

Facility Services Review

**Submitted to:
Toronto District School Board**

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1 Executive Summary

The largest school board in Canada, the Toronto District School Board (TDSB) is responsible for 280,000 students and 650 facilities. The TDSB operates in a dynamic environment which is affected by changes within government mandates, external factors such as demographic trends and the financial challenges of managing the increasing demands for quality services and programs with restricted funding. There are many stakeholders including parents, students, staff, government ministries, school Trustees, community organizations and Principals who provide input and direction to the TDSB. The governance and operations of the TDSB are complex, owing to the size and diversity of the organisation.

To support effective governance, the TDSB implemented a comprehensive System Review. The objectives of the System Review were to assist the TDSB in determining whether:

- Programmes and services are achieving their intended purposes;
- Policies and processes are in place to support the achievement of the organisation's goals;
- Operations are conducted in ways that use resources efficiently and effectively; and
- The organisation is continuing to consider and implement changes for sustained improvement.

The challenges facing TDSB and Facility Services provide context for this review of Facility Services. The Review was designed to answer the following five questions:

1. Are the current objectives of Facility Services clear?
2. How satisfied with Facility Services are its clients?
3. Is Facility Services staff organized well to achieve the objectives? Are there opportunities for realignment of functions to improve efficiency and effectiveness, to better support students and schools, and to improve integration with other functions within TDSB?
4. Is Facility Services delivering value that is appropriate for the investment of resources?
5. How well is Facility Services determining current priorities and preparing for future challenges?

During the review, the Consulting Team found several areas of strength as well as significant opportunities to improve efficiency and effectiveness. For the purposes of the Executive Summary, the recommendations have been organized into six headings:

1. Position the Facility Services Department for Success
2. Planning for the Future
3. Improve Organizational Effectiveness
4. Strengthen Facility Service Management System

5. Deliver more with Existing Resources
6. Client Centred Service Delivery

Forty-two recommendations have been developed to address the findings. The recommendations can be found in section 7 or Appendix C.

1. Position the Facility Services Department for Success

During the Review, it was found that Facility Services has developed strategic initiatives that are aligned with the system-wide goals of TDSB and that progress has been made towards achieving these goals.

The Review identified a need for improved coordination between Facility Services and the other TDSB departments. Additionally, the communication between the Board of Trustees, the Director of Education and Facility Services needs to be improved. Increased policy direction to Facility Services would increase the overall integration of Facility Services within the Board and reduce risk.

2. Planning for the Future

Facility Services has recognised the need to plan for the future. They have developed annual plans to achieve their goals in coordination with the larger corporate goals. The department, in cooperation with the School Services and Business Services, has begun to develop a long term capital plan that will address student accommodation and facility requirements.

The Review identified the need to coordinate more effectively with the whole organization to identify the dynamic demands of the school board in the coming years. In addition, Facility Services must be prepared to implement the strategic and capital plans developed to meet these demands.

3. Improve Organisational Effectiveness

Facility Services has made structural changes in response to client issues. They have recognised the need to modify their organisational structure to be closer to the schools and to deliver better client service.

The Review identified a number of issues to be addressed if the department is to become more contemporary and responsive. Facility Services must satisfy the needs/demands of clients that are not paying for services, while working within the fiscal discipline set out by funders who are several steps removed from the implications of the funding levels.

4. Strengthen Facility Service Management Systems

Facility Services has begun to put in place metrics to measure their performance. They undertake benchmarking activities to compare their services with those of private contractors to determine whether TDSB is getting good value for its money.

The Review identified a need to create a robust management system to provide the management team with accurate, timely information to make effective decisions.

5. Deliver More with Existing Resources

Facility Services has begun to map their processes to improve consistency and reduce errors. They have developed standards for caretaking, maintenance and energy to communicate to clients and frontline staff the expectations of service.

The Review identified that there is capacity within Facility Services to deliver more with existing resources. Facility Services will need to evaluate its processes and systems for opportunities for improvement.

6. Client Centred Service Delivery

Facility Services maintains school cleanliness and conditions at a level that clients consider satisfactory. More importantly, Facility Services recognize that they are providing a service to clients and have identified that good client service is a key function of their department. They have begun to address the need for improvement in their client service delivery.

The Review identified the need to improve the client centred service. Building upon the work already underway by Facility Services, there is room to improve the delivery of services, the communication processes and resource allocation.

In summary, our findings confirm that Facility Services is working hard to deliver programmes and services with current resource constraints. Initiatives have been launched to improve the ways that operations use resources to improve efficiency and effectiveness. There are clear indications that Facility Services is looking for ways to implement changes for sustained improvement. This Review also confirms that there continues to be significant opportunities to improve productivity, service delivery and accountability. In order to meet the ongoing challenges facing TDSB, Facility Services should build on the work completed and the recommendations from this Review to structure a focused change agenda to accelerate the implementation of improvement initiatives.

2 Introduction

2.1 Project Background

The TDSB is the largest school board in Canada, with 650 facilities including 558 schools and approximately 280,000 students and 39,000 staff. The School Board reflects the culturally diverse community in which it is located. More than 80 languages are represented in the schools.

Governance and operations of the TDSB are complex, owing to the size and diversity of the organisation. To support effective governance, the TDSB implemented a comprehensive System Review. The objectives of the System Review were to assist the TDSB in determining whether:

- Programmes and services are achieving their intended purposes;
- Policies and processes are in place to support the achievement of the organisation's goals;
- Operations are conducted in ways that use resources efficiently and effectively; and
- The organisation is continuing to consider and implement changes for sustained improvement.

The Board initiated this process with reviews of the Information Technology Services Department and the Facility Services Department, the latter being the subject of this project.

TDSB's Facility Services Department is committed to the planning and provision of safe, clean, healthy and creative learning and working environments for students, staff and community in all TDSB facilities.

In addition to the significant challenges of managing the day to day operations and maintenance of a large and geographically distributed portfolio of schools, Facility Services must also manage the consequences of having a large number of buildings and building components that are reaching, or have already reached, the end of their useful life. This and other issues confronting Facility Services have been set out in an Environmental Scan to support the development of a 10-Year Facility Infrastructure Plan for the TDSB.

2.2 Facility Services Review Background

The Facility Services Review was undertaken as part of the TDSB's efforts to identify ways to provide more efficient and effective services that support schools within the district and derive full value for the funding received.

The Facility Services Review addressed the following five questions:

1. Are the current objectives of Facility Services clear?
2. How satisfied with Facility Services are its clients?
3. Is Facility Services staff organized well to achieve the objectives? Are there opportunities for realignment of functions to improve efficiency and effectiveness, to

better support students and schools, and to improve integration with other functions within TDSB?

4. Is Facility Services delivering value that is appropriate for the investment of resources?
5. How well is Facility Services determining current priorities and preparing for future challenges?

The 14-week Facility Services Review engaged an integrated team representing the TDSB, including the Project Committee members as well as staff providing project management and coordination. The Review was directed and supported by a core team of four management consultants from Blackstone Partners and RMI Group.

3 Project Scope and Principles

3.1 Scope

The scope of the Review addressed each of the five questions mentioned in Section 2.2 above. In addressing these questions, the Review included an examination of the following:

- Evaluation of the extent to which there are explicit standards for operation and maintenance of schools, and the extent to which achievement of these standards is measured;
- Evaluation of current processes for maintenance, repairs, and capital improvements, and processes by which Facility Services responds to schools' requests;
- Further evaluation of reasonableness of charges to school budgets by Facility Services;
- Evaluation of current plans of Facility Services to improve services to schools;
- Evaluation of opportunities for greater integration with other functions of TDSB, with particular (but not exclusive) regard for planning, human resources, IT, and finance functions;
- Evaluation of the adequacy of alignment and location of Facility Services resources (staff and equipment) to meet TDSB's facilities requirements;
- Evaluation of the cost-effectiveness of the current balance between hiring staff and purchasing service in design and construction;
- Evaluation of the extent to which current tendering processes for major renewal projects result in contract awards that provide good value for money;
- Evaluation of processes by which Facility Services determines priority for maintenance work to be done in schools;
- Evaluation of processes by which Facility Services determines priority for major renewal projects; and
- Evaluation of Facility Services' current approach to the development of a long-term capital plan for repair, renewal, or replacement of schools.

3.2 Out of Scope

To emphasize, the Facility Services Review process was not a budget review; not an audit; and not an assessment of individuals', skills or competencies. Also, the Review focused on opportunities of significance, not on opportunities that were minimal or marginal in nature (i.e. high effort, low return).

3.3 Guiding Principles

Project execution was guided by the following principles:

- Respect for the Collective Bargaining Agreements
- Utilization of resources
- Guiding and building management competencies

- Forward-looking and strategic
- Organisation design to ensure delivery capacity
- Incorporation of Best Practices
- Minimization of staff disruptions
- Inclusive of stakeholder input
- A focus on implementation

These statements of principles provided a critical context to the Facility Services Review. They ensured that results were achieved through the use of the TDSB's finite resources (financial, human, capital and information) and were therefore the key reference points against which the Facility Services Review identified, analyzed and assessed the current inventory of programmes, activities and services undertaken by Facility Services.

3.4 Related Projects

At the time of the Facility Services Review, there were other projects that were underway within Facility Services including:

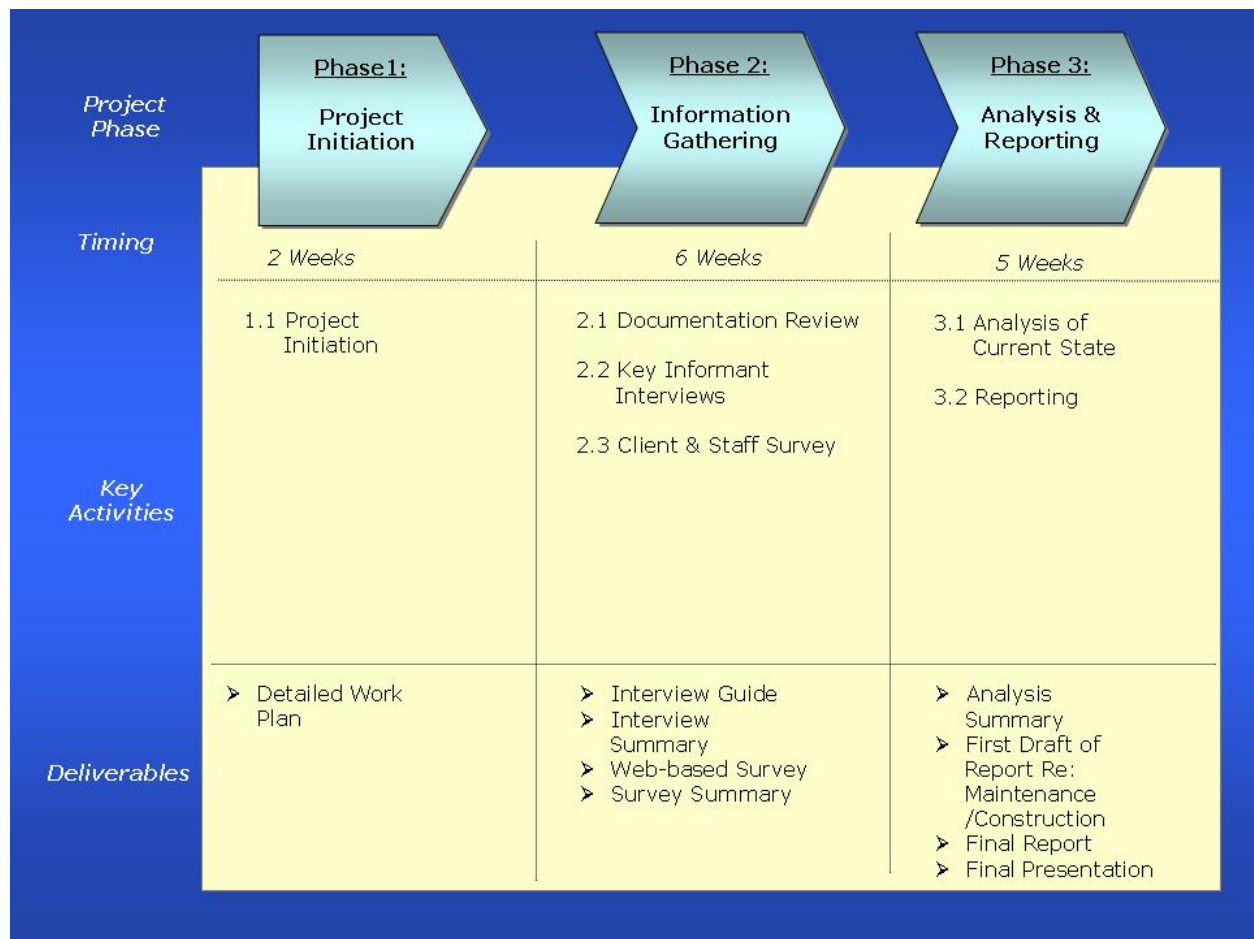
- Programme Revitalisation
- Capital Asset Management Strategy
- Real Estate Division Review
- Administration Review
- Information Technology Review
- Facility Services Re-Alignment

The Facility Services Review endeavoured not to duplicate work that was being undertaken by these projects.

4 Methodology

The Facility Services Review was administered according to a general work plan shown below in Figure 4A.

Figure 4A
High Level Work Plan



4.1 Key Facility Services Review Project Components, Resources and Milestones

To meet the objectives of the Facility Services Review, Blackstone Partners utilized a 3-phased approach. These phases included:

- Phase 1: Project Initiation
- Phase 2: Information Gathering
- Phase 3: Analysis and Reporting

Each of these phases focused on the accomplishment of very specific, tangible outcomes and contributed to the objectives of the overall project. Table 4A below provides a detailed description of each phase.

**Table 4A
Detailed Work Plan**

Activities	Details	Deliverables	Timing
Phase 1: Project Initiation			
Kick Off Meeting with Project Management Committee Update Document Library	<ul style="list-style-type: none"> ■ Kick-off Meeting ■ Meeting with Project Sponsor & Project Committee ■ Confirmation of work plan, establishment of expectations, definition of roles and responsibilities and validation of our approach ■ Development of communication plan for stakeholder identification & engagement ■ Elements to include: project team structure, identified roles and responsibilities, work plan and project management processes (e.g. communication plan, scope change management, issue management) 	<ul style="list-style-type: none"> ■ Detailed Work Plan ■ Communication Plan ■ Present Work Plan and Communication Plan to Project Management Committee 	Weeks 1 - 2
Phase 2: Information Gathering			
Document Review	A review of relevant reports and data <ul style="list-style-type: none"> ■ Documentation review of relevant TDSB and Facility Services strategy, planning and budgeting documents 	<ul style="list-style-type: none"> ■ Summary of documentation review findings 	Weeks 1 - 10

Activities	Details	Deliverables	Timing
Stakeholder Engagement	Initial Interviews <ul style="list-style-type: none"> ■ Develop Interview Guide ■ Confirm Interview Guide with Project Committee ■ Facilitate Interviews (9) ■ Facilitate Focus Groups (3) ■ Facilitate Meetings (1) ■ Interview and Focus Group Summaries Secondary Interviews <ul style="list-style-type: none"> ■ Develop Interview Guide ■ Confirm Interview Guide with Project Committee ■ Facilitate Interviews (5) ■ Facilitate Group Interviews (6) ■ Interview and Focus Group Summaries Client and Staff survey using CMT methodology <ul style="list-style-type: none"> ■ Develop Web-based Survey ■ Confirm Survey with Project Committee ■ Collect Surveys ■ Analyze Surveys 	<ul style="list-style-type: none"> ■ Interview Summaries ■ Survey Summaries 	
Benchmarking and Comparative Analysis	Benchmarking and comparative analysis of similar sized school Boards, both public and separate	<ul style="list-style-type: none"> ■ Analysis Summary 	
Phase 3: Analysis and Reporting			
Opportunity Identification	Facilitate Opportunity Identification Session <ul style="list-style-type: none"> ■ Develop Session ■ Facilitate Session ■ Summarize Session 	<ul style="list-style-type: none"> ■ Session Summary ■ Opportunity Log 	Weeks 11 - 14
Report	Draft Facility Services Review Report <ul style="list-style-type: none"> ■ Develop Draft #1 ■ Review by Project Committee ■ Develop Draft #2 ■ Final Presentation to Project Committee 	<ul style="list-style-type: none"> ■ Future state document 	
Meet with Project Management Committee		<ul style="list-style-type: none"> ■ Present Final Report 	

5 Current State

5.1 Environmental Scan

In 1998, a province-wide funding formula for Ontario schools was introduced as a way to more strategically determine the level of funding that School Boards receive from government grants and from property taxes. A large portion of this funding is based on student enrolment, not the square footage that needs to be maintained. Responding to suggestions from school administrators and others, the government has applied additional funding to support schools in rural areas and those that are facing declining enrolment. Over the years, the government has allocated additional funding towards specific education initiatives such as reducing classroom size. However, there are strict guidelines on how and where this money can be utilised.

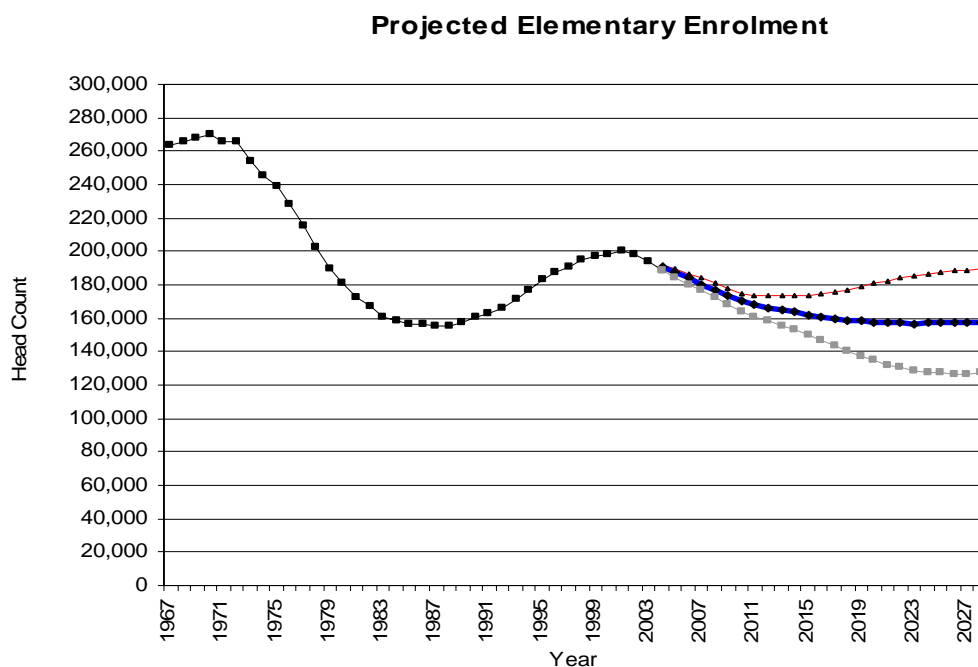
As outlined below, there are several factors that contribute to the budget shortfalls.

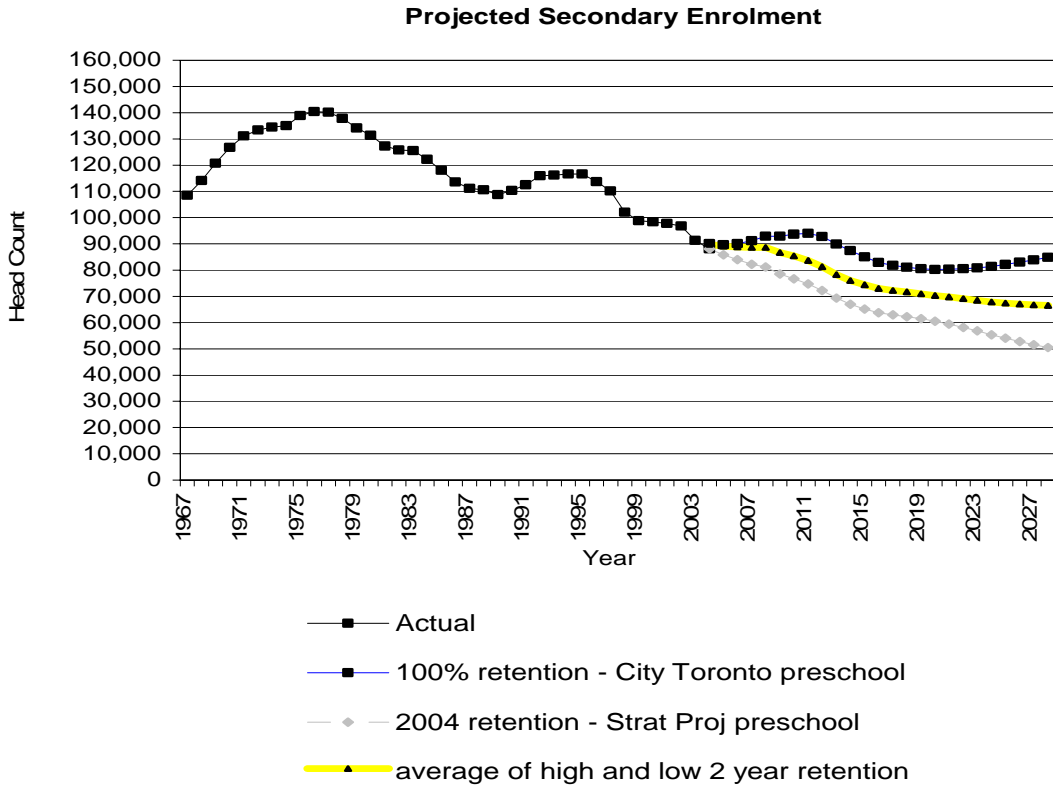
Declining Enrolment

Enrolment in TDSB elementary schools has been declining since 2001, while that of secondary schools has been declining since 1994. Secondary school enrolment, similar to elementary enrolment, has been affected by changes in population trends; however, the decline has also been a result of the introduction of a four-year secondary programme as well as a reduction in the number of adult students in regular secondary day schools.

