Introduction

This is the presentation of our journey to a new strategic direction. You have a handout that represents our work in full – this discussion will provide some context and overview of the critical points.
**Agenda**

The project overview, which will provide some context, identify the scope and offer background (points 1-4)
The inputs from stakeholders and associations, ie: Resources and Operations (point 5)
Strategic Direction, which will demonstrate and rationalize the work of this group – G16 (point 6)
Recommendations, which include our action plan and next steps (points 7-9)

**Presentation Topics**
- Background
- Project mandate
- Project overview
- Project process
- High level Strengths, Weaknesses, Opportunities and Threats (SWOT) review
- Strategic direction
- Action Planning
- Recommendation
- Next steps
Background

Our 360+ member Division has a huge responsibility in supporting a World class institution that features 8.5 million gross sq. ft. in roughly 90 buildings. Connected by 17 km of roadway and adorned with more than 7000 parking spaces.
Department currently undergoing significant changes to organizational structure, processes & new technology, requiring Consultant to review organizational structure and recommend and facilitate changes that align with the University’s mission

It’s a responsibility we take seriously and has prompted us to act accordingly. Our recent investment in technology, innovation, and overall constant improvements align us with the University’s strategic objectives.
Project Mandate

Strategic Organizational Development designed to review existing services, organizational functionality and delivery systems and develop an appropriate organization structure and strategic direction which will support the delivery of high quality services and service models in keeping with the University’s mission statement.
Project Outline

• To assess the current environment and culture within PP&CPS and make recommendations in the following areas by:
  • Review current Strategic Planning;
  • Review current and upcoming initiatives that may impact Strategic Organizational Development;
  • Review of senior management goals and objectives;
  • Review of Organizational and Ministry reporting requirements;
  • Review of the performance measurement criteria,
  • Review of succession planning strategies;
  • Identify alternative practices and strategies that would align PP&CPS with UWO strategies and with other best in class organizations and;
  • Design an action plan with time lines, milestones and deliverables for future direction;
Steering Committee Members – Our Team/Roster

- Paul Martin
- Sue Mark
- George Qubty
- Jerry Minler
- Mark Van Den Bossche
- Rod Crichton
- Tracey White-Lockwood
- Chuck Griffin
- Charlie Price
- Bernard Hughes
- Iain Findlater
- Robert Flegel
- Greg Ackland
- Roy Forget
- Brandon Watson
- Marcia O’Connor
**Process Involved**

- Establishment a Steering Committee
- Provision of ongoing communication
- Development of a project plan
- Conducting several Steering Committee meetings
- Conducting one on one interviews/meetings
- Conducting 6 input sessions – Supervisors/Leads and random 40
- Discussing input and feedback from the input sessions
- Development and review of a high level SWOT
- Development of a Strategic Direction
- Provision of regular up-dates to the project sponsor
- Development of an action plan
- Providing recommendation and next steps
Stakeholder Feedback

Griffin collected and consolidated stakeholder feedback. From the raw data there was an effort to define our strengths, weaknesses, opportunities, and threats (SWOT). You will notice contradictions that are a result of the perspective of each stakeholder. SWOT described in following slides.
Strengths

- Strong communication between certain areas
- Good rapport among employees and staff
- Good understanding of role within university
- Adequate Funding
- Flexibility/emergency response
- Record-keeping/access to information
- Networking with other colleges & universities
- Regular meetings with staff and supervisors
- Capable, knowledgeable staff
- Improvements with new management
Weaknesses

• Communications with key stakeholders
• Training; orientation program
• No integrated process for projects & joint initiatives
• Lack of supervisors/clarity on roles & responsibilities
• Poor space layout
• No sustainability plan
• Customer Service (poor perception, no training)
• Collecting and sharing data
• Marketing of PP&CPS to UWO Community
• Succession planning
Opportunities

