



Proprietary & Confidential

DRAFT REPORT

City of Salem

FACILITIES MAINTENANCE EFFICIENCY STUDY

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I. EXECUTIVE SUMMARY

A. BACKGROUND, SCOPE, AND METHODOLOGY

The City of Salem’s (the City) Facilities Maintenance Division (the Division) provides maintenance and custodial services to the majority of the City’s buildings. The goal of this assessment is to identify opportunities to improve the Division’s efficiency and effectiveness related to:

- Service levels and responsiveness to customer needs
- Staffing levels and structure, skills, capacity, and efficiency
- Cost recovery and allocation policies and procedures
- Intradivisional and interdivisional collaboration and coordination
- Policies, procedures, and processes
- Systems and technology, including asset management

This assessment was conducted between September 2022 and January 2023. Analysis was informed by interviews with City leadership and staff, employee survey results, and a review of data and documents provided by the City.

B. SUMMARY OF OBSERVATIONS AND RECOMMENDATIONS

Findings and recommendations were grouped into three areas—**People**, **Strategy and Systems**, and **Customer Service and Collaboration**. People, Strategy and Systems, and Customer Service and Collaboration findings and recommendations are summarized below. Observations and recommendations for all three areas are provided in Section III of this report.

OBSERVATIONS AND RECOMMENDATIONS		
People		
1.	Observation	According to best practices for facilities maintenance staffing, the Division is understaffed.
	Recommendation	<ul style="list-style-type: none"> A. Determine the feasibility of increasing maintenance and custodial staffing. B. Explore internal training as a recruitment and retention strategy to fill open positions. C. Consider bringing the Salem Public Library (the Library) custodian position into the Division.
2.	Observation	There are opportunities to improve delegation, communication, and succession planning activities to strengthen the Division’s current and future leadership team.
	Recommendation	<ul style="list-style-type: none"> A. Consider providing management leadership trainings focused on delegation and communication. B. Begin to implement strategies for succession planning.



OBSERVATIONS AND RECOMMENDATIONS	
3.	Observation The Facilities Division provides comprehensive tactical trainings, but developing career pipelines could encourage internal growth.
	Recommendation Continue efforts to develop, document, communicate, and provide career ladders and training opportunities to encourage employee engagement and internal growth.
4.	Observation The Division plays a role in the City's response to homelessness, but the impacts on Facilities personnel is not sustainable and staff report serious safety concerns.
	Recommendation Explore options to increase staff safety and morale.
Strategy and Systems	
5.	Observation The Division has historically focused on delivering high-quality work to maintain the City's spaces. However, due to a variety of factors, the Division has not yet been able to engage in more proactive strategic planning to guide, improve, and modernize its work.
	Recommendation In coordination with City leadership, determine which planning activities are feasible and explore options to establish a centralized space planning approach.
6.	Observation Currently, the Division is primarily funded through allocated interdepartmental charges. The Division is considering shifting to an Internal Service Fund (ISF) model.
	Recommendation Continue to explore the potential benefits and drawbacks of shifting to an ISF model. If the Division chooses to pursue this route, it will be important to gain meaningful input from customer departments, clearly demonstrate the intended positive impacts for the City as a whole, and be able to make the case for why the timing of this transition is urgent.
7.	Observation While the Division's technology systems meet most of the team's basic needs, there are opportunities for improvement around automation, data analysis, and customer communication.
	Recommendation A. Continue efforts to upgrade to a more effective work order system. B. Increase usage and deployment of mobile devices among staff. C. Continue efforts to expand the use of technology and data analytics to streamline workflows and more proactively identify maintenance needs.
Customer Service and Collaboration	
8.	Observation The Division has a City-wide reputation for great customer service, but there are opportunities to improve service consistency and standardize communication processes.
	Recommendation A. To clarify expectations, develop service level agreements or other documentation that more clearly defines the standard level of service each department will receive.



OBSERVATIONS AND RECOMMENDATIONS		
		<ul style="list-style-type: none">B. Take steps to improve the consistency and clarity of work order communication with customers.C. Establish regular customer engagement surveys to solicit input and track performance over time.
9.	Observation	There is overlap between departments in roles and responsibilities concerning the maintenance of City assets.
	Recommendation	<ul style="list-style-type: none">A. As part of developing service level agreements, review, clarify, and document interdepartmental roles and responsibilities.B. Consider developing a user-friendly guide to working with the Division that can be used as part of onboarding new staff members.C. Continue to explore the potential benefits of centralizing the management of the security function into one team.



II. BACKGROUND, SCOPE, AND METHODOLOGY

A. BACKGROUND

The City of Salem’s (the City) Facilities Maintenance Division (the Division) provides maintenance and custodial services to the majority of the City’s buildings. The mission of the Division is to plan, build, maintain, and operate City facilities. The Division strives to be responsible and accountable stewards of the public’s investment in City facilities by delivering cost-effective value in a manner that exceeds expectations for quality and timeliness.

The City of Salem engaged Moss Adams LLP to provide consulting services in support of organizational assessment and optimization, with the tandem purposes of achieving fiscal sustainability and the goals set out in the City’s strategic plan. This assessment is part of a suite of projects that are being conducted in fiscal year (FY) 2022–2023.

B. SCOPE AND METHODOLOGY

The goal of this efficiency study is to identify opportunities to improve the Division’s efficiency and effectiveness. Areas of focus in this study included:

- Service levels and responsiveness to customer needs
- Staffing levels and structure, skills, capacity, and efficiency
- Cost recovery and allocation policies and procedures
- Intradivisional and interdivisional collaboration and coordination
- Policies, procedures, and processes
- Systems and technology, including asset management

This assessment was conducted between September 2022 and January 2023. Analysis was informed by interviews with City leadership and staff, employee survey results, a review of data and documents provided by the Division, and comparison to industry best practices. The project consisted of four major phases:

- **Project Initiation and Management:** This phase concentrated on comprehensive planning and project management. It included selecting employees to interview, identifying documents to review, communicating results, and establishing regular reports on project status.
- **Fieldwork:** This phase included interviews, document review, a survey, and best practice research. We worked with Division leadership to obtain the most up-to-date information and insight available.
 - *Interviews:* We conducted interviews and focus groups with over 50 employees, including all Division staff and various stakeholders in every customer department across the City.
 - *Survey:* A customer satisfaction survey was sent to 104 customer department employees to gain broader insights. We received 59 responses, which is a strong response rate of 57%.
 - *Document review:* We reviewed documents, including operational policies and procedures, organization charts, service reports, and others.



- *Best practice research*: Based on identified opportunities for improvement, we conducted research on operational and staffing best practices.
- **Analysis**: In this assessment phase, we evaluated the importance, impact, and scope of our observations within the context of the information we gathered to develop actionable recommendations.
- **Reporting**: We concluded the project by reviewing draft observations and recommendations with Division management to validate facts and confirm the practicality of our recommendations.

C. COMMENDATIONS

Based on the insights gathered through interviews and document review, it is evident that the City's Facilities Division has many commendable organizational attributes. Some examples are provided below.

- **Good Relationships**: Interviewed and surveyed staff throughout the City generally noted that Facilities Division staff care about the City and its employees. Many people reported that the Facilities team communicates well, works hard, is highly responsive, and provides prompt, friendly, and skilled service. City employees generally expressed gratitude for their partnership with the Facilities team.
- **Healthy Internal Culture**: Interviewed staff throughout the Facilities Division generally reported that staff have good relationships with each other and their supervisors.
- **High-Quality Service**: City staff noted through interviews and surveys that the Division—in particular the maintenance and repair team—performs high-quality work. Many people brought up that the Division's operations have continuously improved over the last decade. Customers appreciate the Division's willingness to go above and beyond to provide excellent service.
- **Smart Practices**: The Facilities Division leadership has a demonstrated interest in exploring and implementing best practices to aid operations. For example, they utilize three-month rotating schedule for custodial routines, which support both continuity and staff engagement by training all staff on each building assignment.

We would like to thank City leadership and staff for their willingness to assist in this assessment.



III. OBSERVATIONS AND RECOMMENDATIONS

Based on the input gathered from interviews, document review, focus groups, and surveys as well as comparisons to best practices, we prepared a comprehensive set of observations and recommendations, which are presented in the three sections previously described.

A. PEOPLE

Staffing Structure

1.	Observation	According to best practices for facilities maintenance staffing, the Division is understaffed.
	Recommendation	<ul style="list-style-type: none">A. Determine the feasibility of increasing maintenance and custodial staffing.B. Explore internal training as a recruitment and retention strategy to fill open positions.C. Consider bringing the Salem Public Library (the Library) custodian position into the Division.

