



IT TAKES A REVOLUTION – A CASE STUDY OF FACILITIES SERVICE IMPROVEMENTS AT UCSB

By David Gonzales

In early 1996, an APPA Facilities Management Evaluation report of the Facilities Maintenance and Operations department at University of California, Santa Barbara (UCSB) quite simply hammered us. The report codified what most at UCSB believed and experienced regarding the ineffectiveness of our facilities service programs. I came to the facilities department later that year, and the shock waves were still being felt by the campus and most facilities workers. Just recently, for about the third time, my boss, Associate Vice Chancellor Everett Kirkelie, asked me, "Have you given serious thought to writing about what's happened since 1996?" Not until recently was the time right to bring you up to date on the new Physical Facilities department at UCSB. Here's the brief version of a very good facilities story.

David Gonzales is director of physical facilities at the University of California, Santa Barbara. He can be reached at david.gonzales@pf.ucsb.edu.

From the Ground Up

One fascinating thing about UC Santa Barbara is the incredibly beautiful location of the campus—800 acres right on the central coastline of California. But the campus landscape was quite mediocre even on the most favorable spring day. How could that be? Why was the landscape so low on the department's priority list? I won't bore you with budget cut stories, nor will I second-guess my predecessors, but the landscape beauty of UCSB did not match up to its geographic advantages. I remember the grounds guidelines presenters at the 1998 APPA educational conference driving home the critical importance of taking care of the campus grounds. Most everyone knew that campus appearance factors rank highest in the minds of parents deciding upon a university to send their children. To a person like me, having been on the job for barely a year and a half, I had to ponder this point seriously.

When I returned to work after that conference, I got really busy implementing landscape improvements that were frustrating me because I could not get them out of the planning stage. We focused initially on areas near major pedestrian walkways, along major roads, and at each campus entrance. We set goals in the summer of 1998: by the fall quarter, we wanted the campus community to return and notice the improved landscape. We met our goals. We got immediate and positive feedback, mostly via e-mail. For the first time, e-mail became my ally. Good news travels fast too! The campus faculty and staff, visitors, and parents of prospective students told us how much more they were enjoying the beauty of UCSB because of the newly improved landscape. This positive feedback about grounds has continued to this day. Since everyone sees the landscape, everyone "knows" that the facilities department is undertaking very positive, tangible improvements for the campus.

I had no idea how important and sweeping this "positive prejudice" would be. Our building maintenance mechanics continued doing their good work in equipment rooms "behind closed doors," but everyone could see the groundskeepers working their magic to transform appearances overnight, creating more beautiful and enjoyable outdoor areas.

Morale and Productivity

One of the major positive outcomes from our landscape improvements was how our groundskeeping staff became well known in our own department! Having toiled for years in virtual anonymity, now everybody knew the names and work product of our groundskeepers. Let me tell you how it warmed my heart to see our grounds workers carry the reputation of the department and become our legitimate facilities heroes during the initial phases of our revolution. This phenomenon gave all the grounds staff and the rest of the facilities department an injection of morale. We were all being noticed and recognized in a positive way. It was sudden, dramatic, and positive. We had been down for too long, and now the emotional energy of our "comeback" was beginning to show itself. All facilities workers felt a lot better during the summer and fall of '98. Remember that productivity enhancements come only if morale improvements occur first. What was happening in our grounds program was spreading throughout the department. The campus was talking about us in positive terms. We were talking about it internally. For a while, it seemed like our grounds program enhanced the reputation of Facilities with every new planting! We convinced ourselves that we must capitalize on this newly found wave of good will and positive energy.

Service Outreach

I remember Jack Hug of UC San Diego advising me early on about the benefits of keeping facilities workers close to their customers. The customers love to see 'em coming, and throw parties for them when they finish their work, he told

me. In mid-1998, about the same time we were beginning our landscape reinvestments, we implemented a program we call PM PLUS. We organized a team of workers representing all trades who traveled the campus on the same schedule as our preventive maintenance team. We met with our customers ahead of the team's arrival and told them that while we PM'd their building, we'd perform needed general maintenance according to their priority lists! You know what that meant; we painted like there was no tomorrow! From the beginning, PM PLUS was a hit with every customer. Our customers especially appreciated the idea that we would address their top maintenance needs, without them having to call us. The PM PLUS team was a hit internally in facilities, too. Many trades workers and custodians wanted to be on this highly visible team, and many new facilities leaders stepped forward during the first months of our PM PLUS experience. The positive inertia of PM PLUS gave us another morale boost and led us to our next major service outreach effort, establishing comprehensive maintenance zones on campus.