Enrolment in both systems is projected to continue to decline in the coming years as outlined in Figure 5.1A

Figure 5.1A
Average Daily Enrolment of Pupils of the Board





While the number of students in the Board is declining, the number of facilities that are operational and require maintenance is not decreasing at the same rate. As a result, there is a gap between the funding, which is based on the average daily enrolment (ADE) of pupils and the desired level maintenance and operating expenditures. Since 2002/03, the province has provided supplementary funding to help address this gap between enrolment and operating budgets. It is projected that in 2006/07, TDSB will receive \$13.8M in declining enrolment adjustments.

Facility Condition

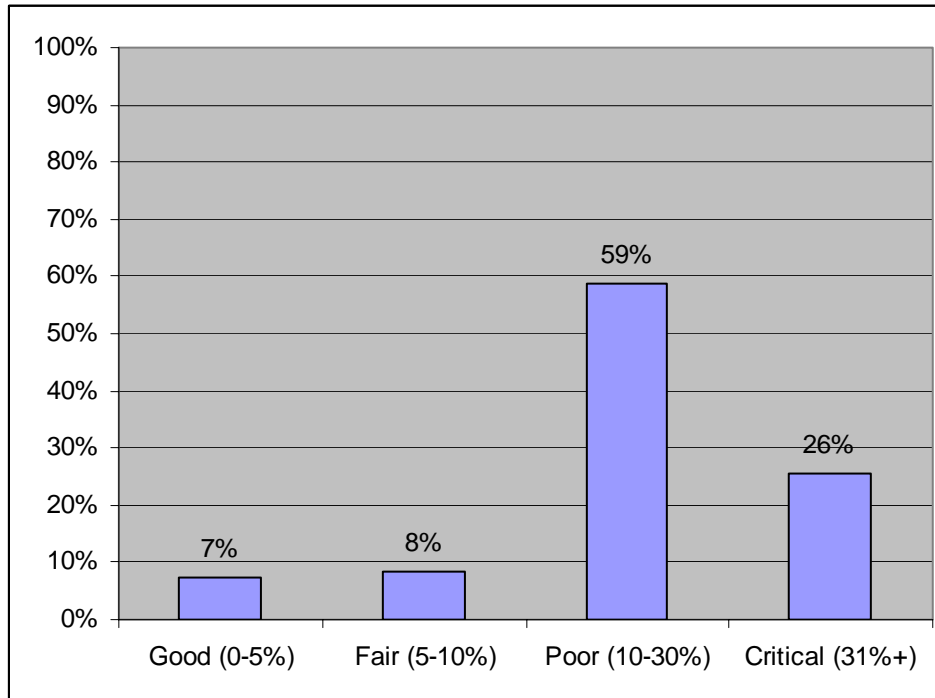
In 2002/03, the Ministry of Education engaged a team of consultants to carry out a condition assessment involving 500 schools across the province. The assessment incorporated several reviews including the physical inspection of all building components which provided information that now assists the long term capital planning process of the Board. Results of the assessment were entered into the Renewal Capital Asset Priority Planning (ReCAPP) software system to identify the renewal needs of Ontario school facilities.

In 2003, the Ministry of Education and TDSB surveyed the TDSB schools to assess the condition and renewal needs. These results were used to identify and prioritize renewal projects and to produce the Facility Condition Index (FCI) report.

As of September 1, 2006 TDSB has a maintenance backlog of approximately \$900 million. The average funding required during 2008 to 2014 to address this backlog and ongoing renewal needs is projected to be approximately \$259 million per year. This compares with an average expenditure of \$40 million per year over the past five years.

The Facility Condition Index is calculated by dividing the maintenance backlog of a facility by the replacement value of that facility. Using the September 1, 2006 Facility Condition Index Report, the overall FCI for the Board is 20%, giving it an average 'poor' condition for TDSB facilities, with 84% of the facilities with a 'poor' or 'critical' FCI. The breakdown can be seen in Table 5.1A.

Table 5.1A
Facility Condition Index



The Ministry has stated that facilities with a FCI of 65% or greater are classified as 'prohibitive to repair'¹. As of September 1 2006, the TDSB had 9 facilities that can be classified in this category.

Over 40% of TDSB buildings are more than 50 years old and many components within these facilities are near or at the end of their useful life term. The Province provides funding for school renewal projects for schools over 20 years of age using an allocation formula that is ultimately

¹ Ministry of Education, "Education Funding Technical Paper 2006-07", Ministry of Education, <http://www.edu.gov.on.ca/eng/funding/0607/technical.pdf> (accessed November 16, 2006)

based on enrolment. In 2005, the Province also pledged to provide ‘Good Places to Learn’ (GPL) funding to further support renewal projects. While overall enrolment is declining, there are some areas of the Board where enrolment is increasing, however TDSB is ineligible for the ‘New Pupil Places’ funding as the Board utilization rate – the number of students attending a school compared to the number of students the school was designed to hold – is only 81.2% for Elementary schools and 79.5% for Secondary schools (2005/06).

The current funding for renewal work falls short of the Board identified requirements. Given the number of schools in the Board and the age of the buildings, as enrolment continues to drop and subsequently funding, the work and investment required to maintain the facilities in a safe and useable condition will continue to increase.

TDSB Mission and Values

The mission of the TDSB is *to enable all students to reach high levels of achievement and to acquire the knowledge, skills and values they need to become responsible members of a democratic society.* The school Board values:

- Each and every student
- A strong public education system
- A partnership of students, schools, family and community
- The uniqueness and diversity of students and communities
- The commitment and skill of staff
- Equity, innovation, accountability and accessibility
- Learning environments that are safe, nurturing, positive and respectful

The mission and values cannot be achieved without the support of business functions within the Board, and Facility Services has a significant role to play in this regard.

Facility Services Mission and Values

Facility Services’ mission ties in directly with the Board mission and values. The Facility Services department is *committed to the planning and provision of safe, clean, healthy and creative learning and working environments for students, staff and communities in all TDSB facilities.* Facility Services values:

- The health and safety of all who visit TDSB facilities including students, staff, trustees and the community at large
- The efficient and effective use of all TDSB facilities, and the resources needed to renew and/or maintain them
- The commitment, diversity, contribution and skills of employees
- Enhancing the flexibility of TDSB facilities to foster their use by the communities in which they reside
- Taking a proactive and responsive approach to meeting the changing needs of our students, staff and communities

- Continuous improvement in staff development, work processes and service delivery
- The importance of staff treating each other with fairness and mutual respect
- Service excellence and putting students first

The environment in which TDSB operates provides important contextual background to the findings and analysis of this Review. Facility Services as a department within the TDSB, faces the environmental pressures above and in addition, must fulfil its mission to maintain the facilities within the board with finite resources. The implications and recommendations in this report have been made with the current environment, and with the TDSB and Facility Services Mission and objectives in mind.

The findings and analysis have been categorized into five sections, based upon the five questions outlined in the Review (Section 2.2). These are:

- Clear Objectives
- Client Satisfaction
- Organisational Structure
- Value
- Planning and Prioritizing

5.2 Clear Objectives

5.2.1 Overview

The value of clear objectives is to set the direction of the organisation and to help identify the tasks which need to be undertaken to achieve the organisations goals and/or mandate. Clarifying the objectives assists with assigning accountability. At a high level, the organisation understands as a whole what it is trying to accomplish; at a low level, the individual understands what task they are trying to accomplish.

The 2005/06 key targets of the Facility Services department are as follows:

1. Fine Facilities/ Develop a Facility Renewal Plan
 - Develop a strategic framework for facility renewal
2. Inspired Staff/ Foster Leadership in schools
 - Develop a model for facility service employee engagement
3. Successful Students/ Ensure Facilities in Good Repair of the Long Term
 - Develop a continuous improvement model for service delivery

These objectives, which are aligned with Board values, were developed by the leadership team within the department as a way to steer the organisation throughout the year. While the success of these objectives can be measured by how far along development of the models has progressed against what was planned, another test would be to look externally at what clients understand of these objectives, and how they rate their achievement.

Through interviews and documentation reviews and analysis, the Facility Services Review evaluated the overall department objectives for clarity. The Review also undertook to evaluate:

- The extent to which there are explicit standards for operation and maintenance of schools
- The extent to which achievement of these standards is measured

5.2.2 Findings and Analysis

Department Objectives

Facility Services has developed strategic priorities, values and a strategy map to support the department's mission. The strategic priorities are aligned with the overall Board goals. Facility Services has also identified 11 Essential Services to provide direction.

Each year Facility Services, along with other departments, submits to the Board of Trustees, their plans for assisting TDSB with achieving its strategic goals. The department plans are reviewed internally within the department twice a year and a year-end report of achievement is submitted to the Director of Education and subsequently to the Board. The plans include

departmental priorities that are linked to the Board's strategic goals and include specific action plans, together with timelines, accountabilities and metrics.

In reviewing the strategic initiatives for 2005/06 it was found that Facility Services has established objectives that are a mixture of both clearly-stated, measurable objectives and actions. Facility Services identified how the targets would be measured (indicators of success). These included facility inventory analyses, client satisfaction surveys, staff satisfaction surveys, facility condition index, etc. Through a review of the documents provided and the interviews conducted, it was found that there was no clear articulation that targets were set for the indicators identified. For example, the Facility Condition Index and the Educational Adequacy Index were identified as a measure of the Renewing TDSB Facilities strategic priority; however, targets have not been clearly identified or communicated.

Facility Services has identified the responsibilities and roles of the groups within the department. Interviews with Facility Services managers clearly revealed that they understand their roles. Most of the division managers identified that they were measured on their ability to achieve the actions set out in the department plan as well as their ability to stay within budget.

In reviewing the 2004/05 year-end report, it was found that there were nine strategic priorities and 105 action items. The 2005/06 departmental plan has 3 strategic priorities and 126 action items. While the plans have been developed and results are being achieved, staff feel that they are occupied with managing the daily operations while the strategic initiatives have lost some focus. The consensus within the department appears to be that staff are reacting to situations rather than acting proactively and that this is caused by a heavy workload and constrained resources.

Operations Group

Operations is the largest group within the Facility Services Department. There is alignment between the Board's goal of Fine Facilities, the objectives of the operations group and the three Board-wide standards (caretaking, maintenance and energy management) developed by Facility Services and approved by the Board of Trustees. A standard for grounds maintenance is under development.

The standards serve two purposes. First, they provide schools with a "plain language" description of the results that Facility Services is intending to achieve, plus descriptions of what over- and under-achievement look like. Second, they identify to Facility Services frontline staff and supervisors all of the elements that need to be attended to when cleaning and maintaining facilities. Setting this out in a comprehensive and clear manner provides staff with direction on the results to be achieved and helps ensure common service levels across the Board.

Conformance to the caretaking and maintenance standards is evaluated annually; generally two to three months into the school year. The review process involves the Family Team Leader (FTL) and Head Caretaker (HC), conducting a walkabout and noting which individual facilities in the school conform to the standards. The standards require that Principals be invited to the walkabout, but Facility Services staff indicated that the participation rate for Principals is not high, at less than 50%. However, all Principals sign off on the results.

The standards call for an action plan to be developed to address any deficiencies noted during the walkabout. When the deficiencies have been corrected the standards call for the FTL and HC to review the previously deficient area with the Principal. All three individuals are required to sign that the deficiencies have been remedied.

The results of the evaluations are provided to Regional Managers in a report that identifies for each school when the evaluation was done and the number of action plans produced. The FTL is responsible for ensuring that deficiencies are corrected in a timely manner. There is no regular periodic reporting of the status of resolving deficiencies to Regional Managers, but the status is reported in a system-wide summary report prepared in the spring.

Operations have identified that some cleanliness deficiencies are largely the result of physical disability situations for individual staff. To address this issue, a special programme involving Student Caretakers assisting staff with tasks beyond their physical capacity has been developed and recently implemented.

Caretaking

The Board's standard of caretaking and cleanliness is for "Ordinary Tidiness" which is the second best level on a five-point scale that is widely used by other facility management operations. It is defined as follows:

This is the base level at which cleaning should be maintained. Lower levels for washrooms, change rooms and food preparation areas are not acceptable due to health, safety and legal requirements. [There should be] very few complaints about the overall building environment.

- Floors, carpets and base mouldings shine and/or are bright and clean. There is no build-up in corners or along walls, but there can be up to two days worth of dirt, dust, stains or streaks. Traffic area is washed clean or vacuumed daily.
- All vertical and horizontal surfaces are clean, but may have some marks, dust and smudges.
- Grounds are well maintained with minor accumulations of litter and debris.
- Special requests and assignments are completed within reasonable periods of time.
- Washroom and shower tile and fixtures gleam, are disinfected and odour free. Supplies are adequate.
- Trash containers are empty and odour-free.

The 2003 Ministry of Education (MOE) School Facility Survey data as provided by Facility Services shows that over 90% of Principals are, as a minimum, satisfied with the level of cleanliness in their school. This means that there were some 50 schools where Principals were not satisfied. To examine the effectiveness of the Facility Services Department's annual assessment process in addressing cleanliness deficiencies, the original 2003 survey data from the Ministry of Education website were obtained and ten schools were identified where both the Principal and the other survey respondents, collectively, had rated the school's cleanliness less than satisfactory. For these ten schools Facility Services was asked to provide the annual assessments results for 2003, 2004 and 2005. This information was provided for six of the ten schools.

Given that the Ministry of Education’s survey results are reliable and given Facility Services’ process for dealing with deficiencies, it was expected that material cleanliness deficiencies would be seen at the schools where the satisfaction expectations were not met in 2003, with improvement in the subsequent years. However as shown in Table 5.2A, the Facility Services assessments, which were signed off by the Principal, do not show many, if any, deficiencies.

Table 5.2A
Comparison of MOE 2003 Survey Results and Facility Services 2003 Facility Assessments

MOE 2003 Survey Overall Cleanliness Rating*		Facility Services Department 2003 Assessment			
School	Principal	All Groups	Areas below TDSB Standard	Action Plan	Other
1	0.8	1.4	2 – re-lamping, safety supplies	Yes	Operations team leader comment "School shows pride thanks to all".
2	1.5	1.5	None	No action plans required	
3	1.4	1.5	None	Not provided	Numerous comments by Ops Team Leader indicating Standard is not being met
4	1.5	1.6	None	No action plan required	
5	1.6	1.6	9	Not provided	
6	1.4	1.5	2 - Dusting	No action plan required	

* 2 = Satisfactory, 1 = Needs Improvement, 0 = Unacceptable

While determining the reason(s) for the apparent inconsistencies between the MOE survey results and the Facility Services assessments for these six schools falls outside of the scope of this Review, some implications are discussed in [Section 5.2.3](#) below.

Building Maintenance

The Board of Trustees approved the evaluation criteria for building maintenance in September 2004. The criteria describe five levels of building maintenance ranging from “Exceptional Maintenance – Level 1” to “Crisis Maintenance – Level 5”. At that time, Facility Services informed the Board that the present maintenance levels were primarily “Reactive Maintenance – Level 4”. Key indicators at this level were a service response time of three months for routine maintenance requests and a preventive maintenance record of less than ten per cent of work orders. With the increased funding levels for 2004/05 Facility Services indicated that the minimum maintenance standard could be increased to “Adequate Maintenance – Level 3”. At Level 3, the following response time standards apply to service requests:

- Emergencies – 1 day
- Urgent – 5 days

- Normal – 1 month
- Preventive Maintenance – 1 month

Time standards for the completion of work have not been established.

Facility Services endeavours to measure the proportion of maintenance work completed within the response time standards and monthly reports are provided to each Regional Manager. However the reports are not considered to be reliable and generally are not used. The primary indicator for maintenance effectiveness appears to be the number of outstanding work orders.

Design and Construction

Design and Construction (D&C) is the second largest group in the Facility Services Department. The objectives of the D&C group are:

- Deliver projects on budget
- Deliver projects on time
- Deliver projects with expected quality
- Customer satisfaction

Performance against the 'on budget' objective is based on the actual costs charged to a project compared to the budget. As an example of current performance, a listing of the health and safety projects completed in 2006 was provided. The list showed a total of 74 projects with budgeted costs of \$1.339 million and actual costs of \$1.334 million or an actual to budget performance ratio of 99.63%. The accuracy reflected in this performance may come as a direct result of the ability of D&C to revise budgets to match bids received from external contractors before the start of the project, as well as the ability of D&C to drive contractors to meet completion dates.

D&C indicated that major capital projects are the most challenging with respect to managing the construction schedule. Within the past two years, three major projects have been completed and in each case the scheduled school opening date was met. It is important to note that for major projects, D&C considers projects as substantially complete when the major components of the work are finished. Trades staff may continue to visit the school for smaller jobs such as final touch-ups and cleaning of worksite. For smaller projects D&C records the project's actual start and finish date. The planned start and finish dates do not appear in any of the reports that were provided for review. Feedback from the survey and stakeholders suggests there is a gap in client and service provider expectations regarding the response time between when a request is submitted and project work is started.

The Consulting Team was advised that project quality is monitored throughout the life of the project through periodic inspections carried out by the independent Design Consultant for the project and the Project Supervisor. In addition, in-house trades inspect the work done by external contractors and provide feedback to project supervisors. At the conclusion of the project the independent consultant carries out a final inspection and documents whether the project has been completed as per the drawings and specifications.

There is no formal process for measuring customer satisfaction. However, D&C does assess customer satisfaction based on the feedback they receive. Examples of emails that expressed high satisfaction levels with completed work were provided.

5.2.3 Implications and Discussion

Planning and Performance Management

Facility Services has established a department business plan with objectives that directly align to the TDSB plan and priorities. To achieve the Facility Services plan over 100 initiatives have been identified. The plan does not contemplate resourcing for unplanned projects. The planning process clearly identifies accountability by functional portfolio, but does not specify the resource plan to support improvement initiatives. After a thorough documentation review and consultation with stakeholders, the objectives are clear, but priorities are not.

Integration and Reporting of Annual Evaluation Results

Facility Services has established Board-wide standards for caretaking, maintenance and energy management and processes for annually evaluating the application of these standards to each school. This is clearly a positive and necessary first step to establishing an effective management system. However additional integration and reporting of results would assist Facility Services Senior Management to achieve the department's objectives and to improve communication of departmental results.

In the evaluation process, as many as 100 individual building elements are categorized as below, at, or above the TDSB standard. However, there is no process for assessing the overall compliance with the standards. Consequently, Facility Services does not have the information required to answer questions such as "What proportion of schools are meeting standard?" or "How many individual building elements are above, meeting or below standard?"

Annual Evaluation Process

During discussions with stakeholders, it was mentioned that there are a significant number of schools that are not being kept clean year-round and that if the Facility Services evaluation process showed otherwise, then it was likely flawed.

As discussed in [Section 5.2.2](#) above, the Consulting Team was not able to reconcile the results of the 2003 Ministry of Education survey with the cleanliness evaluations for any of the six schools that were examined. Based on the survey conducted in October 2006 for this Review, 84% of Principals are, as a minimum, satisfied with the cleanliness in their school. This suggests there are some 90 schools where Principals are not satisfied.

The annual evaluation process has characteristics that may reduce its effectiveness in identifying the typical cleanliness levels in schools. These include:

- It is a one-time inspection, conducted early in the school year following the major summer cleaning programme.
- It is a largely a self-assessment by Facility Services staff who have a direct interest in the outcome.

- Principals may be reluctant to express concerns directly to the Head Caretaker.

Correction of Deficiencies

The annual assessment process assigns the Family Team Leaders the responsibility for monitoring the correction of deficiencies identified in the annual assessment process. However school principals have indicated that these deficiencies are not being handled promptly, in spite of the importance to schools. This suggests that the managers need a reporting mechanism to ensure that standards are properly applied.

Appropriate Measures and Targets

Effectiveness, efficiency and customer service are the dimensions of programme performance generally acknowledged as being important: The Operations programme has performance indicators in place that capture some of these dimensions; however there are some gaps. For example there is no efficiency indicator for the maintenance programme. In the D&C group there are also no efficiency indicators, the effectiveness dimension reflected in on-schedule delivery is only captured for the largest projects and the customer satisfaction indicators are ad-hoc.

5.2.4 Summary and Recommendations

The processes an organisation uses to plan, resource, deliver, control and report its results comprise its management system. It shapes organisational culture and is a critical determinant of overall organisational effectiveness. A well-designed and properly functioning management system will clarify the organisation's objectives for staff at all levels and help ensure that all programmes, activities and the actions of individuals are aligned with achieving the objectives. The accountability for ensuring that an effective management system is in place rests with an organisation's most senior executive; for the TDSB this is the Director of Education. The responsibility for setting out the design of the management system and monitoring its effectiveness is typically part of controllership responsibilities, which are commonly, but not necessarily assigned to the chief financial officer or equivalent position. Business unit heads or functional managers are accountable for implementing a management system that is aligned with corporate requirements and supports them to achieve their specific accountabilities.