The Facilities Services Division is housed in the Enterprise Services Department and is overseen by the Service Technologies Manager. The Division employs 31 FTE, composed of Building Operations (which primarily provides facilities maintenance services), and Building Maintenance and Services (which primarily provides custodial services). In addition, there is also a Management Analyst II and an Admin Analyst I who provide administrative and analytic support to the Division.



City of Salem Facilities Services Organizational Chart



In general, the Division is operating with a lean staffing structure. Based on the data collected for the Salem Internal Services Benchmarking project, peer cities are operating with almost double the number of staff and outsourced resources in comparison to Salem. In terms of workload, interviewed Division staff reported a variety of perceptions—some reporting that they felt stretched thin while others felt like the current team size was reasonable.

A commonly reported issue was handling employee absences. The Division has historically operated with a de facto staffing policy to hire only enough staff so that buildings can be fully serviced when all personnel are present. In reality, interviewees report that there was not a single week in 2022 when all staff were present, due to sick leave, vacation, or open positions. As a result, supervisors are sometimes required to perform front-line work to provide coverage or reduce temporarily the scope of provided services when employees are out. Temporary staffing agencies are available, but they are primarily used to cover long-term absences. Interviewees reported that short-term absences are significantly easier to manage in-house, as there are efficiency costs to using a temp agency. Because of this, custodians in particular are often short-staffed. If budgets allow, it is best practice to staff facilities teams to take into account expected absences due to sickness, training, vacation, and personal days.

The Division is also understaffed when compared to APPA benchmarking standards. In FY 2023, the Division will be responsible for 2,299,809 square feet of service area, broken out into building square footage (1,881,424) and grounds/hardscape square footage (418,385). Below are charts showing FY 2023 staffing levels compared with best practices. In general, the City is operating with a lean staffing model.



SQUARE FEET PER FTE CALCULATION		
	Maintenance Crew	Custodial Crew
FTE	10	13
Square Feet of Service Area	2,299,809	427,483
Square Feet per FTE	229,980	32,883

APPA RECOMMENDED MAINTENANCE ¹ AND CUSTODIAL ² STAFFING STANDARDS				
Level	Maintenance	Sq. Ft. per FTE	Custodial	Sq. Ft. per FTE
1	Showpiece	47,220	Spotlessness	12,300
2	Comprehensive Stewardship	67,456	Tidiness	24,500
3	Managed Care	94,439	Casual Inattention	45,600
4	Reactive Management	118,049	Moderate Dinginess	74,000
5	Crisis Response	236,098	Unkempt Neglect	116,800

Maintenance Staffing

According to the APPA standards, managing over two million square feet of service area with 10 maintenance crew on staff places the Facilities team in the Reactive Management level of maintenance service (bordering on the Crisis Response level). This level is characterized by long response times with service calls that are not responded to in a timely fashion. Although interviewed customers did report that response times can vary and some work orders can occasionally fall through the cracks, the Facilities team can be commended that the level of service they provide is generally far better than the level of service predicted by staffing best practices at this level.

The FY 2021–2022 Monthly Work Orders Report indicates that although most work orders from earlier in the fiscal year are resolved, there are still open work orders from each month (for example, 2.76% of work orders from September 2021 are still open, 6.4% from February 2022, and 9.4% from July 2022). Although some months are as low as 0.23% open work orders, there is no single month where all work orders are closed. The average of open work orders for the fiscal year is 5.87%, or 307 work orders. It is important to note that this data does not include all work orders that the Division receives—for example, user service requests like moving offices or furniture are not captured.

The City relies on contractors for maintenance projects that require highly specialized trades or equipment, such as high voltage technician work, repairing and installing new specialty equipment,

¹ [Recommended APPA Staffing Standards](#)

² [Cleaning Operations](#), APPA



and underground plumbing. The use of contractors may explain how the City is managing to maintain a strong operating environment, despite the relatively low number of maintenance staff.

At the Reactive Management level, most work can be expected to be characterized as corrective maintenance, with only 10–25% of work falling into the preventative maintenance category. Based on interviews, the perception among customers is that the vast majority of maintenance activities at the City are corrective, rather than preventative. However, data provided by the Division does not support that perception:

WORK ORDER TYPE	2022	2021	2020	2019	2018
Corrective	21.4%	18.9%	18.6%	12.2%	20.1%
Preventive	59.1%	58.6%	62.4%	66.3%	51.2%
Service	19.5%	22.5%	18.9%	21.5%	28.8%
Total Work Orders	5,240	4,835	4,383	4,671	4,319

In general, having a strong preventive maintenance program can produce long-term cost savings for the City. To move up from the Reactive Management to the Managed Care category, the Division would need to add three additional maintenance positions.

Custodial Staffing

Cleaning 427,483 square feet with 13 custodial crew on staff places the Facilities team between the Tidiness and Casual Inattention service levels based on APPA’s recommended staffing levels for an office with carpet floor. (Not all buildings cleaned by the custodial crew fall into this type, but it is a useful average for estimating staffing needs.) The Casual Inattention service level is characterized by the following appearance levels:

- Floors are swept or vacuumed clean, but upon close observation there can be stains. A buildup of dirt and/or floor finish in corners and along walls can be seen.
- There are dull spots and/or matted carpet in walking lanes. There are streaks or splashes on base molding.
- All vertical and horizontal surfaces have obvious dust, dirt, marks, smudges, and fingerprints. Lamps all work and fixtures are clean.
- Trash containers and pencil sharpeners hold only daily waste and are clean and odor-free.

Interviewed customers reported varying experiences in adherence to this service level. For example, although surfaces are generally clean, supplies in washrooms are not always replaced. A longer discussion is included in the Customer Satisfaction and Communication section of this report.

Currently, 11 custodians work six days per week covering an average of 333,458 square feet each shift, which is an average of 30,314 square feet per person per shift. Cleaning an average of 30,314 square feet per person per shift does not align with the Facilities team’s stated goal of achieving Level 3 cleaning based on the Federal Education Department’s building cleaning



standards, which recommends 19,000–25,000 square feet per person per shift.³ To achieve this level, the team would need to add two to three custodians per shift if the cadence of building cleaning remained the same.

Management and Administrative Staffing Levels

Interviewed Facilities personnel at all levels mentioned that supervisors are managing too many direct reports. APPA benchmark facilities staffing recommends 0.16 group supervisors, 0.34 O&M managers, and 0.33 administrative support staff per 100,000 gross square feet.⁴ This does place the Facilities team below the recommended levels of management and supervisor staffing by square footage. However, the crew levels are also below the recommended levels of staffing, and it would not make sense to right-size management without also right-sizing crew.

APPA benchmarking also suggests that the Administrative Support roles are particularly understaffed. Increased staffing in that area could help relieve some of the administrative burden currently falling on group supervisors and managers. However, given the City’s lean approach to administrative staffing, we do not see this as the highest priority staffing need within the Division.

POSITION TYPE	CURRENT FTE	APPA RECOMMENDED STAFFING PER 100,000 GSF	RECOMMENDED DIVISION STAFFING	ADDITIONAL STAFFING NEEDED TO MEET APPA STANDARDS
Group Supervisors	2	0.16	3.7	1–2
O&M Managers	4	0.34	7.8	3–4
Administrative Support	2	0.33	7.6	5–7

Turnover and Recruitment

Since 2019, the Division’s turnover rate has been 27% with four crew positions and five project leaders or management positions experiencing turnover. The Division is currently fully staffed, apart from the HVAC Technician position.

Facilities management reported that recruitment is an especially significant challenge for the team, particularly for skilled trades. This is likely due, in part, to the City’s comparatively low salaries for these roles compared with private sector salaries. In particular, the difficulty of hiring an HVAC technician has been impactful on the team.

Staffing Redundancies

The Salem Public Library (the Library) employs a full-time Custodian to supplement the work of the Facilities Division. According to interviewed staff, this role focuses on cleaning all hard surfaces (including tabletops, handrails, light switches, and kitchenette sinks), vacuuming the stairs, taking out

³ [Building Cleaning Standard Type, CEDS](#)

⁴ [Facilities Staffing Benchmark Summary Assessment](#)



the recycling, and cleaning and maintaining the elevators. They also dust shelving periodically, clear debris from meeting rooms, and clean the windows as needed between twice-yearly contracted cleans. This position also responds to urgent custodial needs that arise throughout the day. Interviewed staff report that there is rarely, if ever, any communication between the Facilities custodial staff who clean the library locations overnight and the Library Custodian. When the Library Custodian encounters an issue that they cannot solve themselves, the work order process is initiated to escalate that task to the Facilities team.

