



Facilities Management Strategic Initiatives Update



**Building Tomorrow's
Duke Today**

*By creating and maintaining
campus facilities*

July 2009

Strategic Initiatives Update

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

The Facilities Management Department is steadily moving forward and working hard to accomplish the actions outlined in our Strategic Initiatives. Each of the ten teams currently assembled continues to meet regularly to evaluate, prioritize and implement the actions in each strategy. While competing demands often accompany the additional workload contained within the Department's Strategic Initiatives, much progress was made since our last report in January.

As you may recall, the purpose of the Strategic Initiatives Update is to provide an opportunity to review the accomplishments to-date and to look forward to the next steps in the plan. We believe that it is still quite important to relay our progress in order to continue our efforts of trying to improve internal and external communication as well as striving to enhance the services provided to our customers. This update serves as one means to do this and we will continue to distribute it on a semi-annual basis.

While many new, exciting and sometimes challenging things transpired at Duke over the last six months, the same occurred for Facilities Management as well. Among a few of the various accomplishments noted on the next page include the completion of a Customer Survey for some of the most frequent users of the work order system for the services we provide in Maintenance Services and Grounds, Recycling and Sanitation. Upon completing a thorough analysis of the results, we are confident that we will be able to address all the concerns noted in the survey and improve our services as well. The Department also began re-designing our website and analyzed our information systems to integrate and consolidate the data flow for improved database management. Improving both of these items will help us communicate more effectively with our customers and provide consolidated and easy to understand information.

The Department is also working diligently on the challenges associated with the budget reduction and in the identification of potential cost savings for the University. While doing so, Facilities Management is paying close attention to any potential impacts this may have on our level of service so that we may better understand and communicate any new information to our customers. In conjunction with these items, the Department recently completed an in-depth review of the management and operation of the steam system on campus. This review included how the Department is currently organized regarding the system, issues and concerns related to the system, and options on how to improve the management and maintenance of the system. This review was extremely important because it will help ensure that we are conducting business in the most effective, reliable and safe manner as possible. The management and operation of the steam system will be consolidated under Utility & Engineering Services within Facilities Management and a transition period will begin this month.

The Department is proud of the efforts put forth since the last report and remains motivated to accomplish the actions noted in the Strategic Initiatives set forth last year. The Champions of each Strategy remain committed to keeping this plan at the forefront of daily activities and appreciate all of the efforts displayed by the members on the teams. These efforts are extremely important not only for the success of the plan, but for the overall success of the Department as we continually strive to improve.

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

- ◆ *Attained a zero percent DART (Days Away Restricted Time) rate which dropped Facilities off the "Top 25 DART List" for the first time since its inception five years ago*
- ◆ *Conducted 3rd Annual Safety Fair with over 200 participants in attendance*
- ◆ *Provided Steam Trap Training for designated employees within Facilities Management*
- ◆ *Restructured daily operations and work related functions within Budgets & Business Services*
- ◆ *Developed Facilities Management Risk Assessment & Mitigation Plan Flow Chart*
- ◆ *New & Revised "Shop Talk" (Department Newsletter) distributed via e-mail*
- ◆ *Customer Survey completed for Maintenance Services and Grounds, Recycling & Sanitation*