• The relaxed environment, good rapport between employees - build on the teams strengths
• Training – improve orientation process and create a stronger knowledge base. Training will decrease employee's nerves and increase their ability and comfort with taking on responsibility.
  -Processes
  -Standard Processes
  -Customer Service
  -Sustainability
  -Facility Management
  -Resource Library
  -PMI for Project Managers
  -AutoCAD – BIM – 3D
  -Technical Training
  -Primivera
• Role Definition – more defined roles will lead to more productive staff and better communication between departments.
• Enhanced Customer Service – currently starting the process, continue to strengthen customer services which will enhance communication and people’s perception of PP+CPS.
• Define clear borders in the organization and distinct role for PP+CPS
• Website: Physical Plant has an ‘ok’ website.
  -Needs to be more interactive with clients for feedback
  -Better Flow
  -Should follow Western Branding
  -All Directors should have input – should be consistent across divisions
• Best Practices team
• PP+CPS branding
• Project Management
• Technology platform – project management, capital planning, event planning, work order system, parking
Threats

- Workload/priorities – too large
- Lack of leadership from top down
- Undefined Roles and Responsibilities
- Lack of Communication
- Lack of Training & Orientation
SWOT - Key Themes (8)
1. Communication – internal, external
2. Customer Service – internal, external
3. Business Processes – management of the business
4. Marketing
5. Leadership
6. People
7. Role/Responsibility – accountability
8. Change
**Our Partners**

We wanted a powerful vision, that was also supportive, complementary, and balanced with our partners in R&O’s vision.

Resources & Operations’ Vision: A creative team working together to provide the best experience for those we support.

Our Vision: To be recognized as the leader in facilities management among research-intensive universities worldwide.

By being the best at what we do, we inevitably provide the best experience for those we are supporting.
Our Mission

“Our integrated Team provides excellence in creating and maintaining Western’s facilities and in serving the community.”

Where the vision speaks who we want to be in ideal terms, the Mission speaks to what we do in real terms.
Our Values

**Collaboration** – Working as a team we share knowledge and expertise with a common goal to achieve results

**Accountable** – We will take ownership and responsibility for our actions

**Respect** – We value people, property, process and the environment

**Integrity** – Take pride and practice the highest standard of ethical behaviour in the best interest of Western

**Commitment** – Through continuous improvement we are devoted to being the best
Goals

From our SWOT analysis in combination with our work up until our core values we developed five (5) goals. The are Business Processes, People, Communication, Stewardship, Customer Service. For each, we provided a definition and a number of specific objectives.
Business Processes (4): Current, effective and efficient processes are understood and consistently followed by all and appropriately supported.

Objectives;

1. To utilize feedback from bi-annual customer survey that will provide us the flexibility to resolve unexpected situations.

2. To appoint an Implementation Process manager who will provide ongoing training through education and communication in accordance with standardized methods and forms.

3. To establish, maintain and review (business processes) regularly or as needed based upon budget regulations, need, resources, etc.

4. To update process changes as required and communicate changes as required (web, binder, posted, etc.) in publication.
People (5): We are an innovative team of highly trained and skilled professionals

Objectives:

1. To develop a training program, review annually to establish and maintain compliance with current standards and legislation, and provide resources to meet training objectives.

2. To identify new/review existing roles and responsibilities as part of an annual review.

3. To complete annual comparison of similar institution to ensure compensation and other factors of retention remain competitive (modern equipment; staff facilities; innovation; consultation; work-life balance)

4. To encourage personal and professional development, within 3 years, 90% of employees shall undertake a learning/self-improvement opportunity annually

5. To initiate, develop and review bi-annually a succession plan that includes cross-training, job-shadowing, mentorships, apprenticeships, part-time roles to maintain a consistent and effective workforce.
Communications (2): Provide timely, accurate and effective communication to all stakeholders consistently

Objectives;

1. To review and develop a communication plan for PPD that outlines all stakeholders, their requirements and timelines (3 months).

2. To develop a schedule and implement Communication Plan within 3 years.
Stewardship (3): Responsible stewards of the environment, facilities and resources entrusted to us today and for the future

Objectives;

1. To make use of the annual facility indices and other resources to monitor the condition of campus infrastructure in order to prioritize and schedule improvements, upgrades and replacements of those facilities.

