

Staffing Plan for the Public Sector
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Public Sector Facilities Council
IFMA Fusion 2012, April 11, 2012
Chicago, IL

For the past several years, the economic and political environment has focused discussions and much debate about smaller government, lower taxes (revenues) and cutting public services. As a public sector facility manager, we know whatever services remain, there will be facilities to manage and lower budgets.

When governments think of reducing the “government,” personnel costs (FTE) are usually the number one item. This is evident when you observe in the news the number of layoffs in the public sector. Teachers, public safety, social services, and facility areas are all affected.

The customary practice for the facility manager to deal with the circumstances, which is to discontinue or reduce nonessential services. The facility manager would propose a staff reduction plan generally based on standards or guidelines to match the reduced service.

Another alternative to reduce staff would be out-sourcing more services. The staffing plan is then deferred and left up to the out-source vendor. These actions will meet the objective to reduce operating costs, but at the expense of accepting lower service expectations.

Effective staffing in today’s changing public sector environment is difficult. This program proposes to approach the best staffing levels and how to develop a staffing strategy to meet customer requirements and to promote your plan to the budget decision makers.

Rational behavior requires theory. Reactive behavior requires only reflex action.
W. Edwards Deming

Planning

A staffing plan is about the alignment of the organization’s human capital with the business direction. Your staffing plan should identify and describe those needs to help optimize the department resources (staff) in meeting the organization’s goals.

The staffing plan objectives should correspond with the organization overall mission. But remember in the process, you will be explaining your plan to finance. To finance, it’s about money. Be sure your plan explains in terms of money; cost avoidance, cost savings and minimize possible liability costs.

The main points:

- Document the mission of the facilities department
- Define facilities responsibility within the organization
- Determine outputs and results
- Standards and guidelines to be follow
- Define short and long term objectives

Be specific when you prepare your staffing plan. And remember, it’s about the money.

Document the Mission

Script the facilities management department mission. This document is not a simple mission statement, but a document use to outline the goals and responsibilities of the department. The document details and

explains what the facilities management department does with its assets. This is important because the facilities departments often take on the responsibility for many activities never define and without added funding or staff. Then the facilities management's role has been expanded to include any activity held within any facility.

Define Facilities Responsibilities

Discussed earlier, the facility management department takes on numerous tasks and duties, generally without regards as to whether or not there are department funds or staff. Like most facility managers, they have a strong commitment to their profession and organization, usually feel obligated to take on the task first and then ask later for resources. Politics play a large role in this predicament, but guidelines can give the facility manager a posture from which he or she can defend the situation.

The facility manager should take the lead and develop a service level agreement (SLA). This document should detail all services provided, but also provide how maintenance and repairs **decisions** are made and how there are **funded**. The SLAs can be a simple document written in a policy/procedures format or can be as complex as a manual. You can develop SLAs for specific tasks, such as keys management or room temperature settings. In other words, the SLA defines in detail the job of the facilities management department and customers' expectations.

When your SLA document has been finalized, you'll need to get your organization to agree on the SLA, hopefully through some type of administrative rules process. Until the SLA is legitimate, it will not be enforceable and the facility manger will be the only defender.

Define Outputs and Results

Accomplished facility manager pretty much know their staff roster and have an org chart. But unlike a sport team, the org chart is not generally looked at like the same as a coach looks at their chart, in the terms of a depth chart.

The depth chart concept used from the management theory viewpoint, is to address the development of key positions within the organization. A depth chart analysis of the key positions should shape the development and training programs in the organization. The manager's goal will be improve staff talents and motive and challenge the workers to embrace the responsibilities and ownership of their job.

Creating a staffing grid provides a visual as how many workers are necessary to fill a department needs. Although there are standards and guidelines contain the numbers to fill staffing requirement, the only real number that count are the funded positions and the actual amount of available budget. Although you can justify what positions are needed for a certain job, it all boils down to money.

Although this does not mean that a standard to define work for the custodial and maintenance staff is not important. Nevertheless, you should write a mission statement and define the job before any staffing guideline can be of value. Without some parameters on the work being done, it is impossible to staff with just a standard / guideline.

Many public sector entities use formulas to guide department staffing levels. Below is an example and you'll notice; you might need to be a bit of a math whiz. The formulas are generally base on some recognized association or another public sector governs.

Staffing Formula Example:

Custodial Staffing Formula
Total gross floor area of single facility Divided by 19,000 square feet Equals FTE custodial position Plus Modifier Equals Total FTE custodial positions for this school facility Repeat this process for each school facility Add results for total FTE custodial positions for entire school district

Medium size college with a total of 500,000 sf.

$$500,000/19,000 = 26.3 \text{ FTE custodial positions}$$

$$26.3 + 1.25 (1) = 27.6 \text{ FTE custodial position for the college.}$$

This staffing formula is based on the assumption of achieving Level 2 – Ordinary Tidiness cleanliness/appearance standard as defined by the Association of Higher Education Facilities Offices (APPA). The authority set the staffing levels, but also influences the level of quality.

Granted, if you gather all building, grounds and equipment data, and you staffed your custodial workers according to standards / guideline, you done the basic job. But what if a school or new mayor directs new mandates and it adds 15 percent more new activities each year, while reducing budgets by 5 percent?

Keep in mind that standards are fallible because some are based on deficient data.

- Notes: (1) Modifier for state colleges set by the Florida Dept. of Education
(2) Florida Dept. of Education Maintenance and Operations Administrative Guidelines for School Districts and Community Colleges.