Keep the Work Inside

The 1998 APPA educational conference in San Jose also helped me to decide another critical issue. Should I contract a portion of our campus custodial service? I was on track to do just that until I met the folks from Iowa State. The contingent of custodial workers led by Rick Terrones, president of the AFSCME local, captured me with their gutsy presentation. I spent more time with those turned-on workers that evening when I saw them at the hotel. They convinced me to listen to my own union staff who were dead-set against the contracting option. When I returned to my campus, I put the challenge to our custodial union leadership: work with me to redesign a more competitive, customer centered custodial service, and I'll junk the contracting proposal. We began meeting weekly in September 1998, an equal number of workers and managers with the facilitating presence of a Human Resources mediator. We called ourselves the "custodial redesign team." We've had over 60 meetings since then, some very difficult and contentious, but we're still meeting. Now, our custodial workers have direct input into all aspects of our custodial service program decisions. Their teams and leaders have more authority and accountability. Morale is way up and so too is their attendance and productivity. We have lots of issues on the table continuously, but there is a much greater sense of commitment to be "competitive with the outside" among our custodial workers and team leaders. Contracting is not an option today.

Operating in the Zone

In January 1999, after several months of discussions at all levels in the organization, we divided the campus into four maintenance zones and opened maintenance and operations headquarters in each zone. Our trades workers were directly involved in all the planning, down to the details of what they

needed in their zone offices and which workers would be on their respective teams. All zone teams consist of at least one representative from each trade. We did this right in plain view of our customers, in our equipment space in their buildings. We established computer connections in the zone offices for communications and building automation systems. We began to smother our customers with service, because very often, our workers were just around the corner from the project or the caller. We were right there for them. Without always knowing it, we were beginning to develop our new service strategy. We aligned all major services in the same geographic maintenance zones, so each zone consists of building trades, custodial and grounds teams.

Integrated service programs became our objective. Internally in facilities, the premium was now on coordination, communication and teamwork among the teams in the three major service programs. These awesome words have huge service impacts when they are part of a real action plan! Feedback from our once harsh critics (we affectionately called them "the friends of facilities") now became "thank you" and "wow." We were now doing our signature PM PLUS projects in all four zones simultaneously!

We started including custodial and landscape projects requested by our customers. At this date, we've completed at least three cycles of PM PLUS visits in all major buildings. Predictably, our customer maintenance request lists are getting shorter. We knew we were making real progress when we combined our PM PLUS with quick responses to all trouble calls the day they come in. By mid 1999, we were on a positive, meaningful course that nobody could deny. Our confidence within the department was way up. Our morale was improving. Our sick leave usage was declining. Productivity enhancements were rampant. Our grounds improvements, our custodial redesign, our new zone structure, our visible presence in the buildings, and our timely response to trouble calls were the talk of the campus. We were being asked to present our new organization and service strategies at campus business officer meetings, and our managers and workers received standing applause. What a change! We have great fun telling our customers in large meetings that we now walk tall in their buildings, no longer ducking to avoid their criticism. Facilities at UCSB was reinventing itself and redefining its working culture. And, best of all, our workers and managers were having more fun delivering great service to the campus. Our workers have a greater stake in the departmental decision making.

Teamwork

One of the more exciting aspects of our facilities revolution was our use of work teams in all of our service programs.

This feature alone helped us identify about 20 new "leaders," who carry the banner of organizational change. Once we went to the zone service structure, we organized all our workers on teams within the four campus geographic zones. Each

zone had one diverse trade team, two or three custodial teams and one grounds team. This is a manageable sized group for coordination, communications, and planning purposes.

