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# FM Strategic Planning

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# Agenda

1. Mission Statement
2. Vision Statement
3. Value Statement
4. Develop Goals
5. Develop Metrics
6. Develop Strategic Plan
7. Advertise the Plan

# 1. Mission Statement



# Mission Statements

- Mission statements define the organization's purpose and primary objectives. These statements are set in the present tense, and they explain why you exist as a business, both to members of the organization and to people outside it. Mission statements tend to be short, clear and powerful.



## GMU Facilities' Mission

- ▶ *The Facilities Department of George Mason University exists to deliver the quality physical environment necessary to support the mission of the university.*

# GMU Facility Management Mission

- Professionally maintain and operate state of the art facilities to provide a safe, comfortable, energy conscious, and aesthetically pleasing learning, teaching, and working environment in an economical and environmentally friendly manner that supports the Mason vision.

# Sample Mission Statements

- ▶ The Smithsonian: *The Office of Facilities Engineering and Operations provides world-class services and stewardship by building, operating, maintaining and ensuring a safe, secure, healthy environment that enhances the Smithsonian experience.*
- ▶ American University: *Facilities Management's mission is to effectively operate and maintain a safe, functional, clean, and attractive living and learning environment at American University.*
- ▶ VCU: *Our mission is to enable the university to carry out its mission of teaching, research and public service by providing cost effective and efficient planning, design, construction and maintenance services throughout Virginia Commonwealth University.*
- ▶ Rochester: *Providing reliable and cost efficient energy and building environments to our customers every day.*



## 2. Vision Statement



# Vision Statement

- Vision statements also define your organization's purpose, but they focus on its goals and aspirations. These statements are designed to be uplifting and inspiring. They're also timeless: even if the organization changes its strategy, the vision will often stay the same.

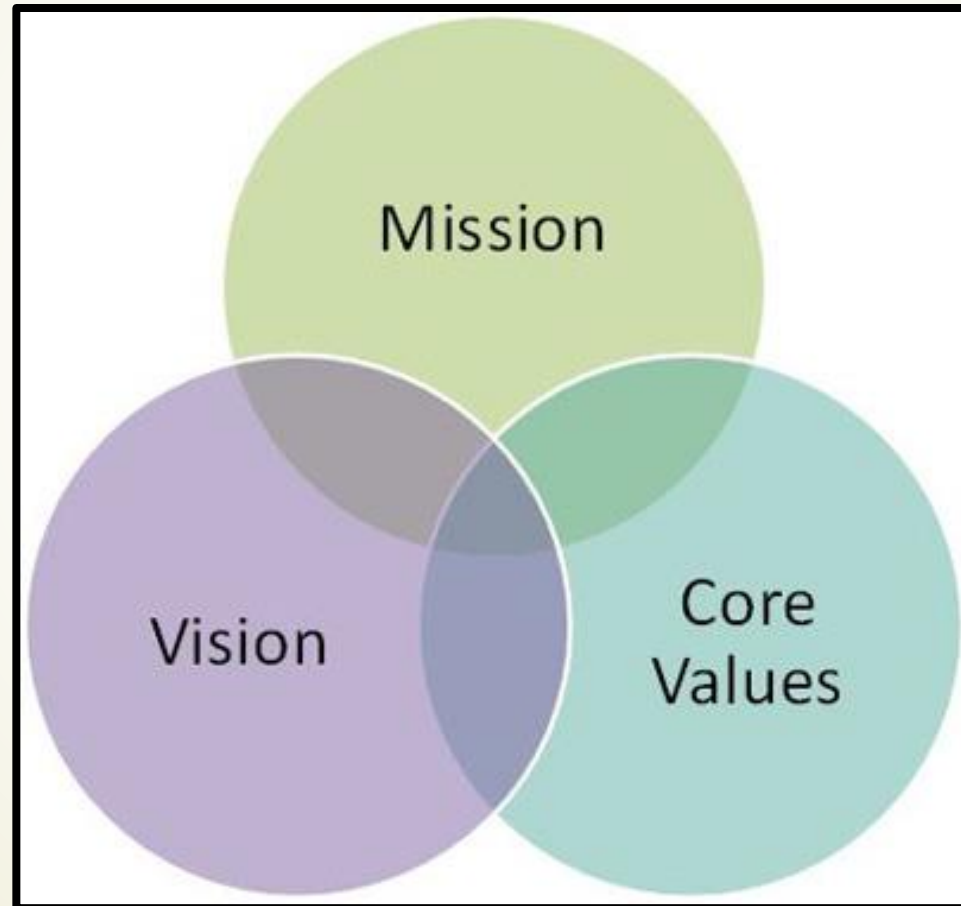
## GMU FM Vision

- ▶ *We are a high performing facilities management team that works in collaboration striving to provide excellent service and ever-improving technical expertise to anticipate and exceed the needs of the Mason Community.*