Standards and Benchmarking

Benchmarking collects data of best practices from across many different facilities environments. The data is then used to formulate standards. Determining staffing requirements for continuing repetitive maintenance tasks over a specific of coverage per employee, such as custodial service or ground care, can be effectively projected using standards / benchmarks. Non-repetitive tasks are generally measured or standardized using a globe prospective, such as per building square feet.

Standards are developed from various institutional organizations across the facilities management profession; with IFMA one of the leaders. Public sector institutions develop and establish their own standards. These parameters are done in order to pre-determine funding appropriations and provide an equivalent and fair allocation. Unfortunately, politics will play a large role in this process.

Professional group standards / benchmarking:

- IFMA (BEX)
- BOMA
- APPA
- FM Goble
- FEA
- State Governments (DOEs)

What standard do you use? What facilities data do you need to collect? Certain public govern, particularly department of education, uses mandate standards / guidelines. Such standards are useful only as general indicators. In any public sector organization, actual staffing needs will vary greatly, depending upon the nature of the facilities, building age, and condition, level of use, standard of care and other variables.

Define Short and Long Term Objectives

We refer to a lectured given by Ms. Phyllis J. Meng, CFM, IFMA Fellow, on *“Finance for the Public Sector FM*, in which she states financial officers are traditionally accountants or bean counters. So the advice; think how your staffing plan affects the organizations financially, because this is who you are marketing your plan to.

Experienced public sector facility manager knows personnel costs are the largest budget item within the organization. Facility managers that use formulas and guidelines and advocates more staff might be thought of not being an effective manager. Consider developing your staffing plan that may not necessary be about increase staff. Have the staffing plan look at staffing levels in relation to the services requirements.

A staffing plan isn't much different than any other strategic business plan, only focusing on department's human capital in meeting the organization's objectives.

- Set strategic direction
- Analyze workforce
- Develop plan of action Implement action plan (market plan to finance)
- Monitor, evaluate and revise plan.

If you already know your strategic direction, there are several keys steps to the workforce analysis phase of the planning model:

- Supply analysis, identifies the capabilities of the organization, analyzes the skill sets of the staff and identifies trends, i.e. turnover.
- Demand analysis, which measures future activities and workloads.
- Gap analysis, which compares information from the supply (providers) analysis and demand analysis (work requests) to identify the gaps between the current organizational competencies and those needed in the future workforce.
- Solution analysis, which involves developing strategies for closing the competency gaps and reducing surplus capabilities.
- Determine type of maintenance organization.

During the gap and solution analysis, the facility manager should consideration current utilization of out-source vendors. Out-sourcing is considered for cost savings or special skills. Another rational is reduction of in-house staff. Since out-sourcing is the means to reduce operating budgets, contracted services needs to an element of your staffing plan.

When doing the analysis, comparing in-house and out-source costs and effectiveness is essential. The

benchmarking of these two elements in the staffing plan provides real time scrutiny that can produce the best end product, good services to your customers.

Facilities maintenance activities can be divided into two (2) organizational types; Centralized (Shop) or decentralized (Area), or a variation of both. We discuss they structures because the organizational arrangement has an impact on the staffing plan.

- Centralized shop is located in one area which crews are dispatched to performance work. Usually this structure segregates the different trade skills and have their own trade specific supervision
- Decentralized shop divides the facilities work into zones / areas, either geographical or cost centers. Each zone / area is assign trade staff and supervision to meet the need of their assign buildings within the zone / area.

The type of facilities organizational structure selected will depend upon your staff size, talent levels, and if you have technology and administrative infrastructure to support the zone / area shops. If you cannot measure, you cannot manage.

Conclusion

The Plan

As stated early, your staffing plan will be reviewed and surely approved by financial staff, possibly a CFO or VP. Thomas McCune presentation at World Workplace 1999 on the topic, *"How to Talk to a CFO,"* where he discuss how a CFO thinks and he or she will be anticipating when you present your staffing business plan.

Here are a few talking points:

- To a financial officer, EVERYTHING is financial.
- If it's expense, eliminate it. If you can't eliminate it, minimize it.
- If it's an investment, maximize the return on it.
- Don't ignore politics.
- Emphasize the corporation's (governmental organization's) welfare, not your division's.

Resources in the public sector have always been relatively scarce in the sense that there is rarely, if ever, enough to go around satisfy all the needs. The public sector facility manager will have to squeeze dollars from all aspect of the facilities department's resources, the largest is staff productively.

A facility staffing plan is more than just numbers; it is a philosophy that is shared with everyone in the organization, from maintenance workers to staffer to financial officers. Although the numbers generated by staffing standards justify and quantify, there are not substitute for a complete staffing plan.

A facility management organization that can involve its staff to improve productivity and eliminate wastes will have the greatest impact on the public sector organization, by *doing more with less*.

It is not enough to do your best; you must know what to do, and then do your best
Dr. W. Edward Deming

Notes

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Thomas McCune, "*How to Talk to a CFO*," *Proceedings of World Workplace*, (Houston: International Facility Management Association, 1999). David G. Cotts, Michael Lee, "*The Facility Management Handbook*," (New York, NY, AMACOM, 1992), Appendix A, page 209

Phyllis J. Meng, CFM, IFMA Fellow, *Proceedings of World Workplace 2010*, "*Finance for the Public Sector FM*," (Houston: International Facility Management Association, 2010).