



Facilities Management Strategic Initiatives Update



Building Tomorrow's Duke Today

*By creating and maintaining
campus facilities*

March 2010

Strategic Initiatives Update

| STRATEGIES | GOALS | CHAMPION | TEAM MEMBERS |
|-----------------------------|---|---------------------------------|---|
| Communication | Timely, consistent, meaningful in all directions | Ellie Jimenez | <i>Shatone Bailey, Lisa Bryant, Arwen Buchholz, Josln Campbell, Jessica Estrada, Marshall Fuller, John Noonan, Debbie Rivers, Pete Romeyn</i> |
| Customers | Customers are our top priority | Ellie Jimenez | <i>Janet Bailey, Lisa Bryant, Jessica Estrada, Shree Jones, Randy Orange, Darin Smith</i> |
| Employees | Develop & retain highly skilled, professional & motivated workforce | Michelle Carter-Jenkins | <i>Curtis Browning, Josln Campbell, Joe Jackson, Andy Lyons, Phil Martin, Rikkia Smith, Mike Snyder, Myron Taschuk, Thomasena Johnson</i> |
| Information Systems | Accurate, accessible, transparent & timely information | Adem Gusa & Russell Thompson | <i>Greg Anspach, Mark Browning, Sam Duffort, Bob Friedman, Wayne Wagoner, Sara Oxley</i> |
| Management Reporting | Meaningful managerial reporting | Sam Duffort | <i>Roger Conner, Tommy Davis, Thomasena Johnson, John Noonan, Ray Walker, Linda Ware</i> |
| Planning | Proactive, integrated & focused plans in all functional areas | Adem Gusa | <i>Jack Burgess, Roger Conner, Cash Davidson,</i> |
| Processes | Best practices established & implemented | Paul Manning | <i>Greg Anspach, Bobby Browning, Cash Davidson, Keith Guile, Bill McCraw, Linda Ware, Dudley Willis, Diane Zakos, Pete Romeyn</i> |
| Reliability | Zero customer interruptions | Jack Burgess & Russell Thompson | <i>Helen Brantley, Mark Browning, David Bryant, Mike Lane, Aurel Selezeanu, Dudley Willis, Woody Cheek</i> |
| Safety | Zero safety incidents | Mike Snyder | <i>Jack Burgess, Joe Jackson, Paul Manning, Lester Matte, John Noonan, Russell Thompson</i> |
| Sustainability | Leader in sustainability | Joe Jackson & Steve Palumbo | <i>Arwen Buchholz, Woody Cheek, Bob Friedman, Myron Taschuk</i> |

Facilities Management continues to make progress on our ten Strategic Initiatives which proves to be an invaluable way for the Department to plan, prioritize and adjust to some of the exciting challenges and opportunities here at Duke. Our team members remain motivated as they work toward accomplishing the actions in each strategy and look with anticipation at the chance to solve current issues with innovation and imagination. Since the last update, despite challenges posed by the ongoing economic situation, many actions have been implemented or are in progress. These updates are part of our efforts to improve internal and external communication and to enhance the many services we provide.

It is no surprise that the worldwide economic situation is among one of the most popular topics discussed at Duke as the University tackles its own budget challenges. As such, the Department continues to emphasize the close tracking of its budget to actual expenses in all functional areas. In the beginning of FY 2010, we rolled out our Monthly Budget Reports and began developing more detailed expense reports for internal use. To coincide with this, the Department continues to implement new front-end controls for identified cost savings. Like many other areas across campus, Facilities modified its staffing plan in line with current budget constraints and implemented a few cost savings measures based in part on the results of the recent Employee Survey we conducted. Facilities also began implementing the University's Temperature and Building Hour Policy geared to help reduce both expenses and overall energy consumption.

We continue to pay very close attention to the various budget related impacts affecting our levels of service. The Department began hosting Quarterly Customer Focus Group Meetings to help improve external communications, address various facilities related items, and develop a method of exchanging information. By hosting these meetings, we hope to better educate our customers about the services we provide, especially in light of the current economic climate. Most importantly, these meetings give us an opportunity to gain valuable input from our customers. Internally, the Department is steadily improving its information systems, which in turn will help communicate necessary information to our customers as well. The completion of our revised website will also be a great asset to acquire information both internally and externally.

On the sustainability front, we are proud of the efforts put forth in the completion of the Climate Action Plan and continue to work at developing energy targets for new buildings. As always, safety remains at the forefront of everything we do on a daily basis and we are working toward the completion of our updated Department Safety SOP's, Manuals, Policies and Procedures. The Department will continue to work hard on the ongoing evaluation of strategies and priorities, and to focus on actions to make progress in each strategic area.

Please contact John Noonan, AVP for Facilities at john.noonan@duke.edu, 660-4252, or Ellie Jimenez, Director of Administration & Special Projects at ellie.jimenez@duke.edu, 660-1477 if you are interested in any further details.

