



# Facilities Management Strategic Initiatives Update

## Building Tomorrow's Duke Today

*By creating and maintaining  
campus facilities*



January 2009

# Strategic Initiatives Update

STRATEGIES	GOALS	CHAMPIONS	TEAM MEMBERS
<b>Communication</b>	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>
<b>Customers</b>	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>
<b>Employees</b>	Develop & retain highly skilled, professional & motivated workforce	Michelle Carter-Jenkins	<i>Reid Babinec, Curtis Browning, Jack Burgess, Josln Campbell, Joe Jackson, Andy Lyons, Phil Martin, Rikkia Smith, Mike Snyder, Myron Taschuk, Gary Teater</i>
<b>Information Systems</b>	Accurate, accessible, transparent & timely information	Adem Gusa & Russell Thompson	<i>Greg Anspach, Mark Browning, Sam Duffort, Bob Friedman, Wayne Wagoner, Dennis Woody</i>
<b>Management Reporting</b>	Meaningful managerial reporting	Sam Duffort	<i>Roger Connor, Tommy Davis, Thomasena Johnson, Regis Koslofsky, John Noonan, Ray Walker, Linda Ware</i>
<b>Planning</b>	Proactive, integrated & focused plans in all functional areas	Adem Gusa	<i>Jack Burgess, Roger Connor, Cash Davidson, Mike Lane</i>
<b>Processes</b>	Best practices established & implemented	Paul Manning	<i>Greg Anspach, Bobby Browning, Cash Davidson, Keith Guile, Bill McCraw, Linda Ware, Dudley Willis, Diane Zakos</i>
<b>Reliability</b>	Zero customer interruptions	Jack Burgess & Russell Thompson	<i>Helen Brantley, Mark Browning, David Bryant, Mike Lane, Willie Rigsbee, Aurel Selezeanu, Mark Wilkinson, Dudley Willis</i>
<b>Safety</b>	Zero safety incidents	Mike Snyder	<i>Jack Burgess, Joe Jackson, Paul Manning, Lester Matte, John Noonan, Russell Thompson, Ronnie Wilkerson</i>
<b>Sustainability</b>	Leader in sustainability	Joe Jackson & Steve Palumbo	<i>Arwen Buchholz, Woody Cheek, Bob Friedman, Myron Taschuk</i>

The Facilities Management Strategic Initiatives were presented to the employees within the Department during the Annual Employee Appreciation and Recognition Luncheon hosted in the Fall of 2008. This event began the implementation of work generated by a series of strategic planning sessions geared to re-evaluate and revise the goals and priorities within the Department. Since that time, the assigned working groups began meeting on a regular basis to prioritize and implement the actions in each strategy. Last month, the Department conducted a quarterly review with all the team members to evaluate and update the status of each action.

The purpose of the Strategic Initiatives Update is to provide an opportunity to review the accomplishments to-date and to look forward to future progress. It is important to provide regular updates not only within the Department, but also to the various members from Duke's senior leadership and University customers who provided input into the development of the plan. Thus, this update also serves as a means to improve communication both internally and externally as this is an important step in the successful implementation of the plan. The Strategic Initiatives Update will be provided on a semi-annual basis and will coincide with the Department's strategic planning sessions already scheduled for the year.

The Strategic Initiatives Update outlines the *Implemented and In-Progress* items as well as the *Next Steps* for the ten strategic initiatives. While only three months into the implementation phase, some progress was made especially in the realm of inventorying the current status of various data and information housed within the Department. As many working groups pointed out, a complete inventory of current practices, data, and work plans needed to be compiled, analyzed, and understood before the improvements within each area could be started. Another key aspect noted by the working groups was the importance of continually assessing the priorities within each strategy. This is very important as external factors outside of our control can often impact the priorities originally established. As such, we will continue to review and prioritize the actions noted in each strategy to ensure they support the overall vision within the Department and at Duke.

The Department remains motivated and excited to work on these initiatives and is proud of the efforts put forth thus far. The column to the right outlines some of the *Highlights* from the work noted on the last page. As we face some changing and challenging times, we continue to work towards the accomplishment of the actions outlined in the Strategic Initiatives and look forward to our continued progress.

### **HIGHLIGHTS**

- ◆ *Developed & issued the Report of the Office of Project Management*
- ◆ *Developed & issued the Quarterly Building Budget Report*
- ◆ *Launched Geocortex— (web-based mapping software using GIS applications)*
- ◆ *Provided Steam System Training— Concepts & Applications for 60 employees within Facilities Management and Engineering & Operations*
- ◆ *Improved Recognition Program within Department*
- ◆ *Developed a plan for 24/7 coverage for energy controls*
- ◆ *Completed Job Hazard Analysis (JHA) refresher training*

Please contact John Noonan, AVP for Facilities at [john.noonan@duke.edu](mailto:john.noonan@duke.edu), 660-4252, or Ellie Jimenez, Director of Administration & Special Projects at [ellie.jimenez@duke.edu](mailto:ellie.jimenez@duke.edu), 660-1477 if you are interested in further details about any item in this update.

