

# STRATEGIC PLAN → Update

Facilities Management Department, Duke University

April 2003

*This year's work on Strategic Plan Goals and Objectives is wrapping up. I hope you will take a few minutes and read through the accomplishments of the many teams. If you were part of a specific team, thanks for your work and commitment to implement your objective. If you were not part of a team this year, we need you to get involved. We need your ideas, your thoughts and your experience to continue to improve how we do business and provide service to our many customers.*

~ Glenn Reynolds

## STRATEGIC GOAL #1: Products and Services – Jack Burgess

*We will routinely deliver products and services that exceed our customers' requirements for quality, timeliness, and cost.*



Jack Burgess is currently reviewing FMD's operations and looking for objectives to start working on. These objectives will be to improve the PM program/operations and improving the service dispatching of the DIN mechanics as well as other items.

### Objective #2

We will strive to be the "best of class" throughout our University. Information sharing will be the standard among all components.

*Team Leader - Chris Boyd. Members - Randy Frazier and Robert Hester.*

This objective is complete. A process has been identified and implemented to improve the processing of transfer tickets. The new process will place the emphasis on the supervisor to identify the repairs that their shop cannot complete. The process will then utilize the building coordinators to track the work and coordinate as needed to ensure that all the work is complete. These tickets will now be tracked in the weekly scheduling meeting. After the scheduling meeting, the WCC staff will contact the customer and provide them a status report along with an anticipated completion date. When the ticket is turned in to the WCC staff, they will contact the customer to make sure all items have been completed satisfactorily.

### Objective #4

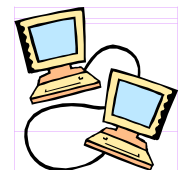
We will develop a Preventive Maintenance (PM) and SMART maintenance program that ensures dependable buildings and utilities such as electricity, HVAC, steam, chilled water and natural gas services to the campus.

*Team Leader - Mark Browning. Members - Woody Cheek, Randy Orange, and Marshall Fuller.*

This objective is complete. The University insurance carrier, FM Global, identified the need for FMD to implement a preventative maintenance program for pressure relief valves on the steam system. The PM shop has implemented a preventative maintenance program for the relief valves. The establishment of a predictive maintenance-commissioning program was another goal for this group. This program has been established and will be used on all major projects. This program utilizes infrared imaging to inspect the electrical systems, ultrasonic testing for steam traps, vibration analysis for shafts, laser alignment for belts and pulleys technology. This program was used on WEL, Kilgo, YOH, and Smith Warehouse. The testing identified several problems that had not been identified and could have led to premature failure of the equipment.

## STRATEGIC GOAL #2: Information Resource Management – Dennis Kennedy

*FMD will use the most effective and innovative technology in order to provide the best resources for our employees. We will enhance our technology wherever possible. Enhanced technology will allow us to exceed our customers' requirements.*



### Objective #1

We will update our computing devices and equipment to keep up with current technology and to meet the changing needs of FMD and our customers.

*Team Leader - Bryan Taylor. Members - Shatone Bailey and Cindy Beard.*

This group concluded its research and drafted a Standard

Practice that would standardize the procedure for updating computing devices and equipment. The team recommended implementing this drafted Standard Practice, which the team submitted to the goal leader.

The recommendation is now being sent to the ITC for review before going to the director for approval.

**Objective #2**

We will review communication processes and apply new technology to improve productivity.

*Team Leader - Aurel Selezeanu. Members - Wayne Herndon and Lisa Bryant.*

This team looked at several cell phone/radio manufacturers to compare coverage area and price of service. The conclusion of the study includes the following: prices are about the same, service depends on the number of repeaters, (poles) around the campus, at this time, there is no service that will provide, 100% of our needs, Nextel has a unique function for direct radio, contact, the existing radio system should stay in place (several people can communicate at the same time).

Final result: No changes needed at this time. This study should be repeated every year to be able to take full advantage of the market and technology changes.

**STRATEGIC GOAL #3: Business Practices – Regis Koslofsky**

*FMD will maximize responsiveness to the University community by improving its business practice in three major areas: 1) management will be significantly more responsive to customers' needs through continuous process improvement; 2) internal and external teamwork will be the norm for us, our suppliers, and our customers; and 3) improvements in the scope and accessibility of our information systems will enable timely and cost-effective delivery of our products and services.*



**Objective #4**

In addition to identifying innovative acquisition strategies, which enhance our ability to support our customers, we will implement a “best value” service strategy that establishes long-term relationships with quality service providers.