Given the nature of Library work and the high public traffic to library locations, it is a reasonable need to have on-site support during daytime hours. However, it is best practice for personnel who are conducting custodial work to be centralized on the same team to ensure consistent standards are applied, improve coordination, and give the City full transparency into how funds are spent on this function. For more details about overlapping services, see the Roles and Responsibilities section of this report.

Recommendation

A. Determine the feasibility of increasing maintenance and custodial staffing.

The Division should determine whether it is feasible to add additional staffing positions to bring the team into better alignment with industry standards and service expectations. In alignment with peer cities, exploring additional outsourcing for particular functions may be useful. If expanding staff is not viable at this time, it be especially important to set clear expectations with customer departments around feasible levels of service (see the Roles and Responsibilities section of this report for more details).

B. Explore internal training as a recruitment and retention strategy to fill open positions.

A potential strategy in the face of difficult recruiting is to increase the availability and intentionality of internal training. This option is discussed in the Staff Training and Career Development section of this report. Interviewed Facilities staff also expressed some desire to increase the training available to Technician I's on skills that are outside the scope of their current roles. Offering standardized tracks for skill development and advertising those processes during the interview process may help make City jobs more attractive and aid in recruitment. For example, one community college that employs this strategy has promoted, or is planning to promote, over 80% of their maintenance assistants to first-class engineer roles.⁵

C. Consider bringing the Library Custodian position into the Division.

While the Library Custodian position could continue to provide on-site daytime support to the Library, centralizing the role so that it is overseen by the Division would help to increase clarity on roles and responsibilities, ensure consistent standards are applied, improve coordination, and give the City full transparency into the level of effort and how funds are spent on this function. If the Division does not bring the Library Custodian position in-house, it is important to ensure that both parties have a clear understanding of the custodial and maintenance work for which they are responsible. This will minimize miscommunication and ensure that the library locations are well maintained.

⁵ [Strategies for Finding Skilled Maintenance Technicians](#)



Management and Leadership

2.	Observation	There are opportunities to improve delegation, communication, and succession planning activities to strengthen the Division’s current and future leadership team.
	Recommendation	<p>A. Consider providing management leadership trainings focused on delegation and communication.</p> <p>B. Begin to implement strategies for succession planning.</p>

The Division supervisors oversee large teams of 13 to 14 staff members. They are supported by project leaders. Based on interviews, there are concerns that the supervisor roles do not always have sufficient backup to be able to fully take time off or to cover during an unexpected absence. In addition, there are significant opportunities to increase delegation and cross-training. Within the Division’s high workload environment, it is particularly important that managers are able to trust and empower direct reports so that they can successfully delegate work.⁶

Some interviewed staff shared that there is a lack of communication and transparency from the Division leadership down to the crew level. Although there are daily morning meetings between project leaders and crew, staff noted that it would be beneficial to know how work orders fit into the larger scheme of maintenance at the City and to have increased visibility into project timelines, especially if projects are going long. In addition, visibility could be increased when process changes are implemented to ensure that staff are aware of the intended benefits from the change.

At least eight Division members—including four managers, supervisors, and project leaders—are eligible for retirement within the next five years. Many of these staff members have significant historical and/or strong customer relationships. However, the Division has not yet started the process of succession planning and there is not currently a viable process in place for the unexpected loss of key personnel that are critical to the Division’s success. This represents a high level of risk for the team’s operations.

Recommendation

A. Consider providing management leadership trainings focused on delegation and communication.

To support the Division’s leadership team, the City should consider providing additional management training focused on appropriate delegation, empowering employees to manage their own workflows, and effective communication. Staff in leadership positions have not received standard training focused on management success skills. Trainings like this not only provide valuable leadership tools, they also help to ensure that staff in management positions are operating with a shared understanding of the intended team environment.

⁶ [Span of Control for Facilities Management](#)



B. Begin to implement strategies for succession planning.

The Division should focus on developing a viable candidate pool internally for key positions long-term. Consider conducting a skill gap analysis and creating training programs and development plans that bridge the gaps. This will allow leadership to allocate resources in ways that support succession plans and employee growth.⁷

When embarking on succession planning, it is also important to consider strategies that will capture employee’s legacy knowledge. Often, a good way to do this is by updating standard operating process and procedure documents with their input.

Staff Training and Career Development

3.	Observation	The Facilities Division provides comprehensive tactical trainings, but developing career pipelines could encourage internal growth.
	Recommendation	Continue efforts to develop, document, communicate, and provide career ladders and training opportunities to encourage employee engagement and internal growth.

The Division provides comprehensive tactical and safety training to front-line employees. Within 30 days of hire, new employees must undergo 18 trainings ranging from City Vehicle Policy training to Wildfire/Smoke/Heat Illness training. In alignment with industry standards and compliance requirements, ongoing training is extensive and occurs on a monthly schedule. The most important trainings repeating annually (for example, Bloodborne Pathogens hands-on training occurs every March for all staff), some trainings occurring every two to three years, and some trainings occurring on an as-needed basis (for example, First Aid and Electrical Safety). Training schedules are disaggregated by employee type.

Although the current training schedule appears to be fully sufficient for maintenance and custodial work-related tasks, there is an opportunity to implement trainings that would increase the team’s overall operational efficiency. Topics that were flagged during interviews include:

- Management/supervisor training on communication and delegation
- Computer skills trainings to allow all needed personnel to participate in the work order system
- Skill-specific training that could help employees become eligible to advance into higher positions within the Division (see below)

Computer-based training is delivered through the Target Solutions system. Staff generally reported a negative experience using this system and had difficulties fitting the trainings into their regular work schedules, which can be attributed in part to understaffing.

Interviewed Division employees reported that they were pleased with the opportunities for career development in most roles. However, given the difficulty of hiring highly skilled positions like HVAC technicians and the value of promoting from within, improving career development and internal

⁷ [Facilities Manager – Succession Planning](#)



growth opportunities within the Division is a high-return area to focus effort. For example, the career pipeline for Maintenance Technicians could be clearly communicated upon hire with defined performance targets for promotion and incentives for pursuing further training. This is aligned with best practice and with leadership’s desire to be an employer for all skill levels and abilities.

In addition, interviewed staff noted that the internal pipeline to becoming a project leader is unclear and that the team might benefit from focusing on developing staff skills to be able to promote from within using a merit-based process.

Recommendation

The Division should continue efforts to develop, document, communicate, and provide career ladders and training opportunities to encourage employee engagement and internal growth. Interviewed Division employees noted that it would be particularly beneficial to better understand the available career paths and promotion opportunities. Key elements of a healthy career ladder in an organization include clear guidelines for employees to prepare themselves for promotions, preparing individualized career growth plans, and conducting explicit annual career growth conversations with interested employees.

Homelessness Response

4. Observation	The Division plays a role in the City’s response to homelessness, but the impacts on Facilities personnel is not sustainable and staff report serious safety concerns.
Recommendation	Explore options to clarify responsibilities and increase staff safety and morale.

The challenges that arise from the high number of people experiencing homelessness (PEH) in the City is an issue for nearly every department, but the Facilities Division is uniquely affected given the nature of the team’s work. Considerations include:

- **Staff Safety:** Interviewed and surveyed staff noted concerns around the evening custodial team’s personal safety, especially traveling between job sites and taking out the trash. Staffing levels do not always allow for buddy-system protocols to be followed. The nighttime security of staff is a major employee morale issue that should be addressed.
- **Workload Changes:** Overtime due to parkade cleaning coverage and after-hours calls for the maintenance services team (which interviewed staff reported is frequently related to PEH), totaled 57.75 hours in FY 2021–2022. In addition, staff report that the workload during regular work hours is inflated due to the increased demands of maintaining outside areas, including washing stairwells and sidewalks, dealing with biohazardous waste, and interacting with people in crises. This has impacts on the Division’s overall budget and ability to maintain standard service levels.

The Human Rights and Federal Compliance Manager in the City Manager’s Office recently oversaw the creation of a team that will take responsibility for some of the cleaning tasks related to PEH. However, this decision was made during recurring meetings of the Internal Homelessness Committee when the Facilities representative was not in attendance.



