

We will be starting momentarily:  
thanks for joining!

Starting thinking now to share later:

*What's one tactic or investment you've seen successfully improve recruitment or retention of designers and project managers on your campus?*





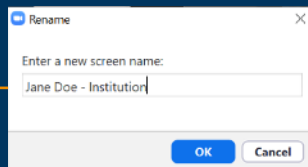
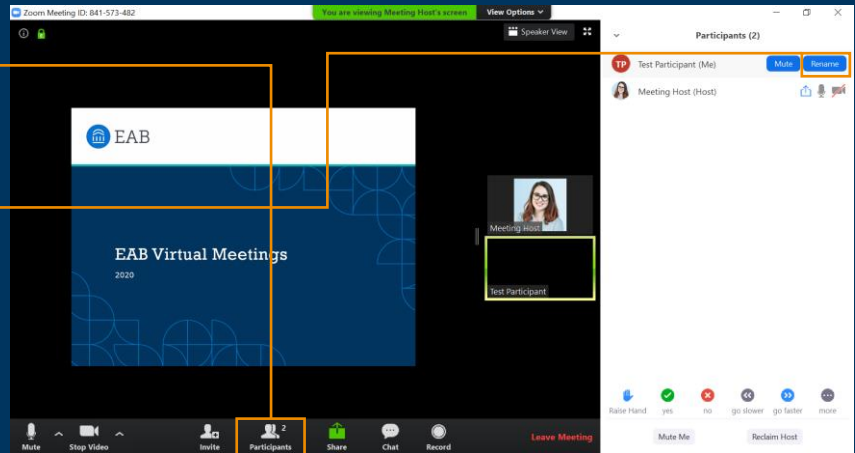
# Develop and Deploy Planning and Design Staff

Bridge the Talent Gap: 4 Conversations to Recruit,  
Retain, and Re-skill Facilities Employees

# Zoom Features and Settings

## Update Your Name

- Click **Participants** in your menu bar.
- On the right side of the screen, you can hover over your name and click **Rename**.
- Add a dash and your institution name.



# Let's See Where Everyone's At

## Come off mute for brief introductions

Please share:

- Your name and role on campus
- Your institution
- What planning and design staff talent concern keeps you up at night/what interested you about this working group

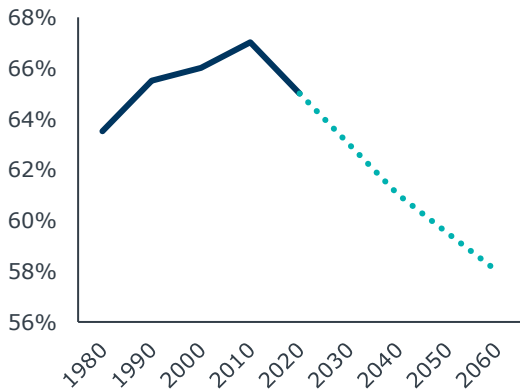


# Talent Troubles Here for the Long Haul

Even If COVID Labor Market Stabilizes, Challenges Will Persist, Worsen

## The Other Demographic Cliff

Percent of U.S. Population Aged 15-64 Years Old



— Observed    ..... Median Prediction



# 6M

estimated worker deficit by 2028

## Three Factors Amplifying Talent Challenges

*Higher Ed Workforce Disproportionately Older*



- **29% over 65** vs 23% in other industries
- ~50% increase in **baby boomer retirements**

*Perpetual Workforce Participation Suppression*



- **3M fewer workers in the labor force** v. February 2020
- **Missing groups:** immigrants, early retirees, adults opting out of labor market

