



Administration and Finance

Operations Detail: Facilities Planning & Management - 05

FACILITIES PLANNING & MANAGEMENT

Customer Service Process

August 2021

1.0 PURPOSE

This document defines FP&M's procedures and best practices for identifying, documenting and executing unplanned work orders for technicians in the field. It also establishes reporting procedures for Customer Service that are effective and efficient and in alignment with Administrative Affairs Quality Principles.

By implementing this process, this will reduce unplanned service interruptions by addressing root causes and underlying issues.

This procedure supports the campus Strategic Plan to advance organizational development and employee excellence while allowing FP&M to redesign, renovate and maintain campus physical resources.

2.0 BACKGROUND

FP&M is a diverse group of nearly 154 FTE with 180 budgeted positions who perform a wide range of tasks that include permitting, construction, inspection and maintenance. FP&M's workforce interacts with all levels of the campus community.

FP&M maintains the full lifecycle of facilities by taking legally required, regular, and planned actions to ensure safe, functional and efficient operations. CSU and CPP have a significant deferred maintenance backlog due to decades of underfunding of facilities maintenance and renewal systemwide.

FP&M maintains an efficient work order system, TMA, to track our work. In-the-field requests for unplanned work orders are not measured or managed.

3.0 OVERVIEW

Establishing this procedure will permit campus leadership and staff to measure and adjust customer service policies and practices to gauge customer satisfaction, maintain accurate budgets and plan essential maintenance. Progress in performing deferred maintenance is a criterion used systemwide to determine the allocation of capital resources.

4.0 CITATIONS

[Facilities Operations Companion Report – Deferred Maintenance Condition](#)

[CPP Strategic Plan – Strategic Initiative 5](#)

[Facilities Modification detail\Work Request Flow Chart.pptx](#)

5.0 PROCEDURES

Current Process

Unplanned customer service requests that bypass FP&M's work order management system may be completed by a technician in the field. However, the customer is asked to submit a service request in the work order management system upon completion of the work.

New Process

Unplanned work orders requiring less than 10 minutes:

If the technician is asked to perform unplanned work while on a service call and the task is estimated to take less than 10 minutes to complete, the technician can perform the work and will be required to submit a new work order request using a mobile device. *Unplanned Work Request* should be selected in the *Request Type Description* field in TMA.

When an unplanned work order request is converted to a work order, sub-type 5 must be selected in the *Work Order Sub-Type* field in TMA. This will identify the work order as unplanned and allows the customer service representative to run monthly reports on the criteria and to quantify the cumulative impacts of these requests.

Process guides have been created for these tasks and can be furnished upon request.

Unplanned work orders requiring more than 10 minutes:

If the technician is asked to perform unplanned work while on a service call and the task is estimated to take more than 10 minutes to complete, the technician will not perform the work. The technicians will instruct the customer to submit a service request to FP&M's Customer Service Center (Ext. 3030 or fmcustomer@cpp.edu) for intake, evaluation, prioritization and assignment to the appropriate trades shop.

Emergency service requests include but are not limited to: threats to life, injury, property damage, threats to health and safety, or academic enterprise. Responses will be addressed by a technician immediately during normal business hours, or as soon as possible after-hours.

Routine maintenance service requests will generate a work order in 24 hours during normal business hours and will be addressed by a technician within 5 business days.

Unplanned service requests less than 10 minutes will be addressed by the technician immediately during normal business hours. Service requests more than 10 minutes will follow the same protocol as Routine maintenance.

6.0 DEFINITIONS

TMA, The Maintenance Authority, is CPP's computerized maintenance management system, a database of information about the organization's maintenance operations. TMA's main function is work order management. The system is used to schedule and track routine service calls and general maintenance repairs as well as preventive maintenance work.

A **service request**, also referred to as a work order request, is a request submitted by a customer with information about a service to be performed on campus. A technician may also submit a service request via mobile device while in the field. The fields required to open a service request are:

1. Contact name
2. Extension
3. Department
4. Location of the issue (building and room/space)
5. The specific, measurable, actionable, relevant and time-limited description of the issue requiring attention

A **work order** is generated from the work order request by a Customer Service representative once FP&M determines the service request is part of FP&M's portfolio of responsibilities and assigns the work order to the applicable trades shop. A work order tracks work performed, hours, labor, material and other costs. The following fields can be found on a work order:

1. Work requested
2. Location of work performed
3. Person who requested the work
4. Requester contact information
5. Billing for the work (department and Chartfield string)

Planned work is defined as activities required by law, code or CSU Policy to ensure that physical infrastructure is safe, effective, comfortable and efficient. Examples of planned work include but are not limited to:

- Routine or Urgent service calls (e.g., issue reported by a customer that is included in FP&M's baseline service (Work order created and a technician is scheduled and dispatched).
 - Baseline custodial services include stocking, cleaning and servicing restrooms
 - Lights out (bulb replacement)
 - Comfort call (temperature adjustment in offices/classrooms)
- Preventive Maintenance (PM)
 - Fire alarm testing,
 - Backflow device testing,
 - Electric motor, belts and filtration systems in buildings
 - Electrical switchgear
 - Plumbing fixtures, equipment and drains
- Chargeback/estimate request (cost recovery, scheduled work)
 - Request for carpet cleaning or floor waxing
 - Event request with 72 hours notice.

Unplanned work includes but is not limited to:

- A technician who is approached while out in the field and asked to perform an unscheduled task
- Furniture is found in the hallway, unattended/unannounced
- A technician is performing a task in a building and discovers missing ceiling tiles
- A technician is in a building and notices a hole in a wall that requires patch and paint repair
- Site assessment/re-population request in the field
- Urgent Maintenance
 - Running water is noticed and Landscape/Plumbing is called to repair a broken irrigation line (sprinkler)
 - A repair (air handler down) is discovered during an initial assessment of a comfort call
 - A locksmith is needed to repair a broken key stuck in a lock

7.0 CONTACTS

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8.0 REVISION TRACKING

Revision History

Revision Date	Revised by	Summary of Revision	Section(s) Revised
08-25-2021	Aaron Klemm	Initial Draft	All

Review/Approval History

Approval Date	Approved by	Summary of Approval	Section(s) Approved
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10-17-2024	Matthew Whinery	Initial Draft	All