

Customer Forum Summary

Presentation by Jack Dempsey, Executive Director, F&S

Following the first Customer Forum last November, four customer working groups were created to investigate areas of concern and make recommendations for improvement to key F&S stakeholders. The groups were:

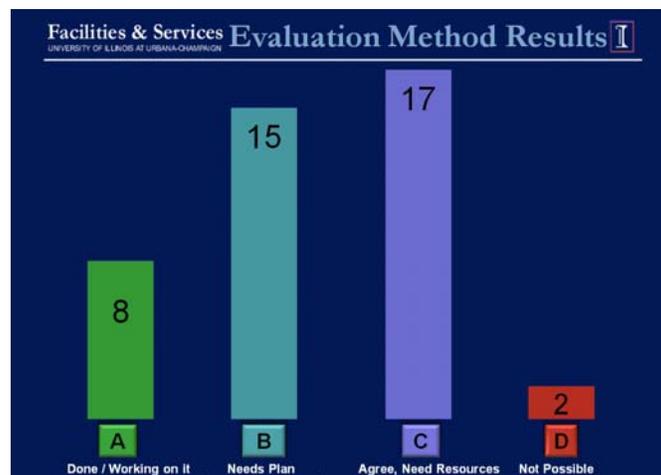
- Communicating Work Order Status (F&S facilitator - Beth Leitz)
- Contractor Services Costs (F&S facilitator - Damon McFall)
- Scheduling Priorities (F&S facilitator - Tom Anderson)
- Customer/Crafts & Trades Interaction (F&S facilitator - Peter Varney)

Each of the working groups met regularly from February to May. They interviewed F&S subject matter experts, reviewed F&S methods and processes, identified principal issues, and developed recommendations that were presented in a group report.

The individual group reports were merged into a single document where duplicate suggestions were combined, formats were standardized, and concise issues and recommendations were identified. This list was thoroughly reviewed by key F&S stakeholders.

The recommendations were grouped into four categories, as follow:

- A** = Already done or working on it
- B** = Readily accomplished with plan and thought
- C** = Agreed, but requires resource reallocation, IT support and/or funding
- D** = Not possible, with an explanation of why



Of the 42 recommendations in the final list, 95% were actionable. All eight A's and ten of the B's we are able to pursue immediately or in the near future. The remaining B's and C's we will continue to prioritize and accomplish as resources permit.

Below are the eight primary issues identified by the groups and presented at the forum. The list includes some of the suggested solutions F&S is acting on:

1. It does not appear that F&S schedules work
 - Publish list of all F&S current work orders – 9/1/11
 - Publish list of all F&S completed work orders – 10/1/11

2. Customers do not see any firmly-defined criteria for prioritizing work
 - Allow customers to request changes in their project priorities – Done
 - Set realistic criteria for prioritizing work requests and communicate to customers
3. Information on F&S processes and services needs to be updated or clarified
 - Provide “How to Guides” to customers (enter service request/follow-up) – 9/1/11
 - Provide overview of work order process
 - Update and provide access to Division of Responsibility (DoR) for buildings
 - Implement a self-managed customer list
4. F&S does not appear to have complete understanding of current processes and programs. F&S does not appear to have consistent customer service and communication skills
 - Set and communicate customer expectations
 - Provide customer service and communication training – start by 11/1/11
5. Customers do not consistently receive specific information regarding work order status
 - Communicate F&S work order contact changes to customer – start by 11/1/11
 - Provide explanation for deferred service request – Done
6. Customers believe Contractor Services requires more transparency
 - Provide clear description and directions on Contractor Services processes, rules, responsible parties, and key process milestones, and communicate changes when they occur
7. Customers recommend implementing a strategy to allow Contractor Services overhead to be dedicated solely to Contractor Services projects
8. Customers do not believe F&S understands the challenges faced by facility managers and how scheduling, costs, and communication affects them and their constituents
 - Provide opportunities for F&S to learn about how process and work schedule affects FM responsibilities

Mr. Dempsey thanked the Customer Working Groups who assisted F&S over the last few months in gaining clarification of its customers’ needs and expectation. He expressed the need to form a *partnership* between F&S and the departments that would best serve the stewardship needs of the Campus and the University. He thanked those in attendance for their interest and invited everyone back in six months for an update on progress.

Informational Sessions

Following Dempsey’s presentation, F&S offered two informational sessions which walked users through the MY.F&S portal to the AiM system and EBS, the utility electronic billing system.

Conclusion

Many of the attendees expressed their appreciation for the forum and the opportunity to meet key F&S personnel that affect their daily operations. The event was successful and plans were announced for the next Customer Forum in October, 2011.