# Strategic Initiatives Update

STRATEGY	IMPLEMENTED & IN-PROGRESS	NEXT STEPS
Communication	<ul style="list-style-type: none"> <li>Communication items currently used within the Department inventoried; recommendations for improvements underway.</li> <li>Department Calendars, Directories, Phone Rosters revised.</li> <li>“Hall of Fame” &amp; “Shop Talk” revised.</li> <li>Computer access for employees inventoried.</li> </ul>	<ul style="list-style-type: none"> <li>Update Department Bulletin Boards; determine feasibility for other technologies to display messages.</li> <li>Ensure all employees have access to computers &amp; e-mail accounts.</li> <li>Inventory cell phones, pagers and radios for consolidation &amp; standardization.</li> <li>Begin planning for website reconstruction.</li> </ul>
Customers	<ul style="list-style-type: none"> <li>Building Contact List updated.</li> <li>Potential communication items for customer use identified &amp; recommended to Communication Team.</li> <li>Customer Survey designed.</li> </ul>	<ul style="list-style-type: none"> <li>Create Department database with contact information for major customers on campus.</li> <li>Create Customer Focus Groups.</li> <li>Conduct Customer Service Training for key areas within the Department.</li> </ul>
Employees	<ul style="list-style-type: none"> <li>Staffing Plans for DU &amp; ES &amp; Maintenance Services finalized.</li> <li>Recruitment Plan outlined for functional areas.</li> <li>Recognition Program improved to include venue, recognition items &amp; committee membership.</li> <li>Department Training Plans updated.</li> </ul>	<ul style="list-style-type: none"> <li>Continue Staffing Plan (Grounds).</li> <li>Create Department Events &amp; Recognition Calendar; continue to make improvements within these areas.</li> <li>Create Department Training Calendar.</li> <li>Review Apprenticeship Program.</li> </ul>
Information Systems	<ul style="list-style-type: none"> <li>Identified &amp; inventoried all Department databases.</li> <li>Department hardware &amp; software standards developed &amp; distributed to employees.</li> <li>Geocortex launched.</li> </ul>	<ul style="list-style-type: none"> <li>Determine consolidation opportunities for improved database management.</li> <li>Implement Strata System (software interface w/SAP) to improve integration &amp; tracking of project data.</li> <li>Initiate network audit &amp; explore document management options.</li> </ul>
Management Reporting	<ul style="list-style-type: none"> <li>Identified Management Reports to utilize within the Department.</li> <li>Report of the Office of Project Management issued.</li> <li>Quarterly Building Budget Report developed &amp; issued.</li> <li>Operating Budget by Functional Area Report drafted.</li> </ul>	<ul style="list-style-type: none"> <li>Assess data and resources necessary to improve or develop various Management Reports.</li> <li>Create schedule for Management Reports.</li> <li>Continue development &amp; issuance of Management Reports.</li> </ul>
Planning	<ul style="list-style-type: none"> <li>Inventoried &amp; defined all plans within the Department &amp; University.</li> <li>Updated 5 year project schedule for the Capital Plan.</li> <li>Began bi-weekly planning and coordination meetings.</li> </ul>	<ul style="list-style-type: none"> <li>Develop the Facilities Management Chapter of the Action Plan (Infrastructure &amp; Utilities).</li> </ul>
Processes	<ul style="list-style-type: none"> <li>Table of Contents approved for the Office of Project Management Manual which will include summary documents, the Capital Project initiation process, end user information, and a building owner manual.</li> <li>Table of Contents updated for the revised Design Guidelines.</li> </ul>	<ul style="list-style-type: none"> <li>Create a Project Management approval for all commitments to the project.</li> <li>Continue to revise and update the Office of Project Management Manual and Design Guidelines.</li> <li>Develop new Systems Applications and Products (SAP) module for Cost at Completion’s.</li> </ul>
Reliability	<ul style="list-style-type: none"> <li>East Data Center Reliability Study underway.</li> <li>Building criticality ratings based on technical complexity defined.</li> <li>Risk Assessment Decision Matrix developed.</li> <li>Plan for 24/7 coverage for energy controls completed.</li> </ul>	<ul style="list-style-type: none"> <li>Develop Facilities Management Risk Assessment &amp; Mitigation Plan Flow Chart.</li> <li>Study full capabilities of Computerized Maintenance Management System (CMMS).</li> <li>Continue to review and update Department Emergency Management Plan.</li> <li>Survey customers on critical ratings &amp; determine specifications required for critical needs.</li> </ul>
Safety	<ul style="list-style-type: none"> <li>Completed Steam System Training Part I: (Theory &amp; Concepts).</li> <li>Developed &amp; prioritized critical safety areas within the Department as part of the program review.</li> <li>Completed classes on Job Hazard Analysis (JHA)- what, why, how to complete.</li> <li>Departmental Safety SOP’s being developed/updated.</li> </ul>	<ul style="list-style-type: none"> <li>Identify teams to conduct program reviews.</li> <li>Continue completion of JHA’s for required maintenance jobs.</li> <li>Conduct Steam Trap Training.</li> <li>Conduct Steam System Training Part II: (Theory &amp; Concepts).</li> <li>Continue providing opportunities for improved Safety Training.</li> </ul>
Sustainability	<ul style="list-style-type: none"> <li>Documented current status of sustainability metrics within the Department (energy, water, recycling, etc).</li> <li>Documented current LEED Buildings &amp; identified those in process of attaining certification.</li> <li>Climate Action Plan for steam production &amp; electricity purchase near completion.</li> </ul>	<ul style="list-style-type: none"> <li>Continue to gather &amp; document sustainability metrics within the Department &amp; University.</li> <li>Complete Climate Action Plan.</li> <li>Identify areas that will improve Duke Enhanced LEED program.</li> <li>Continue exploring opportunities for energy saving measures.</li> </ul>