Recommendation

The Division should explore options to increase staff safety and morale. Options may include:

- Hiring additional security personnel for nighttime coverage.
- Reviewing options for what work could feasibly be accomplished during the day and transitioning more Division personnel to day shifts. According to APPA, day cleaning is becoming increasingly popular as it reduces energy costs and increases performance—both because people generally perform better during the day, and because workers are being observed by customers. In addition, day cleaning can increase customer satisfaction because they see the work occurring. Although there are downsides, teams can also consider swing-shift cleaning.
- Ensuring that the buddy-system protocol is always in place.
- Consider providing additional bonuses or increased hazard pay to employees who work night shifts or who are primarily responsible for maintaining outside spaces.

The Division should also consider re-engaging with the Internal Homelessness Committee and reviewing all of the tasks that Facilities is currently handling related to PEH to determine if additional tasks could be outsourced to a specialized group. Although cities are generally the largest funder of encampment responses in the U.S., those costs are typically borne by police and homeless service provider’s budgets.⁸ The Human Rights and Federal Compliance Manager also is available to facilitate conversations with Facilities staff during different shifts to discuss the challenges around homelessness and the actions that the City is taking. Such discussions could provide a good forum for information and open dialogue that would boost employee morale and yield solutions.

B. STRATEGY AND SYSTEMS

Division Strategy

5.	Observation	The Division has historically focused on delivering high-quality work to maintain the City’s spaces. However, due to a variety of factors, the Division has not yet been able to engage in proactive strategic planning to guide, improve, and modernize its work.
	Recommendation	In coordination with City leadership, determine which planning activities are feasible and explore options to establish a centralized space planning approach.

The Division has historically focused on delivering high-quality work to maintain the City’s spaces. However, due to a variety of factors, including limited staff capacity, the Division has not yet been able to engage in more proactive strategic planning to guide, improve, and modernize its work. There are a variety of planning options including division planning, space planning, and strategic facility planning, that may help to move the Division forward and take on more of a leadership role within the City. These planning efforts can be done individually or in tandem with one another; however, apart

⁸ [Exploring Homelessness Among People Living in Encampments and Associated Cost](#)



from division planning, the other two areas will require significant buy-in and coordination with City leadership.

Division Planning

The Division does not have a strategic plan or operating plan to guide efforts beyond the team's day to day work. This type of plan could lay out Division goals, action items, funding sources, and performance measures that can be used to track progress over time.

Sample strategic plans from other entities include:

- [Facilities Management 2021 Strategic Plan](#), University of Maryland
- [Facilities Management Operations Plan](#), Southern Utah University
- [Facilities Maintenance Plan](#), Amador County Public Schools
- [Facilities Management Strategic Plan](#), Cal Poly
- [Facilities Management 2020 Strategic Plan](#), Dallas County
- [Facilities Management & Planning Strategic Plan](#), College of Wooster
- [Facilities Management Strategic Direction & Planning](#), Dalhousie University
- [Facilities Management Strategic Plan](#), West Virginia University

Space Planning

The goal of space planning, management, and allocation is to make the best possible use of a city's physical assets and to plan for future needs. Space planning helps to assess whether a city's facilities are being used most efficiently and economically and would help the City address shifts in needs related to the ongoing remote work environment for some positions and teams.

Currently, the City does not have a centralized space planning approach, committee, or governance process. Instead, each department makes internal decisions about how space is used within their allotted areas or facilities. While a certain degree of autonomy is useful, the City is experiencing negative impacts related to the lack of a centralized approach including:

- Inconsistent employee experience of space use and allocation depending on department
- Difficulties coordinating around decisions that impact space planning, as there is no decision-making framework
- Inefficient use of space due to lack of centralized areas for break rooms, storage, etc.
- No guidelines around activities like moving offices or reworking desk layouts, which can result in a high number of related requests

While the Division is not responsible for space planning, effective (or ineffective) use of City facilities does have a large impact in the efficiency of the Division's custodial and maintenance work. In particular, centralized space planning would enable enterprise-wide changes to improve efficiency. For example, if trash cans are centralized to several locations within each floor of the building (rather than maintaining a trash can at every desk), this could produce significant time savings.



Strategic Facility Planning

A Strategic Facility Plan is a five-to-ten-year plan that defines the high-level facility needs for an organization to successfully achieve their strategic goals. In general, these plans include an in-depth analysis of existing facilities; identify the type, quantity, and location of spaces needed by the organization; identify opportunities to improve current space use; forecast future needs; and lay out a feasible plan to meet the organization’s needs. They are often aligned with or incorporate elements of energy master planning. This type of plan is predicated on centralized coordination and an enterprise-approach to space planning governance.

Recommendation

In coordination with City leadership, the Division should work to determine which planning activities are feasible. At minimum, the Division could establish its own strategic plan to guide its efforts across the next five years. If feasible, the establishment of a centralized space planning approach or governance structure could be highly beneficial to the City. In addition to supporting more efficient and equitable use of space, this work would also enable the creation of a strategic facilities plan (without centralized space management and maintenance funding, it is challenging for these types of plans to be successful in guiding work).

Division Funding

6.	Observation	Currently, the Division is primarily funded through allocated interdepartmental charges. The Division is considering shifting to an Internal Service Fund (ISF) model.
	Recommendation	Continue to explore the potential benefits and drawbacks of shifting to an ISF model. If the Division chooses to pursue this route, it will be important to gain meaningful input from customer departments, clearly demonstrate the intended positive impacts for the City as a whole and make the case for why the timing of this transition is urgent.

The Division is currently structured as an internal services team that supports the work of all other divisions within the City. Within that setting, the Division is funded through interdepartmental charges that are calculated using various allocation bases and included in the City’s annual Internal Cost Allocation Plan (ICAP).

For General Fund departments, the Division’s allocation basis is determined by total square feet of service area. Non-general fund departments are directly billed for services. The Office of Management and Budget (OMB) Uniform Guidance analyzed various cost allocation methods based on a set of accepted economic and public policy criteria, including equity (fairness across departments), simplicity (how easy the basis is to understand), efficiency (cost of administration), and ease of cost recovery.

BASIS	EQUITY	SIMPLICITY	EFFICIENCY	COST RECOVERY
Standardized per-unit allocation	Low	Medium	High	Low



BASIS	EQUITY	SIMPLICITY	EFFICIENCY	COST RECOVERY
Tailored per-unit allocation	Low-Medium	Medium-High	High	Medium
Per-unit allocation, and some usage-based charges	Medium	Low	Medium	Medium
Direct bill fully burdened hourly costs	High	Low	Low	High

Some interviewed staff reported a lack of clarity around how Division costs are determined. Lack of understanding of cost allocation charges is a common challenge for cities since cost allocation is complicated to design, administer, and explain. Without clear and comprehensive outreach and communication, departments will not adequately understand internal service charges.

The Division leadership is also considering the option to shift to an Internal Service Fund (ISF) model. An ISF is a model where internal service departments recover costs via cost reimbursement as services are provided via invoicing or direct billing. Internal service rates charged out to departments typically include:

- Operational costs
 - Salary and benefits of ISF personnel
 - Operational expenses (service and supplies)
 - Allowable indirect costs (department)
 - A-87 costs (other central service department costs)
 - Working capital/operating reserve
- Retained earnings from prior year
 - Unreserved surplus or deficit from the prior year

The County of Fresno has identified the following advantages and disadvantages of using an ISF model.⁹

ADVANTAGES OF USING ISF MODEL	DISADVANTAGES OF USING ISF MODEL
<ul style="list-style-type: none"> • Transparency: The rate development process should openly disclose the projected units of service and/or product to be provided with the projected expenditures (type and dollar amount) necessary to provide the service and/or product. • Efficient use of resources: The use of an ISF segregates financial reporting for ISF operations from the rest of the Central Service Departments that should enhance responsiveness to changes in demand. 	<ul style="list-style-type: none"> • Lack of flexibility: The ISF may not be able to adjust rates timely to reflect changes in demand (in tight budgetary times users may postpone use of services and/or products until later in the budget year thus giving a “false” demand reading at mid-year). • User uncertainty about ISF rates: It can be challenging for user department to estimate ISF rates from year to year for their budgeting/planning purposes as many ISF input variables are not readily available or projectable, including salary and benefits

⁹ [The County of Fresno Internal Service Fund Best Practices](#)



ADVANTAGES OF USING ISF MODEL	DISADVANTAGES OF USING ISF MODEL
<ul style="list-style-type: none"> ● Encourages long-term planning: The ISF should consider the cost of repairing and/or replacing equipment in the development of rates. Allows the operation to plan for retirement of ISF assets. ● Better management and control: The development of rates provides a tool to compare ISF rates to comparable services provided by the private sector for competitive analysis. ● Aids management in identifying where operational inefficiencies may be: These include inefficient output per unit of input, cost effectiveness of inputs to generate output, and cost structure of inputs. 	<p>changes, ISF staffing levels, reserve levels, and demand from other users.</p> <ul style="list-style-type: none"> ● Potential for “excess reserves”: The management of the ISF may develop rates with an aggressive replacement/repair program but not spend the reserves in accordance with program terms, thereby accumulating reserves in excess of what is required to operate the ISF. The users of the ISF would have then been overcharged for the services and/or products received. This can be mitigated by offering departmental subsidies in following years. ● Lacks economy of scale: The ISF may be unable to provide competitive rates as compared to the private sector due to a smaller customer base and/or product volume.