# Sample FM Vision Statements

- ▶ *Smithsonian: OFEO will successfully steward the national treasures that are the Smithsonian's buildings, gardens, and facilities, through the efforts of a highly professional, motivated and dedicated workforce and through collaborative partnerships with Smithsonian stakeholders.*
- ▶ *VCU: To be the model of quality integrated service through excellence in planning, design, construction and craftsmanship.*
- ▶ *UVA: Excellence, innovation, and leadership in our support of the education, research, health care and public service mission of the University.*
- ▶ *Texas State: Quality, Responsive Service: Making a Difference at Texas State. Provision of quality services that are responsive to the needs of the campus community and support creation of an Emerging Research University.*
- ▶ *Northwestern: As an innovative and collaborative partner, FM delivers an exceptional customer experience through superior service and stewardship. FM attracts and grows great talent within a supportive culture by offering challenging and meaningful work in a high-performing team.*

### 3. Value Statement





# Value Statements

- Values are clear in everything you do, how you operate. Articulating values provides everyone with guiding lights, ways of choosing among competing priorities and guidelines about how people will work together. A values statement reflects the core ideology of an organization, the deeply held values that do not change over time. It answers the question, "how do we carry out our mission?" Values are what your organization lives, breathes and reflects in all its activities.

# GMU FM Values

- We are the foundation of the community we want to build together. We are:
  - **M**ission Guided
  - **A**lways Reliable
  - **S**afety Focused
  - **O**perational Excellence
  - **N**oble Integrity

# Sample FM Values

- Smithsonian:
  - Excellence: Developing the skills and talents of our team members to accomplish our vital work
  - Leadership: Fostering an environment that rewards creativity and supports innovative ideas
  - Integrity: Personally dedicated to supporting the Smithsonian's mission
  - Teamwork: Succeeding together through mutual respect and support
  - Effectiveness: Delivering the right service in the right place at the right time
- VA Tech: We affirm our commitment to our customers through the following five core values:
  - We are stewards of the campus environment.
  - We care for your facilities.
  - We are reliable, thorough, & professional.
  - We treat our customer with respect.
  - We continuously strive to improve.
- American University:
  - Customer focused
  - Commitment to sustainability
  - Operational Excellence
- UVA:
  - Collaboration: Striving to work together and with others to accomplish the purpose and vision of the University by sharing knowledge, learning and building consensus
  - Respect: Sharing a common respect for ourselves, each other and our University community
  - Integrity: Striving for honesty and equity in all our endeavors
  - Excellence: Striving to be second to none in all that we do
  - Pride: Taking pride in the beauty of our grounds, the grandeur of our buildings and the quality of our work
  - Community: Making the University and our community a better place to study, work, heal and live

## 4. Develop Goals



# Setting Goals: Balanced Scorecard

- Need to focus on 4 areas:





## How is Facilities doing?

- Meeting our mission?
- Reaching our vision?
- Following our values?

# What needs improvement?

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- 1. Holistic reliability (Hold)
- 2. Internal communication – (Tad)
  - “FM / Shop Onboarding”
- 3. External facilities communication (#22)
- 4. Community communication (Hold)
  - “FM Handbook”
- 5. Purchasing process (Mike/Jimmy)
- 6. Contracting services (Kathy)
- 7. **Fleet management** (Scott)
- 8. Policies and procedures / Roles and responsibilities (Hold)
- 9. Accountability (Hold)
- 10. **Recycling** (Dustin)
- 11. **Grounds** (Archie)
- 12. Duplication of service providers (Frank)
- 13. **PM Staffing** (Quenton/Nick)
- 14. BA Staffing (Ronnie)
- 15. Technology – out of date (Mike/Tad)
- 16. **Supervisor Budgets/charge backs** (Megan)
- 17. Training plan/matrix (Lisa/Roberta)
- 18. “Right Staffing” (Kathy)
- 19. Employee Incentives on merit (Roberta)
- 20. **Project planning** (Christine)
- 21. FM Services to satellite campuses (Tad/John/Mike)
- 22. MOU's - #4 (Kathy)
- 23. Time clocks (Mike)
- 24. Energy (Pat)
- 25. Re-instate quarterly stewardship program (Tad)
- 26. “As-Builts” and other documents making it to archives (Ralph)
- 27. Standards of quality – FM wide (Hold)

- 1. What needs improvement?
  - PM Staffing Levels
  - Benchmarks
  - Industry standards

What could we do to make it better?