The Consulting Team envision an overall management system for Facility Services, and potentially TDSB, where:

- Vision and goals are clearly defined, communicated, understood and accepted by staff;
- All functions necessary to achieve the goals are identified and are assigned to the most appropriate organisation level;
- Functions and the activities needed to carry them out, are assigned to positions in a manner that balances effectiveness and efficiency needs, and ensures that individuals can be accountable for results;
- Positions, and hence the staff in them, are delegated the authority needed to carry out their responsibilities without the undue involvement of higher level positions;
- There is co-operation among peers, and between schools and a mutual respect for the value that each group brings to the system;

- Policy and practice development is done in consultation with the "frontline" and positive change for the client is valued more than the status quo;
- Strategic and operational planning is done at the appropriate level and in a manner that fosters ownership of and commitment to planned results;
- Critical success factors are known and stretch performance targets are set and readily accepted;
- Results are measured and appropriately recognized and rewarded;
- Frontline managers operate within the resources allocated to them by the planning/budgeting process;
- Information on results achieved and resources used are available to managers and staff on a timely basis;
- Resources are allocated to programmes consistent with the programme priorities and there is the flexibility to re-allocate resources to meet new needs;
- Individual managers operate on a level playing field;
- Both individual accomplishments and contributions to team or Board results are encouraged and rewarded;
- Innovation, ongoing improvement and replication are the norm; and
- Management time is directed to high value added activities, and low value added activities are eliminated.

Facility Services has been concentrating its efforts on strengthening its management of planning, resourcing and to a lesser degree the delivery functions. Work to strengthen the control and reporting functions has been much more limited. The overall result is that while senior management are clear about the department's direction and priorities, they have limited information about the results that are being delivered and the progress that is being achieved. Without information on current achievements, it is neither possible to communicate these to Facility Services managers, staff or external stakeholders, nor to make informed decisions.

Research suggests that 70-90% of organisations fail to realize success from their strategic plans!² Without effective execution of strategy, the organisation can feel that they have wasted precious time, money and resources to little effect. Effective strategy implementation is a result of clear communication of strategy, translating strategy into everyone's job and rigorously managing results.

Recommendations

1. Facility Services strengthen its performance measurement and reporting system. This would include: identifying the critical success factors and indicators for each departmental programme and organisation level, tracking actual results and reporting of actual versus target results in a format and frequency that meets stakeholder needs.

² From Kaplan & Norton : *Strategy Maps*, HBS Press

2. Facility Services refine the department planning process to include prioritization of initiatives with measurable targets. The plan should include identification of resources to support current Facility Services activities and new initiatives and contingencies for unplanned organisational projects.
3. A TDSB “corporate” unit be assigned the responsibility for designing TDSB’s management system and provide the Facility Services Department with the guidance needed to ensure that Board-wide requirements are met.

5.3 Client Satisfaction

5.3.1 Overview

Client service is an important topic in the public sector. Government and public facing organisations are recognizing their accountability to taxpayers and their clients. They have also realized that attention to client satisfaction can improve their processes and, at times, reduce costs.

A client survey was conducted to evaluate how satisfied clients are with Facility Services. This information was supplemented by stakeholder interviews along with documentation reviews and analyses. The Review undertook to evaluate the following:

- Current processes for maintenance, repairs, and capital improvements
- Processes by which Facility Services responds to schools' requests
- Reasonableness of charges to school budgets by Facility Services

The findings from this part of the Review are outlined in this section as follows:

- First, the findings from the client survey are discussed for both the facility maintenance process and the client service aspect;
- Second, the findings from client interviews and focus groups are explored; and
- Finally, an analysis of the client-facing processes within the Facility Services Department is undertaken.

5.3.2 Findings and Analysis

Client Survey

From 2000 to 2003, the MOE administered an annual survey to determine the level of satisfaction with the overall cleanliness, condition, comfort and safety of each school in Ontario. The results of the MOE's School Facility Survey showed that in general, TDSB clients were satisfied with the level of cleanliness, condition and accessibility of their schools.

Building on the questions that were developed for the MOE survey, the Consulting Team created a two-part client survey. Part One of the survey was based on the MOE survey and was completed by randomly selected School Principals, Student Council members and Parent Council members. Part Two of the survey was completed only by School Principals.

The survey was not intended to be an assessment of how well individuals are doing their jobs. Indeed, all groups within the school community collectively have an impact on the school environment as well as the culture within the school. Instead, the survey was intended to determine the level of satisfaction and to identify areas for improvement.

The questions in Part Two were based on the Common Measurements Tool (CMT) methodology to evaluate client satisfaction. The CMT is widely used in the Canadian public

sector to obtain information on the five key elements underlying all service interactions: client expectations, client perceptions of the quality of the service experience, client satisfaction levels, client-defined levels of importance, and identifiable priorities for service improvement.

Part One – Facilities

The Facilities Survey was based upon the Ministry of Education School Facilities Survey. The Survey asked respondents to rate their satisfaction and the importance of various aspects or areas with regards to the following categories:

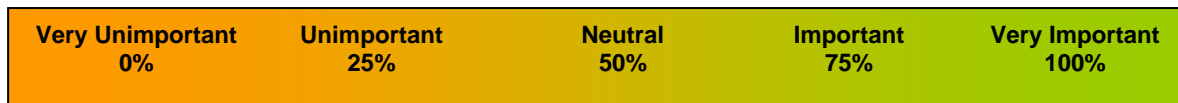
- Cleanliness
- Condition
- Comfort
- Accessibility and Security
- Teamwork and Collaboration

The rating scale used in Part One is shown in Figure 5.3A.

Figure 5.3A
Satisfaction Rating Scale



Importance Rating Scale



Cleanliness

Figure 5.3B
Overall Cleanliness Satisfaction Rating



When asked to rate their overall satisfaction with the cleanliness of facilities, the average rating was 66% (Figure 5.3B). The respondents were asked to rate their satisfaction with the cleanliness of various areas within their school. They were also asked to rate how important it is for those areas to be clean. All respondents rated the importance of cleanliness as high. (See Table 5.3A)

Table 5.3A
Client Ratings of Cleanliness

	School Council		Parent Council		School Principal	
	Satisfaction	Importance	Satisfaction	Importance	Satisfaction	Importance
	Average	Average	Average	Average	Average	Average
Building Exterior	75	85	61	89	65	88
Cafeteria	68	90	63	96	66	92
Classrooms	72	96	63	94	62	96
General Administrative Area	91	81	72	84	73	90
Grounds	67	88	54	91	61	93
Gymnasium	86	87	71	88	69	94
Main Lobby, Hallways and Stairways	81	87	71	91	70	95
Portable Classrooms	90	88	60	86	67	95
Resource Centres	88	86	70	88	71	93
Science Laboratories	87	85	59	89	65	90
Washrooms and Shower Facilities	52	90	50	96	55	96

With regards to the ratings of cleanliness, the School Council representatives (students) rated the cleanliness higher than did the Parent Council representatives and Principals. On average, all areas were rated between satisfactory and good. However, the relatively low satisfaction level of the washroom and shower facilities indicates a need for improvement in this area.

Condition

Figure 5.3C
Overall Condition Satisfaction Rating



When asked to rate their overall satisfaction with the condition of facilities, the average rating was 61% (Figure 5.3C). The respondents were asked to rate the condition of various areas within their school. As above, they were also asked to rate how important it is for those areas to be in good condition. All respondents rated the importance of facilities in good condition as high. (See Table 5.3B)

Table 5.3B
Client Ratings of Condition

	School Council		Parent Council		School Principal	
	Satisfaction	Importance	Satisfaction	Importance	Satisfaction	Importance
	Average	Average	Average	Average	Average	Average
Building Exterior	73	88	56	86	60	88
Cafeteria	75	91	56	95	67	95
Classrooms	75	94	61	95	59	94
General Administrative Area	92	85	69	86	70	92
Grounds	69	89	51	92	55	92
Gymnasium	77	87	68	88	61	93
Main Lobby, Hallways and Stairways	78	89	66	92	64	92
Portable Classrooms	80	94	56	81	68	93
Resource Centres	86	84	66	85	68	93
Science Laboratories	79	85	57	88	57	92
Washrooms and Shower Facilities	53	90	50	97	50	91

The School Council rated the condition of the various areas within the school higher – at a satisfactory or good level, while the Parent Council representatives and Principals rated more areas at a satisfactory level. The lowest rated areas were the washroom and shower facilities. The satisfaction with the condition of the various areas was typically rated lower than the satisfaction levels with the cleanliness. This could reflect the age of the facilities or the ability of Facility Service staff to maintain the condition of the facilities, or a combination of the two.

Comfort

Figure 5.3D
Overall Comfort Satisfaction Rating



When asked to rate their overall satisfaction with the comfort of facilities, the average rating was 58% (Figure 5.3D). The respondents were asked to rate their satisfaction with the comfort of the school; the components of comfort include temperature, air quality, lighting and noise control. The respondents were also asked to rate the importance of comfort in the school. All respondents rated the importance of facilities' comfort as high. (See Table 5.3D)

The School Council respondents rated the comfort components higher than the other cohorts. Temperature received the lowest satisfaction level across all cohorts. Also, a large number of Parent Council and Principals rated air quality as unacceptable or needs improvement.

Table 5.3D
Client Ratings of Comfort

	School Council		Parent Council		School Principal	
	Satisfaction	Importance	Satisfaction	Importance	Satisfaction	Importance
	Average	Average	Average	Average	Average	Average
Air Quality	73	91	56	94	53	95
Lighting	79	89	62	91	65	92
Noise Control	71	85	63	90	63	88
Temperature	57	91	49	95	41	95

Accessibility and Security

Figure 5.3E
Overall Accessibility and Security Satisfaction Rating



The average rating for overall satisfaction with the accessibility and security of facilities was 58% (Figure 5.3E). The respondents were asked to rate their satisfaction with various aspects of accessibility and security. The respondents were also asked to rate the importance of accessibility and security in the school. All respondents rated the importance of accessibility and security of schools as high. (See Table 5.3E)

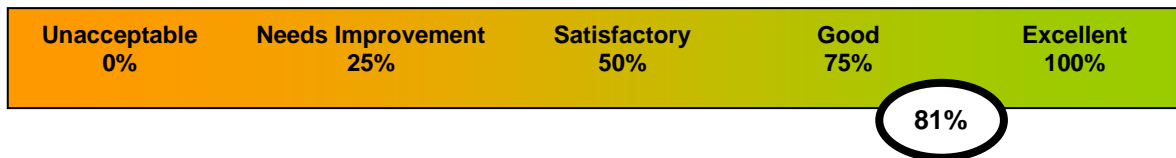
Table 5.3E
Client Ratings of Accessibility and Security

	School Council		Parent Council		School Principal	
	Satisfaction	Importance	Satisfaction	Importance	Satisfaction	Importance
	Average	Average	Average	Average	Average	Average
Barrier Free Access	77	92	43	85	46	90
Safety of Grounds and Walkways	71	97	53	96	54	97
Security	70	97	55	96	53	96

Again, the School Council rated their satisfaction higher than the Parent Council and Principals, giving a high satisfactory or good rating. The Parent Council representatives and Principals rated Barrier Free Access as needing improvement. The safety of grounds and walkways and security were rated at a low satisfactory level. This suggests that a large portion of respondents rated these components as unacceptable or needs improvement.

Teamwork and Collaboration

Figure 5.3F
Overall Teamwork and Collaboration Satisfaction Rating



The respondents were asked to rate their perception of the teamwork and collaboration of the various groups within the school who work together to maintain the facility. The respondents were also asked to rate the importance of teamwork and collaboration in this regard. All respondents rated teamwork and collaboration as important. (See Table 5.3F)

All the cohorts rated the teamwork and collaboration as good. The respondents perceive that the various groups work together well.

Table 5.3F
Client Ratings of Teamwork and Collaboration

	School Council		Parent Council		School Principal	
	Satisfaction	Importance	Satisfaction	Importance	Satisfaction	Importance
	Average	Average	Average	Average	Average	Average
Teamwork and Collaboration	89	96	74	91	84	98

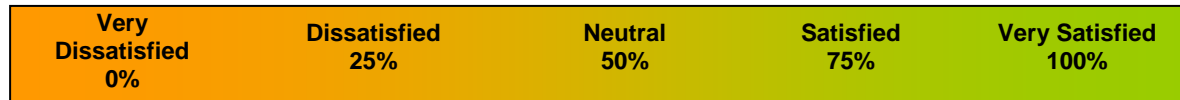
Part Two – Client Service

Client service is an increasingly important topic with public facing organisations. The survey was designed to take into consideration client expectations, client perceptions of the quality of the service experience, client satisfaction levels, client-defined levels of importance, and identifiable priorities for service improvement for the following areas:

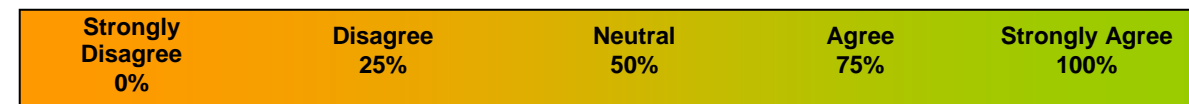
- Service Response
- Accessibility
- Communication
- Quality of Service
- Quality of Work
- Value
- Satisfaction

Part Two of the survey, which focused on service delivery, was only completed by School Principals. The rating scales used in the Part Two are shown in Figure 5.3F. It should be noted that the satisfaction scale in Part Two, differs from that of Part One. For Part Two, the satisfaction scale reflects the Common Measurements Tool (CMT) requirements, whereas in Part One, the satisfaction scale was based on the previous Ministry of Education surveys. The full survey results can be found in Appendix B.

Figure 5.3F
Satisfaction Rating Scale



Agreement Rating Scale



Importance Rating Scale



Service Response

The majority of respondents (73%) reported that work on their most recent request started within 4 weeks of being requested.

The survey respondents were asked what an appropriate amount of time was to receive a service. While the acceptable response period varied by service type, the majority of respondents (75%) felt that 2 weeks was acceptable.

With regards to the number of contacts required to receive their request (where a "contact" is each different phone call, e-mail, online request, fax, or meeting) the majority (63%) of respondents replied that an acceptable number of contacts was 1, while 35% replied that 2-3 contacts was acceptable.

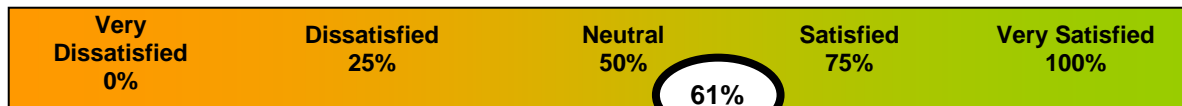
The number of people that a respondent had to deal with in order to receive their service varied greatly from 1 person to over 5 people with the majority of respondents (75%) receiving their service within 3 contacts.

The respondents felt that the following areas could be improved:

- Time until service is provided
- The number of people to deal with
- The number of contacts

Accessibility

Figure 5.3G
Overall Accessibility Satisfaction Rating



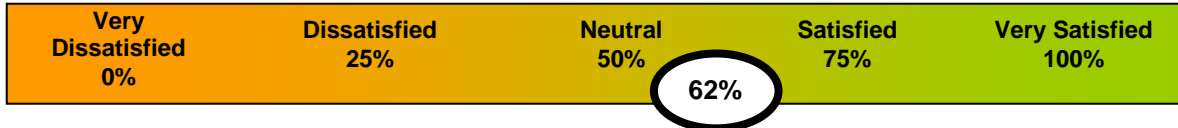
Respondents' overall satisfaction with the accessibility of the service was rated at 61%. The individual aspects are outlined in Table 5.3F. Overall, the respondents neither agreed nor disagreed with the statements, while they agreed that the statements were important. This suggests that accessibility is an area for improvement.

Table 5.3F
Client Level of Agreement with Accessibility of Service Elements

Service	Agreement Average	Importance Average
It was clear how to request the service	57	93
It was clear who to contact to receive the service	51	91
Service was easily accessible through the intranet	50	82
Service was easily accessible by telephone	52	84
The hours of service were convenient	60	85
Various methods of access were available (e.g. fax, intranet, telephone, e-mail)	65	87

Communication

Figure 5.3H
Overall Communication Satisfaction Rating



Respondents’ overall satisfaction with the communication of the service was rated at 62%. The individual communication statements are outlined in Table 5.3G. In general, the respondents neither agreed nor disagreed with the statements, while they agreed that all the statements were important. This suggests that communication with clients is an area for improvement.

Table 5.3G
Client Level of Agreement with Communication Elements

Service	Agreement Average	Importance Average
I was informed of everything I had to do in order to get the service.	62	90
My questions were answered.	68	90
I received consistent information/advice.	59	89
Written and verbal language was clear (e.g., not complicated).	65	89
Service staff were easy to understand.	74	90
Forms (paper or on-line) were easy to understand and fill out.	64	87
Procedures were straight forward and easy to understand	62	88
It is easy to find out the status of my request.	49	91
I was informed when service staff would be at my school.	46	87
I was informed about problems in completing the request	47	86
I was informed when the request was completed	60	87

Three areas which were rated the lowest included finding out the status of the request, being informed when services would be at the school, and being informed about problems in completing the request. These three areas were also rated as the top three areas for improvement.

Quality of Service

The respondents rated the service staff to be courteous (82% rating) and knowledgeable and competent (80% rating). The respondents agreed (83% rating) that the service staff behave appropriately when working at a school. This high satisfaction rating suggests that Facility Services is hiring the right people, setting the right expectations, providing the appropriate training, or a combination of these factors.

Quality of Work

Respondents agreed (67% rating) they received the service they required. However, the comments from the survey suggest that there were still outstanding issues.

The quality of the work performed was rated at a satisfaction level of 72%. Additionally, the majority (82% rating) of respondents received the service without error. The types of errors that were experienced included incorrect material being used, miscommunication between Facility Services and the contractor or between contractors and the skilled trades, and damage to the facility while the service was performed.

Value

Value is a difficult issue to address. It is the balance between costs, service and quality of service. Thirty-six percent of respondents agree that they receive sufficient information to judge the reasonableness of the cost estimates for site funded work. Further, eighteen percent of respondents agree that they receive good value for their site funded improvement expenditures.

Satisfaction

Consistent with the results from Part I, the respondents rated their satisfaction with Caretaking as satisfactory (74%), as shown in Table 5.3H. An average of 41% of respondents rated the balance of the services (Grounds Maintenance, Building Maintenance, D&C and Community Use Permits) as dissatisfied or neutral, cumulating in neutral ratings. This suggests that there clients are not delighted with the services.

Table 5.3H
Client Ratings of Satisfaction with Services

Service	Satisfaction Average
Caretaking	76
Grounds maintenance	57
Building maintenance	59
Design and construction	51
Community Use permits	59

Emergency building repairs is the most frequently mentioned reason for contacting Facility Services. Satisfaction with these repairs is significantly lower than for minor facility repairs and among the lowest of all the services. Consequently, the Consulting Team is highlighting the client feedback for this particular service to support Facility Services to improve satisfaction levels for this service. Respondent satisfaction with emergency building repair, minor facility repair, and a composite of all services, for three key aspects of service are shown in Table 5.3I.

Table 5.31
Client Ratings of Satisfaction with Service Elements for Selected Services

Service	Satisfaction - %		
	How staff provided the service	The amount of time it took to get the service	The quality of the end result
Emergency Building Repair	59	46	68
Minor Facility Repair	75	65	78
Average for All Services	69	54	72

Trustee Satisfaction

The Consulting Team considers the Board of Trustees to be a Facility Services Department client as information provided by Facility Services is used by Trustees to carry out their governance responsibilities. The Consulting Team met with four members of the Operations and Facilities Management Committee (OFM) of the Board to explore the alignment of the support provided by Facility Services with the Committee’s needs in the following areas: decision making, planning, monitoring and reporting, and communication. Members identified areas where their needs are being met and areas where improvement would be welcome.

Members noted that Facility Services responds well to questions regarding proposed or past decisions, or variances between actual and planned results. It was also noted that the types of decisions that Facility Services brings to OFM for consideration are appropriately aligned with trustee responsibilities. Members also indicated they are satisfied with their involvement in the long-term plans developed by Facility Services. The overall working relationship with Facility Services management is viewed as positive.

The areas of major concern involve: timeliness, lack of sufficient information, and the appropriateness of recommendations.

Members believe that issues that require a decision by OFM are not being identified and brought to OFM on a timely basis. This reduces the Committee’s flexibility to ask for information on potential alternative actions.

A related concern is that Facility Services submissions lack sufficient information to assess if a recommendation or alternative action is reasonable, for example: stakeholder views; impacts - money, community relations, government relations; potential risks. Members described the current situation as one where the organisation works on intuition, not on evidence and options. Members acknowledged that Facility Services has not been provided with clear direction on the information required by the Board, in part because of the diversity of Trustee views on this matter.

Members also expressed reservations about the reasonableness of the information presented to OFM, for example projections of year-end results and proposed actions to remedy gaps between actual and planned results.

Processes for Requesting Services

Schools do not request regular grounds maintenance, preventive maintenance and inspection services from Facility Services, as these services are provided routinely. Schools contact Facility Services when “things” need to be fixed, upgraded or replaced or when there are issues with the staff or contractors that Facility Services has assigned to service their school. Emergency building repair and minor facility repair are the two most common reasons why clients request services from Facility Services.

The first point of contact between schools and Facility Services is through the Head Caretaker. Facility Services and the two bargaining agents have reached agreement on the minor maintenance that caretakers can undertake at a school. Currently, because of a high caretaking workload, some maintenance that caretakers are permitted to undertake is being submitted to the FTL maintenance staff. This increases travel time and administrative time at the FTL maintenance level.

Schools typically request services through one of three channels: 1) emergency requests, such as flooding or a malfunctioning fire alarm, are normally placed by telephoning a call centre; 2) routine maintenance requests, such as a broken clock, burned out lights or uncomfortable temperatures, are typically communicated to the Head Caretaker who subsequently enters the information into the Facility Services’ work order management system and 3) requests involving minor improvements, and which will be directly funded by schools or other clients, are typically made by completing and submitting the required forms.

The two most common points of contact for schools are the FTL and the Project Supervisor.