As noted above, an ISF structure could allow for the accumulation of reserve funds to address deferred maintenance (as any unspent ISF revenue can be maintained within the ISF for future use). While the ISF obviously does not generate additional revenue beyond current City resources, it would create a mechanism through which to begin storing City funds for emergencies or deferred maintenance purposes.

Based on interviews and survey feedback, there are significant questions about the potential of adopting an ISF model. Primary concerns include:

- Complexity of developing and adopting an ISF when staff capacity and other resources are low
- Lack of significant positive benefit for City departments or the City as a whole (multiple interviewees noted the perspective that “it’s just shifting money from one pot to another” without increasing services or improving the overall work environment)
- Perverse incentive for departments to limit interactions with the Division in an attempt to “lower costs” without a full understanding of the impacts of deferred maintenance

Recommendation

The Division should continue to explore the potential benefits and drawbacks of shifting to an ISF model. If the Division chooses to pursue this route, it will be important to:

- Gain meaningful input from customer departments to better understand their questions and concerns. Based on interviews, there are substantial questions about the need for and value of making this type of transition.
- Clearly demonstrate the intended positive impacts for the City as a whole, as well as individual departments. There is a lack of clarity around how this would benefit teams beyond the Facilities Division.
- Make the case for why the timing of this transition is urgent. Given that City staff are generally stretched thin and there are many other initiatives underway, the Division will need to make a compelling case for relative urgency of this work.



Technology

7.	Observation	While the Division’s technology systems meet most of the team’s basic needs, there are opportunities for improvement around automation, data analysis, and customer communication.
	Recommendation	<p>A. Continue current efforts to upgrade to a more effective work order system.</p> <p>B. Increase usage and deployment of mobile devices among staff.</p> <p>C. Continue efforts to expand the use of technology and data analytics to streamline workflows and more proactively identify maintenance needs.</p>

In alignment with best practice, the Division uses a digital work order system, MaintStar. The system handles work orders for preventative maintenance, corrective maintenance, and user services. It also provides a platform for system equipment inventory control and tracking equipment service and failure. Staff report that the MaintStar system is outdated, is difficult to use on mobile devices, and creates challenges to running effective reports for data analysis. The Division is considering upgrading to the Cityworks system and is currently piloting a system change that will eliminate the need for paper in the work order process.

City-wide, customers initiate the work order process by submitting requests via MaintStar. Facilities managers and administrative staff then delegate work orders in the MaintStar system to staff on a daily basis. Work orders are assigned digitally or printed out, depending on staff level (Maintenance Tech I’s receive printed copies). Digitally assigned work orders can be closed out in the system by the employee who responded to the issue. For printed work orders, the paper copies are returned to administrative staff at the end of the day and updated in the system.

Staff report that this process generally works well, but the use of paper work orders creates the need for manual data entry. In addition, staff reported that it is difficult to access the digital work orders via their phones, which means that updates need to be made from a computer (rather than when out in the field).

Customers reported that the MaintStar work order form does not allow enough information to be submitted. For example, it would be beneficial to be able to add photographs or better pinpoint the exact location of an issue. These types of additional details could save Facilities staff time during project start-up. Please see the Customer Satisfaction and Communication section of this report for more details related to MaintStar and related customer-facing processes.

Recommendation

A. Continue current efforts to upgrade to a more effective work order system.

Ideally, the next system would include elements like:

- Easy user interface
- Mobile device optimization so that it can be used on phones and tablets



- Options for additional details in the work order tickets (potentially including photos, pinpoint location¹⁰, etc.)
- Ability for non-City staff to place work orders

B. Increase usage and deployment of mobile devices among staff.

Increasing the usage and deployment of mobile devices will decrease the need for morning meetings and eliminate labor-intensive paper-based processes. Implementing tablets for all staff who respond to work orders will boost efficiency and allow better reporting, as staff will be able to receive work orders, add comments, change statuses, and add appropriate data in the field.

C. Continue efforts to expand the use of technology and data analytics to streamline workflows and proactively identify maintenance needs.

There are also opportunities to improve the use of current systems to gain efficiency. For example:

- The MaintStar program allows for digital assignment of maintenance staff to specific projects. Currently, supervisors and project leaders assess the work orders in the MaintStar system at the start of each shift and delegate to staff as appropriate. Utilizing digital assignment may reduce the time required for standing morning meetings where assignments are discussed, especially if all staff are given access to the work order system.
- Staff report that the Division is currently using MaintStar data to help determine whether repairing or replacing aging systems and equipment is the most cost efficient. In addition, visit reports include information about the zone, duration, and incident counts per location, but do not currently collect data on the type of work performed or issue attended to. Increasing the information collected might reveal opportunities for increased efficiency. For example, if many incident reports were coded as the same type of corrective maintenance, a low-cost preventive maintenance intervention may be identified.
- In alignment with best practice, the Facilities team employs Automated Logic WebCTRL, which controls HVAC equipment, lighting, energy data logging, real-time temperatures, and building use schedules (SensorView is used for Library lighting controls and Keeper Enterprise is used for Police Station lighting controls). There may be opportunities to expand analysis of data that is generated by Automated Logic WebCTRL to proactively identify issues.

¹⁰ [Maximizing CMMS Benefits to Benefit Department Performance](#)



C. CUSTOMER SERVICE AND COLLABORATION

Customer Satisfaction and Communication

8.	Observation	The Division has a City-wide reputation for great customer service, but there are opportunities to improve service consistency and standardize communication processes.
	Recommendation	<p>A. To clarify expectations, develop service level agreements or other documentation that more clearly defines the standard level of service each department will receive.</p> <p>B. Take steps to improve the consistency and clarity of work order communication with customers.</p> <p>C. Establish regular customer engagement surveys to solicit input and track performance over time.</p>

Overall, customer satisfaction is high throughout the City. Interviewed and surveyed City employees consistently reported that the Facilities team does an excellent job, is highly responsive, and greatly appreciated. The areas for improvement in this section are spread across service levels, custodial- and maintenance-specific service considerations, and communication with customers.

Service Levels

The Division has drafted service level agreements for many of the primary City facilities, including City Hall. However, these drafts have not yet been revised with customer departments, adopted, or circulated.

Based on interviews and survey results, there is a lack of clarity about the standard maintenance and custodial services that the Facilities team provides, and about the additional services that might be available upon request. Without well-defined and well-communicated service levels, customer departments report confusion over standard services and may have frustration when certain activities are not being performed (for example, dusting) as they are unaware these activities are outside the scope of the Division.

Custodial Services

Interviewed and surveyed City employees noted that there are great staff on the custodial crew who provide good basic cleaning on a consistent basis. Staff also commended the custodial team on their quick responses to urgent requests.

When asked to rate the quality of the cleaning and custodial services provided by the Facilities team within the past year, the majority of survey respondents said Excellent (19%) or Good (59%), while 21% respondents said it was Okay. When asked to rate the timeliness of the custodial services provided by the Facilities team, most survey respondents said Excellent (35%) or Good (47%), while 16% responded said it was Okay.