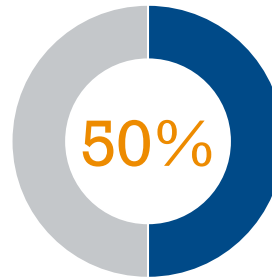
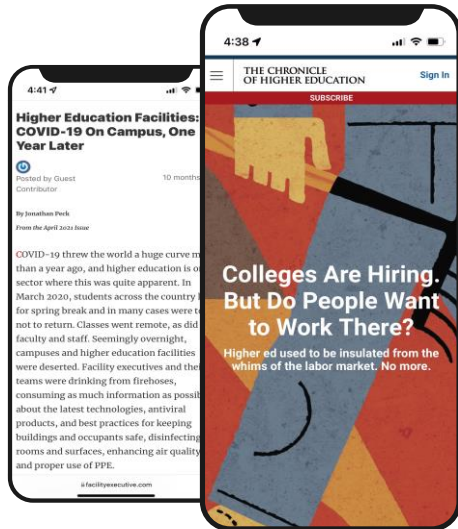
*Globalization of Talent Market*



- Remote work **removing geographic boundaries** on work and recruitment
- Competing with new, different competitors

# “The Great Resignation” Comes for Facilities

Pandemic Exacerbating Existing Recruitment and Retention Challenges



or more of Facilities leaders reported an increase in vacancies compared to 2019

“We had to create radio ads to advertise for open cleaner positions. I never thought that would be necessary.”

*Senior Estates Officer, Large Public*

# A Multi-Layered Problem

Different Segments of Facilities Workforce Pose Distinct Challenges

## Staff Segment



**Frontline Supervisors**

## Bridge the Talent Gap Session

Session 4: Prepare and Cultivate  
New Managers and Supervisors  
*June 28, 2022*



**Designers and Project Managers**

**Session 3: Develop and Deploy  
Planning and Design Staff**  
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**Skilled Tradespeople**

Session 2: Attract and Grow  
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*May 17, 2022*



**Frontline Service Staff**

Session 1: Recruit and Retain  
Frontline Workers  
*May 10, 2022*

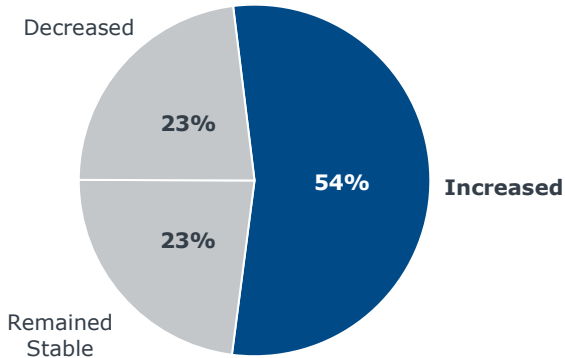
# Hiring Staff Helpful, But Not Sufficient



All Institutions Must Revisit, Modernize PM<sup>1</sup> Processes and Structures

## Distribution of How Higher Ed Project Management Staffing Levels Have Changed, 2008 vs. 2018

n=36



“

I could add three more project managers tomorrow and still suffer from poorly executed projects because we lack the tools, systems, and support staff to help them.

**Michael Perez, Chief Facilities Officer**  
Vanderbilt University

”

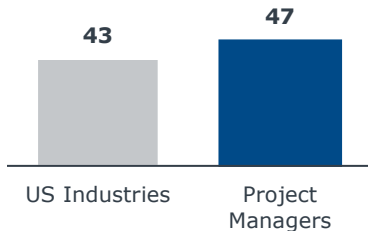
1) Project management.