1. Validation of School Dude Data
2. Identify equipment responsibilities

What is the goal?

- Proper preventative maintenance of buildings

How can we measure our progress?

- Measure PM completion
  - Current:
  - Goals:

Who should champion this initiative? Quenton

## 2. What needs improvement?

Quality

Attention to detail

What could we do to make it better?

Surveys -

Periodic

Annual

What is the goal?

To increase customer satisfaction 😊

How can we measure our progress? Ask community / Internal

Who should champion this initiative? –Martin Myers

## 8. What needs improvement?

Energy

Working Capital

Policy

What could we do to make it better?

- Finalize the Energy Policy
- Prioritized Energy Project List – based on ROI
- Develop the Working Capital Fund Program

What is the goal?

5% reduction by 2020 (based on 2015 consumption -- sq/ft)

How can we measure our progress?

Who should champion this initiative? Pat



## 5. Develop Metrics



# Value of Measuring

- Transparency of operating cost at the granular level
- Facts and statistics to support decision-making processes
- Agility and speed in making decisions which can save money and improve outcomes
- Business intelligence across sectors, to compare performance, analyze the impact of investments and leverage innovations



# Measure What, Why and How

**WHAT:** How do you determine what to measure, there are hundreds of facility metric? = Start with goals!

**WHY:** Need to determine if metrics are for internal use or external reporting (or both).

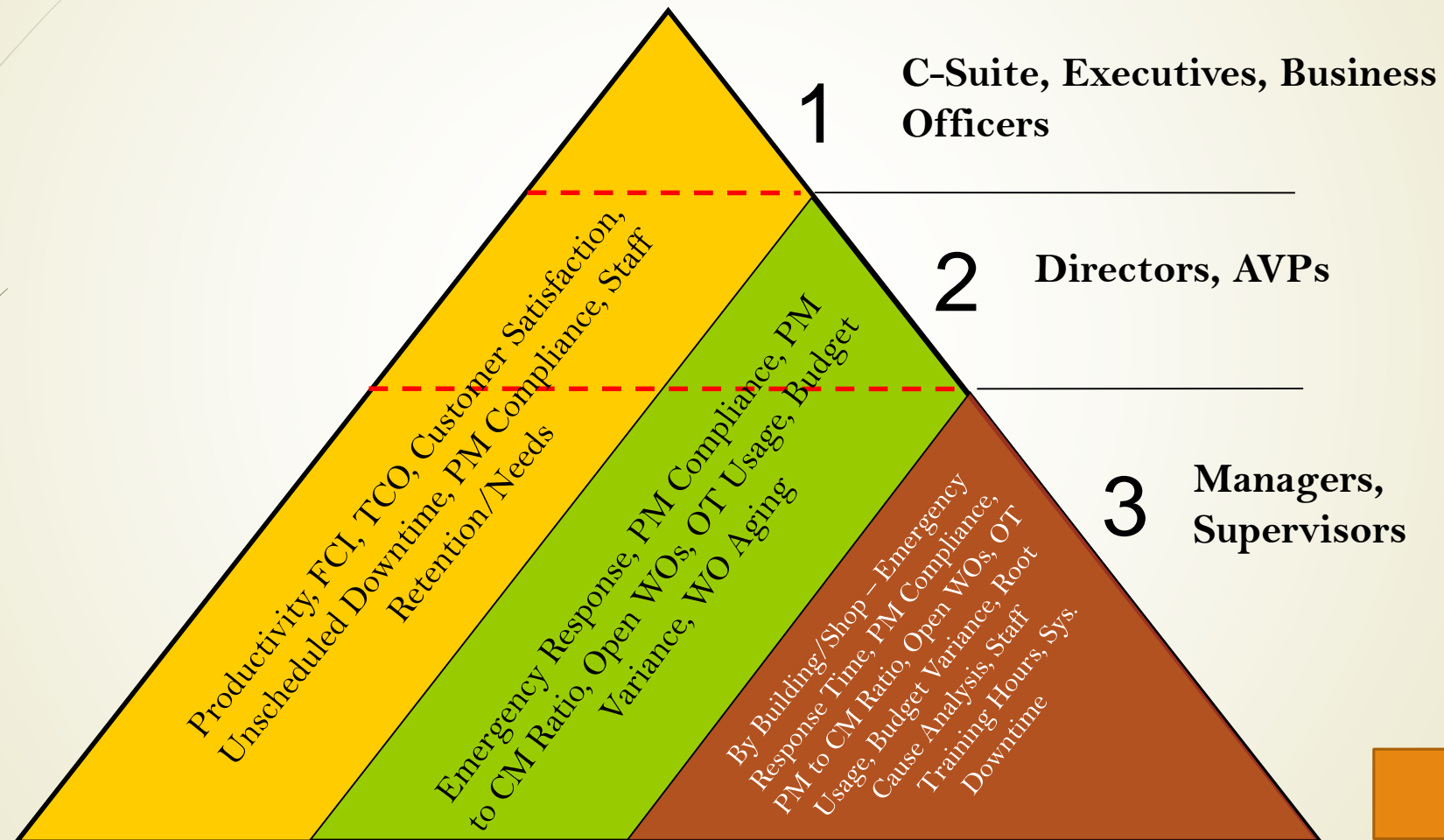
**HOW:** Need to establish a process for gathering, reporting and reacting to the metrics.