HIGHLIGHTS

- ◆ *Completed the development of five key Departmental Safety Procedures & began training for all employees*
- ◆ *Completed East Data Center Reliability Plan*
- ◆ *Distributed Office of Project Management Annual Report*
- ◆ *Revised American Institute of Architects (AIA) contract documents to address full spectrum of design & construction projects*
- ◆ *Conducted Quarterly Customer Focus Group Meetings to enhance communication & customer service*
- ◆ *Utilized Employee Survey results to modify & improve Department Events*
- ◆ *Improved after-hour Customer Service Call Center operations for 24/7 coverage*
- ◆ *Redesigned 2nd & 3rd shift coverage for 24/7 operations*

Strategic Initiatives Update

| STRATEGY | IMPLEMENTED & IN-PROGRESS | NEXT STEPS |
|----------------------|--|--|
| Communication | <ul style="list-style-type: none"> • Website re-design ready to launch • Inventory of communication devices near completion • Re-deployment of shared employee computers underway • Department Communication Boards re-designed • Regular budget related communications in discussion • Strategic Initiatives included during Employee Orientation | <ul style="list-style-type: none"> • Continue to improve & enhance Department website • Re-develop Semi-Annual Strategic Update for employees & Annual Update for Customers • Finalize improved methods to communicate budget related items to both employees & customers |
| Customers | <ul style="list-style-type: none"> • Produced Customer Survey results for Maintenance Services & Grounds, Recycling, & Sanitation • Conducted Quarterly Customer Focus Group Meetings • Presented Facilities Budget Update to Business Managers & Financial Officers • Improved after-hour Customer Service Call Center Operations | <ul style="list-style-type: none"> • Incorporate Customer Survey results into Strategic Initiatives • Create e-mail distribution lists for major customers on campus • Continue development of improved methods to communicate important customer related information • Continue to enhance content and follow-up actions during Quarterly Customer Focus Group Meetings |
| Employees | <ul style="list-style-type: none"> • Employee Training Plans distributed to Directors for increased oversight • Staffing Plan modified due to current budget constraints • Implemented cost savings measures for Department related functions based on Employee Survey results • Finalizing New Employee Checklist | <ul style="list-style-type: none"> • Continue recruitment plan for critical positions approved for FY10 • Conduct Feasibility Study for Department Apprenticeship Program • Conduct regular review of Department Staffing Plan to coincide with current budget related activities |
| Information Systems | <ul style="list-style-type: none"> • Developed flow chart for improved database management • Made key changes to Project database to include pertinent account information & updates on start dates • Completed Phase I of IT network audit (security) • Completed Department hardware & software standards • Developing backup for control servers at Chilled Water Plant • Migrating database server for campus wide mapping | <ul style="list-style-type: none"> • Complete consolidation & integration of Department databases • Conduct Phase II of IT network audit (capabilities) • Continue to improve & update Geocortex functions & capabilities |
| Management Reporting | <ul style="list-style-type: none"> • Tracking budget to actual expenses in coordination with monthly meetings in all functional areas • Department Scorecard drafted • Implementing various front-end controls for identified cost savings • Conducted educational sessions for improved understanding of Capital Project Review Process | <ul style="list-style-type: none"> • Finalize Department Scorecard • Continue analyzing & identifying potential cost savings that support University budget guidance • Work with various University entities & Communication Team to consolidate radio types used on campus • Continue development of meaningful budget related reports & communications |
| Planning | <ul style="list-style-type: none"> • Established separate Working Committee's to better distribute plans & drawings; combined with OUA inventory • Refining Building Renewal process to include system budget allocations for upcoming Capital Plan • Conducting standing meetings to review Facilities projects identified in FY10 Capital Plan | <ul style="list-style-type: none"> • Finalize Revised Renewal Process • Update landscape & utilities plans |
| Processes | <ul style="list-style-type: none"> • Design Guidelines near completion • Continuing development of OPM Manual • Revised AIA contract agreements • Conducted Severe Weather analysis; updating Snow & Ice Plan • Completed & distributed OPM Annual Report | <ul style="list-style-type: none"> • Finalize Design Guidelines • Finalize OPM Manual • Identify gaps & areas of improvement for all Project Processes |
| Reliability | <ul style="list-style-type: none"> • Completed East Data Center Reliability Plan • Completed comprehensive list of buildings with critical systems; identified equipment with alarms • Training employees on proper use of Facilities Risk Assessment & Mitigation Plan Flow Chart • Implemented Quality Control documents & identified training needs by levels 1,2,3 | <ul style="list-style-type: none"> • Conduct gap analysis & determine which critical systems & equipment need alarms • Continue revising & updating Emergency Management Response Plans for Department and all systems • Review all Quality Control documents • Finalize drafts & implement revised Department Safety Program |
| Safety | <ul style="list-style-type: none"> • Completed five Departmental Safety Procedures & began training • Hiring Safety Firm to assist with completion of Departmental Safety SOP's, Manuals, Policies & Procedures • Began work on Spill Control facilities, hazardous waste management & hazardous chemical & materials programs | <ul style="list-style-type: none"> • Continue providing opportunities for improved Safety Training & Compliance • Complete Department Safety Management Plan (Administration & Management) |
| Sustainability | <ul style="list-style-type: none"> • Completed documentation of sustainability metrics within the Department (energy, water, recycling, etc) • Completed Climate Action Plan • Developing energy targets for new facilities • Began implementation of University Temperature & Building Hour Policy | <ul style="list-style-type: none"> • Begin implementing Climate Action Plan • Continue identifying areas that will improve Duke Enhanced LEED program • Continue exploring opportunities for energy saving measures (water usage, storm water quality, solar hot water & electricity) |