# Survey Data: Project Managers

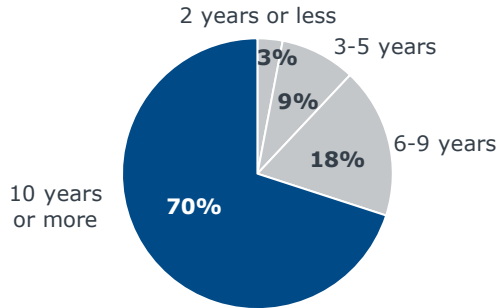
## Average Age

n=548



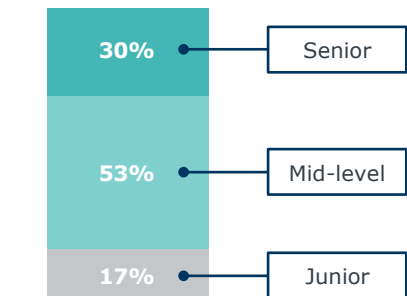
## Breakdown of PMs by Experience

n=493



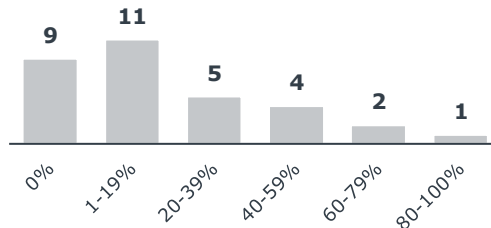
## Distribution of PMs by Seniority

n=548



## Distribution of Institutions by Percentage of PMs Certified<sup>1</sup>

n=32



1) Includes but not limited to: PMI's project management certification (PMP), Scrum Alliance's Certified ScrumMaster, ASQ's Certified Six Sigma Black Belt, and professional certifications from a college or university.

# Survey Data: Snapshot of PM Salaries



## Salary Range by Project Management Level (US Dollars)

n=33<sup>1</sup>

Level	Average	25 <sup>th</sup> Percentile	50 <sup>th</sup> Percentile	75 <sup>th</sup> Percentile
Senior Project Managers	\$100,000	\$88,000	\$96,000	\$110,00
Project Managers	\$77,500	\$68,000	\$76,000	\$84,500
Junior Project Managers	\$64,000	\$51,000	\$60,500	\$78,000

1) Represents number of reporting institutions.

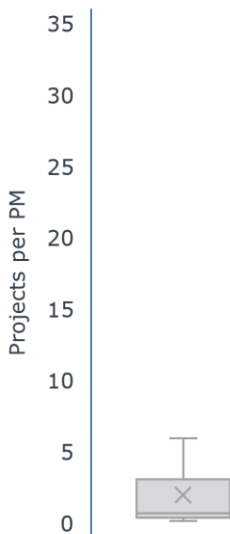
# Survey Data: Breakdown of PM Workloads



## Distribution of Project Manager Workloads

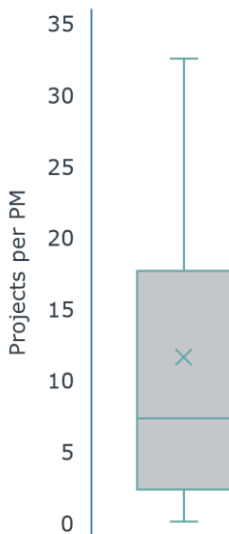
n=36

### Capital Projects



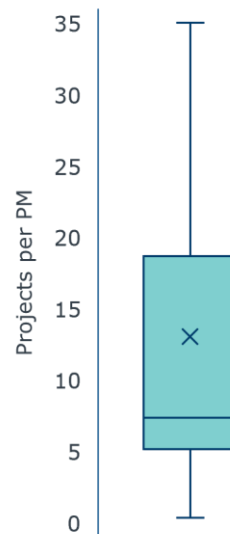
For capital projects, the average workload is 1.9 projects per PM, while the median workload is 0.6 projects per PM.

### Smaller Projects<sup>1</sup>



For smaller projects, the average workload is 11.5 projects per PM, while the median workload is 7.2 projects per PM.

### Total Projects<sup>2</sup>



For combined total projects, the average workload is 13 projects per PM, while the median workload is 7.3 projects per PM.

1) Institutions self-reported their formal or informal thresholds between capital and smaller projects. The average threshold was \$1.2M.

2) Total projects is a combination of capital and smaller projects.