2. To determine conservation measures to develop processes that all FM employees and the Western Community can participate in, which would reduce the environmental impact year by year.

3. To prioritize, allocate and schedule (realign) our people, equipment and funds annually to meet the operational and academic needs of the university.
Customer Service (4): Enhance our customers’ experience by understanding, responding and providing mutually effective solutions

Objectives;

1. To design and implement an employee **customer service training program** for implementation within 12 months.

2. To **review existing methods of communication** for responding to each stakeholder group, utilizing information from bi-annual customer surveys (3 months).

3. To integrate a **real-time procedure** into our customer service process to **gather feedback** (within 3 years).

4. To **identify** customer service needs and **create plan** within 3 months for handling the **highest priority issues/complaints**.
Strategic Direction - Success Considerations

We have outlined that our vision is to be a leader. In making that goal come to fruition, we acknowledge there will be a heavy investment from our team that may interrupt their day-to-day activities. These are some considerations for a successful implementation of our strategic direction.

Accountability/Commitment
Senior person to manage and be accountable for the overall process (possibly Griffin & Associates)
All Direct Reports to AVP (committed active support) / Each goal assigned to a Direct Report
Someone from Steering Committee as an Advisor to each committee
Committee (x-sectional) for each Goal
Goals and objectives are x-sectional

Accommodation
Back fill positions (for committee reps to execute the objectives) as appropriate
Possible consultants to do work
Deferral of other work

Other Initiatives
Transparency with other initiatives i.e. Deloitte
Recommendations – Action Plan

From our thematic goals and subsequent objects, we developed specific action plans for each. This is the playbook that will lead us to satisfying our values and delivering us to our vision.

As you can see from the hand out hard copy of the action plan spreadsheet, we have broken the actions down into ...

**Timeframe:** Short=0-6 months(7 objectives); Medium=6-1.5 years(5 objectives); Long=1.5-3 years(6 objectives)

**Sponsor:** Overall accountability for the objective

**Lead:** Project Manager

**Person(s) Responsible:** Staff responsible in implementing the objective

**Facilities Committee rep:** Reps from Steering Committee

**Other Initiatives Underway:** Other initiatives that may impact on this objective
Recommendations - Rebranding and Brand mark

[“Your company's brand is a powerful relationship ... knotted to the principle of providing exceptional value.” - Karl Speak]

Your brand is the expectations and relationship that you have with your customers, your brand mark(s) is/are the symbol of that quality. Since we are proposing we change how we deliver our services (our brand), we thought it was important to change our brand mark, as well.

We are proposing a name change to “Facilities Management”. A name change shouldn’t be taken lightly. Although you will shed some of the negative connotations that may be associated with the old name, you also lose those positive connections. In the opinion of the team, there is more to gain than to lose by matching our name with our new strategic direction.

The tagline has many possible uses; The rationale is that it will act as a quick reference to our vision in three simple word we can call upon the sentiment behind it; “Building, Leading, Growing...”

We also recommended incorporating our proposed new name with the Western brand mark and develop a new logo.
Recommendations

1. As alluded to in the success considerations, we as a group strongly recommend maintaining the steering committee in an advisory role to monitor progress and own the roll-out of each of the action items.

Next Steps
2. We see the next immediate steps as quite steep, but critical in getting the ball rolling. We must ...
... Obtain approval to move forward.
... Mobilize the implementation teams (including conduct an all team meeting (logistics) and schedule regular team meetings)
... Assess and re-align workload as necessary
... Identify implementation process manager – as identified in our Business Processes objective.
**Conclusion** – A summary of our Strategic Planning journey – and what a long strange trip it has been. This overview demonstrates the path we took and the heavy lifting that was done by this group.

- Mission, Vision, Values
- Thematic Goals
  - Business Process
  - People
  - Communications
  - Stewardship
  - Customer Service
- Objectives
- Action Plan
- Recommendations