Although customers across the City are generally happy with the custodial services provided by the Facilities team, several areas for improvement arose:



- **Restrooms:** In general, survey respondents noted that more attention could be paid to restrooms. Refills of hand towels, soap, and toilet paper are not consistent, and customers sometimes refill themselves or leave sticky notes to prompt a refill. In addition, some restroom trash cans are not consistently emptied, and some floors need to be swept and mopped more often. All of these services are including in the “Daily Cleaning” restroom service procedures in the Custodial Standard Operating Procedure document.
- **Vacuuming:** Some customers reported that vacuuming is inconsistent, with some areas (like front lobbies) rarely or never vacuumed, while other areas become very dirty before being vacuumed. There is a need to ensure that thorough vacuuming is indeed occurring once per week, in accordance with the Custodial Standard Operating Policy and Procedure.
- **Trash/Recycling:** Some customers expressed confusion about the trash and recycling services. Trash emptying is reportedly inconsistent, and customers aren’t sure where to put their trash bins to ensure that they are emptied consistently. There is also confusion about what types of recycling are taken out by the Facilities team and why boxes that are broken down and placed next to trash cans are not removed. Although the Facilities team does have a Standard Operating Policy and Procedure document outlining the City-wide recycling program, this SOP has not been clearly communicated to customers. In addition, the practice of calling the Facilities team or submitting a work order when mixed recycling bins are full is cumbersome and could be streamlined.
- **Exteriors:** Many customers expressed confusion about the exterior services that the Facilities team provides. Some customers were under the impression that the level of cleaning around building exteriors and in and around the parking structures is currently less frequent than it has been in the past. Examples included dirty building exteriors and patios with spiderwebs and debris.
- **Additional Services:** When asked what additional services they would like to see, many interviewed and surveyed customers requested that dusting be added as a basic service. There is currently no regular dusting of surface areas, windowsills, or equipment.

Maintenance Services

Interviewed and surveyed City employees noted that the Facilities Maintenance team is extremely responsive and timely, and the majority mentioned that they appreciate the team’s great communication. Staff also commended the Maintenance team on the quality of their work and their accommodating work style, and mentioned that the team is particularly adept at identifying when issues are covered by a warranty and reaching out to the manufacturer to resolve them.

When asked to rate the quality of the repair and maintenance services provided by the Facilities team within the past year, most survey respondents said Excellent (52%) or Good (37%), while 9% rated it Okay. When asked to rate the timeliness of the maintenance services provided by the Facilities team, most survey respondents said Excellent (52%) or Good (26%). There were a wider range of negative responses in this category with 17% of respondents providing a rating of Okay, 4% providing a rating of Poor, and 2% providing a rating of Terrible.

Although customers across the City are generally happy with the quality of the maintenance services provided by the Facilities team, several areas for improvement arose:

- **Communication:** There is an opportunity for improvement with customer communication procedures that are addressed in the following sections of this report.



- *Contractor Management:* The Facilities team employs contractors to handle highly specialized work. In addition, customer departments sometime utilize outside contractors to complete maintenance projects. Interviewed and surveyed customers reported that they would like increased transparency around Facilities' preferred operating procedure for contractor management, as it is not always clear whether or not the Division should be the primary point of contact for the contractor.

Communication

In general, survey ratings related to communication were positive:

- Quality and timeliness of communication from the Facilities received ratings of Excellent (46%), Good (37%), Okay (11%), Poor (4%), or Terrible (2%).
- Quality of project management from the Facilities team (project updates on work orders, explanation of services, and maintenance decisions, etc.) received ratings of Excellent (46%), Good (36%), Okay (12%), Poor (4%), or Terrible (2%).
- Agreement with this statement: "I know how to contact Facilities to get the services I need from the Facilities team," received ratings of Strongly Agree (58%), Agree (35%), Neither Agree or Disagree (2%), Disagree (4%), or Strongly Disagree (2%).

Currently, most work requests for custodial and maintenance work are submitted through MaintStar. In general, Departments have designated one or two staff to submit work order requests on behalf of their department and handle all the follow-up communication. However, non-City customers (for example, tenants in historical buildings that are owned by the City), do not have access to MaintStar and instead send all requests to the general Facilities email address. Some customers who do have access to MaintStar have taken to contacting the Facilities team by email too, and others are in the habit of calling members of the Facilities team directly—either in concert with submitting a work order request or instead of submitting one. This appears to vary by the customer's personal preference and level of comfort with the Division.

In the case of an emergency or urgent request, most customers call the Facilities team directly. Interviewed and surveyed customers appreciated that the Facilities team is responsive and helpful at any time to manage these types of requests. However, knowledge about the emergency contact protocol was inconsistent across customer departments. Some recalled that a procedure may have been distributed for this emergency contact protocol at some point, but many did not know about this procedure and do not know how to contact the Facilities team by phone in case of emergency. In particular, there were varied definitions for what constitutes an emergency, which can result in tension if issues are not addressed as quickly as the customer believes that they should.

After submitting a work order, customers reported widely varying experiences of communication and updates. Generally, most continued communication is conducted through the initial mode of customer contact or in-person while work is being performed. Although some customers are satisfied with the current communication procedures, many are not. The channels, frequency, and consistency of communication arose as a clear area that customers would like to see improved.

Some customers reported that they do not hear back promptly after submitting a work order, but that experience is not uniform. Some said that work is seemingly slow to occur after submitting a work order, and that updates are not always provided during the process. Generally, customers would like



to receive a higher volume of updates on their work orders. Examples of project updates that customers would like to receive include:

- A notification when someone on the Facilities team has received and assigned the work order with an anticipated work date
- An estimated time of arrival (by Facilities staff and/or contractors) on the date that work is anticipated, including updates if that time changes
- An update after progress is made on the work order, including what steps were taken, the next steps, an anticipated timeline, and information about the rate of labor and cost of materials if the customer will be billed for the work
- An update if there are changes to the project that will have impacts outside of what was originally discussed as the project scope
- A notification when the work order is resolved with an explanation of the work that was done

Although the MaintStar work order process functions well in most situations, there are several specialized situations that could benefit from process improvement:

- Customers who are not City employees do not have a standardized way to contact the Facilities team and sometimes delay submitting work requests because the informal modes of communication available to them can feel like they are asking for a favor.
- When asked to rate their level of agreement with the statement “I know how to use to the work order system (MaintStar) to submit work orders and receive updates on my requests,” 80% of respondents either agreed or strongly agreed. However, 20% responded neutrally or disagreed. This suggests that additional communication about the use of this tool may be beneficial.
- Some customers noted that the practice of assigning one or two staff members in each department to submit work orders in MaintStar can create communication blocks, as the information must be funneled through those people. Often, the original requestor does not have visibility into work updates unless the person in charge of work orders takes extra steps to keep them in the loop. This is an interdepartmental issue to resolve, but sometimes the Division is blamed for lack of communication.
- City staff with more experience may get higher value out of the system because they know who to call on the Facilities team and/or feel comfortable reaching out to personal contacts to clarify the work needed (for example, to provide more detail or send photographs) and expedite service in the case of urgent needs.

Currently, project managers will sometimes conduct site visits to check in on customers, and Facilities administrative staff send out email updates regarding campus-wide projects that customers report are helpful. However, customer outreach of this kind is not standardized. In addition, the Division has not yet established a practice of conducting regular customer engagement/satisfaction surveys to solicit input and track performance over time.

Recommendation

A. To clarify expectations, develop service level agreements or other documentation that more clearly defines the standard level of service each department will receive.

The Division should develop service level agreements or similar documents that clearly define service levels and help **ameliorate** some of the customer confusion surrounding departmental overlap. See the Roles and Responsibilities section of this report for more details.



B. Take steps to improve the consistency and clarity of work order communication with customers.

The Division should set clear expectations around follow-up communications for maintenance projects. As part of this work, it will be important to align with department points of contact who play a critical role in keeping all interesting parties apprised of project updates.

C. Establish regular customer engagement surveys to solicit input and track performance over time.

The Division should establish a customer engagement survey that is administered on an annual basis, at minimum. It may be beneficial to combine this with surveys for other or all internal services provided by the Enterprise Services Department.

Roles and Responsibilities

9.	Observation	There is overlap between departments in roles and responsibilities concerning the maintenance of City assets.
	Recommendation	<p>A. As part of developing service level agreements, review, clarify, and document intradepartmental roles and responsibilities.</p> <p>B. Consider developing a user-friendly guide to working with the Division that can be used as part of onboarding new staff members.</p> <p>C. Continue to explore the potential benefits of centralizing the management of the security function into one team.</p>

Division Overlaps

As noted in the Customer Satisfaction and Communication section of this report, the lack of service level agreements has created some difficulties ensuring that all parties are aligned on expectations. In addition, there are gray areas in service overlap between the Division and various departments that cause confusion for customers and personnel. The most significant areas of departmental overlap are related to maintenance activities within various divisions of Public Works.