# Measuring Can Answer

- Do you think that you could save a lot a space for your company, but just don't have a way to prove it?
- Have you thought your facility could save a lot of energy (and money) by installing lighting sensors in the rest rooms, but want some evidence?
- Do you believe your facility is spending much more on electricity than other similar facilities?
- Do you think your maintenance expenditures are considerably less than those of many other buildings and wish there were a way for you to get recognized for how well you've been managing your maintenance program?
- Do you think you could save money by outsourcing more of your operations?

# Metrics for Everyone





# Types of Metrics

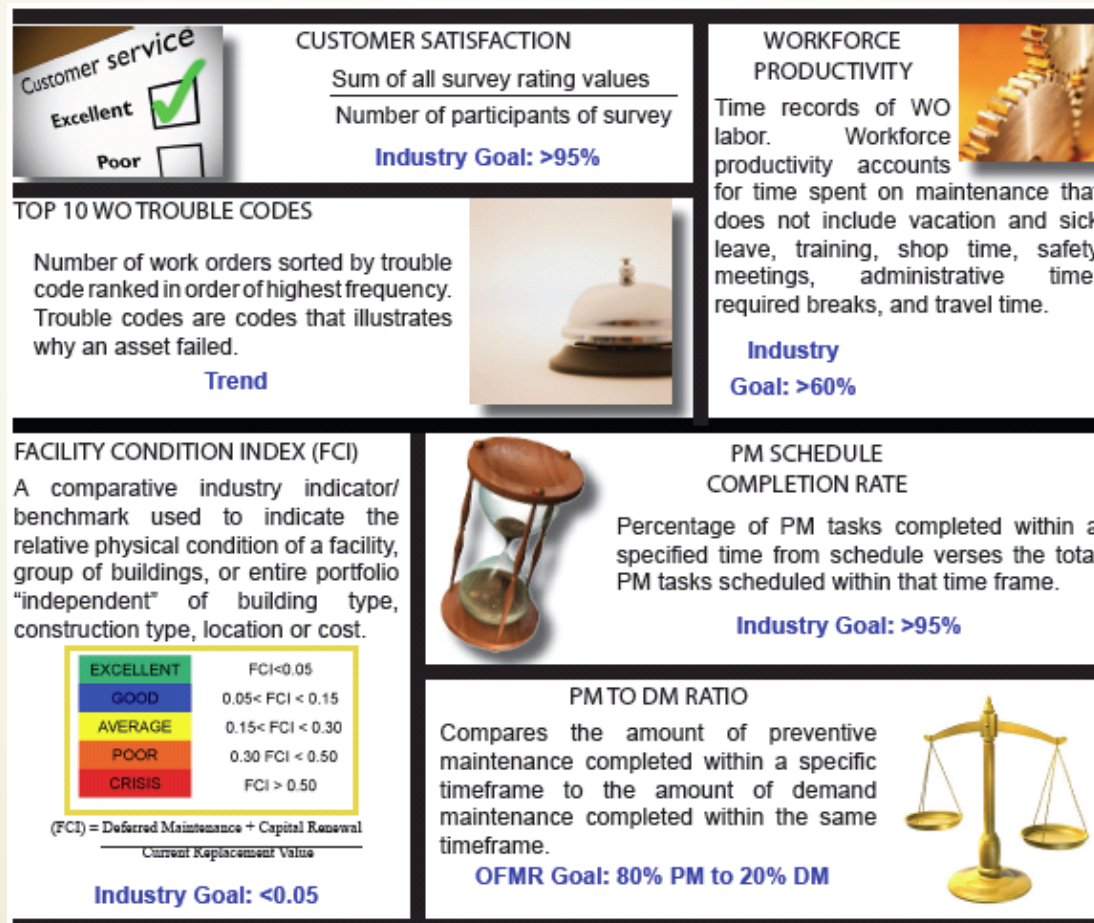
- Trends: Compare last month's outcome to this month's, tracking trends
- Industry Standard: Example APPA – An Facilities organization perform at a Service Level 2 should spend 75% of their time doing proactive work.
- Peers: Compare your maintenance cost/sf to other organizations like you – Example Sightlines and universities.
- Goals: Set a goal, for example 75% productivity and check if you are achieving that goal; overall for the Facilities organization and by individual groups such as shops.