*Team Leader - Phil Eason. Members - Bob Friedman, Daryl Clayton.*

The intent of this group was to streamline and remove bottlenecks from the parts procurement process for the Key Shop. Overall, it is felt that Hardware Distributors is doing a good job handling Key Shop inventory. Shop personnel felt there were several areas of concern, including:

\*Establish realistic minimum and maximum numbers of parts to keep on hand. Mechanic involvement in setting these levels has successfully addressed this problem and alleviated problems with lack of parts availability.

\*A random verification process to insure the number of parts shown to be in inventory matches what is actually available. This has been addressed by more attention to detail on the part of shop personnel, and making sure existing procedures are carried out.

\*A direct computer link of Hardware Distributors could speed up processing of parts orders and reduce delays. Hardware Distributors has expressed interest in this solution and is in the process of developing software to address this need. Currently, parts orders can be phoned in so delays in ordering can still be minimized.

This team has completed its work and has disbanded.

**Objective #5**

We will work in partnership with all Duke University and Duke Health Systems customers to obtain products and services with improved quality and reduced total cost.

*Team Leader - Wayne Wagoner. Members - Jean Ferguson and Myron Taschuk.*

After reviewing the objective, this team developed specific action items to review with Procurement Services. We discovered that Procurement Services has an on-going initiative that parallels this objective. It began with the Health System and was broadened to include the University several years ago.

Procurement Services has convened all the stakeholders to discuss everything important to them including quality products/services at a reduced cost. Bids went out to vendors to supply these items and cost data was analyzed. They have developed dynamic partnerships, improved supplier relationships, and streamlined business processes. Savings have been documented from between 3 and 30 %, depending on items.

We asked Procurement Services to help us identify areas that impact FMD and how we might help. We were informed that one of the components of this ongoing initiative is for standardization. Currently, natural gas is purchased from three different vendors in three different methods. They would like the stakeholders (including FMD) to agree on a single vendor and have everyone purchase in the same way. This is one example of how FMD can participate in an effort to achieve our common goal.

Our recommendation would be for FMD to increase its involvement in this ongoing initiative from Procurement Services. This will allow for more attention to be focused on areas that may directly benefit FMD.

**STRATEGIC GOAL #4:  
Resource Conservation –  
Joe Jackson**



*FMD will develop strategies in Energy Management, Waste Reduction and Conservation which save money, and provide service to the University community. Efficient, cost-effective, and sustainable environmental activities will be pursued by the Department. FMD will monitor and apply to consumption levels of steam, gas, electricity, and water.*

**Objective #4**

We will strive to meter all buildings for electricity, steam and water in order to distribute costs based on usage, targeting two years to accomplish this.

*Team Leader - Dennis Woody. Members - Darin Smith and Gary Teater.*

The Infocenter Suite and Utilities Cost Manager software has been set up for all buildings attached to the Towerview chilled water plant. Chilled water usage is being calculated and reported by building and billing based on ton hour usage will start in July 2003. We will continue to work with new and renovation projects to ensure that all utilities have the proper meters installed and that this data is incorporated into this program for future billing.

**STRATEGIC GOAL #5:  
People – Michelle Jenkins**



*FMD will be a superior workplace that offers an exceptional quality of work life.*

**Objective #3**

We will continually improve the skills and capabilities of our employees, encourage self-development, and provide opportunities for personal growth and career enhancement.

*Team Leader - Mike Snyder. Members - Thomas Gregory and Jonathan Nance.*

The FMD employee survey was completed in November and this team has just finished tabulating both the numerical data and comments. The team analyzed the information in preparation for forwarding recommendations on how FMD can better provide opportunities for personal growth and career development to/for its employees.

The recommendation was sent to the Director on March 4th, 2003.

**Objective #5**

Establish aggressive Turnover/Recruitment Program.

*Team Leader - Brenda Kuzan. Members - Martha Reed and Mike Stainback.*

Twenty-eight exit interviews ranging from one to thirty five years of service was reviewed. Various reasons for leaving the workforce are for better job/ more money, no room for advancement, more challenging career, location and personal reasons. Supervisory reasons and work environment had the highest percentages for leaving while Learning & Development and Rewards & Recognition (Pay) had the lowest percentage for leaving the workforce.

The most apparent course of action is above the scope for this team.

**STRATEGIC GOAL #6:  
Customer Focus – Ray Wrenn**



*FMD will be the Provider of Choice for our customers.*

**Objective #1**

We will implement formal and informal customer feedback strategies that allow customers to define quality.

*Team Leader - Violet DeKnikker. Members - Andy O'Shea and Debbie Rivers.*

Three months ago, the team proposed making hanging tags which would be put on doors or left with the customer on service calls. This proposal is still in review by the FMD Management Team.