Operations Group Processes

The vast majority of requests are initially reviewed by a Team Lead Assistant (TLA) who, with support from the FTL as needed, determines if the work should be done, which group should do the work (Family Team Maintenance, Regional Maintenance, Central Services Maintenance or D&C) and the priority assigned to the request. Since there can be no action on a request until these determinations have been made, the timeliness and accuracy of the initial review plays a critical role in Facility Services’ ability to meet its time standards. D&C and Central Services expressed concern over undue delays in the relaying of requests from the TLA.

When a Head Caretaker submits an online maintenance request, they identify the priority of the work, e.g. urgent or normal. This priority may be changed by the TLA, but there is no feedback to the school. However, the priority assigned by the TLA appears in the work order management system and the Head Caretaker may access this system real time through SAP or the Principal may access a snapshot of the system through the web portal to find out the status of the request.

The basic process for assigning staff to a request is as follows. The TLA determines which trade(s) are needed to carry out the work, they note any special parts or materials required and assign the work order to the appropriate individual(s). An individual tradesperson typically works at a small number of schools. This allows the tradesperson to develop a good working relationship with the Head Caretaker and to develop a high level of knowledge of the school’s equipment, physical layout and repair history. During stakeholder engagement exercises, it was

mentioned that many of the requests from schools do not contain sufficient information to allow the TLA to determine which trade(s) is needed. The TLA's experience helps reduce the number of instances where the incorrect trade is sent to the client but, even so, such instances occur with some degree of regularity. The same basic process is followed in Central Services; however the FTL is more likely to be directly involved in the review and assignment process.

The work order management system is real time, so as soon as a work order is assigned it is available for the tradesperson to view from any computer connected to the Board's intranet. However, trades do not have routine intranet access when on the job. Consequently in the regional setting, the TLA prints each person's work orders and makes them available for pickup at the end of the day. Trades staff retrieve the new work orders and brief the FTL on any issues regarding outstanding work orders upon their return to their base at the end of the day. If the number of outstanding work orders at a school is growing, the FTL will assess the opportunity to re-assign work orders to other staff. On occasion a school may be "blitzed", which involves assigning a team of trades to deal with existing work orders and other needs which have not been reported yet. This is an efficient way of working, as it increases the ratio of working to travel time. However, it is difficult to implement as trades are often called away to deal with emergency requirements at other schools. The process used in Central Services is somewhat different, as trades generally do not go to the central yard on a daily basis. Consequently trades typically contact the FTL at the start of each day to receive any urgent work orders verbally. This contact also provides the opportunity for the FTL and the tradesperson to exchange information on the status of work orders previously assigned. Central Services tradespeople typically use a Head Caretaker's computer to access the system and print their work orders.

Work progression on the requested service is supervised by the FTL who is responsible for a number of different types of skilled trades and for the caretaking function³. There is no expected completion date given to a work order. Schools cannot rely on Facility Services' response time standards as an indication of when work will be started. This is partly because the TLA may have changed the priority from what the school entered on its request and partly because the time standards are not consistently met. Consequently schools have no dependable way of knowing whether or when to expect a fix or when to initiate a follow-up request. This is a major concern for Principals and "making it easy to find out the status of my request" and "being informed when Facilities staff will be at my school" were the two highest rated communication improvement opportunities identified in the satisfaction survey.

When trades staff arrive at the school to complete the work order, ideally they will have the required parts and materials in their service van. However, clients and managers mentioned that this is frequently not the case and that after identifying what is needed to complete the job, the tradesperson often goes to a neighbourhood store and purchases the material using the Board's P-card and returns to the school to complete the work. Facility Services managers find local purchases as less than ideal as there is no record of the specific items that were purchased, only the total amount, date and merchant. If, while at a school, a tradesperson is asked to perform additional maintenance work there is the flexibility to repair very minor items.

³ *Through interviews and other analysis, it was understood that the typical career path for an FTL is through the caretaking function. The Maintenance and Construction Skilled Trades Council (MCSTC), which is the employee representative for trades staff at TDSB, opined that a career progression through the caretaking function does not provide the experience required to effectively supervise the work of skilled tradespeople.*

However if the repair is significant the school is asked to submit a notification and the tradesperson leaves the school to deal with the next work order. Some stakeholders believe this is inefficient and that the tradesperson should be able to fix deficiencies not on the work order. The related issue of the fairness of allowing “queue jumping” was not commented on.

The tradesperson tracks the time required to complete the work, which includes travel time and any time spent procuring parts or materials. This information is entered into the work order management system on a weekly basis. This could be up to two weeks after the work was completed. Consequently, the work order management system does not have current information on the status of work orders and the snapshot of the status of work orders that is available to Principals through the Facility Services intranet site is even less current.

Design and Construction Group Processes

The Design and Construction group is involved with schools on a wide range of projects. Most of the D&C effort is directed to large-scale projects such as: asbestos removal, plumbing fixture replacement, heating and cooling system replacement and similar essential work. These types of projects are funded from budgets controlled by D&C. While schools may urge/encourage Facility Services to undertake this type of work, they do not formally request it, since the need for the work is based on a Board-wide prioritization process. As well as the aforementioned projects, D&C may also assume requests that schools have submitted to the Operations FTL but which exceed the project scope that the Operations group can undertake.

Principals and School Superintendents control the Board’s budget for small improvement projects, which are referred to as “site-funded” projects. Schools may also use other funding sources, such as fundraising to pay for these projects. The projects involve activities such as: painting a portion of the school, painting lines on playground surfaces, supply and installation of tack and whiteboards, replacement of carpeting or cleaning drapes and blinds. All site-funded projects must be undertaken by Facility Services. Once a school has identified a project, it submits a request to D&C which responds by providing the school with a fixed price for the work. The costing of these projects may involve discussions with the school to clarify the project’s scope and site visits by D&C staff or external contractors. In 2005/06 schools submitted approximately 1,200 requests for site-funded work. The estimates for these projects totalled \$4.2 million. D&C spent \$240k preparing cost estimates for these projects. Once the cost of the project is known, schools decide if they want to proceed. Sometimes the cost is more than they can afford or causes the school to reassess the benefits of the project, and a decision is made not to proceed. If the school chooses to proceed with the project, they inform D&C and are charged the agreed price up-front. D&C then schedules the project.

Based on feedback from clients during interviews and through the survey, the majority of issues with D&C arise from site-funded projects, with the main points of contention being 1) length of time between when a work order is registered to when work is completed, 2) the inconsistent communication to School Principals regarding when work will begin and end and 3) the costs of the projects.

D&C management advised the Consulting Team that there are documented processes for how work is to be carried out and how communications should be sent and provided the examples. Also, D&C staff have been trained on communication and project supervision. Management

advised the Consulting Team that the problems experienced by schools are not typical and are attributable to the quantity of requests received, and the lack of staffing resources.

Facility Services recently revised the process for site funded projects so that schools are no longer directly charged for this work. D&C will continue to perform the work, but requests will go through the caretaker and FTL as with other operations and maintenance requests. The Consulting Team views this recent change as an interim step towards having almost all small improvement projects delivered by the Operations group. However it is less clear that the transfer of budget control from the school level to the School Superintendent level will address the concerns that schools have with the costs of these small projects. The strength of the previous site funded process was that it allowed schools to decide how a very small part of the overall budget would be spent. When the system does not have the resources to meet all reasonable needs, having the ability to “step outside” the central prioritization system is important. The revised approach has the potential to raise issues around the responsibility for prioritizing projects, the total value of work that any individual school can request and the delineation of budgets within families of schools. Facility Services should monitor the impact of the revised process closely to ensure that is received positively.

Charges to School Budgets

In 2005/06, the expenditures of the Facility Services department totalled \$470 million. Of this amount approximately 1% was charged to school budgets⁴.

Schools are required to pay for the following services provided by Facility Services:

- Repairs to furniture, computer hardware and peripherals, small appliances and electronic equipment, and the like
- Minor facility improvements (site-funded improvements) as described previously
- Maintenance activities that exceed the Board’s standards
- Caretaking costs associated with an abnormal level of weekend school events

In assessing the “*reasonableness of charges*” from Facility Services, the Consulting Team considered the following:

- Does the basis for determining charges reflect Board policy, practices or intent?
- Are actual charges applied consistent with Board policy, practices or intent?
- Do the labour hours reflect good productivity levels?
- Do clients feel they are getting good value?

Each of these dimensions is reviewed in the following sections.

⁴ Toronto District School Board, *Financial Facts: Revenue & Expenditure Trends, January 2006*

Does the basis for determining charges reflect Board policy, practices or intent?

Trades Work

Facility Services’ objective is to charge to individual projects the direct costs of the work. The “head office” costs of each group and the cost of the corporate support functions are indirect or overhead costs and are not charged to the projects. These costs are described below.

Direct Costs: *The cost of doing work that is easily and accurately identifiable. Examples include, but are not limited to, salaries, wages and benefits of personnel doing the work, materials and supplies, travel, and equipment.*

Indirect or Overhead Costs: *The costs of doing work that cannot be directly attributed to it, usually because they are incurred for objectives common to a variety of activities. Examples include, but are not limited to, financial administration (including purchasing and accounting), information technology (including telecommunications), supervision and administrative support, physical plant and maintenance (including utilities, waste disposal, security), and insurance.*

There is no TDSB policy setting out the basis for inter-departmental cost transfers. However Facility Services’ approach is consistent with good practice. It provides decision makers with appropriate price signals, while recognizing the increasing cost and diminishing value in attempting to allocate indirect and overhead costs for internal cost transfers.

Are actual charges applied consistent with Board policy, practices or intent?

Trades

The majority of charges to school budgets are based on a firm price. Thus providing that the overall variance between actual and budget costs for all projects is small, then on an overall basis charges are being applied consistent with the intended cost recovery.

Central Repair Shops

A high level review of the hourly rate charged by Fleet Services for vehicle repairs was undertaken. It was found that the current rate has not been updated for a few years and is only partially recovering actual costs. It is not providing decision makers with appropriate price signals.

A high level review of a sample of work orders for equipment repairs suggests that the labour charges were reasonable.

Do the labour hours reflect good productivity levels?

The Design & Construction group does not have comparative information on productivity levels. It does however periodically compare its internal estimates for routine projects with quotations provided by private firms. For this Review, this is a reasonable proxy for labour productivity information. In most cases, the D&C cost has been lower. This is to be expected, as D&C cost estimates do not include the costs of its “head office” group, the cost of TDSB’s support groups, or a provision for pre-tax profit. Consequently, favourable performance on a narrow selection of

work should not be taken as reliable evidence that D&C's productivity is the same as its private sector suppliers.

Do clients feel they are getting good value for site-funded projects?

No other question in the survey of Principals produced as much negative response as the question that asked about the level of agreement with the statement "*I receive good value for my site-funded improvement expenditures*". Eighty percent (80%) of respondents replied they did not agree with this statement and nearly half (40%) strongly disagreed.

5.3.3 Implications and Discussion

Facilities

Based on the responses to the client satisfaction survey, the strengths of the current processes are:

1. Facility Services Department staff, in general. The positive attributes recognized by schools include:
 - a. Providing fair treatment
 - b. Courtesy and appropriate behaviour
 - c. Knowledge and competency
2. Maintenance staff, in particular. In addition to high ratings in the three areas above, the staff providing minor facility repair services were also recognized for their:
 - a. Flexibility
 - b. Up-to-date information
 - c. Willingness to go the extra mile
3. The quality of the end result, particularly new construction
4. Overall, the process for obtaining minor facility repairs is solid

In general, the ratings in the Facilities Survey were typically "satisfactory". However, there were areas of concern where large numbers of respondents rated their satisfaction as "unacceptable" or "needs improvement". These areas include the:

1. Cleanliness and condition of washroom and shower facilities
2. Condition of school grounds
3. Comfort level of temperature
4. Air quality

Facility Services has committed to service level 2 as a target for cleanliness. In the 2005 year-end review, the management team stated that 95% of the schools had received a level 2 rating. However, with regards to maintenance, the Building Maintenance Report commits to a Level 3 target and outlines the additional funds required to achieve each subsequent level. While Facility Services, as outlined in other areas of this report, has made moves towards streamlining their process, it is critical that they continue this streamlining and process evaluation as service improvements will not be fixed by more funding or new hires.

Client Service

The results from the survey show that School Principals agree that the quality of service and quality of work are satisfactory. This suggests that Facility Services has hired or contracted the right people with the right skills to be the frontline workers in the schools. When compared to the high importance clients placed on receiving quality service and work, it is important for Facility Services to remain diligent to ensure they maintain the strong quality of service and work. This may include hiring standards, managing workload, training and workplace culture.

The results from the accessibility and communication analyses suggest that the issues are process based, rather than staff or funding based. Facility Services has begun to address the process issues by mapping their internal processes. Additionally, they have begun to outline a structure to assist with communication and accessibility by creating a call centre that clients may contact to get information about their request. Facility Services has also been improving the information on and the functionality of their website. The risks of not improving accessibility and communication include increased client frustration which may lead to increased pressure from other areas within the organisation or political pressure.

Additionally, improving accessibility and communication with the schools frees up the Principals' time to spend on student related issues. It also allows schools to better schedule their classes, therefore improving the safety and educational experience of the students.

Service response experiences, and the perception of acceptable service responses, varied greatly among the respondents. As mentioned earlier, based on documentation reviews as well as interviews, the mechanism that Facility Services has in place to track the service response is not considered current or accurate. Without a robust measurement in place, Facility Services cannot effectively manage service response. Failure to address the service response times may lead to increased backlog which will lead to increase workload and costs. Additionally, it may interfere with students' education or the community use of the school.

Charges to Budgets

Facility Services charges for discretionary work have caught the attention of schools, the MCSTC and Trustees. Schools are concerned because the very limited funds they have for site improvements accomplish so little. MCSTC are concerned because in addition to the wages paid to an individual, the labour rate includes other payroll costs incurred by TDSB, such as, but not limited to: Canada Pension Plan, Employment Insurance, health and dental insurance and vacation pay. The labour rate also recovers the cost of vehicles, tools and communication devices. MCSTC believe that Principals do not have the information to distinguish between the "all in" hourly rate and the wages that trades staff are paid. The Consulting Team agrees with MCSTC. Trustees are concerned because the schools, community and the MCSTC are concerned with the current practice.

In pursuing good cost allocation practice Facility Services has, albeit inadvertently, drawn attention to the true labour costs associated with maintenance and construction work. It appears that Facility Services is being held accountable for the resultant concerns in different quarters. Facility Services should be held accountable for the productivity of its processes and work force, and the costs associated with Workplace Safety and Insurance Board coverage. Facility Services is not, and should not be held, accountable for the absence of Board policy

regarding interdepartmental cost transfers, the wage and benefit provisions for MCSTC members approved by the Board of Trustees and payroll taxes set by the Government of Canada.

5.3.4 Summary and Recommendations

Generally, Principals respect the efforts of the individual staff in Facility Services to maintain, repair and improve school facilities; however, they have much higher expectations of the overall system than it is currently delivering. The deteriorating condition of TDSB facilities is well documented, as is the reduction in maintenance funding from the pre-amalgamation levels. The key question is, “Are there material opportunities to improve client satisfaction within the current funding envelope?” From the analysis, it is clear that there are many opportunities to be capitalized on.

There are almost 600 skilled trades staff in the Operations group that provide maintenance and repair services to schools. In addition, the 490 trades staff in D&C are also involved in delivering major maintenance and facility improvement projects. Just as Student Success is TDSB’s focus, maximizing the ability of trades staff to do maintenance work must be a focus for Facility Services. Management’s role must be to clear the roadblocks that prevent trades from practising their skill. Stakeholders identified a number of instances where trades efforts were directed to getting ready to work, but not actually practising their skill, for example: shopping for spare parts, waiting for the caretaker to provide access to locked rooms and taking the service truck for an oil change or other maintenance.

Recommendations

1. Facility Services initiate a continuous improvement process to significantly increase the amount of time that trades staff spend correcting or preventing deficiencies. An appropriate target would be a productivity increase equivalent to an additional 100 FTE’s within two years.
2. Facility Services take steps, consistent with the provisions in collective agreements, to maximize the amount of minor maintenance that caretaking staff are able to undertake in their school.
3. Facility Services provide schools with an expected completion date for work and when work has the potential to disrupt school operations and that suitable work dates be agreed with the school.
4. Facility Services strengthen the contribution of the proposed new role for Facility Team Leaders to increasing accountability and customer service, by providing schools with a quarterly report card on the maintenance and construction services delivered and the timeliness of these services. This report card could be the basis for quarterly meetings between a principal and the responsible FTL to discuss the achievements relative to Facility Service standards and the school’s expectations.
5. Facility Services review and revise the processes for providing emergency repairs to address the relatively low client satisfaction ratings.

6. The Director of Education should clarify that the responsibility for policy and practice for interdepartmental cost allocation or fee for service, resides with the Business Services department.
7. Facility Services review how it can better address the expectations of the Operations and Facility Management Committee concerning the content and timeliness of its submissions to the Committee.
8. Facility Services should review its interdepartmental cost allocation or fee for service practices, including the cost transfers within Facility Services, e.g. central services to regions, to ensure they comply with policy and practice, as communicated by Business Services.
9. Facility Services undertake an objective comparison of the productivity of its in-house construction processes relative to external suppliers and subsequently, if warranted, identify opportunities to first match and then surpass external productivity levels.

5.4 Organisational Structure

5.4.1 Overview

In conducting the analysis of the current organisation structure for Facility Services, the Consulting Team interviewed stakeholders, reviewed the results of surveys and assessed organisational structures, both current and proposed.

The Facility Services Review evaluated how well the Facility Services is organized to achieve its objectives. The Review also evaluated:

- The opportunities for realignment of functions:
 - To improve efficiency and effectiveness
 - To better support students and schools
 - To improve integration with other functions within TDSB
- The adequacy of alignment and location of Facility Services resources (staff and equipment) to meet TDSB's facilities requirements
- The current plans of Facility Services to improve services to schools

An organisational design methodology was used to inform the evaluation and included the following design criteria:

- a. Span of control (i.e. number of direct reports into a position)
- b. Organisational levels between the front line worker and the Director of Education
- c. Allocation of resources among programmes (i.e. caretaking, maintenance, construction, design and "corporate" functions and allocation within programmes to specific services or clients)
- d. Number of client interfaces
- e. Number of handoffs in the provision of services
- f. Equipment utilization
- g. Communication flow and decision making
- h. Clarity of roles and accountabilities by portfolio

Throughout the analysis current organisational design principles found in other large public sector organisations and found in organisation design literature are referred to. Specific to TDSB, these include:

1. **Achieve “one Department”** based on: consistency across divisions; a cross-functional focus. Encourage new patterns of collaboration, problem solving, learning and productive work by replacing silos with permeable structures.
2. **Build an organisation structure that is driven by a client focused and process-oriented model.**
3. **Align functions to TDSB structure to support pooling of** commonly shared administrative and support functions in central functional areas including: Information Technology, Finance, Human Resources, and Organisational Development.
4. **Demonstrate Cost-Effectiveness** by “making the most” of Facility Services resources: minimizing duplication and overlap; and eliminating low value activities such as travel, locating supplies.
5. **Build an organisation which has a wider span of control** and accountability, and fewer levels between front line and Directors.
6. **Create capacity for effective management of strategic priorities** and projects that includes: performance management, stakeholder engagement/communication, quality initiatives and change management.
7. **Create opportunities for employees to connect to the mission** of the organisation through alignment to client groups and service delivery teams.

5.4.2 Findings and Analysis

A brief description of the structure supporting major work activities is described below.

Caretaking

Caretaking services are almost fully decentralized, with the majority of caretaking staff assigned to specific schools. Some caretaking staff “float” across schools to provide services when the assigned caretaker is absent or to provide assistance in dealing with emergency situations. This model of alignment provides a good balance between customer service and efficiency. Seventy-five percent (75%) of Principals are satisfied or very satisfied with caretaking services. Eighty-four percent (84%) of Principals rate cleanliness as satisfactory or above. This indicates the overall resources allocated to caretaking services are reasonable. The range of individual ratings may indicate that Facility Services’ standards are not being achieved consistently across schools and that some schools are relatively disadvantaged.

Maintenance

Grounds Maintenance

The Central Services group provides major grounds maintenance services. Minor services are incorporated within the caretaking role. Given the specialized equipment and efficiency benefits from high utilization rates it makes sense to deliver grounds maintenance services on an

administratively centralized basis. It is also good practice to distribute equipment and plan the work routes and schedules so that travel time is minimized. Central Services provide grounds maintenance services on this basis and periodically review the allocation of equipment and routing to identify opportunities for improvements. Currently the frequency of grounds services is based on a number of factors that have not been formally communicated to all schools. Work is underway to formalize these factors and prepare a grounds maintenance standard.

Approximately 50% of Principals are satisfied or very satisfied with grounds maintenance services. Parent Councils have a similar level of satisfaction, while Student Councils have significantly higher satisfaction levels. In an environment of limited resources, one might expect that it would be acceptable to have satisfaction levels for exterior space that are lower than those for the interior space. However Principals, Parent Councils and Student Councils all assigned a high importance to the condition of grounds with no differentiation between many interior facilities. As with caretaking, the range of individual ratings may indicate that all schools are not receiving the same levels of service.

Building Maintenance

Building maintenance services are delivered by one of five groups, depending upon the nature of the required maintenance work. The internal groups are: regional maintenance staff within a family of schools, regional maintenance staff within a region, Central Services staff and construction staff. Contractors are the fifth group.

The number of client interfaces for maintenance is generally low. Unplanned work is either requested through the call centre or the intranet. Planned or preventive maintenance work is not initiated by the client. Depending on the nature of the required maintenance work there may be a number of handoffs within the Operations group and sometimes within the D&C group.