# Metrics / Reports

Metric Description	Std.	Metric Description	Std.
Facility Condition Index (FCI)	<0.05	Stockroom Turns / Year	2 - 3
Deferred Maintenance Backlog	Trend	Annual Training Hours	>40 hrs.
On-the-job Wrench Time	>60%	Maint. Cost / Replacement Cost	3 - 4%
PM / CM Ratio	70 / 30	Percent Return Work	<5%
Unscheduled Maintenance Downtime	<2%	Mean Time Between Failures	Trend
PM Schedule Compliance	>95%	% Failures Assessed: Root Cause	>75%
CM Schedule Compliance	>90%	Maintenance OT Percentage	5-15%
Unscheduled Man-Hours	<10%	% WO Covered by Estimates	>90%
WO Turn-Around Time	Trend	On-Site Supervisor Time	>65%
Emergency Response Time	<15 min. <sup>2</sup>	Stockroom On-Time Delivery	>97%
Stockroom Service Level	>97%	Material / Part Performance	>98%

# Maintenance Metrics

## metrics and targets top 10 maintenance KPIs



# Maintenance Metrics

## metrics and targets top 10 maintenance KPIs

### WO COMPLETION TARGET

Identifies work orders that are past due, analyzes their aging, and shows if the overall trend is increasing or decreasing. It also helps the maintenance manager to prioritize work orders based on the age and type.

**Trend**

### STAFF TURNOVER

Number employees that leave organization

Number employees in organization in same year

**Industry Goal: <10%**



### UNSCHEDULED DOWNTIME

Reports on the reliability of critical equipment. Requires use of work type field to identify breakdowns.

**Annual Trend**

### TOTAL COST OF OWNERSHIP

A dollar per square foot value associated with a facility. It is a calculation of all facilities-specific costs (not including furnishings or non-facility specific equipment) divided by estimated lifespan of the building and the total gross area.

**Building Comparison**

## 6. Develop Strategic Plan





## MISSION

*"To provide the facilities and operational support required to fulfill the mission, vision and values of \_\_\_\_\_"*

Customer  
Perspective

Deliver services that our customers need and value.  
Our customers recognize us as their provider of choice.

Process  
Perspective

Services that are delivered by continually enhanced processes,  
efficiently, and seamlessly.

Learning  
and Growth  
Perspective

A Facilities Management organization whose people possess the  
latest skills and knowledge, and are recognized for their  
contributions to the organization.

Financial  
Perspective

Optimally used resources that provide the best value when compared  
to other providers and which are utilized in total alignment with the  
strategy of the organization.

