

Assessment Cycle 2022-2023

University Affairs

Plant Services

Prepared by: Tiffany Summerlin

Date: June 7, 2023

Approved by: Jennifer Kelly

Date: June 23, 2023

Northwestern Mission. Northwestern State University is a responsive, student-oriented institution committed to acquiring, creating, and disseminating knowledge through innovative teaching, research, and service. With its certificate, undergraduate, and graduate programs, Northwestern State University prepares its increasingly diverse student population to contribute to an inclusive global community with a steadfast dedication to improving our region, state, and nation.

University Affairs is a diverse group of innovative and talented professionals who provide quality facilities, maintenance, and management services in support of education and research at Northwestern State University. We are committed to being fully responsive to the needs of faculty, students, staff, and the public, who are our customers. The division of University Affairs strives to cooperate with all campus constituents to provide a functional, safe, and efficient facilities operation for the University.

The **University Plant Services Department** is a service department with the mission of offering continuous quality services to the university, to enhance student life and learning. The University Plant Services Department of Northwestern State University is responsible for providing asset/space management, central receiving and shipping, and property control/state inventory reporting for the Natchitoches campus, as well as Leesville and Shreveport campuses. Plant Services also houses an inventory of supplies in our on-site warehouse, to provide immediate access to materials for NSU Physical Plant employees to use on our campuses.

Plant Services

Service Outcomes:

SO 1. Ensure the Plant Services Department engages in an annual inventory of all taggable supplies and equipment belonging to this institution.

Measure 1.1 Target is to conduct at least one comprehensive inventory review annually achieving 99% accountability, thereby fulfilling one of the requirements for property certification with the State of Louisiana Property Assistance Agency. A 1% variable is both expected and allowable for the strategic plan. This is the reason for the 99% goal.

Finding. Target was Met.

Assessment Cycle 2022-2023

Analysis. In 2021-2022 the target was met. Based on the analysis of the 2021-2022 results the following changes were implemented in AC 2022-2023 according to the plan of action from 2021-2022. Bi-monthly campus-wide Messenger emails were sent to property custodians reminding them of proper forms that must be submitted to property control before moving state property. This included surplus, location changes, and donations. As a result of these changes, in 2022-2023, the target was met. Plant Services assisted departments in locating items on their annual inventory reports, which had been moved by the department since last year's audit. This year's inventory of unlocated items was .318%, which is within the requirement of 1%.

Decision. Based on the analysis of the 2022-2023 results, in 2023-2024 the following changes will be implemented to drive continuous improvement. Property Control will train employees in Movable Property form management by email/phone as needed. The Property Control area will monitor campus inventory departmentally during the year. The goal is to maintain 99% accountability so the requirement will be met by the State of Louisiana. Property Control will perform random spot checks on inventory throughout the year to improve.

Measure 1.2 Establish a briefing between the Plant Services Director and the University President on the physical inventory outcome and any potential impacts to the strategic plan on an annual basis.

Finding. Target was Met.

Analysis. In 2021-2022 the target was met. Based on the analysis of the 2021-2022 results the following changes were implemented in AC 2022-2023 according to the plan of action from 2021-2022. Plant Services sent bi-monthly Messengers to departments reminding them of the importance of accurate departmental inventory reports and procedures for re-locating items on their inventory. Due to staff changes, the Director position was replaced by the Executive Director of University Affairs. All updates were reported timely and were escalated to the President's office on an as-needed basis when problems arose.

Decision. Based on the analysis of the 2022-2023 results, in 2023-2024 the following changes will be implemented to drive continuous improvement. The measure is to be dissolved as it is procedural and will never change.

Measure 1.3 Implement use of barcode scanners for a trial run to digitize the Annual Inventory. Property Control will choose three (3) smaller departments to start implementing the new strategy and establish departmental procedures.

Finding. Target was Not Met.

Analysis. In 2021-2022 the target was not met. Based on the analysis of the 2021-2022 results the following changes were implemented in AC 2022-2023 according to the plan of action from 2021-2022. Plant Services was not able to see this project to fruition. Due

Assessment Cycle 2022-2023

to staff changes and limited supplies, barcodes and scanners were not ordered, and the project was at a standstill.

