are followed.

*This is a partial list of the Department’s Performance Measurements for this Theme. For a full list, please visit: [http://ppims.mcmaster.ca/pplant/documents/strategicplanframework.pdf]*
VALUES

- TRUST
- RESPECT
- ACCOUNTABILITY
- INTEGRITY
- TEAMWORK
- PERSERVANCE

MISSION
To deliver service excellence on time and on budget to a satisfied customer. We are committed to providing a healthy, safe, supportive and inspiring physical environment conducive to learning, teaching, research, community partnering and the attraction and retention of quality students, faculty and staff.

VISION
Embracing innovation and commitment in designing, building, and maintaining facilities and grounds that ensure McMaster’s continued placement as a world-class University.

Group shot of Facility Services’ Staff