Caring

Integrity

Discovery

**CORE VALUES**

## MISSION

*"To provide the facilities and operational support required to fulfill the mission, vision and values of \_\_\_\_\_"*

### Customer Perspective

1. Establish a proactive customer service program
2. Develop partnerships with customers for mutual success
3. Implement effective customer service feedback and measurement system

### Process Perspective

4. Simplify and streamline processes
5. Improve the delivery of service
6. Integrate technology to improve services
7. Adopt best practices to improve services

### Learning and Growth Perspective

8. Provide appropriate training for our employees
9. Formalize a program for career development
10. Prepare and encourage employees to implement new techniques

### Financial Perspective

11. Establish a high level of accountability
12. Align department priorities with institutional requirements
13. Benchmark performance
14. Maximize asset utilization

Caring

Integrity

Discovery

**CORE VALUES**

# Strategic Plan Example

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Goals	Strategic Objectives	Metrics	Target	Strategic Initiatives	Champion(s)	Metric	Target	Action Items	
Deliver Exceptional, Proactive Customer Service	Provide a safe, comfortable and aesthetically pleasing learning, teaching and working environment.	Customer Satisfaction Surveys	>80%	Improve communications with end-users through establishing MOUs.	Kathy	# of MOUs activated/year	2	Complete Eagle Bank and Student Services MOU.	
				Institute Customer Surveys	Kathy	Start using survey	January 2016	Write sample survey	
				Reinstitute stewardship program in UT Shop.	Bob	% of space inspected	100% yearly	Institute and track an inspection program for all GMU spaces.	
Continually Enhanced & Seamless Processes	Professionally maintain and operate state of the art facilities.	Preventive Maintenance Completion Rates	>95%	Develop process for measuring actual PM completion rates by shop	Quenton/Nick	Determine actual PM completion rate	December 2016	Work with Tad, Superintendents, Mike Lay & Nicole to establish a reportable metric in School Dude.	
		Overdue Work Orders	<5%	Establish streamline contracting plan	Kathy	Needed services under contract by Jan 2016	100%	Need electrical, roll-up doors, and HVAC	
				Streamline purchasing process.	Mike/Jimmy	Time to receive materials	?	1. Map procedures. 2. Write policy. 3. Determine FM buying authority. 4. Train.	
Increase the Effectiveness of our Workforce	High-performing FM team that provides ever-improving technical expertise.	Productivity	>80%	Increase internal communications	Tad/Lisa	Establish internal communication program	In place by JAN	New hires on-boarding process, regular internal emails, use of bulletin boards, regular meetings with agendas	
				Establish Roles & Responsibilities and right-size	Kathy & Supers	Right-sized Shops	By end of FY16	Grounds (Archie), BA Shop (Ronnie), HVAC Shop (Venton), PM Shop (Quenton)	
				Update technology	Tad/Mike/Luis	Establish FM IT plan	In place by JAN	Institute usage of handhelds. Problem with phones? New computers.	
				Time clocks	Mike	Time Lost	<20 hrs/week	Buy 5 additional clocks, track lost time	
		Annual Training Hours	8,000 hrs/year	Develop training program includes tracking training needs and hours (need software)	Lisa/Roberta	% of no-shows for safety training	0%	Investigate training tracking software. Set training approval process. Set training goals.	
		Employee Incentives	# of incentives given / year	Establish FM employee incentive program	Lisa/Roberta	Incentive Plan in place	In place by JAN	List current available incentives. Discuss with supervisors. Establish expectations.	
Be Respected as Outstanding Stewards of Mason's Resources	In a fiscally sound and environmentally friendly manner.	Total Cost of Ownership (TCO)	<\$5/SF	Centralize management of Mason's Fleet	Scott	Vehicles/Equip in School Dude with maintenance schedule	100%	Establish University Vehicle Policy	
				Establish budgets by shop	Megan	Budget vs. actual expenditures	In place by JAN	Megan and Tad developing a plan.	
				Determine TCO by campus	Tad/John/Mike /Megan	Establish means to calculate TCO	In place by JAN	Schedule a meeting with Tad, John, Mike and Megan.	
		Energy Goals	5% Reduction by 2020	Determine energy saving projects	Frank/Pat	Establish revolving fund	In Place by FY16	Hire consultant	
				Establish energy management action plans with users	Pat	Meet with Customers	100% by FY16	Meet with Student Services. Need to establish University Energy policy	
		Recycling Goals (Total Cost of Recycling & Waste Management)	10% Reduction by FY17	Identify every stream & actual diversion rates/pricing	Dustin	Diversion Rate Increase by 2018	35%	Purchase recycling stream software.	
				Diversion Rate Increase	Dustin			Hire consultant to study various initiatives	
								Composting food waste.	
							Institute GMU Recycling Policy		