Decision: Based on the analysis of the 2022-2023 results, in 2023-2024 the following changes will be implemented to drive continuous improvement. Plant Services will consult with NSU IT department to create a program to assist with database functions. Once the database is functional, barcodes and durable scanners will need to be purchased to assist in accuracy and speed in performing inventory reporting.

SO 2. Supplying parts, materials, and equipment to the Physical Plant to support daily campus work orders.

Measure 2.1 Stock and supply all parts, materials, and equipment for Physical Plant workers so they may complete their work orders promptly. If materials are not on hand, they will be secured from vendors, by the warehouse supervisor, purchased then supplied to the employee for repairs.

Finding: Target was Met.

Analysis. In 2021-2022 the target was met. Based on the analysis of the 2021-2022 results the following changes were implemented in AC 2022-2023 according to the plan of action from 2021-2022. The Warehouse Manager followed trends on those items most frequently used and kept those items in stock. As a result, in 2022-2023, these items were for immediate availability to the maintenance workers, and workers' orders were completed promptly.

Decision. Based on the analysis of the 2022-2023 results, in 2023-2024 the following changes will be implemented to drive continuous improvement. The Warehouse Manager will stock the Warehouse with required and affordable items for the next year. The Warehouse Manager will survey items bought outright from local vendors to keep viable items in stock and will also work closely with the Trades Supervisors to identify new items for stock. This will improve workflow and timeliness in completing work orders.

Measure 2.2 Parts, materials, and equipment will be documented and electronically filed with the matching work order. Work order records/documentation will be thorough and up to date.

Findings. Target was Met.

Analysis. In 2021-2022 the target was met. Based on the analysis of the 2021-2022 results the following changes were implemented in AC 2022-2023 according to the plan of action from 2021-2022. Work order records and documentation were complete, up to date, and matched with the purchase order and/or request of parts, materials, and equipment. Work orders have been tied to Invoices and Purchase Orders for complete and accurate record keeping. As a result, in 2022-2023, the Warehouse records and

Assessment Cycle 2022-2023

documentation helped in annual and semi-annual inventory checks. Finding inventory mistakes was easier when records were up to date and complete.

Decision. Based on the analysis of the 2022-2023 results, in 2023-2024 the following changes will be implemented to drive continuous improvement. The measure is to be dissolved as it is procedural and will never change.

Measure 2.3 After annual Warehouse inventory, surplus all Warehouse items that are old, outdated, and unused.

Findings. New Target for 2023-2024.

Analysis. This measure is being implemented due to several items in the Warehouse that are remaining from buildings that have been demolished.

Decision. In 2023-2024, the following changes will be implemented to drive continuous improvement. The Warehouse Manager will segregate surplus items and remove them from inventory. Proper paperwork will be used for state reporting.

Measure 2.4 Upgrade the NSU Warehouse with barcode scanners and signature pads to make inventory and Warehouse reporting more efficient.

Findings. Target was Not Met.

Analysis. In 2021-2022 the target was not met. Based on the analysis of the 2021-2022 results the following changes were implemented in AC 2022-2023 according to the plan of action from 2021-2022. This measure was added to streamline Warehouse Inventory data collection. The process was paused again in 2022-2023 due to the pending upgrade of Warehouse Inventory Software (TMA 7).

Decision. Based on the analysis of the 2022-2023 results, in 2023-2024 the following changes will be implemented to drive continuous improvement. When TMA 7 is upgraded, barcodes and scanners need to be purchased and implemented to assist in accuracy and speed in performing daily tasks and inventory reporting. This also includes an update to change the Warehouse Requisition form to preprogrammed form in TMA software to reduce paper and ink waste.

SO 3. The Central Receiving area will assist the Property Control area by tagging all items received through Central Receiving before releasing the property to the appropriate campus department.

Measure 3.1 Efficient communication between Central Receiving and Property Control about items valued at or above the \$1,000.00 threshold will prevent them from leaving Central Receiving without state tags.

Finding. Target was Met.

Assessment Cycle 2022-2023

Analysis. In 2021-2022 the target was met. Based on the analysis of the 2021-2022 results the following changes were implemented in AC 2022-2023 according to the plan of action from 2021-2022. Central Receiving and Property Control employees worked together to ensure that no equipment came through without a state property tag being affixed before leaving for the department. As a result of these changes, in 2022-2023, the Central Receiving Department provided the necessary information to Property Control and tagged all incoming items costing \$1,000.00 or more. The Central Receiving Coordinator followed Plant Services policies for receiving and tagging state property. This aided Property Control in accuracy.