**Objective #3**

We will improve the customer service skills of our employees.

*Team Leader - Erma Gray. Members - Peggy Trutt and Bert Houser.*

This team turned in their recommendation to Glenn Reynolds on December 10, 2002. This team focused on how to provide needed training to the department and especially how to quickly train new employees at FMD.

The team recommended that we form a committee to revamp the existing FMD new employee orientation to include customer service training in the afternoon. Initially, the sessions should include not only new employees, but established employees as well until all have been through the training.

This recommendation has recently been approved by FMD's Management Team.

## **STRATEGIC GOAL #7: Community Relations – John Cline**

*FMD will foster good community relations by supporting, protecting and renewing the environment in our neighborhood communities and schools through revitalization projects, environmental education and outreach services.*



### **Objective # 1**

We will coordinate with the Office of Community Affairs program known as the Neighborhood Partnership Initiative (NPI) to enhance neighborhoods and schools through beautification and revitalization projects.

*Team Leader – Claude Stubblefield. Members – John Cline and Joe Jackson (ex officio).*

### **STATUS:**

All NPI projects are well under way for this spring.

- Sound attenuation panels have been built for the Forest View School cafeteria, and the Structural Trades Shop will install them by April 21.
- Seven storage units and some additional shelving are being built by the Structural Trades Shop and installed in various classrooms at George Watts Elementary School. They will be complete by the end of April.
- The Structural Trades Shop arranged for development of a new outdoor sign for the St. James Community Center in Walltown and will complete installation by April 21.
- At the Walltown Children's Theater, FMD Stewardship contractors are donating the entire project on a pro bono basis. The Surety Exterminating Company and BASF Corporation have donated a complete treatment to stop a current termite infestation, using a relatively new and safe product called Termidor. T.A. Loving Company is preparing to repair the damage already done by that infestation. Late April or early May should complete the entire project.
- Skanska USA Building Company has arranged for the final landscaping for the Outdoor Learning Center at the E. K. Powe School, subject to improvement in the weather. When completed, it will represent by far the most ambitious single pro bono effort donated by FMD Stewardship contractors.
- Grounds and Sanitation has conducted its annual school landscaping project for Earth Month at the Durham School of the Arts. Joel's Tree Service, another of our Stewardship contractors, has donated the effort to remove limbs from six large oak trees in the project area that were damaged in the December ice storm.
- The final project for the year involves repaving the asphalt track at the Durham School of the Arts. A consortium of contractors will donate this project, and arrangements for the work are still in progress.

All projects should be completed by the end of May.

### **Objective # 2**

We will support agencies that provide needed assistance to our communities such as: United Way, Red Cross (blood drives), NC Food Bank and special relief efforts during natural disasters. Additional assistance opportunities will be considered for support, including Habitat and University sponsored youth outreach programs.

*Team Leader – Irene Carver. Members – Sheila Alexander, Graham Butler and Howard Weckerle.*

### **STATUS:**

The FMD/DSG Holiday Food Drive was completed in the previous quarter with a record total of 38,000 cans of food collected for the Food Bank of North Carolina.

A blood drive was held on February 26 at the Smith Warehouse Building. Despite some breakdowns in the Red Cross registration process and a shortage of Red Cross staff, employees at FMD and other nearby Duke employees still donated a total of 22 units of blood. Another 19 employees signed up to give but could not be accommodated. Of those 19, some were able to give at a later date. The Red Cross has acknowledged their breakdowns and are taking corrective steps to make the next drive go more smoothly.

### **Objective # 3**

We will publicize outreach opportunities and results, both within and outside of FMD, to help our employees find rewarding outlets for their desire to help our neighbors, and to help the community to understand and appreciate the value of Duke as a neighbor. We will honor and support the desire of many employees to volunteer off-duty in their schools, churches and other organizations, and to do so as individuals, rather than as representatives of the University.

*Team Leader: Claude Stubblefield, with assistance from John Cline and Kenny Bridges*

### **STATUS:**

Claude and Kenny conducted briefing and information gathering sessions with many employees at FMD to plan and develop the new Employee Opportunity Boards that have now been placed in strategic locations in FMD. The opportunity board is intended as a way to gather off duty community volunteer opportunities and make them known to employees, and where possible, to recognize groups or individual employees for their volunteer efforts. The projects to be listed will come from the ideas of employees, not from FMD or from Duke. Since Duke will not formally sponsor the opportunities, they are not limited to the geographic area immediately adjoining the University and can come from anywhere that our employees live. Employees can post suggestions by contacting Claude or Kenny.

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Contact: Erma Gray 660-1438 or, [erma.gray@duke.edu](mailto:erma.gray@duke.edu)