# Strategic Plan Customer

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Goals	Strategic Objectives	Metrics	Target	Current	Strategic Initiatives	Champion(s)	Action Items	Status
Deliver Exceptional, Proactive Customer Service	Provide a safe, comfortable and aesthetically pleasing learning, teaching and working environment.	Customer Satisfaction Surveys	>80%	N/A	Improve communications with end-users through establishing MOUs.	Kathy/Tad	Complete Eagle Bank and Student Services MOU.	Tad working on Eagle Bank. Draft Student Services written
					Update FM website	Website Team	Work with Aurora on website format.	Work with supervisors on website content.
					Institute Customer Surveys	Kathy/Mike	Add survey to website (Kathy). Institute automatic work order surveys through SchoolDude (Mike).	Discuss survey options
					Reinstitute stewardship program in UT Shop.	Jose/Bob/Steve	Calculate % complete.	UTs performing inspections

# Strategic Plan Process

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Goals	Strategic Objectives	Metrics	Target	Current	Strategic Initiatives	Champion(s)	Action Items	Status
Continually Enhanced & Seamless Processes	Professionally maintain and operate state of the art facilities.	Preventive Maintenance Completion Rates	>95%	53%	Develop process for measuring actual PM completion rates by shop	Quenton/Nick	Roll-out new metric's report	New metrics set
		PM/DM	75%	37%	Develop process for measuring PM/DM	Kathy	Roll-out new metrics' report	New metrics set
		Overdue Work Orders	<5%	>2,000	Establish FM services contracting plan	Kathy	Need electrical, roll-up doors, and HVAC	Electrical awarded, doors advertised, HVAC SOW written
					Establish FM supply contracting plan	Kathy/ Hassan	Need to create supply contract's list	Working on list



# Strategic Plan Staff

Goals	Strategic Objectives	Metrics	Target	Current	Strategic Initiatives	Champion(s)	Action Items	Status
Increase the Effectiveness of our Workforce	High-performing FM team that provides ever-improving technical expertise.	Productivity	>80%	75%	Increase internal communications	Tad/Lisa	New hires on-boarding process, regular internal emails, use of bulletin boards, and general calendar.	Take pictures of new hires. Working on calendar.
					Establish Roles & Responsibilities and right-size	Kathy & Supers	Staffing analysis complete	Waiting on new FM
					Update technology	Tad/Mike/Luis	Institute usage of handhelds. Problem with phones? New computers.	Working on pilot for 12 new pads.
		Annual Training Hours	8,000 hrs/year	?	Develop training program includes tracking training needs and hours (need software)	Lisa/Roberta	Investigate training tracking software. Set training approval process. Set training goals.	?
		Employee Incentives	# of incentives given / year	?	Establish FM employee incentive program	Lisa/Roberta	List current available incentives. Discuss with supervisors. Establish expectations.	Report incentives to Lisa for tracking.

# Strategic Plan Stewardship

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Goals	Strategic Objectives	Metrics	Target	Current	Strategic Initiatives	Champion(s)	Action Items	Status
Be Respected as Outstanding Stewards of Mason's Resources	In a fiscally sound and environmentally friendly manner.	Total Cost of Ownership (TCO)	<\$5/SF	?	Centralize management of Mason's Fleet	Scott	Establish University Vehicle Policy	Risk Management has lead - Legal has recommended minor changes. Tom to look into.
					Establish budgets by shop	Megan	Megan and Tad developing a plan.	Almost done
		Energy Goals	5% Reduction by 2020	?	Determine energy saving projects	Frank/Pat	Hire consultant	SOW written
					Establish energy management action plans with users	Pat	Need to establish University Energy policy	Facilities Admin has lead. Legal reviewing
		Recycling Goals (Total Cost of Recycling & Waste Management)	10% Reduction by FY17	\$1.7M	Identify every stream & actual diversion rates/pricing	Dustin	Purchase recycling stream software.	Pilot
							Hire consultant to study various initiatives	
					Diversion Rate Increase	Dustin	Composting food waste.	Pilot
							Institute GMU Recycling Policy	Margaret