Decision. Based on the analysis of the 2022-2023 results, in 2023-2024 the following changes will be implemented to drive continuous improvement. The measure is to be dissolved as it is procedural and will never change.

SO 4. The Asset Management/Space Utilization area will report all changes in the annual Board of Regents report (space utilization) and Property Exposure.

Measure 4.1 Report annually to the University Institutional Research Director, all changes in NSU Space Utilization. These updates are requested of departments across campus and compiled into a single report. Included in reporting are changes in square footage, changes in space utilization, and correct coding, according to the Board of Regents coding system.

Finding. Target was Met.

Analysis. In 2021-2022 the target was met. Based on the analysis of the 2021-2022 results the following changes were implemented in AC 2022-2023 according to the plan of action from 2021-2022. The information was gathered, organized, and submitted to the Institutional Research Office. As a result, it was submitted to the Board of Regents and accepted as complete for determining space utilization for our campus.

Decision. Based on the analysis of the 2022-2023 results, in 2023-2024 the following changes will be implemented to drive continuous improvement. The measure will continue to be used to show communication with departments across campus to report any changes in buildings, classrooms, offices, and special spaces. A form is being devised to collect precise square footage, specs, and building usage.

Measure 4.2 Report to the State of Louisiana-Office of Risk Management any additions, changes, or dispositions of buildings on the Northwestern State University campus via the bi-annual RC04-Property Exposure Report. Property Exposure reporting on the RC04 assists in establishing accurate insurance rates for all of the NSU campuses.

Finding. Target was Met.

Assessment Cycle 2022-2023

Analysis. In 2021-2022 the target was met. Based on the analysis of the 2021-2022 results the following changes were implemented in AC 2022-2023 according to the plan of action from 2021-2022. These reports were submitted timely and assured proper insurance coverage for Northwestern State University campuses. As a result, many secondary moveable property buildings were found and added to the Property Exposure Report.

Decision. Based on the analysis of the 2022-2023 results, in 2023-2024 the following changes will be implemented to drive continuous improvement. The measure has helped maintain the paperwork needed to keep our projects and buildings insured through the year. A form is being devised to collect precise square footage, specs, and other property (outdoor, fine art, livestock, etc).

Comprehensive summary of key evidence of improvement based on analysis of results.

SO	Measure	Key Evidence
1	1.1	Movable Property forms for relocation and/or surplus of equipment and other state items increased accountability for property custodians and has thereby resulted in a lower number of unlocated items on the annual LPAA property inventory report.
1	1.2	Plant Services/Property Control established a briefing of physical inventory outcome.
1	1.3	The Property Control area has worked hard to modernize the annual inventory cycle and can hopefully provide scanners and a database to aid in the efficiency of the inventory operation.
2	2.1	The NSU Warehouse stocked a better inventory supply, so Physical Plant workers completed campus work orders promptly.
2	2.2	The NSU Warehouse delivered complete, up-to-date documentation for Business Affairs.
2	2.3	The NSU Warehouse will surplus old, outdated items after annual inventory.
2	2.4	The NSU Warehouse modernized with barcode scanners and signature pads to make processing transactions more efficient.
3	3.1	Central Receiving consistently tagged all items valued at or above the \$1000.00 threshold.
4	4.1	The Asset Manager reported building changes to the Board of Regents annually.
4	4.2	Asset Manager reported to State of Louisiana Office of Risk Management and additions/changes/dispositions and reflect those changes in the Property Exposure Report.

Assessment Cycle 2022-2023

Plan of Action Moving Forward.

SO	Measure	Plan
1	1.1	Monitor campus inventory and surplus.
1	1.2	Measure will be dissolved.
1	1.3	Develop database and purchase barcode scanners and to scan the taggable inventory items.
2	2.1	Stock Warehouse with items needed for campus work orders.
2	2.2	Measure will be dissolved.
2	2.3	Surplus outdated, unused warehouse inventory.
2	2.4	Implement barcode scanners and signature pads to modernize Warehouse.
3	3.1	Measure will be dissolved.
4	4.1	Report annually to Board of Regents on Space Utilization for NSU Campus.
4	4.2	Report bi-annually to State of Louisiana Office of Risk Management for any changes to buildings on NSU Campus.