- **Parks:** Parks maintains many outdoor spaces and buildings, and often performs work that has some degree of overlap with the Division. However, there is no clear criteria or consistency around how responsibilities have been divided across the teams. Instead, each team has inherited a set of assets to maintain without a clear organizing principle. As a result, there has been tension between these two groups and has led to an environment where similar assets (for example, park benches) have been maintained to different standards depending on which group is taking the lead.
- **Pumps and Controls:** The Pumps and Controls division maintains their own structures, but interviewed staff reported that there are positions within that division with similar skillsets and job descriptions to those in Facilities. Facilities staff reported concerns around ensuring that City assets are maintained in a standardized manner and dividing up maintenance and custodial teams between departments places that vision at risk. Public Works staff noted that there are many Public Works structures that are not currently maintained by Facilities given their specialized nature.



- *Engineering:* Staff report there is generally a good understanding of what types of projects should be project managed by the Division versus Engineering. However, interviewees noted that it would be beneficial to officially document the criteria used to determine this division of labor.
- *Library:* As noted in the Staffing Structure section of this report, the Library employs a daytime custodian who operates in the same service area as the Division.

In terms of gaps, the confusion around the division of labor between departments has left some areas assigned to no one, like the grounds of fire stations and the exteriors of buildings. Facilities custodians who attend to building exteriors are only doing so for 13 properties in the downtown core.

Security

Another area that is not technically assigned to anyone is the issue of security and, as a result, the City does not have a unified approach to security. Security controls—including cameras, door locks and swipe cards, and use of security guards—are dependent on specific building/space needs and individual department preferences. In addition, there are facilities (like the Airport and the Police Department) where security is fully and separately managed. The current conditions of the main security systems in use are:

- *Cameras:* Some departments have chosen to install cameras. In general, IT is involved in maintaining the software side of this work, but there is a lack of clarity around who is meant to install and maintain the camera hardware. There is an interest in understanding what services the Division can provide (for example, periodically cleaning the cameras).
- *Door Locks and Swipe Cards:* IT maintains most standard door locks and swipe cards. However, many of the non-office facilities (for example, the Public Works warehouse) maintain their own locks.
- *Security Guards:* Currently the City employs security guards at specific locations (for example, the Municipal Court maintains a full-time guard). While there appears to be strong interest from staff in adding additional security positions, this is a large expense for the City.

Because the security function is currently decentralized, the City lacks a unified approach to both prevention and response to security threats.

Recommendation

A. As part of developing service level agreements, review, clarify, and document intradepartmental roles and responsibilities.

The Division will need to work with the Public Works Department to better clarify and document roles and responsibilities between the Division and Parks, Pumps and Controls, and Engineering. As part of this work, the group will need to develop a set of decision-making criteria that can be consistently applied across structures (for example, a common criterion is that all vertical structures owned by a city are maintained by the city's facilities team). For any assets or buildings where maintenance is transferred between groups, it will be important to consider how the departments will account for any deferred maintenance costs.

In addition to the general service definitions within the service level agreements, specific considerations include:



- Documenting a full list of all the buildings and spaces to which Facilities provides maintenance and/or custodial services.
- Developing a clear definition of what constitutes an emergency and related communication processes.
- Clarifying responsibilities related to exterior building maintenance and contractor management.

B. Consider developing a user-friendly guide to working with the Division that can be used as part of onboarding new staff members.

This type of guide would provide a high-level summary of the Division's general responsibilities and give new staff members a consistent reference point for future needs. These types of guides general include:

- A summary of the Division's responsibilities
- Division organizational chart or staffing list
- Primary points of contact for various types of requests
- Overview of the maintenance request process
- Links to other reference documents (like service level agreements)

C. Continue to explore the potential benefits of centralizing the management of the security function into one team.

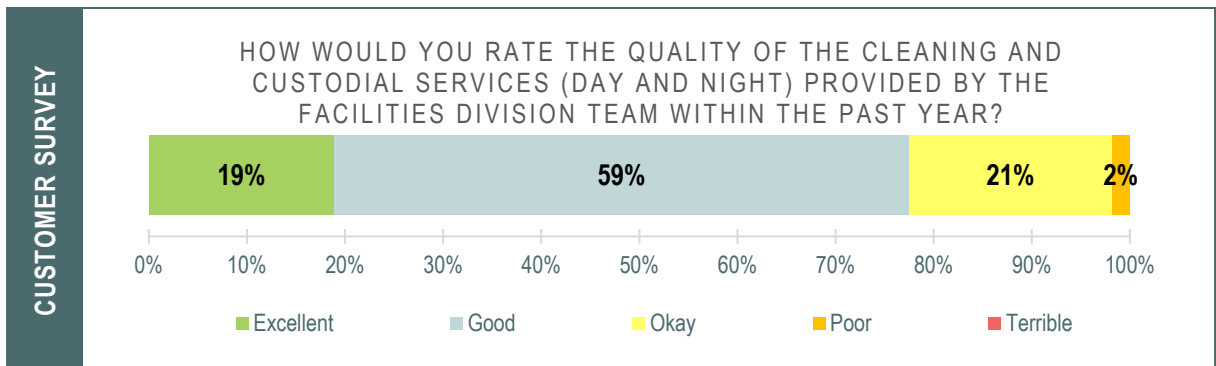
The City at large would benefit from centralizing the management of the security function into one team so that the City can have a unified and equitable approach, as opposed to departments putting together their own unique patchwork solutions. Within that context, the Division would be a natural home for that centralized management.¹¹

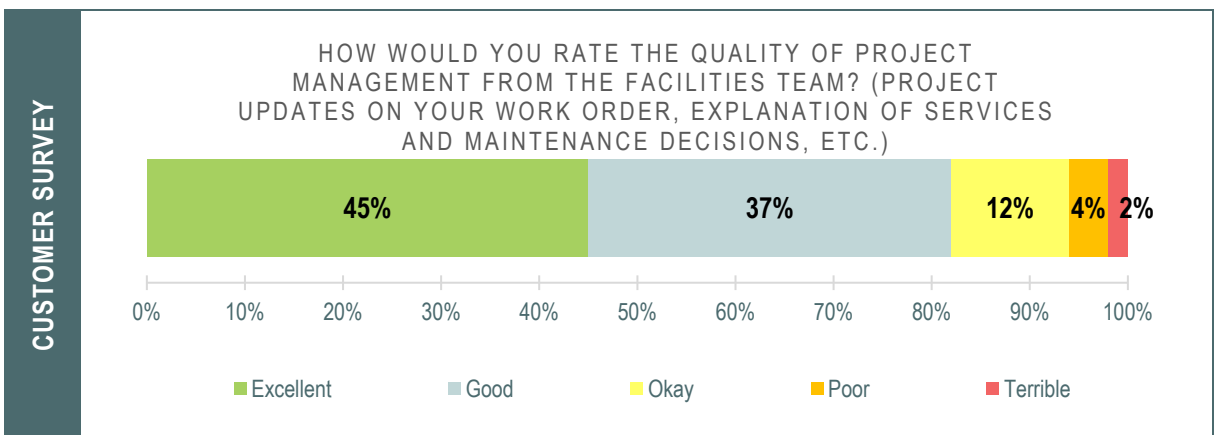
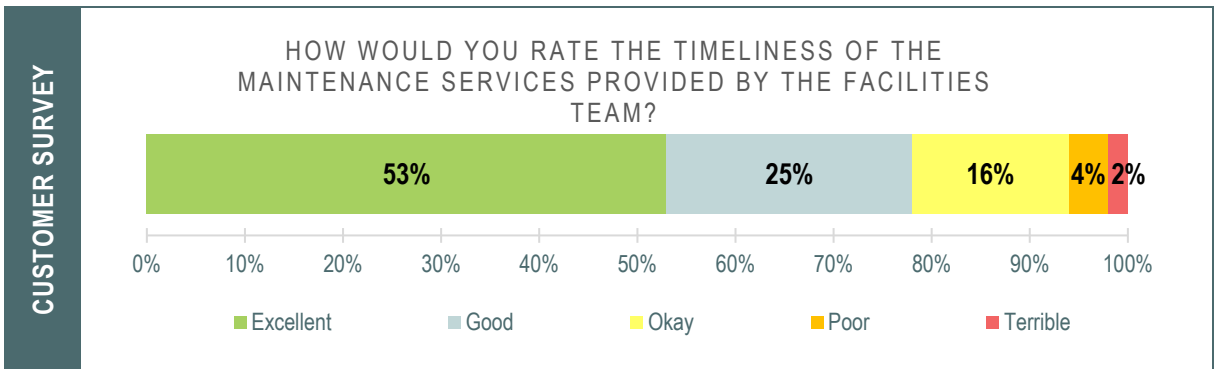
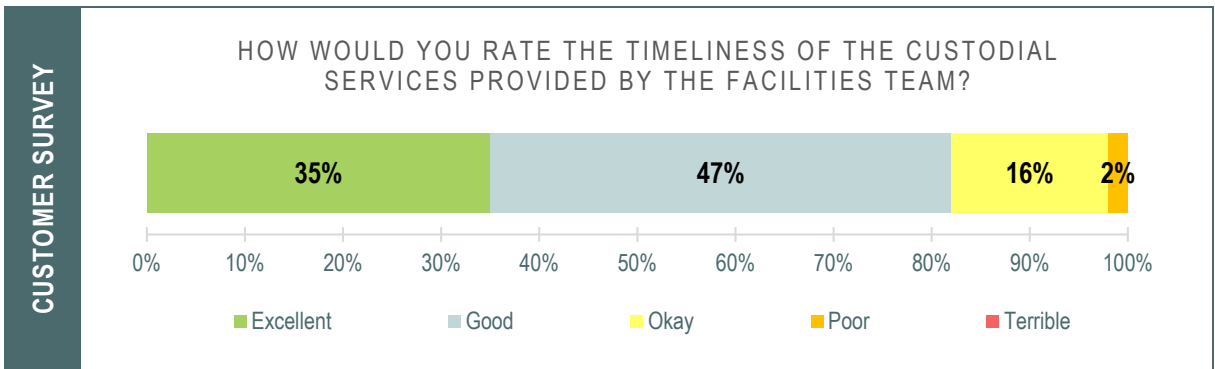
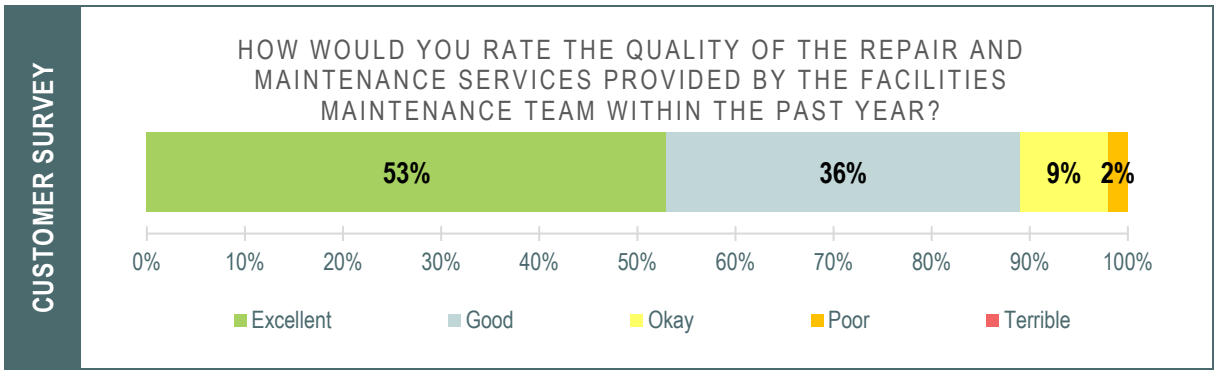
¹¹ [Security Measures and Services](#)