Within the Operations group, approximately one-third of maintenance staff are assigned to Central Services and two-thirds are assigned to regions. The rationale for this split is largely based on providing a family of schools with a number of tradespeople by skill and then centralizing the other trades either at the regional or Central Services level. Another factor in this allocation is to provide centralized oversight of specialized services such as those provided by electronic and electrical technicians.

The handoff of maintenance work is largely based on financial criteria. Projects under \$10k are done by Operations and those above \$10k are done by Construction. Operations managers generally see the \$10k cut-off as an arbitrary value. They would prefer to have a more rational basis that reduced the number of handoffs and considered the scope and complexity of required work. Fifty-three percent (53%) of Principals are satisfied or very satisfied with building maintenance services. As with caretaking and grounds maintenance services the range of individual ratings may indicate that all schools are not receiving the same levels of service.

Facility Improvements

Facility improvements range from installing a new doorstep to the replacement of major building systems costing over \$1 million. These improvements are provided by the D&C group which is centralized in the Yonge and 401 area. A review of detailed listings of D&C projects for the period 2005/06 revealed that approximately 60% of all projects are less than \$10k.

Facility Services has received feedback from schools that the interface between the Operations groups and D&C is problematic and has developed plans to streamline this interface to better respond to client requirements. Stakeholders confirmed the concerns with the services received from the D&C group.

Planning

The Planning function's mandate is organisation-wide in scope: *"the provision of comprehensive planning services and information to the system in a timely fashion with effective communication to staff, parents, communities and all relevant levels of government: education planning, planning information systems (GIS) and land use planning"*.

Planning activities include enrolment projections, accommodation planning, physical space planning, long range planning, projects, and long term capital planning. Stakeholders expressed varying perspectives regarding the best location for system level planning, the ideal scope for Facility Services with respect to planning as well as the ideal location for long term capital planning.

Facility Services Department has set up a cross functional committee to inform the long term capital planning process. This committee includes representation from Business Services, Employee Services and School Services. Several stakeholders have expressed concern about the long term capital, plan and in particular, they perceive that little has been completed. Stakeholders are not aware of the cross functional committee and the work that has been completed to date.

Staff Development

There are 2 resources dedicated to Facility Services to provide training and recruitment support to the department. The Consulting Team understands this in-house team was created to address the unique needs of Facility Services' training and recruitment requirements and the fact that Employee Services was unable to meet these needs. Examples of the unique requirements include WHMIS training and scaffolding safety. TDSB's direction on corporate services, such as staff development, is to centralize to achieve efficiencies and expertise.

Quality/Organisational Development

There are 2 resources within Quality focused on supporting continuous improvement initiatives such as quality improvement, special projects and general project support to Facility Services.

Real Estate

There are 3 resources within Real Estate and the activities are focused on real estate revenue, tenant services and leasing. Stakeholders reinforced the fact that real estate is unique and valuable resource for TDSB and further expressed concern about the current number of positions as well as the focus and accountability of the unit.

Executive Officer's Office

Supporting the Executive Officer are 2 Administrative Support Positions. The Executive Assistant spends approximately 50% of her time on issues management, communication and supporting community consultation efforts. The office appears to handle a large volume of requests for information from the organisation, Trustees and the public. The Consulting Team observed that while resourcing for the office is likely adequate based on the intended administrative support functions the department does not have dedicated resources with expert skills assigned to communication, consultation and issues management activities.

Span of Control

The current span of control (number of direct reports into a position) for the Facility Services Department is as follows:

- There are 6 direct reports to the Executive Officer:
 - Manager Planning
 - Manager Real Estate
 - Manager Standards, Compliance & Environment
 - Manager Energy
 - Manager Design & Construction
 - General Manager
- Additional direct reports include:
 - Staff Development
 - Quality/Organisational Development
 - Executive Assistant
 - Administrative Assistant

The Facility Services General Manager position is responsible for overseeing over 80% of the budget and 80% of the resources. The General Manager has adopted a client service delivery model for maintenance and caretaking services through the implementation of a Family Team Lead model. Presently, the construction activity is provided in a centralized fashion. However, Facility Services has proposed a model that recommends transferring Construction to the Maintenance portfolio.

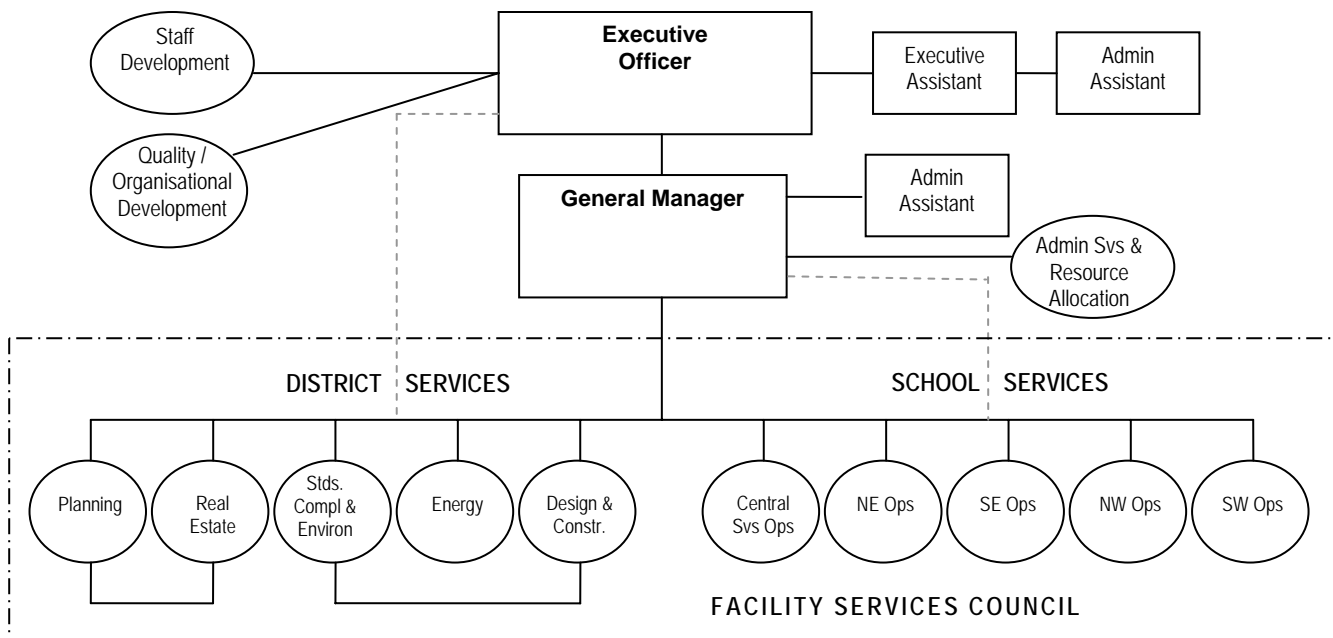
The Facility Services General Manager has solid line responsibility for the managers leading School Services portfolios including: Central Services Operations, Northeast Operations, Southeast Operations, Northwest Operations and Southwest Operations.

The portfolios reporting into the Executive Officer combine organisation wide activities such as planning, business support services such as employee services activities and combine operations with specialized central services such as construction and design. The client service delivery component is 3 levels below the Executive Officer at the Family Team Lead level.

The 6 direct reports to the Executive Officer along with the 5 direct reports to the General Manager compose the Facility Services Council. This Council meets regularly to advance the plan of Facility Services, address issues and plan priorities.

Figure 5.4A is the current structure for Facility Services.

Figure 5.4A
Current Facility Services Organisation Structure



Several themes emerged from the interviews with stakeholders that have implications for the current organisational structure. They are as follows:

Silos seem to exist within Facilities Services. Stakeholders expressed frustration over a perception that Facility Services operates as a silo within the TDSB. An example frequently cited is Facility Services' funding of staffing and HR positions rather than using Employee Services resources. There is a perception that Facility Services perceives its business as unique and too complicated for others to understand. Within Facility Services there is a perception that the portfolios do not easily communicate and share information with each other. Some Principals and Trustees perceive that they have to understand the Facility Services structure to know whom to contact for attention on an issue. They do not perceive that a Facility Services employee is representing all of Facility Services but rather each employee represents their particular area.

The Consulting Team observed evidence of a traditional command and control structure. Some Senior Managers seemed to know very little about the activities, performance and

accountabilities of other portfolios. Another Senior Manager interviewed explained that the customers were the problem because they do not understand the facilities business. The Consulting Team observed that an unusually high number of issues come to the Senior Managers for resolution suggesting that the staff do not have the skills, tools or authority to make decisions closer to the front lines.

Threads of a customer service orientation are emerging. Generally stakeholders were very positive about the changes that Facility Services has been putting in place to make it easier for Principals to access Facility Services. However, Principals in particular, emphasized that for issues and unique situations there is still a requirement to understand Facility Services' structure and to have relationships with key players to get results.

The Consulting Team observed that processes and information systems seem to be designed within functional parameters rather than from the client perspective. Results from the survey indicate that Principals would like to contact fewer numbers of people and to have fewer points of contact. As changes to the structure are made it will be important to redesign process and systems to support client service positions and responsibilities.

Efficiency of Structure The span of control appears to be quite narrow at the management levels. For example, the number of direct reports for Managers reporting into the Executive Officer ranges from 3-5. Many public sector organisations have mandated that spans of control at this level will not be less than 8-10.

Stakeholders express concern about quality control, employee development and management as well as the ability to interact with employees in a meaningful way to improve productivity and reduce issues with absenteeism, overtime and performance.

Many public sector organisations have successfully increased spans of control. Higher spans of control can lead to:

- Greater employee empowerment
- Faster decision making processes
- Improved communications
- Greater organisational flexibility
- Reduced personnel and overhead costs
- Increased delegation resulting in improved job satisfaction

It is important to evaluate the organisational conditions supporting broad spans of control. As job complexity increases, and as there are changes in geographic proximity and the expectations for coordination and for the way work gets done, there may be requirements to provide more supervision, at least during the transition period.

Management Capability. A variety of stakeholders expressed concern over the management skills and capabilities of Facility Services employees. Interviewees acknowledged the professional discipline and expertise of the Managers but challenged their understanding of management and leadership concepts required to support the strategies of a large complex public sector organisation. Questions were raised about the investment in management

training, the development and promotion process as well as the ability to effectively implement change.

Governance. While the governance process for TDSB is out of scope for this project the Consulting Team believe it is important to raise the concerns expressed by a number of interviewees with respect to the Trustees' role in the operations of Facility Services. There is a concern that Trustees circumvent established process to get things done in their ward at the expense of other projects which had priority.

The Consulting Team observed that most Trustees understand their role with respect to oversight versus operations but acknowledged that the Facility Services culture is such that to get anything done they must intervene. It is clear that management is working to address the relationship with the Trustees; however, several Managers believe it is their job to make Trustee requests a priority.

For the most part, Trustees acknowledged that they do not provide clear, consistent and aligned direction to TDSB with respect to Facility Services.

5.4.3 Implications and Discussion

A review and analysis of the current organisational structure of Facility Services reveals a number of issues to be addressed if the department is to become more contemporary and responsive.

Like other large public sector organisations, Facility Services must satisfy the needs/demands of clients that are not paying for services, while working within the fiscal discipline set out by funders who are several steps removed from the implications of the funding levels. This is a difficult space to be in.

The challenge facing Facility Services management is to organize and allocate available resources consistent with the Board's priorities and to provide comparable service levels to all clients. However the nature of setting priorities between programmes such as Caretaking and Maintenance or the present and the future is that it is impossible to set out the priorities in a definitive manner. Frequently, the best situation achievable is to develop some rational (quantitative) basis that attempts to reflect priorities and then continually fine-tune the allocation of resources based on stakeholder feedback. This is the approach that has been taken by the Operations group in the allocation of caretaking FTE's to schools and of tradespeople between Central Services, regions and Family of School units.

The information received from stakeholders suggests that neither the current allocation of resources between D&C and Operations nor the allocation of D&C resources to the different types of services provided to schools has been adjusted recently. However there are plans to make significant adjustments in the near future.

The Consulting Team supports Facility Services' introduction of the Facilities Team Lead (FTL) position to address key client service principles such as:

- Single point of access
- Accountability for service delivery and issues management

However, in the current state, FTLs do not have responsibility for the resources required to provide the service. Facility Services' proposed structure (May 2006) recommends transferring construction activities into the operations portfolio.

Public Sector organisations continue to find innovative ways to meet the increasing demands of client groups while faced with mounting resource constraints. Large organisations have realized benefits from centralizing shared resources and by applying a disciplined approach to understanding what activities are core to their mandate. Both the public and private sectors have realized the benefits of designing structures that focus on these core activities to achieve focus, clarify accountabilities and drive value without the distraction of providing non-core services that could be more effectively performed elsewhere. Interim or time-specific positions are being used more and more to provide organisations with flexibility to achieve specific goals. For example, organisations facing years of major capital development and strategic management of real estate may create a time specific, senior level position outside of Facilities to lead the long term capital development project. Examples of this model can be found in universities and hospitals.

Facility Services, in the context of the system level TDSB Review may find opportunities to realign services that are not core to delivering on its mandate of Fine Facilities.

5.4.4 Summary and Recommendations

The Consulting Team acknowledges that changes to the TDSB structure may be forthcoming which may impact the relevance of the following organisational design recommendations. In particular, TDSB decisions regarding key activities: enrolment and projection planning; real estate and long term capital planning should inform additional changes to the Facility Services structure. The Consulting Team also acknowledges that the recommendations provided do not take into account current resources, individual skill sets and management capacity to support the recommendations.

This section provides a series of recommendations that can be implemented to directly improve client service and productivity as well as some considerations regarding the key activities under review within TDSB at the system level. These recommendations have been designed to make the Facility Services structure more effective, efficient and aligned to the Facility Services mandate.

Recommendations

1. Ensure the Executive Officer has direct accountability for the client service delivery model through the direct reporting of Regional Managers to the Executive Officer.
2. Re-evaluate the number of Regional Managers and scope of responsibility to ensure this position is well designed to achieve the client service and performance targets. These positions should align to the system level TDSB structure to enhance TDSB collaboration.

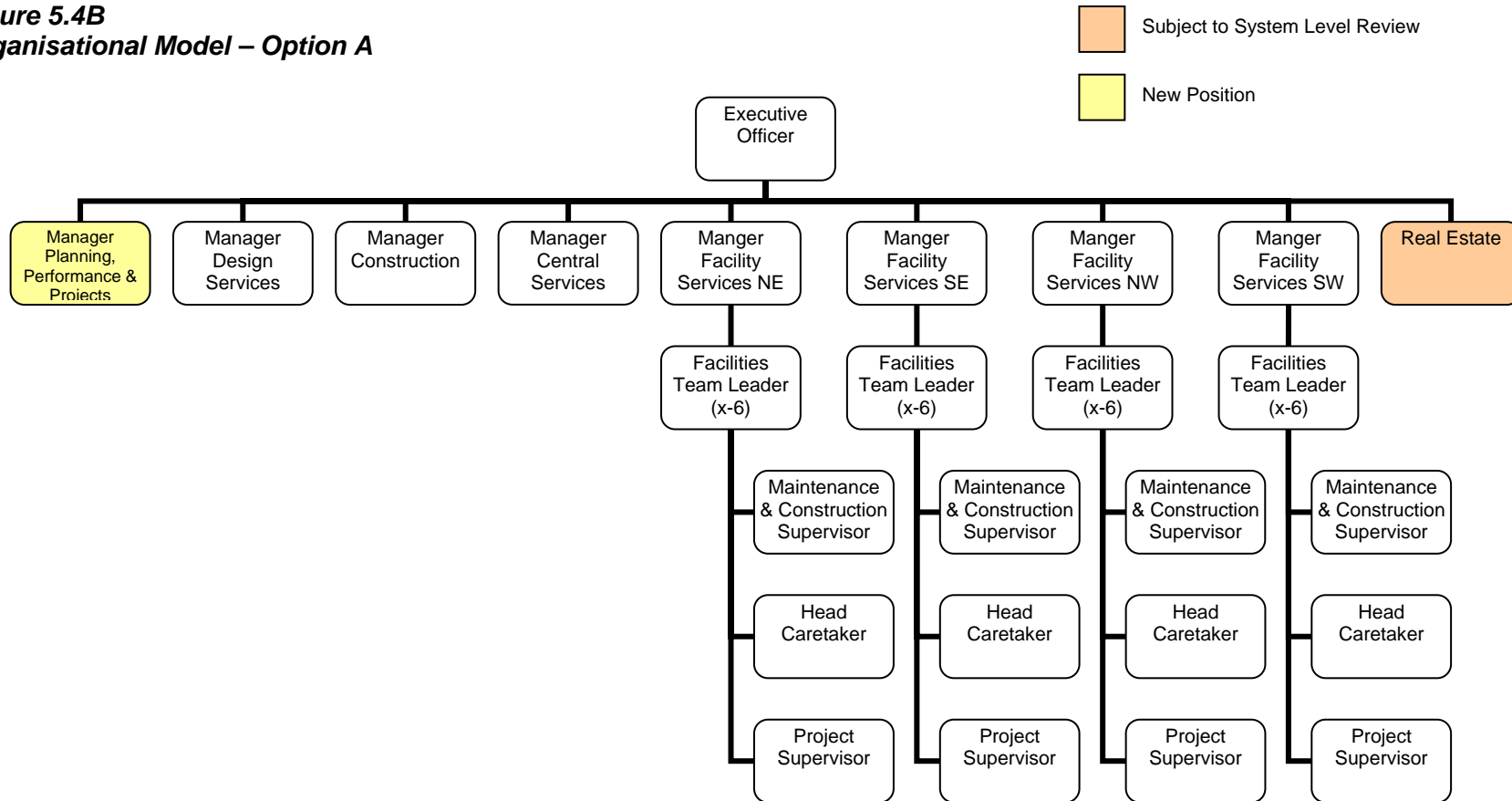
3. Proceed with the Facility Team Lead model contemplated in the proposed delivery model prepared by Facility Services (May 2006). Align the FTL model to the overall structure adopted by TDSB (i.e. by geography, type of school or other).
4. Facility Services should also examine the feasibility of transferring from D&C to Operations the responsibility and resources for projects that can be more effectively and efficiently delivered by Operations or where delivery by Operations will increase client satisfaction. The initial starting point for this examination should be projects done by D&C with a value less than \$25k. This will provide the FTLs with the resources to better deliver coordinated services to the schools.
5. Ensure there is an appropriate balance between the resources allocated to caretaking and facility condition work, by continuing to explore with a representative group of Principals, School Councils and Student Councils, the relative importance and current satisfaction levels for these two programmes.
6. Ensure there is an appropriate level of resources allocated to grounds maintenance, by continuing to explore with a representative group of Principals, School Councils and Student Councils, the importance of the condition of grounds relative to the condition of inside facilities.
7. Conduct a more detailed review of the geographic location of resources to identify opportunities to more effectively connect resources to a team, closer to the equipment they require as well as client locations. This review should align to TDSB system level geographic models.
8. Transfer the support activities such as staff development positions to Employee Services and establish a service level agreement to address concerns about service levels.
9. Restructure the Real Estate portfolio to build strategic competency, which includes planning, process and people, focused on managing this unique asset to maximize the Return on Asset (ROA).
10. Conduct a detailed review of the span of control for all positions within Facility Services including a review of the number of levels required to ensure compliance to TDSB goals.
11. Create a unit to support Facility Services organisational performance processes which would include resources to support the following activities: performance measurement and management, quality initiatives and innovation, leading practice and benchmarking, project and change management, issues management, communication and stakeholder consultation.
12. Assess management capability and establish a management development programme to ensure employees are prepared to take on the management challenges within TDSB.
13. Review protocols for Trustee requests and work with TDSB Director to ensure processes are appropriate and in place. Consider including these protocols in the Trustee orientation programme.

14. Establish service level agreements between the departments providing support to Facility Services such as Employee Services and Business Services to make sure adequate resources are provided to support Facility Services' business requirements.
15. Consolidate Facility Services planning with other enabling portfolios such as design, standards, environment and energy.
16. Review the planning process in its entirety and function within Facility Services to determine which elements are core to Facility Services operations and evaluate options for transferring system level planning to a corporate function. This recommendation must be considered in the context of the System Level Review.
17. Conduct a detailed review of Facility Services' corporate support requirements with regards to budgeting, reporting, community consultation and communication.

These recommendations describe an ideal future state and will require careful transition to ensure effective transference of activities, clarification of roles and responsibilities by position, development of skill sets to manage changes to portfolios as well as considerations for Facility Services employees.

The Consulting Team has drafted 2 models for consideration by TDSB. Key attributes of the model are described below in Figures 5.4B and 5.4C.