Strategic Initiatives Update

STRATEGY	IMPLEMENTED & IN-PROGRESS	NEXT STEPS
Communication	<ul style="list-style-type: none"> • Hall of Fame distributed via e-mail • Shop Talk distributed & production schedule established • Lotus Notes e-mail accounts set up for all employees • Push to Talk Radio testing completed • Website re-design underway • Began inventory of communication devices 	<ul style="list-style-type: none"> • Consolidate communication devices (cell phones, radios, pagers, desk phones) • Re-deploy shared computers in correct locations for improved employee access • Update Department Bulletin Boards • Begin routine budget related communications • Review Department Employee Orientation
Customers	<ul style="list-style-type: none"> • Conducted Customer Survey for Maintenance Services & Grounds, Recycling, & Sanitation • Updating Customer Contact List to help identify key leaders, business managers, facilities & daily contacts • Identified potential customer related information to use on updated Department website 	<ul style="list-style-type: none"> • Begin analyzing Customer Survey results • Create Customer Focus Groups • Create e-mail distribution lists for major customers on campus • Help identify useful customer related reports & methods to distribute (e-mail, meetings, website)
Employees	<ul style="list-style-type: none"> • Department Training Plans updated • Distributed Employee Survey to help provide recommendations for cost effective Recognition Program • Staffing Plan near completion • Continue succession planning to include review of any potential effects from Staff Retirement Incentive Package 	<ul style="list-style-type: none"> • Distribute Staffing Plan to Department • Publish Department Events & Recognition Calendar • Create & publish Department Training Calendar • Continue recruitment plan for critical positions approved for FY10 • Review Apprenticeship Program
Information Systems	<ul style="list-style-type: none"> • Analyzed Department information systems to integrate & consolidate data flow for improved database management • Developing goals, identifying summary reports & key personnel to implement Strata (or similar) system • Continuing to develop Department hardware & software standards • Began Central Printer study • Geocortex continually updated 	<ul style="list-style-type: none"> • Begin consolidating, revising & updating approved Department databases • Distribute standards, implementation & training schedule to employees • Begin IT network audit with assistance from OIT
Management Reporting	<ul style="list-style-type: none"> • Restructured daily operations & business related work functions within Budgets & Business Services • Assessed data & resources necessary to improve/develop Management Reports • Identified potential cost savings for Department & implemented budget controls as well as formal Budget to Actual monthly meetings with key leaders of functional areas 	<ul style="list-style-type: none"> • Determine schedule for Management Reports • Continue analyzing & identifying potential cost savings that support University budget guidance • Work with Communication Team to begin distributing budget updates to Department on regular basis
Planning	<ul style="list-style-type: none"> • Identified & inventoried all plans in various engineering disciplines • Created schedule of all existing plans • Began to refine Building Renewal Planning to improve process & effectiveness 	<ul style="list-style-type: none"> • Continually update 5 year project schedule • Finalize Revised Renewal Process • Conduct standing meetings to review status of Facilities Management initiated projects identified in FY10 Capital Plan
Processes	<ul style="list-style-type: none"> • Began work on updating Design Guidelines • Creating Standard Document templates for PM Manual • Revising Standard Agreements using AIA 2007 as basis • Utilizing electronic format for Agreements 	<ul style="list-style-type: none"> • Revise Contract Agreement formats • Create Project Management approval for all commitments to the project • Continue to revise & update the OPM Processes Manual & Design Guidelines
Reliability	<ul style="list-style-type: none"> • East Data Center Reliability Study near completion • Developing comprehensive list of buildings with critical areas, systems & operations in conjunction with similar work conducted by OESO • Developed Facilities Management Risk Assessment & Mitigation Plan Flow Chart • Began review of 7i Datastream to understand system utilization versus capabilities 	<ul style="list-style-type: none"> • Continue to identify all critical area (survey customers on critical ratings & determine specifications required for critical needs) • Integrate critical ratings/areas into University Emergency Management Plan • Continue to revise and update Department Emergency Management Plan
Safety	<ul style="list-style-type: none"> • Draft Electrical Safety Manual complete & ready for review • Various Personal Protective Equipment (PPE) policies being updated & revised • Completed Steam Trap Training • Walking/Working Surfaces Policies drafted & under review • Lock Out Tag Out SOP being revised • Confined Spaces Policies & Procedures under review • Conducted 3rd Annual Safety Fair with over 200 participants in attendance 	<ul style="list-style-type: none"> • Completion of Departmental Safety SOP's, Manuals, Policies & Procedures • Continue providing opportunities for improved Safety Training. • Complete Department Safety Management Plan (Administration & Management)
Sustainability	<ul style="list-style-type: none"> • Continue to document current status of sustainability metrics within the Department (energy, water, recycling, etc) • Climate Action Plan near completion 	<ul style="list-style-type: none"> • Continue to gather & document sustainability metrics within the Department & University • Identify areas that will improve Duke Enhanced LEED program • Continue exploring opportunities for energy saving measures