# Further Analysis of PM Workload



## Breakdown of PM Workload

n=36

Workload Metric	Average	25 <sup>th</sup> Percentile	50 <sup>th</sup> Percentile	75 <sup>th</sup> Percentile
Capital Projects per PM (n=36)	1.90 projects	0.30 projects	0.60 projects	2.81 projects
Capital Dollars per PM (n=31)	\$9,241,606	\$2,024,304	\$4,472,285	\$14,019,013
GSF Impacted per PM (n=26)	86,268 GSF	10,158 GSF	28,286 GSF	38,586 GSF

# Quick Poll

For planning and design staff (architects, designers, project managers, etc.), the most difficulty talent management challenge is:

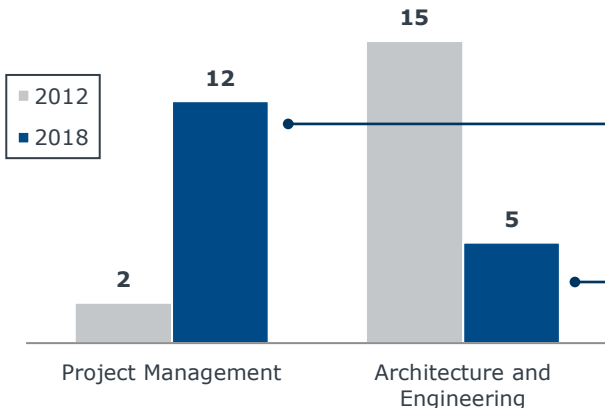
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- a) Recruitment
- b) Training
- c) Engagement
- d) Retention
- e) Upskilling

# Redesigning the Staffing Portfolio

## Manitoba Adjusts FTEs to Invest in Dedicated Internal Project Managers

### Number of FTE per Function at University of Manitoba



Leaders added PMs by replacing technical positions vacated by attrition, ultimately increasing PMs by 500%

Manitoba now outsources most design activities to free up institutional staff time for project management



“Five years ago, we had mostly technical staff. Now, we have invested in PMs who ensure projects meet targets and clients are satisfied.”

*Andrew Konowalchuk  
AVP Facilities, University of Manitoba*

### Institutions That Have Insourced PMs Since 2008



# Open Conversation

Write in the chat or come off mute!

What planning and design roles does your campus keep in-house? Which do you outsource?

Has it become more challenging for your institution to find quality and affordable contractors for capital project work?



# Selectively Offload Tasks to Dedicated Specialists

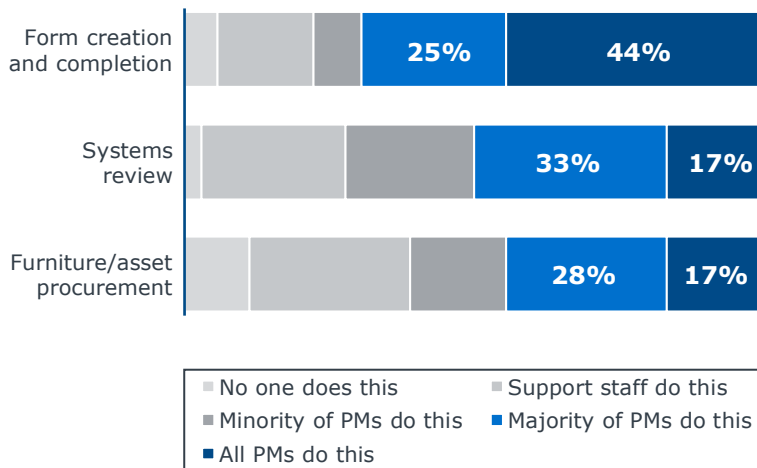


PMs Spend Significant Time Performing Lower-Level, Non-Critical Tasks

## Many PMs Still Performing Lower-Skill Tasks...

*Breakdown in responses to question "What proportion of PMs/support staff perform the following task?"*

n=36



## ...Yet PM Offices Have Healthy Cohort of Support Staff

1:2

Ratio of support staff to PMs across surveyed institutions

7.6

Average number of PM support staff FTE per institution

19.25

Median number of projects per PM support staff



## Best Opportunities for Dedicated PM Support Roles

1. Create, complete, and confirm the approval of project forms.
2. Prepare, administer, and review change orders.
3. Review project systems, including those related to life safety, ADA<sup>1</sup>, fire, building code, etc.
4. Coordinate and monitor construction schedules and delivery.
5. Ensure digitization of proposal and vendor materials and manage project databases.
6. Coordinate, plan, and support regular communication between PM and sponsor.