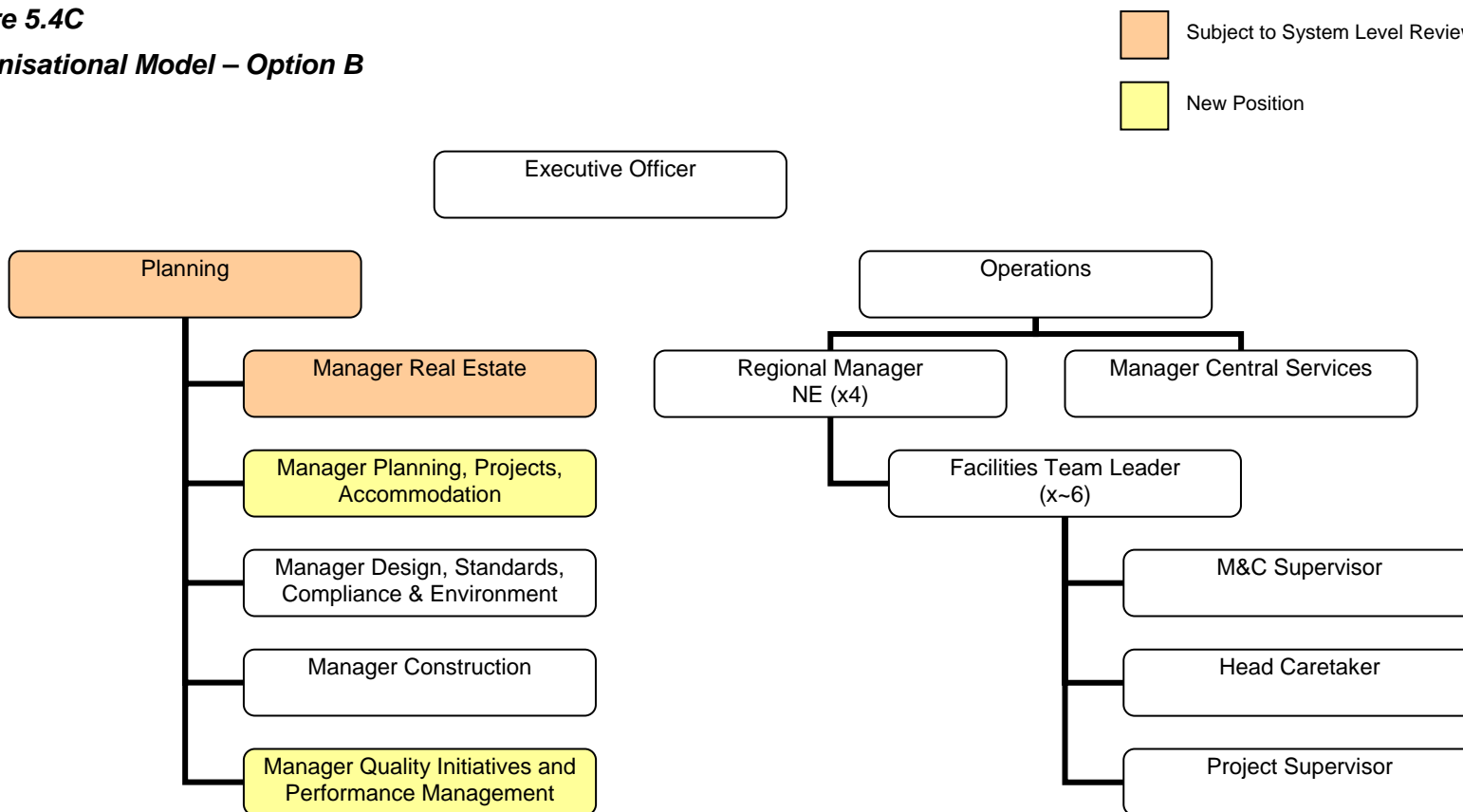
Figure 5.4B
Organisational Model – Option A



Attributes of Option A

- Focus on Facility Services operations
- Eliminates management layer within Facility Services
- Expands span of control
- Achieves client service focus at senior level
- Builds on strength of FTL model
- Builds capacity for organisational initiatives
- Planning may be system level or Facility Services focus only depending on outcome of System Level Review

Figure 5.4C
Organisational Model – Option B



Attributes of Option B

- Consolidates 2 main streams of activities within Facility Services: Planning and Operations
- Expands span of control
- Achieves client service focus at senior level
- Builds on strength of FTL model
- Builds capacity for organisational initiatives

5.5 Value

5.5.1 Overview

As with client service, value is an increasingly important issue facing government and public facing private organisations for similar reasons. The public is holding these organisations accountable to the dollars that are spent and comparing it with the service they receive. In an environment with severe budget pressures, investing resources where they can have the most impact is crucial.

As outlined in the Environmental State review ([section 5.1](#)), the amount of funding that the TDSB receives from the Ministry has historically been less than is needed to cover the Board's budgetary needs. This issue is highlighted especially in Facility Services processes where projects are completed utilizing Ministry grants and school budgets. In this tight monetary environment, the good value received in return for investment is an important indicator not only of client satisfaction, but also of efficient use of resources including staff.

Through documentation review and analysis as well as interviews, the Facility Services Review evaluated whether Facility Services is delivering value that is appropriate for the investment of resources. The Review also evaluated:

- The cost-effectiveness of the current balance between hiring staff and purchasing service in Design and Construction
- The extent to which current tendering processes for major renewal projects result in contract awards that provide good value for money

5.5.2 Findings and Analysis

Design and Construction

The Design and Construction group is responsible for carrying out all major renewal projects within schools and those smaller projects that are beyond the scope of the Operations group. Major construction projects generally are those that have been captured in the ReCAPP programme, while other projects originate from site-funded requests from schools and emergency repairs, especially those that have health and safety implications.

The Design group is composed of 18 individuals. Once a project is identified, it is these individuals who arrange for production of the drawings from which the tradespeople work.

The Construction group is composed of 490 trades staff supervised by 5 Project Supervisors responsible for in-house projects. As well, there are 12 Project Supervisors who look after contract projects, within the two families of schools for which they are responsible. These contract Project Supervisors supervise all contractors who may be working in their respective schools. With this size of group, maintaining open communication channels is very important. One of the main complaints that Facility Services clients have is that there is lack of communication from D&C. The liaison people within D&C are the Project Supervisors. It is these individuals who are responsible for letting Principals know when trades staff will arrive on

their premises and when work will be completed. D&C has specific processes outlined for communications protocols, and carries out two communications audits per year to ensure that these protocols are being followed. According to D&C, results from the most recent communications audits revealed that communications for contracted work is satisfactory, while there are some concerns with communications for in-house work. .

D&C defines major renewal projects as those that have a budget of \$100k or more. The majority of these projects are carried out by contract staff, unless it is more cost effective for in-house trades to perform the work. For example, D&C has a quality award winning window production team and has determined that for all window replacement projects, it is more cost effective for the experts within D&C to perform the project, even if it is over \$100k. It should be noted that D&C's definition of major renewal projects is different from that of the Purchasing Department. Purchasing defines a major project as one that is over \$1M.

Tender Process

As a public organisation, the TDSB must follow a mandated process to acquire contractors. Within D&C, this process is different depending on the value of the projects to be completed.

For projects that have budgets over \$1M or additions greater than 500 ft², of which there are 2-3 per year, contractors must follow a pre-qualification process in order to be invited to participate in the tender process. The pre-qualification process ensures that contractors meet for example, insurance requirements, City of Toronto fair wage policy, experiential qualifications and other qualifications that the TDSB requires.

For projects under \$1M, contractors must also undergo a pre-qualification process. Contractors that qualify are placed on the VOR list and are eligible to bid for projects. Currently, the D&C VOR list contains 128 contractors. The number of contractors on the list may fluctuate from year to year depending on a variety of factors. For example, if additional funding becomes available for construction projects, an invitation for qualified contractors may be advertised. The invitation to the pre-qualification process can be directed to specific trades if the VOR does not carry a sufficient number, or it can be a general invitation to contractors. It is therefore possible for a contractor to be on the VOR for several years at a time as there is no set interval for renewal of the register. It was however, mentioned by the Purchasing Department that a contractor on the list may be required to provide proof of compliance at any time if it is suspected that there have been changes in any of the pre-qualification requirements e.g. changes in insurance policies.

For planned projects, Design Coordinators define the budget based on their experience and with information from consultants and other key individuals. Based on this budget, a tender is developed within 3 days following receipt of specifications and drawings. Bids are typically invited from 6-8 contractors who are on the VOR list. A specific process is utilized to select the 6-8 contractors to ensure fair representation on the bidders list. Contractors may be removed from the VOR for failing to bid when they are invited or for other negative performance issues such as repeatedly failing to meet project requirements.

Once bids are received for projects, the budget that was originally set by the Design Coordinator can be revised to best reflect the value of the bids received. The winning contractor (usually the lowest bidder) is commissioned to begin the work within 3 days of receiving winning notification.

Projects under \$100k

Approximately 25% of the Construction budget is completed by in-house staff and the majority of these projects fall under this heading. It was made clear to the Consulting Team that while most projects under \$100k are completed by in-house trades, D&C management have the obligation to show that they are offering competitive rates as discussed earlier.

The work for these projects is typically initiated by a concern from the Principals or Head Caretaker or is part of the prioritization list created by the walk around as discussed in [Section 5.2.2](#). Once a work order is received, a Design Coordinator investigates the request and submits a budget recommendation for approval by the Manager of Design and Construction. D&C receives over 1,200 site-funded and health and safety or emergency requests per year. It would not be feasible for Design Coordinators to visit every work site for a budget estimate. In addition, it would sometimes be more costly to carry out these estimations than it would to perform the job. In such cases, the Design Coordinators present drawings and a budget estimate based on their experience and using the standard rates that D&C has defined. Once a project budget has been approved following the documented sign-off, the project is released to trades staff for work to commence. It was mentioned during stakeholder interviews that a source of delay in this process is at the design step because any work which requires drawings cannot commence without the drawings from the Design Coordinator.

Make vs. Buy Decisions

TDSB does not have a policy on whether to provide the services in-house, “make”, or to contract out the service, “buy”. Facility Services has developed a departmental “make vs. buy” guideline and self-assess their compliance. This is another example where the Board could increase its support to Facility Services by providing policy direction and periodic compliance assessments.

Approximately 75% of total project dollars are for projects that are completed by external contractors. This percentage changes based on the overall annual D&C budget and the type of projects that are required. For example, in-house staff do not perform roofing work, or boiler and chiller replacements. Therefore for a year with major roofing or boiler issues, there may be a higher percentage of project work completed by external contractors.

Aside from the project type, the make vs. buy decision is based on the cost efficiency of using in-house staff over contractors. As mentioned, for projects where in-house staff have expertise, for example window replacement, it is more cost effective, as determined by Facility Services, to use TDSB staff. Another benefit for using in-house staff is that they are easier to mobilise for emergency and health and safety complaints where quick response is essential, or when the scope of work is difficult to define. The management also believes that in-house staff have established relationships with Head Caretakers and Family Team Leaders and therefore know and understand the schools better.

D&C has a detailed process describing how to benchmark project costs against external contractors. This methodology has several flaws. The first is that D&C is using labour costs only and comparing them to fully loaded costs (i.e. overhead, profits) provided by external contractors. Furthermore, the external contractors used as comparators are on the VOR list and therefore may not be perceived as a fair representation of the overall industry. In addition to the flaws mentioned above, the documentation provided revealed that there are no benchmarking studies carried out against other school boards in any jurisdiction. Most importantly, it appears that there is no comparison of productivity of in-house staff vs. contractors i.e. no documents revealed a study where a direct comparison of labour hours utilised to complete a project was considered. Labour rates, which D&C are using as benchmarks, should not be the only factors in determining make vs. buy decisions because these rates are typically the same for internal staff as they are for contract staff.

5.5.3 Implications and Discussion

Make vs. Buy

Over the past 3 years, D&C has increased their trades staff by approximately 33%. This increase does not appear to have been driven by a need to realize financial benefits of having more in-house staff. The increase may have improved the time to service for emergency repairs due to the knowledge of schools from in-house staff, but it has not moved client satisfaction with timeliness to a satisfactory level. While faster response and greater knowledge may play an important role in improved client service, the cost effectiveness of hiring vs. contracting should ultimately be determined by considering the productivity obtained for a given cost.

While the processes that D&C has developed to determine whether to use in-house staff or contract staff exist, they do not adequately prove that the department is obtaining the best value for the money they spend on resources to complete projects.

Tender Process

Currently, the pre-qualification process for projects over \$1M is feasible because the number of projects in this category is small. However, as the number of renewal projects increases within TDSB due to the age of buildings, the value of performing a pre-qualification process for every single project will have to be reconsidered.

There are several benefits and risks associated with the current tender process for projects below \$1M. A quick review of other public school boards and organisations revealed a variety of options for tendering projects that fall within this category. For example, one school board did not have a pre-qualification process for any projects, while another had a mix depending on the value and location of the project. It is important to note that the TDSB's tendering process is constrained by the terms of the fair trades council and the collective agreement.

For TDSB, the current pre-qualification process reduces the burden on the purchasing department in terms of reviewing all bids. In the current system, bids are received from contractors that have already met the general requirements of the TDSB, and therefore the review undertaken by the Purchasing Department is to consider pricing, materials and timelines,

and not such things as insurance, licensing, bonding etc. There is however, a risk that the VOR list that is created from this pre-qualification process will become stale. As well, since there is no requirement that contractors on the list re-qualify after a given period of time, there is a risk that TDSB is unknowingly carrying on its VOR contractors whose qualifications have changed. While in general the implications on the quality of work completed by D&C may not be large, the transparency of the bidding process could be questioned.

It was mentioned that the number of contractors on the preferred list varies depending on the provincial funding received by D&C and on the state of the construction industry. Sometimes D&C receives a low response rate for projects, a situation that makes it difficult to ensure that bids are the most competitive. This low response rate may be caused by a reluctance of contractors to bid when they are unsure of whether the work can be completed in the given timelines. D&C is well-known for its strictness with project completion dates and contractors may be unwilling to risk penalty fees of being unable to meet timelines. While the rationale for inviting bids from a limited number of contractors is understandable – faster, more efficient reviews by Purchasing Services – situations of low response rates are not necessarily consistent with realizing the best value and raises questions about whether the VOR processes is as effective as it could be.

5.5.4 Summary and Recommendations

D&C appears to have a very good system of documenting and auditing processes that are used to determine flow of work within the department. However, these processes will need to be redesigned in order to increase transparency and flexibility, as well as to align with new structures and goals.

Recommendations

1. Obtain Board endorsement for its “make vs. buy” guidelines and the processes used to apply these guidelines.
2. Strengthen the process for comparing internal costs vs. contract costs and industry comparators.
3. Maintain the tendering processes and continually evaluate to meet periods of increased high-value project work.

5.6 Prioritization and Planning

5.6.1 Overview

Through documentation review and analysis as well as interviews, the Facility Services Review evaluated how well Facility Services is determining current priorities and preparing for future challenges. The Review also evaluated:

- Processes by which Facility Services determines priority for work to be done in schools for maintenance
- Processes by which Facility Services determines priority for major renewal projects
- Facility Services' current approach to the development of a long-term capital plan for repair, renewal, or replacement of schools

5.6.2 Findings and Analysis

Prioritizing

Facility Services' maintenance processes have been described in [Section 5.3](#). In addressing the question of how maintenance work is prioritized, "maintenance" is defined as the activities of the Operations group to maintain and repair school buildings. Maintenance activities can be grouped into two broad categories: *preventive* (also referred to as *planned*) and *breakdown* (also referred to as *forced* or *reactive*).

Facility Services have indicated that following amalgamation, overall maintenance funding was reduced by more than 35%. This resulted in reduced planned maintenance and subsequently higher requirements for breakdown maintenance. It also contributed to the current the level of deferred maintenance, which is estimated to be \$1 billion.

In determining the relative priority of planned versus breakdown maintenance, breakdown maintenance takes priority. This is true both when the respective programmes are being planned and when they are being delivered. In recent years, the residual funds available for planned maintenance have been increasing and for three years starting September 2002, maintenance FTE's increased from 456 to 581, an increase of approximately 27%. In late 2004/05 Facility Services determined that an "adequate" level of maintenance had been achieved, following a period where maintenance was judged to be at only at a "reactive" level. Moving from "adequate" to "comprehensive" maintenance has been estimated to require a further 90 trades FTEs, however there are indications this figure might be low. As increased maintenance funding has become available, Facility Services has been taking steps to identify the optimal planned maintenance activities and frequencies.

Facility Services categorizes requests for breakdown maintenance as: emergency, urgent or normal/routine. At the "adequate" maintenance level the time standards for responding to requests are:

- Emergencies - 1 day

- Urgent – 5 days
- Normal – 1 month

As described previously in [Section 5.3](#), the school Head Caretakers makes the initial determination of the nature of the request (emergency, urgent or normal), but the Team Lead Assistant (TLA), or in some cases the Family Team Leader (FTL), makes the final determination. It is not unusual for the TLA or FTL to adjust the priority indicated by the school. Emergencies take priority over all other work and trades are frequently required to leave one school where they are working on urgent or normal requests or preventive maintenance, to respond to an emergency request at another school.

Once a maintenance request has been assigned to a tradesperson by the TLA or FTL, that individual has considerable flexibility in determining when the work will be done, i.e. determining its relative priority in a long list of outstanding work. The guidelines provided to trades staff are to respond to the oldest requests first while taking in account the category (urgent or normal), the existence of other requests for the same school, minimizing travel time and the time required to complete the job versus the remaining working time available that day.

Major Renewal Projects

Major Renewal Projects are projects that are funded by an annual Renewal Grant and are major facility components like boilers, roofs, floors, etc. The Major Renewal Project process is a highly consultative process. The TDSB uses ReCAPP to plan and prioritize the renewal of physical assets using lifecycle planning principles. ReCAPP is used to report the Facility Condition Index (FCI) and the Renewal Backlog.

The process for the Renewal Process is as follows:

1. Assess building and site with regards to condition, site, suggested replacement timetable, suggested replacement cost
2. Develop relative priorities for building components
3. Review components that require renewal in the next 3-5 years
4. Present renewal project report (ReCAPP) to Stakeholders including Trustees, Area Superintendents and Principals
 - i. Gather input on accuracy and completeness
 - ii. Gather input on prioritization of projects
5. Analyze input
6. Develop Conservation Maintenance Programme
7. Family Team Leaders to review programme and provide feedback where required
8. Programme approval by Board

Step 1 is compiled by 3 groups of consulting engineers. Facility Services also confers with tradespeople who are familiar with the facilities and consolidates their input with that of the consulting engineers.

Step 4 is very consultative which adds to the length of the process. While the consultative process can be used to engage stakeholders and communicate progress that has been made, it must be weighed against the value and the use of the information collected as well as the effort expended to collect the information.

In the document 'Renewal Priorities – Site Consultation Process', it was commented that "adjustments are being made in the database to track [changes to priority] requests and they may be used to help choose renewal projects within that particular building. The actual priority of the component renewal will/cannot be changed in the database". This statement questions the value of the collecting the re-prioritization requests in step 4 or the flexibility of the system and/or process.

The Facility Services' document Renewal Priorities – Site Consultation Process indicated that the consultative input collected from the stakeholders confirmed that the information in the database was approximately 93% accurate.

Capital Planning

From the documentation review, interviews and consultation with staff, it is clear that Facility Services is well aware of the major backlog of capital projects, as well as future renewal requirements. The department, along with the rest of the organisation, has recognized the need for a coordinated, long range capital plan. This plan is scheduled to be presented to the Board in June 2007.

Facility Services initiated the long-term capital planning project 3 years ago. There is a significant amount of confusion by stakeholders, in particular Trustees and Union management, as to the status of the long-term capital plan.

A review of the supplied documentation showed that this initiative has had many names over the past 3 years including, but not limited to Schools for the Future, Facilities Deep Retrofit Programme, Facilities Strategic Framework, 3Rs for 2020 – Renewal Reconstruct or Replace. The various names of the project have likely caused some of this confusion among the TDSB staff and Board contributing to the belief that the process has stalled. Additionally, communication about the progress of this vital initiative has not been consistent or widespread.

In October 2006, a new long term capital planning team was introduced, called the Stewardship of Capital and Financial Assets Core Change Team. This team was created in response to the Directors Plan for 2006/2007, in which three major commitments for 2006/2007 are outlined. These commitments are

- 1) Improving Student Success;
- 2) Improving Service to Schools, Community and Board; and
- 3) Improving Stewardship of Capital and Financial Assets.

The mandate of the Stewardship of Capital and Financial Assets Core Change Team is to link asset management with programme and community needs. The plan will outline what is possible with existing funding sources and additional opportunities that would be possible with increased funding or new sources of revenue.

With regards to the capital planning process, a second team, the Programme Revitalization Core Change Team has been created to develop the first commitment of Improving Student Success. This team will be providing direction to the Stewardship of Capital and Financial Assets Core Change Team with regards to the programme requirements of the schools.

Cross Functional Membership

Through the review of documentation of the capital planning process prior to the new capital planning team, it was clear that Facility Services had involved cross functional teams in the development of the long term capital plan. The membership of the teams included Facility Services, School Services and Business Services. These cross functional teams brought forth system awareness of the need for a long term capital plan.

The new capital planning team, The Programme Revitalization Core Change Team has established a cross functional team in the development of the long term capital plan. The membership of the teams included Facility Services, School Services and Business Services.

The current capital planning process developed the report Prioritizing Review Areas. The report outlines the roles of the TDSB departments with regards to the Capital Planning Process as follows:

- Programme School Services defines the vision
- Facility Services builds the vision
- Business Services pays for the vision
- Employee Services staffs the vision
- The Board informs and approves the vision

Process

It was found that while there have been accomplishments made and project management principles put in place, the robust processes required to manage a project of this magnitude and importance have not been put in place. While a mandate of the Capital Plan has been created, there is no complete documentation that outlines clearly defined roles and responsibilities, scope, comprehensive stakeholder engagement process, committee structure and interdependencies, work plan and deliverables. Additionally, there is no defined communication plan to communicate the findings to the senior management of the TDSB or the Trustees.

In the winter/spring of 2006, the Ministry requested that all school boards develop review areas within which issues of student accommodation can be addressed. It seems that the staff capitalized on this request and decided that pilot areas, based on the accommodation review areas, would be reviewed to assist in the development of the capital plan. The two areas that were prioritized for the pilot review are Area 1: Bendale BTI, David and Mary Thomson CI, Highbrook, Donwood Park Jr. PS and Edgewood PS and Area 8: Yonge-Sheppard Corridor.