The all-important issue of who would lead each team was resolved in favor of the bargaining unit workers. The workers would be led by one of their own. This allowed us to significantly reduce the number of supervisors/managers in the department, and provided the

opportunity for previously untested staff to rise to their next level of leadership, commitment, and performance. In other words, the workers' behavior norms would be established in the team setting, led by one of their peers. We were able to upgrade working leads to higher paying positions but still in the bargaining unit. We tasked each working lead to perform and organize the work flow of their team, contact customers, schedule PM PLUS projects, organize the response to daily trouble calls, coordinate with the leads from other services, and resolve everything possible informally within the team setting. We have 13 custodial leads, 9 trades leads, and 5 grounds leads calling the shots on work flow.

Facilities managers are now responsible for supporting and coaching the leads and making all the strategic decisions about our services. So far, we've experienced more success than expected with this model. And, we've opened the door to new careers for 27 highly motivated leads. Just imagine how positive the lead's impact on team workers is in this period of revolutionary change compared to the former supervisory-manager hierarchy.

The Heart of the Issue

Obviously, I'm telling only the good-news stuff. We've had lots of trial and error; we've had to recover when we missed our objective; we've had to move ahead with many inexperienced leaders whose initial leadership training experiences were on the job. But through it all, the constants which came through for us are the heart and will of our facilities staff. Our staff are very good people with high levels of confidence, expertise, and pride in their work. We managers are the lucky ones to be able to unleash this potent force of maintenance experts on the campus, in a redesigned service



structure utilizing a service strategy that really works for us. After reading and studying Leonard L. Berry's *On Great Service*, we figured out how to get the emotion and passion of our facilities staff working for the department, leading the revolution in facilities.

Doing the Hard Work

We started this revolution by meeting with groups of employees in all of our services. We still meet regularly (weekly or biweekly) with representatives of the trades, custodial, and grounds workers. They tell us the truth. We have learned to be better listeners. And when they are right, we decide the issues accordingly. Worker input and involvement has been invaluable and key to the process of change.

Employee empowerment cannot be a buzz word in a major change scenario. We learned the importance of letting the workers decide and implement many improvements. But, providing new authority and responsibility to workers and their leads resulted in new jobs with new compensation requirements. Some of the savings realized when we reduced supervisor numbers has been spent to upgrade salaries of all the leads. But, the morale and productivity gains in facilities put UCSB way ahead on the customer service balance sheet.

Finally, the need to expose these facilities revolutionaries to valuable leadership training, the kind to which we used to

send only managers, becomes critically important. So, we developed a Leadership 2000 series of learning experiences primarily for our Leads, our new leadership forces. We have courses scheduled in writing, cultural communications, training and presentation skills, organizational change, and ethics in Facilities. We are using campus managers, faculty, and consultants as trainers. We started with a memorable day of George B. Wright presenting on leadership and teamwork, and Professor Leonard L. Berry, author of *On Great Service* and *Discovering the Soul of Service* recently visited us.

Revolution is defined as a sudden, radical, or complete change. That says it all at UCSB Facilities these days. So, my facilities colleagues, UCSB is back on track, but not just because I said so. Ask any of our customers.

I must share a personal note on these events. I'll never forget my first days on the job in the facilities department as acting director. On the one hand, having worked at UCSB for 15 years, I knew the major players at all levels in all campus administrative and academic venues. This would prove to be very beneficial. But on the other hand, the facilities workers, all being unionized, knew me only as the Labor Relations Manager—you know, part of the problem from their perspective. "Oh no, not him," I heard often.

You can see that some of my major challenges started on day one, but so too did the excitement of high volume activity and achievement. Soon, I saw the facilities operation as a wonderful mix of significant challenges and meaningful rewards for everyone in the organization. I have concluded that it's the loyalty, expertise, and quality of the facilities staff that has been key to our success. This awesome power of the facilities workers needed to be unleashed on the campus in a way that my predecessors had not. I know they tried.

I thrive at work on the aspects involving the power of the human spirit. Our days are filled with accomplishment, joy, disappointment, frustration, recovery, and strategy. We embrace the emotions of all these experiences each day with more confidence and understanding how the power of our collective energy is working for us now. 📌

Ed. Note: For more information about APPA's Facilities Management Evaluation Program, please visit www.appa.org/fmep or contact Randel Edwards at APPA at 703-684-1446 ext. 234 or randel@appa.org.



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