For sample job descriptions, please click [here](#).

## Lessons from Early Movers



### Carve Out Specific Duties for Supporting Positions

- **University of Manitoba's** project assistants distinct from unit AAS<sup>2</sup> and contract coordinators
- Used technical staff vacancies to hire two assistants, with plans to increase to four



### Map Roles to Internal Career Ladder

- **University of Alberta's** project coordinators, coordinator assistants manage PM admin tasks
- Creates career ladder for PM staff, improving mobility for entry-level employees



### Deploy Supporting Staff to Maximize Staff Dollars

- **Rutgers University's** project specialists take over administrative responsibilities from PMs, oversee smaller projects
- Specialists are 1-3 salary grades less than PMs

# Leverage Your Largest Labor Pool: Students



## Michigan Tech Uses Student Interns to Fill Technical Roles

- Facilities provides internship opportunities for up to six students annually in PM
- Roles include operating AutoCAD<sup>1</sup> and GIS<sup>2</sup> systems, construction management
- Provides work experience for students at lower cost than full-time hire
- Internship description and advertisement documents can be downloaded [here](#)



## ASU Establishes Internship Program to Support Project Managers

- Partnered with local construction school to create intern roles within ASU's PM function
- Six interns (three undergraduate, three graduate) take on responsibilities such as construction management and contract writing under guidance of a PM mentor
- Plan to hire high-performing interns into project management roles post-graduation
- Program documents can be downloaded [here](#)

## Additional Benefits from Project Management Student Interns



Cost savings



Talent pipeline



Service to institutional mission

1) Software application that uses computer-aided design (CAD).

2) Geographic information system.

# Open Conversation

Write in the chat or come off mute!

What types of tasks or activities tend to drive disengagement or frustration among your project managers?

Has anyone had success creating new types of support roles for project management? How?



# Transfer High Complexity Tasks to Specialized PMs

## Outline of Three Project Management Groups at Calgary



	Project Managers	Initiation Group	Controls Group
<b>Staff Number</b>	11 FTE	2 FTE	2 FTE
<b>Job Titles<sup>1</sup></b>	<ul style="list-style-type: none"> <li>Project Manager</li> <li>Project Coordinator</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Specialist, Project Manager Pre-Initiation</a></li> <li><a href="#">Project Coordinator, Project Initiation and Scoping</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Specialist, Quality Assurance and Project Controls</a></li> <li><a href="#">Project Controls Assistant</a></li> </ul>
<b>Responsibilities</b>	<ul style="list-style-type: none"> <li>Project delivery and oversight</li> <li>Communication with clients</li> </ul>	<ul style="list-style-type: none"> <li>Proposal scoping</li> <li>Financial estimations</li> <li>Construction pre-planning</li> </ul>	<ul style="list-style-type: none"> <li>Project quality assurance</li> <li>Risk analysis and monitoring</li> <li>Project and process audits</li> </ul>
<b>Staff Background</b>	<ul style="list-style-type: none"> <li>Experience in engineering and/or construction</li> <li>Majority have PM certifications</li> </ul>	<ul style="list-style-type: none"> <li>Master engineer with PM background</li> <li>Civil engineer with highway planning experience</li> </ul>	<ul style="list-style-type: none"> <li>Microbiologist with MBA, PM certification</li> <li>Individual with years of experience with controls</li> </ul>

1) Job descriptions for select roles are hyperlinked within the table.

# Early Results from Calgary's PM Model



## Total Project Completion Rates, 2017



### Faster Turnaround on Projects

Calgary received \$160 million in federal infrastructure funding that had to be spent in 21 months. Calgary credits its initiation and controls groups with enabling the PMs to complete all planned projects and use almost every dollar of funding.