The Student Success Core Change Team is reviewing the programme requirements of these two areas. The Stewardship of Capital and Financial Assets Core Change Team has engaged a consultant to assist with the development of the capital plan for these two areas.

Engagement

The current capital planning process is building upon work and findings from the previous initiatives. The previous phases were highly consultative with the schools, superintendents, Trustees, parents, students, and community and government partners.

In an earlier guise of the capital planning process, Facility Services developed Guiding Principles to help guide the development of the Capital Plan. While the consultative process in a public organisation is vital, it is important that the stakeholders are engaged in a thoughtful and meaningful way. In reviewing the document “Report on the Consultation and Response to the Draft Guiding Principles”, it was found that the respondents felt in some instances that they did not have the appropriate information to answer the questions. In addition, a review of the survey questions found that many survey questions were unclear, biased, or asked too much for one multiple choice question.

A review of the Board Minutes of the past 9 months found that there has not been a comprehensive and clear update on the status of the long term capital plan or process. Table 5.6B outlines items in the minutes that related to the Accommodation Review.

Table 5.6B
Board Minutes Capital Planning Items

Month	Items Related to Long Term Capital Plan
February	None
March	Pupil Accommodation Review Areas Pupil Accommodation Review: Prioritization of Review Areas, Stage 1
April	None
May	None
June	Pupil Accommodation Review Areas: Roadmap to 2010
July	None
August	None
September	Programme Revitalization Reviews: Areas 1 and 8

However, a summary of the completed tasks in process was outlined in a board report for the Pupil Accommodation Review in the March 8 2006 minutes. It is stated that

Staff is currently engaged in developing a long-term strategy for addressing the accommodation needs of the TDSB. This process has included:

- A *Schools for the Future Summit* which was held on September 24, 2005. The participants in this conference included Trustees, parents, union and federation representatives and senior staff.
- The four main issues discussed at the summit were the role of the school in the community, unfunded excess space, strategies for funding the Renew, Revitalize, Replace campaign, and rethinking how we build and renovate our schools.

- As a result of its discussions, the summit developed a set of 17 principles that should guide the development of the 10-Year Facility Infrastructure Plan.
- The principles developed at the summit have been shared with local communities across the TDSB through ward forums hosted by Trustees. A survey form was developed to provide feedback on the guiding principles.
- The guiding principles will form the basis of facility policy revisions that will determine the way in which facility related issues will be addressed in the future.

The Board is currently in the process of determining review areas for student accommodation. This is in response to a request from the Ministry of Education.

In reviewing the minutes of the Capital Planning Team, it is clear that the committee is aware of the need to have buy-in from the Trustees as well as Principals and teachers. While there has been consultation with these and other stakeholders, these groups are not aware of the larger picture of the capital planning process or the current state.

5.6.3 Implications and Discussion

Prioritization

The objective of planned maintenance is to minimize total costs or reduce to an acceptable level the possibility of a breakdown at an inopportune time. Planned maintenance minimizes total costs by extending equipment life or reducing the need for breakdown maintenance. Organisations typically base their planned maintenance activities and frequency on a combination of manufacturer or industry recommendations and their own experiences.

Budget levels for planned maintenance would normally be sufficient to carry out the optimal planned maintenance programme, since to spend less would lead to higher long-term costs and an increased frequency of breakdowns. Reductions to the optimal level of planned maintenance expenditures typically do not show up in increased costs and reduced equipment performance immediately. Where equipment is robust and has been well maintained, it may take years for the impact of planned maintenance under-spending to be obvious. When that point is reached, it generally requires a significant increase in planned maintenance expenditures to reverse the trend and to restore performance. For this reason organisations with large infrastructure will generally only slash their planned maintenance expenditures out of financial desperation.

When faced with reduced maintenance funding, assigning first priority to breakdown maintenance as Facility Services has done, is the only reasonable choice.

The differences between the priority indicated by the schools when submitting maintenance requests and that assigned by maintenance staff are widely known. It is less clear if the reasons for the differences are well understood. However, the unilateral act of changing the priority assigned by the school, combined with a lack of feedback to the school about the change is not the basis for a good client relationship.

The high degree of latitude that trades have in determining when work gets done combined with the limited tracking of completed work and the large volume of outstanding work orders, suggests that there is likely a general lack of consistency in the prioritization of individual work requests. With upwards of fifteen staff in more than four different work centres involved in the initial categorization of urgent or normal, there is also likely a degree of inconsistency in that prioritization process.

Major Capital Renewal

The major capital renewal planning process is highly consultative and hence very long. From the documentation provided, it is not clear whether the major capital renewal process is going to be integrated into the long term capital planning process. The types of projects that are included in major capital renewal overlap somewhat with the long term capital plan. By integrating the major capital renewal process into the long term capital planning process, a complete picture of the state of the facilities will be available to make better funding and prioritization decisions.

Long Term Capital Plan

TDSB is trending towards a crisis situation if long term capital planning is not completed in a reasonable time and implementation started immediately. Planning and implementation of the magnitude required for TDSB will require dedicated staff to complete the planning process and to oversee the implementation of the plan. The engagement of the Board of Trustees and senior management of the TDSB in this process is critical. It is these individuals who will make the major funding decisions and who will oversee the prioritization of initiatives over the coming years.

The cross functional membership of the oversight committees is a good management practice that the majority of organisations utilize when undertaking long term capital planning. By implementing this practice, TDSB understands how one area of the organisation informs the decisions of another area and that the development of a long term capital plan requires the involvement of a large number of people with a variety of skills and expertise.

The magnitude, length and public interest of the long term capital plan requires that a more robust project management plan be put in place. This will increase the probability of success, ensure tasks are completed on time, provide accountability, provide a transparent record of the process and ensure the continuous implementation of the plan.

5.6.4 Summary and Recommendations

Planning for the future is typically the responsibility of the senior executives and/or Board of an organisation. They typically see the picture of the organisation as a whole and have good insight into the environment in which their organisation operates. In addition, they have oversight of the resource allocation as well as the prioritization of initiatives. In an organisation like the TDSB, the development of a long term capital plan, similar to strategic planning, is informed by all of the departments, as it has effects on all of the departments. During the past 3 years, Facility Services has taken the leadership role in developing the long term capital plan for TDSB. However, to be effective and comprehensive, it must be driven from the senior leadership and cascaded throughout the organisation where appropriate. A highly engaged senior

management team and Board will assist in the successful implementation of the plan by driving the plan from the top and maintaining focus.

Other large public sector organisations with fewer facilities and a small real estate asset base have separated the long-term capital planning process including the management of major renewal and new build projects from daily operations. A group of expert resources create a unit to drive the process for a set period of time.

Recommendations

1. Facility Services continue to develop an optimal preventive maintenance programme and implement the programme as funding permits.
2. Facilities Services investigate how to provide maintenance staff with additional guidance and direction on how work is to be prioritized to balance fairness and efficiency considerations.
3. Facility Services improve the tracking of its performance against its time standards and use this information to ensure individual schools are receiving consistent levels of service.
4. TDSB review the long-term capital planning process to ensure the following:
 - Actively sponsored by the Board and Senior Team
 - Resourced effectively: members and skills
 - Positioned within the organisation to minimize disruption to operations
5. TDSB corporately outline the roles and responsibilities, scope, committee structure and interdependencies, work plan and deliverables of the Capital Planning Process and that these be updated as the plan is continually developed and implemented.
6. TDSB corporately develop a robust communication plan to inform the senior management team and the Trustees about the status of the Capital Planning process.
7. Facility Services ensure that engagement tools are clear, unbiased and designed to capture useful information. A mechanism for this is to undertake pre-testing to understand how the engagement be perceived.
8. Incorporate the Major Renewal Projects process into the long term capital plan.

6 Client Service Delivery Model

6.1 Overview

One of Facility Services' values is *service excellence and putting students first*. It became clear through the review process that client service is an important component of the objectives that Facility Services is trying to achieve. However, there did not seem to be a clearly defined, agreed upon model of what client service means to Facility Services.

To assist in this definition, the Consulting Team facilitated a working session with the M4R team to understand the aspects of client service that they were trying to achieve. The key components identified in the session include:

1. Client satisfaction
 - A minimum satisfaction rating of 80%
 - A measure of the number of "Kudos" from schools or no issues
 - Clients are delighted with Facility Services so that they do not ask for other service providers
2. Ease of access to service
 - One-stop shopping
 - Access through one person or one point of contact (i.e. having one number) so there is no confusion on the client's side covering all of Facility Services including real estate and planning
 - Contact person is resourced and has the capacity to make decisions and to solve the problem or provide further information
3. Deliver quality service
 - Minimize, reduce or eliminate rework
 - Efficient delivery of service is to stay on budget
 - Manage facility problems for the principals to take the burden away
 - Be invisible – the work gets done with no negative impact on the client
 - Deliver work in a safe manner so as not to expose client to hazards

Recommendations

1. Facility Services build upon the work completed prior to and at the M4R session and clearly articulate the client service model.
2. Facility Services cascade the client service model throughout the department and imbed the concepts into all processes and management performance programmes.

7 Future State: Summary and Recommendations

The basic purpose of the Review of Facility Services was to evaluate the extent to which the department was achieving the following:

- Programmes and services are achieving their intended purposes;
- Policies and processes are in place to support the achievement of the organisation's goals;
- Operations are conducted in ways that use resources efficiently and effectively; and
- The organisation is continuing to consider and implement changes for sustained improvement.

The report thus far has addressed the questions according to the framework provided by TDSB: Clear Objectives, Client Satisfaction, Organisational Structure, Value and Prioritization and Planning. This section of the report provides an integrated summary of recommendations by 6 themes:

1. Position the Facility Services Department for Success
2. Planning for the Future
3. Organisational Effectiveness
4. Strengthen Facility Services Management Systems
5. Deliver More with Existing Resources
6. Client-centred Service Delivery

In summary, our findings confirm that Facility Services is working hard to deliver programmes and services with current resource constraints. Initiatives have been launched to improve the ways that operations use resources to improve efficiency and effectiveness. There are clear indications that Facility Services is looking for ways to implement changes for sustained improvement. While the focus of this Review has been on Facility Services, it is important to acknowledge the system level and environmental challenges influencing Facility Services' ability to meet expectations. These challenges include:

- Ability of Trustees to provide clear, consistent, aligned directions
- Lingering challenges of managing a large complex amalgamation such as culture, labour relations, geographic scope
- Funding constraints
- Expectations of clients
- Aging facilities
- Unclear corporate policy and direction on management systems and cost allocation to schools

Most public sector organisations face similar challenges. The opportunity for Facility Services is to find innovative ways to work more effectively and affectively on the core activities that impact client service. The consulting team puts forward the following recommendations.

7.1 Position the Facility Services Department for Success

1. A TDSB “corporate” unit be assigned the responsibility for designing TDSB’s management system and providing the Facility Services Department with the guidance needed to ensure that Board-wide requirements are met.
2. Facility Services review how it can better address the expectations of the Operations and Facility Management Committee concerning the content and timeliness of its submissions to the Committee.
3. The Director of Education should clarify that the responsibility for policy and practice for interdepartmental cost allocation or fee for service, resides with the Business Services department.
4. Facility Services should review its interdepartmental cost allocation or fee for service practices, including the cost transfers within Facility Services, e.g. central services to regions, to ensure they comply with policy and practice, as communicated by Business Services.
5. Obtain Board endorsement for its “make vs. buy” guidelines and the processes used to apply these guidelines.
6. Conduct a detailed review of Facility Services’ corporate support requirements with regards to budgeting, reporting, community consultation and communication.

7.2 Planning for the Future

7. Facility Services develop a coherent and focused change agenda and prioritize initiatives for quarterly and annual review to achieve a disciplined results-based approach.
8. TDSB review the long-term capital planning process to ensure the following:
 - Actively sponsored by the Board and Senior Team
 - Resourced effectively: members and skills
 - Positioned within the organisation to minimize disruption to operations
9. TDSB corporately develop a robust communication plan to inform the senior management team and the Trustees about the status of the Capital Planning process.
10. TDSB corporately outline the roles and responsibilities, scope, committee structure and interdependencies, work plan and deliverables of the Capital Planning Process and that these be updated as the plan is continually developed and implemented.
11. Facility Services ensure that engagement tools are clear, unbiased and designed to capture useful information. A mechanism for this is to undertake pre-testing to understand how the engagement be perceived.
12. Incorporate the Major Renewal Projects process into the long term capital plan.

7.3 Organisational Effectiveness

13. Ensure the Executive Officer has direct accountability for the client service delivery model through the direct reporting of Regional Managers to the Executive Officer.
14. Re-evaluate the number of Regional Managers and scope of responsibility to ensure this position is well designed to achieve the client service and performance targets. These positions should align to the system level TDSB structure to enhance TDSB collaboration.
15. Proceed with the Facility Team Lead model contemplated in the proposed delivery model prepared by Facility Services (May 2006). Align the FTL model to the overall structure adopted by TDSB (i.e. by geography, type of school or other).
16. Facility Services should also examine the feasibility of transferring from D&C to Operations the responsibility and resources for projects that can be more effectively and efficiently delivered by Operations or where delivery by Operations will increase client satisfaction. The initial starting point for this examination should be projects done by D&C with a value less than \$25k. This will provide the FTLs with the resources to better deliver coordinated services to the schools.
17. Ensure there is an appropriate balance between the resources allocated to caretaking and facility condition work, by continuing to explore with a representative group of Principals, School Councils and Student Councils, the relative importance and current satisfaction levels for these two programmes.
18. Ensure there is an appropriate level of resources allocated to grounds maintenance, by continuing to explore with a representative group of Principals, School Councils and Student Councils, the importance of the condition of grounds relative to the condition of inside facilities.
19. Conduct a more detailed review of the geographic location of resources to identify opportunities to more effectively connect resources to a team, closer to the equipment they require as well as client locations. This review should align to TDSB system level geographic models.
20. Transfer the support activities such as staff development positions to Employee Services and establish a service level agreement to address concerns about service levels.
21. Restructure the Real Estate portfolio to build strategic competency, which includes planning, process and people, focused on managing this unique asset to maximize the Return on Asset (ROA).
22. Conduct a detailed review of the span of control for all positions within Facility Services including a review of the number of levels required to ensure compliance to TDSB goals.
23. Create a unit to support Facility Services organisational performance processes which would include resources to support the following activities: performance measurement and management, quality initiatives and innovation, leading practice and benchmarking,

project and change management, issues management, communication and stakeholder consultation.

24. Assess management capability and establish a management development programme to ensure employees are prepared to take on the management challenges within TDSB.
25. Review protocols for Trustee requests and work with TDSB Director to ensure processes are appropriate and in place. Consider including these protocols in the Trustee orientation programme.
26. Establish service level agreements between the departments providing support to Facility Services such as Employee Services and Business Services to make sure adequate resources are provided to support Facility Services' business requirements.
27. Consolidate Facility Services planning with other enabling portfolios such as design, standards, environment and energy.
28. Review the planning process in its entirety and function within Facility Services to determine which elements are core to Facility Services operations and evaluate options for transferring system level planning to a corporate function. This recommendation must be considered in the context of the System Level Review.

7.4 Strengthen Facility Service Management Systems

29. Facility Services strengthen its performance measurement and reporting system. This would include: identifying the critical success factors and indicators for each departmental programme and organisation level, tracking actual results and reporting of actual versus target results in a format and frequency that meets stakeholder needs.
30. Facility Services strengthen the contribution of the proposed new role for Facility Team Leaders to increasing accountability and customer service, by providing schools with a quarterly report card on the maintenance and construction services delivered and the timeliness of these services. This report card could be the basis for quarterly meetings between a principal and the responsible FTL to discuss the achievements relative to Facility Service standards and the school's expectations.
31. Facility Services continue to develop an optimal preventive maintenance programme and implement the programme as funding permits.
32. Facility Services review and revise the processes for providing emergency repairs to address the relatively low client satisfaction ratings.
33. Strengthen the process for comparing internal costs vs. contract costs and industry comparators.
34. Facility Services improve the tracking of its performance against its time standards and use this information to ensure individual schools are receiving consistent levels of service.

7.5 Deliver More with Existing Resources

35. Facility Services initiate a continuous improvement process to significantly increase the amount of time that trades staff spend correcting or preventing deficiencies. An appropriate target would be a productivity increase equivalent to an additional 100 FTE's within two years.
36. Facility Services take steps, consistent with the provisions in collective agreements, to maximize the amount of minor maintenance that caretaking staff are able to undertake in their school.
37. Facility Services undertake an objective comparison of the productivity of its in-house construction processes relative to external suppliers and subsequently, if warranted, identify opportunities to first match and then surpass external productivity levels.
38. Facilities Services investigate how to provide maintenance staff with additional guidance and direction on how work is to be prioritized to balance fairness and efficiency considerations.
39. Maintain the tendering processes and continually evaluate to meet periods of increased high-value project work.

7.6 Client Centred Service Delivery

40. Facility Services provide schools with an expected completion date for work and when work has the potential to disrupt school operations and that suitable work dates be agreed with the school.
41. Facility Services build upon the work completed prior to and at the M4R session and clearly articulate the client service model.
42. Facility Services cascade the client service model throughout the department and imbed the concepts into all processes and management performance programmes.

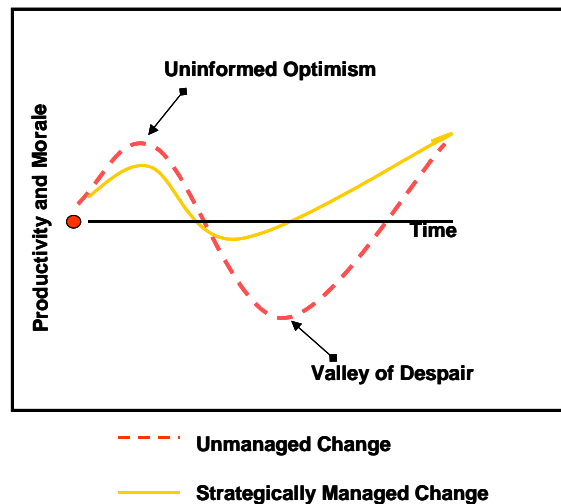
8 Creating the Change Agenda

8.1 Overview

Large projects and organisational transformations are typically prone to varying degrees of financial, technological and human risk. By creating the change agenda and managing the change, the organisation is better able to manage these risks. Change management is the application of a comprehensive approach and tools to ensure that organisational fundamentals – such as work processes, people, structure, culture and values – are aligned with the organisational goals. Change management is typically an integrated process that parallels all other project implementation activities.

Without a change management component, project risk is significant, and the response of stakeholders (e.g., frontline staff, management and schools) can cause tremendous swings in productivity and morale. Change management activities seek to “normalize” this response by keeping abreast of stakeholder sentiment and responding quickly with appropriate action. Figure 7.1A demonstrates the variance in response produced by strategically managed change vs. unmanaged change.

Figure 7.1A
Strategically Managed Change vs. Unmanaged Change



It has been well documented that lack of adequate change management is responsible for the failure of structure and systems implementations. Change management can enable Facility Services to achieve desired results, including:

- Project completion on time and within budget;
- Increased capacity to assimilate change and respond to future change pressure;
- Enhanced ability of all levels in the organisation to deal with transitions; and
- Implementation with minimal anxiety and reduction in productivity.

To assist with change management within Facility Services, the Consulting Team facilitated the M4R Team to begin to identify the components for successful change and prioritization of initiatives. The results of these sessions are outlined below.

8.2 Moving Towards Successful Change

Barriers to change exist in all organisations; some are easier to address than others. In order to move towards successful change, a key exercise is to

1. Identify the barriers that exist
2. Understand what is within the organisation's ability to change or influence
3. Develop strategies to address the barriers so that change can be successfully implemented and risks mitigated

The M4R Team identified ten barriers to successful change within Facility Services. They are

1. High workload - volume
2. Limited resources – people, budget, equipment
3. Large organisation
4. Diversity of communities within the TDSB
5. Changing political agendas
6. High client expectations
7. Varying or unclear leadership expectations (i.e. Trustees, senior management)
8. Staff morale (i.e. staff are tired, uncertainty, fear of change)
9. Collective Agreement
10. Service Level Agreement between Facility Services, Business Services and Employee Services

Facility Services should continue with the exercise to understand their scope of influence upon the identified barriers and develop strategies to mitigate risk.

8.3 Prioritization Criteria

TDSB has undergone planning exercises to ensure that the organisation is managing daily operations as well as preparing for the future. This planning includes yearly department plans and the longer term strategic plan. Many initiatives have been developed through these exercises. In fact, the sheer number of initiatives can be overwhelming when trying to distribute a limited number of resources (including but not limited to money, people, equipment).

To assist Facility Services to wisely distribute the resources to the critical initiatives that will have the highest effect, the Consulting Team facilitated a session with the M4R Team to develop a list of prioritization criteria. These are criteria are outlined below:

1. Immediate impact on more schools

2. Potential for greater cost savings
3. Improve staff morale
4. Ease of implementation
5. Compliance with regulations
6. Compliance/adherence to funding
7. Alignment to system priorities
8. Health and safety

The criteria are designed to assist Facility Services in determining which initiatives are more important in order to focus resources on a critical few initiatives, thereby enhancing the likelihood of success.

Facility Services should further refine these criteria and apply it to projects underway to determine which ones to stop, continue with or accelerate. New initiatives should be evaluated against these criteria as well. The result will be a focused portfolio of projects, planfully resourced and monitored for completion and measurable results.

Appendix A

Stakeholder Engagement

Appendix A

The following individuals provided valuable insight into the processes and perceptions of the Facility Services Department. The group interviews ranged in size from 3 individuals to 6 individuals; the names listed are the main contacts for the respective groups.