# Calculating Metrics

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
Available Shop Hours	Total Hours In School Dude	Total Additional Hours	Total Leave Hours	Total Hours of Shop Admin	Total Shop Training Hours	Wrench Turning Time	Productivity (Wrench Turning Time/(Total Hours - Leave))	# of Service Calls Completed this Month	# of Open Work Orders	# of Overdue Work Orders (30 days or more)	Total # of Hours Logged on Completed Service Calls this Month	Average Time per Service Call	Total # PMs Completed this Month	Total # of PMs Assigned this month	PM Completion Rate (PMs completed/assigned)	PM Hours Logged this Month	Corrective Hours Logged this Month	PM/CM Ratio (PM hours / Total PM + Corrective Hours)	Stewardship WO	PM Voids
Based on the number of working days in the month. This doesn't come from SD. Includes supervisors and wage employees.	Hours recorded in SD in a given month.	OT and Comp Time	Vacation, sick leave and <b>holidays?</b>	Hours recorded on ADMIN work orders.	Hours recorded on Training work orders.	<b>B - C - D - E - F</b> Note: Does not include OT or comp time	<b>G/(B-D)</b> Note: Does not include OT or comp time	Service calls include PMs, Corrective Repairs, & Minor Improvements only	All work orders	All work orders	PMs, Corrective Repairs, & Minor Improvement only	"I" total hours / No. of "I" WO	PMs only	PMs only	N/O	PMs only	Corrective Repairs only	Q/(Q + R)	Requested Work Orders Classified as "Services / Stewardship"	Work Orders with status changed to VOID in a given month



## 7. Advertise The Plan





# Why Worry About Public Relations?

- FMs are at best seen as quiet fulfillers of organizational needs, at worst as expensive noncontributors to corporate revenues and goals.
- It is not enough to do a good job, your customers and bosses need to know it too.
- The FM needs to increase service awareness, knowledge while decreasing resistance to Facility policies & procedures.



# Set Realistic PR Objectives

- Increase awareness of facility services.
- Decrease resistance to Facility policies.
- Improve the image of Facilities as a service provider.
- Enhance customer's knowledge about facility services.
- Disclose facility metrics.

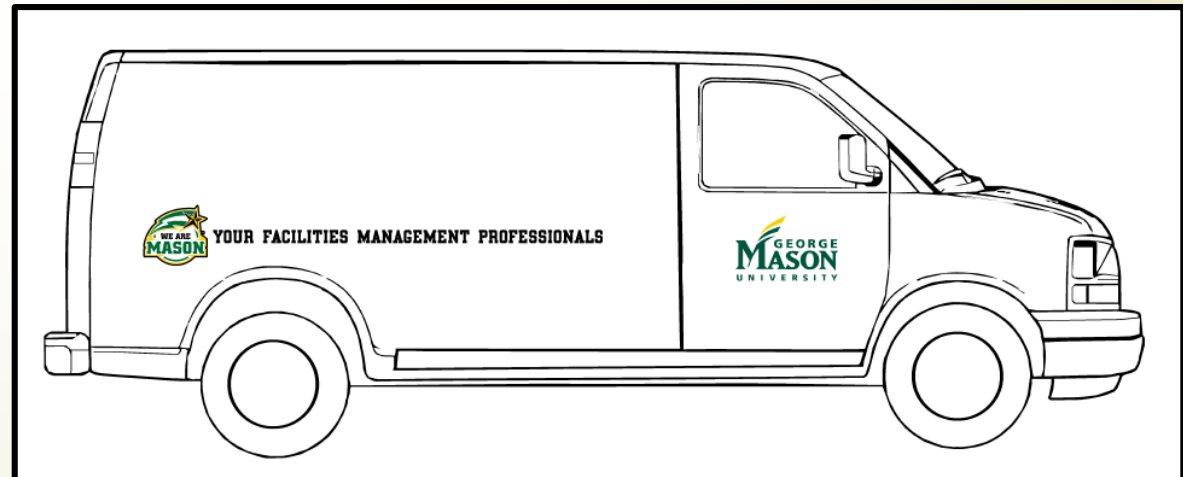


# How to Spread the Word

- Website
- Report Metrics
- Annual Facilities Report
- Advertise Facilities Mission/Vision/Values/Goals:
  - Truck signs
  - Signature blocks
  - Business cards
  - Posters (for shops)
  - T-shirts
  - Hats

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**We are Your Facilities Management Team**  
*Dedicated Professionals*  
*Providing World-Class Facilities*  
*Delivering Exceptional Customer Service*



# Questions?



**Never tick off  
a guy that owns  
a backhoe!**