### Budget Savings Returned to Project Sponsors

Improved scoping and tighter project controls have allowed Calgary to consistently deliver projects under budget. In a single week in 2018, project management returned surpluses to twenty separate units.

“Poor project scope and controls are the most frequent source of project setbacks. I sleep easier knowing we have expert staff dedicated to performing those activities right every time.”

*Mark Scharf  
Director, Project Management, University of Calgary*



# Mind the Gap

## Dedicated Staff Monitor O&M Needs Across Handoff, Early Occupancy



### Handoff Czar

- Single FTE focuses on quality control and warranty tracking across building handoff, reducing pressure on project managers
- Coordinates between contractors and O&M through first year of occupancy
- Ideal for** institutions with smaller capital project workloads



### Transition Team

- Created new positions within Building Operations to oversee transitions
- Team participates in every phase of capital project, but charged with oversight of equipment, safety, and training issues in lead-up to occupancy
- Ideal for** institutions with high volume of capital projects, experienced staff



### Outsourced Partner

- Transition to Occupancy (T20) program** enlists third party to coordinate handoff in collaboration with in-house project delivery team
- Focus on commissioning, data transfer, O&M staff training, and creation of maintenance strategy
- Ideal for** institutions with very large capital workload and good financial resources

Across seven capital projects, Miami University's handoff czar realized:

[Download](#) the handoff czar job description

**\$450K** costs avoided from monitoring warranties

**\$120K** refunds from contractors

**3x** ROI on czar's annual salary

# Open Conversation

Write in the chat or come off mute!

What types of new planning and design responsibilities or roles might make sense for your institutions as vacancies allow for modifications to job descriptions?

What other tactics have people used to improve planning and design staff recruitment and retention?



## Next Steps:

Take 3 minutes to reflect and write

What's the one tactic or investment discussed during this working session that I am going to take back to campus to try to improve deploying and developing planning and design staff?





# We Hope to See You Next Time!

Contact [lberglund@eab.com](mailto:lberglund@eab.com) with any questions or thoughts

## Staff Segment



**Frontline Supervisors**

## Bridge the Talent Gap Session

**Session 4: Prepare and Cultivate New Managers and Supervisors**

*June 28, 2022*



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Session 1: Recruit and Retain Frontline Workers

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# From Great Renegotiation to Org Transformation

## How EAB Can Help Institutions Achieve Their Strategic Talent Management Goals



### Winning the Great Renegotiation

- ✓ Implement high-impact tactics with proven ROI in the current labor market
- ✓ Customize compensation packages based on employee value and preference analyses

Sansdemir-Era Playbook for **Staff Recruitment and Retention** (*forthcoming*)



### Becoming a Top Talent Destination

- ✓ Develop a data-informed understanding of competitive position as a local, regional, and global employer
- ✓ Use strategic employer branding to gain a competitive advantage

**Employer Brand** Diagnostic and Associated Toolkit (*forthcoming*)



### Maximizing Organizational Learning and Effectiveness

- ✓ Identify top barriers to continuous improvement and peak performance
- ✓ Redesign structures, roles, and processes to realize long-term goals (e.g., increased operational efficiency)

Proactive **Succession Planning** Guide and Interactive Workshop (*forthcoming*)

**URGENT**



Summer 2022

**IMPORTANT**



Fall-Winter 2022

**TRANSFORMATIONAL**



2023 and Beyond

# Join us IN PERSON this Summer!

## 2022 Roundtable for Senior Facilities Officers

Which upcoming IN-PERSON roundtable session would you like to register for?

- A) July 13-14, 2022 | EAB's Washington, DC Office
- B) August 2-3, 2022 | EAB's Washington, DC Office
- C) I am interested in attending, but I will need to check my calendar first.

*\*Event is best suited for the senior most Facilities officer at your institution*

### → Agenda in Brief:

- **EAB's 2022 State of the Sector**
- **Strategic Sustainability: Three Questions Facilities Leaders Must Answer to Achieve Ambitious Green Goals**
- **Campus 2030: Making Smart Investments in Tomorrow's Multi-Modal Campus**





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