Individual Interviews

Director of Education	Gerry Connelly
Executive Officer	Sheila Penny
General Manager	Frank Coppinger
Manager, Design & Construction	Richard Kalmin
Manager, Planning	Andrew Gowdy
Manager, Real Estate	Gabriella Sicheri
Manager, Standards, Compliance and Environment	David Percival
Senior Administrator, Construction	Mohamed Attalla
FS Central Manager	Jerry Snajder
FS - NE Regional Manager	Steve Shaw
FS - SE Regional Manager	Bob Hawkins
FS - SW Regional Manager	Rick Daigle
FS - NW Regional Manager	Gail Farquharson
Executive Superintendent, Employee Services	Penny Mustin
Executive Superintendent - School Services, Student Success	Melanie Parrack
Trustee	Irene Atkinson
Trustee	Sheila Cary-Meagher
Trustee	Bruce Davis
Trustee	Sheila Ward
Trustee	Chris Bolton

Focus Groups

Operations & Facilities Management Committee	
Trustee	Scott Harrison
Trustee	Howard Goodman
Trustee	Noah Ng
Trustee	Mari Rutka

<p>Superintendents</p>	<p>Jill Worthy Elizabeth Bewley Thompson Kerry-Lynn Stadynek Kathleen Meighan Michael Smith</p>										
<p>TSAA</p>	<p>Karl Sprogis (Chair) Ami Trefler (Vice-chair) Ralph Nigro Virginia Hoffman Aldona Volunge Donald Stuart Beth Mills</p>										
<p><u>Group Interviews</u></p> <table> <tr> <td data-bbox="183 898 1015 932"> <p>General Manager, Information Technology</p> </td> <td data-bbox="1015 898 1437 932"> <p>Jacob Chan</p> </td> </tr> <tr> <td data-bbox="183 932 1015 1003"> <p>System Superintendent - Special Programmes (including Continuing Education)</p> </td> <td data-bbox="1015 932 1437 1003"> <p>Nadine Segal</p> </td> </tr> <tr> <td data-bbox="183 1003 1015 1037"> <p>Central Co-ordinating Principal, Continuing Education</p> </td> <td data-bbox="1015 1003 1437 1037"> <p>Judy Whitfield</p> </td> </tr> <tr> <td data-bbox="183 1037 1015 1071"> <p>Executive Superintendent, Business Services</p> </td> <td data-bbox="1015 1037 1437 1071"> <p>Don Higgins</p> </td> </tr> <tr> <td data-bbox="183 1071 1015 1123"> <p>MCSTC</p> </td> <td data-bbox="1015 1071 1437 1123"> <p>Jimmy Hazel & other officers</p> </td> </tr> </table>		<p>General Manager, Information Technology</p>	<p>Jacob Chan</p>	<p>System Superintendent - Special Programmes (including Continuing Education)</p>	<p>Nadine Segal</p>	<p>Central Co-ordinating Principal, Continuing Education</p>	<p>Judy Whitfield</p>	<p>Executive Superintendent, Business Services</p>	<p>Don Higgins</p>	<p>MCSTC</p>	<p>Jimmy Hazel & other officers</p>
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<p>Executive Superintendent, Business Services</p>	<p>Don Higgins</p>										
<p>MCSTC</p>	<p>Jimmy Hazel & other officers</p>										

Appendix B

Client Survey Responses

Appendix B

Parts One and Two of the survey were analyzed using a five-point scale for measuring satisfaction, importance or agreement level. The average of the responses is calculated, with the results reported as a percentage, where 0% is low and 100% is high. For example, Unacceptable is 0%, Needs Improvement is 25%, Satisfactory is 50%, Good is 75%, Excellent is 100%. This method is different from other survey methodologies that define client satisfaction as the percentage of respondents who are *satisfied* and *very satisfied*, i.e. top two boxes.

Part One: Analysis of Responses from All Cohorts

Satisfaction Rating Scale

Unacceptable 0%	Needs Improvement 25%	Satisfactory 50%	Good 75%	Excellent 100%
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Importance Rating Scale

Very Unimportant 0%	Unimportant 25%	Neutral 50%	Important 75%	Very Important 100%
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Question:

Please rate the Cleanliness and the Importance of Cleanliness in your school in the following areas

Results:

	School Council		Parent Council		School Principal	
	Satisfaction Average	Importance Average	Satisfaction Average	Importance Average	Satisfaction Average	Importance Average
Building Exterior	75	85	61	89	65	88
Cafeteria	68	90	63	96	66	92
Classrooms	72	96	63	94	62	96
General Administrative Area	91	81	72	84	73	90
Grounds	67	88	54	91	61	93
Gymnasium	86	87	71	88	69	94
Main Lobby, Hallways and Stairways	81	87	71	91	70	95
Portable Classrooms	90	88	60	86	67	95
Resource Centers	88	86	70	88	71	93
Science Laboratories	87	85	59	89	65	90
Washrooms and Shower Facilities	52	90	50	96	55	96

Question:
Overall, how would you rate the Cleanliness of the school?

Results:

	Satisfaction Average
School Council	78
Parent Council	56
School Principal	64

Question
Please rate the Condition and the Importance of Condition in your school in the following areas

Results:

	School Council		Parent Council		School Principal	
	Satisfaction Average	Importance Average	Satisfaction Average	Importance Average	Satisfaction Average	Importance Average
Building Exterior	73	88	56	86	60	88
Cafeteria	75	91	56	95	67	95
Classrooms	75	94	61	95	59	94
General Administrative Area	92	85	69	86	70	92
Grounds	69	89	51	92	55	92
Gymnasium	77	87	68	88	61	93
Main Lobby, Hallways and Stairways	78	89	66	92	64	92
Portable Classrooms	80	94	56	81	68	93
Resource Centers	86	84	66	85	68	93
Science Laboratories	79	85	57	88	57	92
Washrooms and Shower Facilities	53	90	50	97	50	91

Question:
Overall, how would you rate the Condition of the school?

Results:

	Satisfaction Average
School Council	73
Parent Council	54
School Principal	55

Question:
Please rate the Comfort and the Importance of Comfort in your school in the following areas

Results:

	School Council		Parent Council		School Principal	
	Satisfaction Average	Importance Average	Satisfaction Average	Importance Average	Satisfaction Average	Importance Average
Air Quality	73	91	56	94	53	95
Lighting	79	89	62	91	65	92
Noise Control	71	85	63	90	63	88
Temperature	57	91	49	95	41	95

Question:
Overall, how would you rate the Comfort of the school?

Results:

	Satisfaction Average
School Council	68
Parent Council	54
School Principal	53

Question:

Please rate the Accessibility and Security and the Importance of Accessibility and Security in your school.

Results:

	School Council		Parent Council		School Principal	
	Satisfaction Average	Importance Average	Satisfaction Average	Importance Average	Satisfaction Average	Importance Average
Barrier Free Access	77	92	43	85	46	90
Safety of Grounds and Walkways	71	97	53	96	54	97
Security	70	97	55	96	53	96

Question:

Overall, how would you rate the Accessibility and Security of the school?

Results:

	Satisfaction Average
School Council	71
Parent Council	52
School Principal	50

Question:

Please rate the Teamwork and Collaboration and the Importance of Teamwork and Collaboration in your school in the following areas

Results:

	School Council		Parent Council		School Principal	
	Satisfaction Average	Importance Average	Satisfaction Average	Importance Average	Satisfaction Average	Importance Average
Teamwork and Collaboration	89	96	74	91	84	98

Part two: Analysis of Responses from Principals

Satisfaction Rating Scale

Very Dissatisfied 0%	Dissatisfied 25%	Neutral 50%	Satisfied 75%	Very Satisfied 100%
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Agreement Rating Scale

Strongly Disagree 0%	Disagree 25%	Neutral 50%	Agree 75%	Strongly Agree 100%
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Importance Rating Scale

Very Unimportant 0%	Unimportant 25%	Neutral 50%	Important 75%	Very Important 100%
-------------------------------	---------------------------	-----------------------	-------------------------	-------------------------------

Question:

What was the reason for your most recently completed request for service from Facility Services

Results:

design advice	2	3%
emergency building repair	19	24%
enhanced security	5	6%
equipment replacement	4	5%
grounds maintenance	7	9%
minor facility improvement	8	10%
minor facility repair	17	22%
new construction	4	5%
permit query	2	3%
Other	10	13%
Total	78	100%

Question:

Which group in Facility Services did you contact for this service?

Results:

Central Services Team Leader	4	5%
Design and Construction	24	31%
Executive Officer/General Manager	2	3%
Other	4	5%
Permit Office	2	3%
Regional FOS Team Leader	41	53%
Total	77	100%

Question:

How long did it take to receive the service - from the time you first contacted until work started?

Results:

Time to Service receipt	Within 24 hours	2 to 5 days	1 to 4 weeks	1 to 3 months	More than 3 months
Total	19%	32%	22%	7%	20%

Question:

What is an acceptable amount of time to receive this service?

Results:

Time to Service receipt	Under 24 hours	Within 5 days	Within 2 weeks	Within 4 weeks	Within 6 weeks	Within 3 months	Other
Total	19%	40%	16%	10%	3%	4%	8%

Question:

How many contacts did it take you to receive your request? A "contact" is each different phone call, e-mail, online request, fax, or meeting.

Results:

No. of Contacts	1	2 to 3	4 to 5	Over 6
Total	31%	44%	17%	8%

Question:

What is an acceptable number of contacts required to receive this service?

Results:

No. of Contacts	1	2 to 3	4 to 5	Over 6
Total	61%	37%	1%	0%

Question:

How many different people did you have to deal with in order to get what you needed?

Results:

Individual Interaction	1	2	3	4	Over 5
Total	32%	27%	22%	11%	8%

Question:

What is an acceptable number of people to deal with in order to get what you need?

Results:

Individual Interaction	1	2	3	4	Over 5
Total	52%	36%	11%	0%	1%

Question:

In the end, did you get what you needed?

Results:

Service	Yes	No	Partly
Total	67%	16%	17%

Question:

Was the service for this request provided without error?

Results:

	Yes	No
Total	82%	18%

Question

Please rate your agreement with the statement: The time until the service was provided was reasonable.

Results:

	Agreement Average	Importance Average
Total	57	90

Question:

Please rate your agreement with the statement: I got the service after a reasonable number of contacts.

Results:

	Agreement Average	Importance Average
Total	60	87

Question:

Please rate your agreement with the statement: I dealt with a reasonable number of people to get the service.

Results:

	Agreement Average	Importance Average
Total	62	88

Question:

Please rate your agreement with the statement: I was treated fairly

Results:

	Agreement Average	Importance Average
Total	75	89

Question:

Please rate your agreement with the statement: Service staff were courteous

Results:

	Agreement Average	Importance Average
Total	82	91

Question:

Please rate your agreement with the statement: Service staff were knowledgeable and competent

Results:

	Agreement Average	Importance Average
Total	79	92

Question:

Please rate your agreement with the statement: Service staff went the extra mile to make sure I got what I needed

Results:

	Agreement Average	Importance Average
Total	67	90

Question:

Please rate your agreement with the statement: Service staff had up-to-date information

Results:

	Agreement Average	Importance Average
Total	70	90

Question:

Please rate your agreement with the statement: Service staff were flexible

Results:

	Agreement Average	Importance Average
Total	70	90

Question:

Overall, how satisfied were you with the following aspects of the service?

Results:

Service	How staff provided the service	The amount of time it took to get the service	The quality of the end result
Total	69	54	72

Question:

Thinking about your typical experience with accessing our services, if we could only improve in three of the areas you just rated, which should we focus on?

Results:

The time until the service was provided was reasonable	78%
I dealt with a reasonable number of people to get the service.	51%
I got the service after a reasonable number of contacts.	48%
Service staff went the extra mile to make sure I got what I needed	28%
Service staff were knowledgeable and competent	23%
Service staff had up-to-date information	16%
Service staff were flexible	9%
Service staff were courteous	7%
I was treated fairly	4%

Question:

Please rate your agreement with and the importance of the following statements:

Results:

Service	Agreement Average	Importance Average
It was clear how to request the service	57	93
It was clear who to contact to receive the service	51	91
Service was easily accessible through the intranet	50	82
Service was easily accessible by telephone	52	84
The hours of service were convenient	60	85
Various methods of access were available (e.g. fax, intranet, telephone, e-mail)	66	87

Question:

Overall, how satisfied were you with the accessibility of the service?

Results:

	Satisfaction Average
Accessibility Satisfaction	61

Question:

Do regular office hours meet your needs for accessing services from the Facility Services Department? Regular office hours are defined here as Monday to Friday (approximately 8:30 am - 4:30 pm).

Results:

	Yes	No
Office hours meet needs	76%	24%

- Suggestion to extend hours to 8:00 am to 5:00 pm

Question:

Please rate your agreement with and the importance of the following statements:

Results:

Service	Agreement Average	Importance Average
I was informed of everything I had to do in order to get the service.	62	90
My questions were answered.	68	90
I received consistent information/advice.	59	89
Written and verbal language was clear (e.g., not complicated).	65	89
Service staff were easy to understand.	74	90
Forms (paper or online) were easy to understand and fill out.	64	87
Procedures were straight forward and easy to understand	62	88
It is easy to find out the status of my request.	49	91
I was informed when service staff would be at my school.	56	87
I was informed about problems in completing the request	47	86
I was informed when the request was completed	60	87

Question:

Overall, how satisfied were you with our communication?

Results:

	Satisfaction Average
Communication Satisfaction	62

Question:

Thinking about your typical communication with Facility Services, if we could only focus on two of the areas you just rated, which should we focus on?

Results:

It is easy to find out the status of my request.	42%
I was informed when service staff would be at my school.	41%
I was informed of everything I had to do in order to get the service.	31%
I received consistent information/advice.	25%
Procedures were straightforward and easy to understand.	25%
My questions were answered.	9%
Forms (paper or online) were easy to understand and fill out.	9%
Service staff were easy to understand.	4%
Written and verbal language was clear (e.g., not complicated).	1%

Question:

How satisfied are you with the following services?

Results:

Service	Satisfaction Average
Caretaking	76
Grounds maintenance	57
Building maintenance	59
Design and construction	51
Community Use permits	59

Question:

Please rate your agreement with and the importance of the following statements:

Results:

Service	Agreement Average	Importance Average
The proportion of my time managing facility-related issues is reasonable.	49	91
The amount of time my head-caretaker spends arranging for needed repairs is reasonable.	54	86
My Head Caretaker handles most facility-related issues.	73	93
I receive regular updates from my Head Caretaker on the status of facility issues of concern to my school.	75	95

Service	Agreement Average	Importance Average
I receive regular updates from my Facility Services' Team Leaders on the status of facility issues of concern to my school.	55	88
Correctable deficiencies in caretaking or maintenance at my school flagged in the annual assessment are handled promptly.	51	87
Facility Services intranet site is useful.	62	77
Facility Services staff behave appropriately when working at my school.	83	94
I receive sufficient information to judge the reasonableness of the cost estimates for site funded work.	43	89
I receive good value for my site funded improvement expenditures	29	92

Appendix C

Recommendations

Appendix C

Position the Facility Services Department for Success

1. A TDSB “corporate” unit be assigned the responsibility for designing TDSB’s management system and providing the Facility Services Department with the guidance needed to ensure that Board-wide requirements are met.
2. Facility Services review how it can better address the expectations of the Operations and Facility Management Committee concerning the content and timeliness of its submissions to the Committee.
3. The Director of Education should clarify that the responsibility for policy and practice for interdepartmental cost allocation or fee for service, resides with the Business Services department.
4. Facility Services should review its interdepartmental cost allocation or fee for service practices, including the cost transfers within Facility Services, e.g. central services to regions, to ensure they comply with policy and practice, as communicated by Business Services.
5. Obtain Board endorsement for its “make vs. buy” guidelines and the processes used to apply these guidelines.
6. Conduct a detailed review of Facility Services’ corporate support requirements with regards to budgeting, reporting, community consultation and communication.

Planning for the Future

7. Facility Services develop a coherent and focused change agenda and prioritize initiatives for quarterly and annual review to achieve a disciplined results-based approach.
8. TDSB review the long-term capital planning process to ensure the following:
 - Actively sponsored by the Board and Senior Team
 - Resourced effectively: members and skills
 - Positioned within the organisation to minimize disruption to operations
9. TDSB corporately develop a robust communication plan to inform the senior management team and the Trustees about the status of the Capital Planning process.
10. TDSB corporately outline the roles and responsibilities, scope, committee structure and interdependencies, work plan and deliverables of the Capital Planning Process and that these be updated as the plan is continually developed and implemented.

11. Facility Services ensure that engagement tools are clear, unbiased and designed to capture useful information. A mechanism for this is to undertake pre-testing to understand how the engagement is perceived.
12. Incorporate the Major Renewal Projects process into the long term capital plan.

Organisational Effectiveness

13. Ensure the Executive Officer has direct accountability for the client service delivery model through the direct reporting of Regional Managers to the Executive Officer.
14. Re-evaluate the number of Regional Managers and scope of responsibility to ensure this position is well designed to achieve the client service and performance targets. These positions should align to the system level TDSB structure to enhance TDSB collaboration.
15. Proceed with the Facility Team Lead model contemplated in the proposed delivery model prepared by Facility Services (May 2006). Align the FTL model to the overall structure adopted by TDSB (i.e. by geography, type of school or other).
16. Facility Services should also examine the feasibility of transferring from D&C to Operations the responsibility and resources for projects that can be more effectively and efficiently delivered by Operations or where delivery by Operations will increase client satisfaction. The initial starting point for this examination should be projects done by D&C with a value less than \$25k. This will provide the FTLs with the resources to better deliver coordinated services to the schools.
17. Ensure there is an appropriate balance between the resources allocated to caretaking and facility condition work, by continuing to explore with a representative group of Principals, School Councils and Student Councils, the relative importance and current satisfaction levels for these two programmes.
18. Ensure there is an appropriate level of resources allocated to grounds maintenance, by continuing to explore with a representative group of Principals, School Councils and Student Councils, the importance of the condition of grounds relative to the condition of inside facilities.
19. Conduct a more detailed review of the geographic location of resources to identify opportunities to more effectively connect resources to a team, closer to the equipment they require as well as client locations. This review should align to TDSB system level geographic models.
20. Transfer the support activities such as staff development positions to Employee Services and establish a service level agreement to address concerns about service levels.
21. Restructure the Real Estate portfolio to build strategic competency, which includes planning, process and people, focused on managing this unique asset to maximize the Return on Asset (ROA).

22. Conduct a detailed review of the span of control for all positions within Facility Services including a review of the number of levels required to ensure compliance to TDSB goals.
23. Create a unit to support Facility Services organisational performance processes which would include resources to support the following activities: performance measurement and management, quality initiatives and innovation, leading practice and benchmarking, project and change management, issues management, communication and stakeholder consultation.
24. Assess management capability and establish a management development programme to ensure employees are prepared to take on the management challenges within TDSB.
25. Review protocols for Trustee requests and work with TDSB Director to ensure processes are appropriate and in place. Consider including these protocols in the Trustee orientation programme.
26. Establish service level agreements between the departments providing support to Facility Services such as Employee Services and Business Services to make sure adequate resources are provided to support Facility Services' business requirements.
27. Consolidate Facility Services planning with other enabling portfolios such as design, standards, environment and energy.
28. Review the planning process in its entirety and function within Facility Services to determine which elements are core to Facility Services operations and evaluate options for transferring system level planning to a corporate function. This recommendation must be considered in the context of the System Level Review.

Strengthen Facility Service Management Systems

29. Facility Services strengthen its performance measurement and reporting system. This would include: identifying the critical success factors and indicators for each departmental programme and organisation level, tracking actual results and reporting of actual versus target results in a format and frequency that meets stakeholder needs.
30. Facility Services strengthen the contribution of the proposed new role for Facility Team Leaders to increasing accountability and customer service, by providing schools with a quarterly report card on the maintenance and construction services delivered and the timeliness of these services. This report card could be the basis for quarterly meetings between a principal and the responsible FTL to discuss the achievements relative to Facility Service standards and the school's expectations.
31. Facility Services continue to develop an optimal preventive maintenance programme and implement the programme as funding permits.
32. Facility Services review and revise the processes for providing emergency repairs to address the relatively low client satisfaction ratings.

33. Strengthen the process for comparing internal costs vs. contract costs and industry comparators.
34. Facility Services improve the tracking of its performance against its time standards and use this information to ensure individual schools are receiving consistent levels of service.

Deliver More with Existing Resources

35. Facility Services initiate a continuous improvement process to significantly increase the amount of time that trades staff spend correcting or preventing deficiencies. An appropriate target would be a productivity increase equivalent to an additional 100 FTE's within two years.
36. Facility Services take steps, consistent with the provisions in collective agreements, to maximize the amount of minor maintenance that caretaking staff are able to undertake in their school.
37. Facility Services undertake an objective comparison of the productivity of its in-house construction processes relative to external suppliers and subsequently, if warranted, identify opportunities to first match and then surpass external productivity levels.
38. Facilities Services investigate how to provide maintenance staff with additional guidance and direction on how work is to be prioritized to balance fairness and efficiency considerations.
39. Perform a business case analysis to clarify the additional cost, if any, for not maintaining a VOR list.
40. Maintain the tendering processes and continually evaluate to meet periods of increased high-value project work.

Client Centred Service Delivery

41. Facility Services provide schools with an expected completion date for work and when work has the potential to disrupt school operations and that suitable work dates be agreed with the school.
42. Facility Services build upon the work completed prior to and at the M4R session and clearly articulate the client service model.
43. Facility Services cascade the client service model throughout the department and imbed the concepts into all processes and management performance programmes.