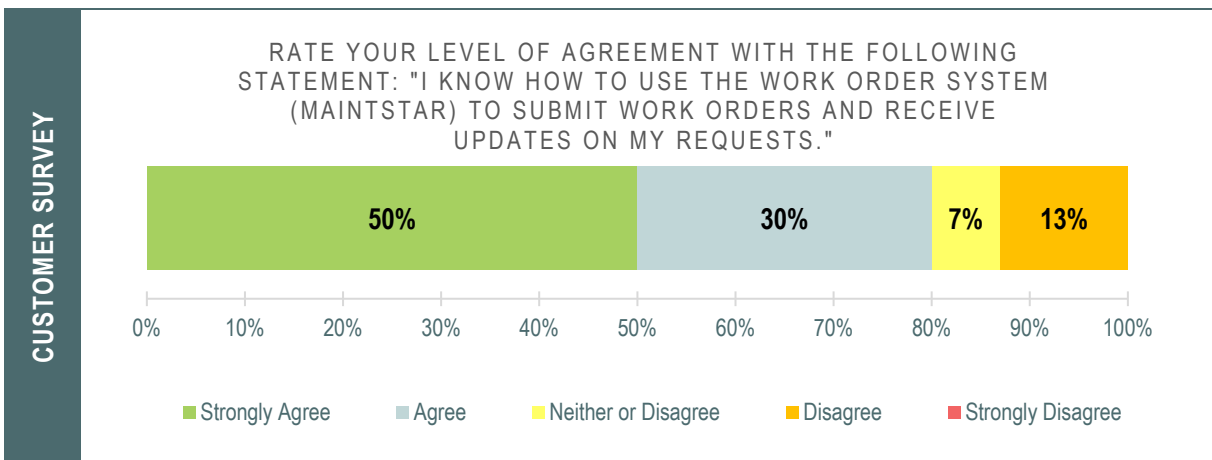
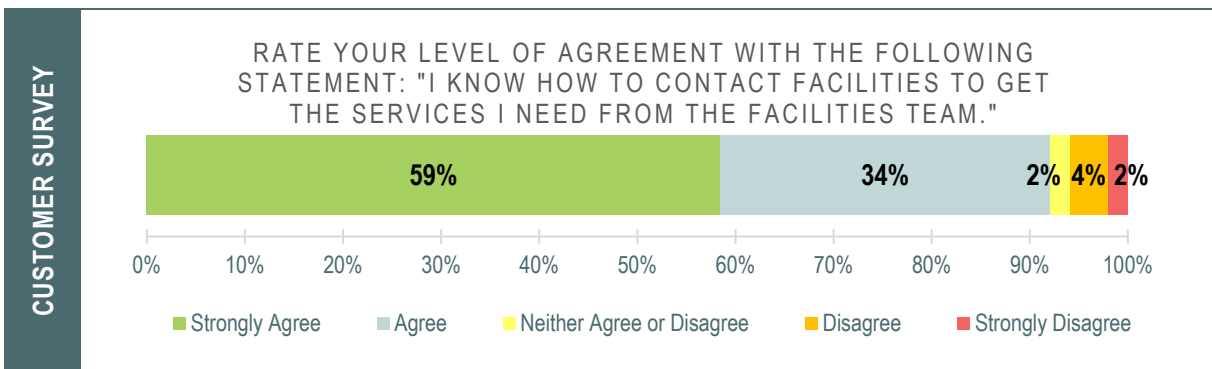
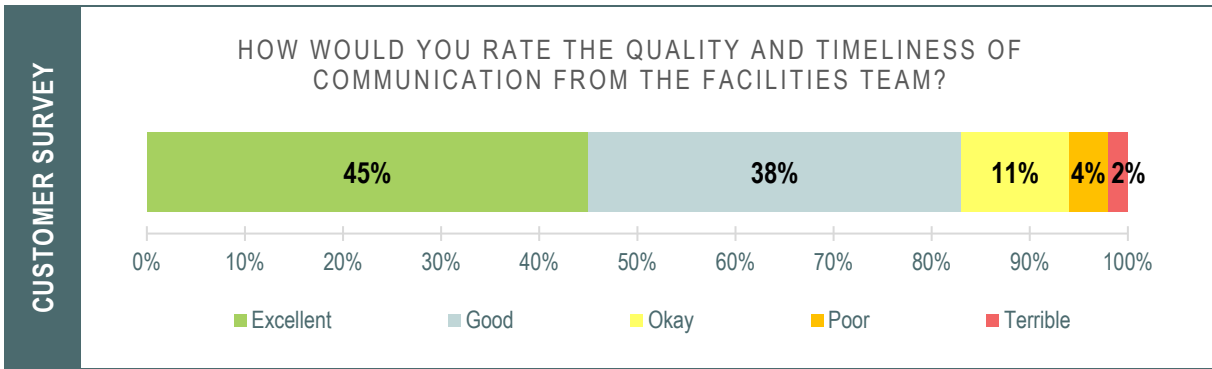
APPENDIX: SURVEY RESULTS

A customer satisfaction survey was sent to 104 recipients across the City. We received 59 responses, which is a strong response rate of 57%. We have included the general breakdown of responses by department below to highlight that almost 20% of responses came from a single department (Public Works).

SURVEY RESPONDENTS BY DEPARTMENT	
City Manager's Office	1
Community Development	5
Human Resources	5
IT	3
Legal	1
Public Works	20
Fire	3
Police	6
Urban Development	5
Other	10
Total Responses	59









MOSSADAMS