The Best Practices in Facility Management

Creating an Environment of Operational Excellence

Teena G. Shouse, CFM, IFMA Fellow
• Performance Management
• Process management and best practices in a club environment
• Summary
Agenda

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• Process management and best practices in a club environment
• Summary
What is your Mission?

“We the Chevy Chase Club Staff strive to consistently exceed the expectations of our members and their guests. The Engineering department accomplishes this through a program of preventive and corrective maintenance, by responding in a timely manner to staff and member requests, and by following safe work practices. The celebration of family, a tradition of civility and a commitment to excellent facilities and services will always be the hallmarks of the Chevy Chase Club.

The mission of Quail Creek Country Club is to enrich the lives of its members by providing a high quality private golf and country club experience, in a fiscally responsible manner, with exceptional recreational and social activities that foster friendship, fellowship and pride.

The Country Club of Virginia is a traditional, private membership, family-oriented social club, dedicated to providing its members quality products, programs, activities, facilities, and services.

Preserve and strengthen the legacy of Wyndemere as a premier community and country club in the greater Naples, Florida area.
You are being pressured by your management to deliver better results & greater value, but at lower costs.

You & your team are being compelled to respond to the need for sustainable facilities.

You have much more influence over a facility’s effect on the environment & the people in the buildings than those who designed/built them.
The importance of a sound strategy

Trend Number 1
Linking facility management to strategy – including workplace culture and branding

• Ensure that facilities support the club culture and brand
• Facilities and their appearance impact member perceptions and expectations of quality
• Service levels and supplier performance must be clearly specified and measured
• Strategic facilities plans assure long term viability of operations
What is strategy?

. . . Your hypothesis or best guess on how you can achieve success, fulfill your mission

Balanced Scorecard (BSC)

A strategic planning and management system of metrics to align business activities to vision and strategy, improve internal and external communications and monitor performance against key goals.
The BSC - a Performance Management Tool

**Strategy**

- **Financial Perspective**
  - How do we look to our financial stakeholders?

- **Member Perspective**
  - How do our members see us?

- **Process Perspective**
  - What must we excel at?

- **Learning and Growth Perspective**
  - Can our FM team continue to improve and create value?
The BSC - a Performance Management Tool

Strategy

Financial Perspective
How do we look to our financial stakeholders?

Member Perspective
How do our members see us?

Process Perspective
What must we excel at?

Learning and Growth Perspective
Can our FM team continue to improve and create value?
VISION

“We are the most respected club with engaged members who enjoy and respect the excellent facilities, quality services and family orientation of our club”

STRATEGIC VALUES

Member Perspective

- INCREASED MEMBER ENGAGEMENT: Club Utilization

Process Perspective

- ENHANCED MANAGEMENT EXCELLENCE: Strategic Planning

Learning and Growth Perspective

- STRENGTHENED RESEARCH: Training & Education

Financial Perspective

- GREATER FINANCIAL STRENGTH: Reserves and Profit

Member Focused

Community Commitment

Operational Excellence
MISSION
“The Facility Management function provides world class services through a dedicated, diverse, and professional workforce, committed to providing a safe environment for members and activities by preserving the integrity of our facilities.”

**Member Perspective**
1. Establish a Proactive Member Service Program
2. Develop Partnerships with Members for Mutual Success
3. Implement Effective Member Feedback and Measurement System

**Process Perspective**
4. Simplify and Streamline Processes
5. Improve the Delivery of Service
6. Integrate Technology to Improve Service

**Learning and Growth Perspective**
7. Provide Appropriate Training for FM Employees
8. Formalize a Program for Career Development
9. Prepare and Encourage Employees to Innovate

**Financial Perspective**
10. Establish a High Level of Accountability
11. Benchmark Performance
12. Maximize Asset Utilization and Value

**STRATEGIC VALUES**
- Member Focused
- Community Commitment
- Operational Excellence

CMAA 2012 – FM Best Practices
MISSION
“The Office of Facility Management provides world class services through a dedicated, diverse, and professional workforce, committed to providing a safe environment for people and collections by preserving the integrity of our facilities.”

Alignment

- Vision
- Mission
- Values
- Operational Plan

How do we get from here to there?

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Measures</th>
<th>Targets</th>
<th>Trends</th>
<th>Initiatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase utilization of services</td>
<td>1. Patient satisfaction 95%-tile</td>
<td>95%</td>
<td>Implement customer service</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Average daily census &gt; 250</td>
<td>175</td>
<td>Implement marketing plan</td>
<td></td>
</tr>
<tr>
<td>Processes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide high quality services</td>
<td>1. % ER patient triaged within 15 minutes of arrival 90%-tile</td>
<td>85%</td>
<td>Review ER patient flow process and streamline</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Medication errors per dose &lt; 2%</td>
<td>2%</td>
<td>Review ER staffing to ensure adequacy</td>
<td></td>
</tr>
<tr>
<td>L &amp; G</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motivate, recognize and retain staff</td>
<td>1. Employee satisfaction &gt; 95%</td>
<td>96%</td>
<td>Develop performance based compensation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Turnover rate 5%</td>
<td>10%</td>
<td>Develop peer recognition program</td>
<td></td>
</tr>
<tr>
<td>Financial</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operate in the black with 5% margin by increasing revenues</td>
<td>1. Net revenue increase over prior year 5%</td>
<td>0%</td>
<td>Review billing and collections processes for accuracy and timeliness</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Decrease net days in accounts receivable 60 days</td>
<td>80 days</td>
<td>Develop incentive program for AR staff</td>
<td></td>
</tr>
</tbody>
</table>
Characteristics of High-Performance Teams

High-performance Organizations:

- Develop a superior service attitude
- Develop strategies that are clear, consistent, and well thought out
- Adhere to high ethical standards
- Provide leadership that is clear, fair, and talent oriented
- Provide clear performance measures
- Allow employees to use their skills, knowledge and experience to create unique solutions for customers
- Promote the organization as a good place to work
Benefits of a High-Performance FM Team

Financial Perspective
How do we look to our financial stakeholders?

- Reduce costs
- Maximize return-on-investment (ROI)
- Minimize total cost of ownership (TCO)
- Maximize asset value and life cycle
Benefits of a High-Performance FM Team

Member Perspective

How do our members see us?

• Improves member satisfaction
• Fully supports strategic business initiatives
• Inspires confidence in stewardship
• Enhances and reinforces reputation
Benefits of a High-Performance FM Team

• Enhance operational efficiencies and effectiveness
• Optimize process performance
• Continuously monitor improved performance excellence
Performance Management Model

- Planning
- Customer Focus
- Performance Results
- Measurement & Analysis
- Workforce Development
- Process Management
- Leadership
Strategic Operational Planning

Key Steps

• Evaluate the culture
• Align with the mission, vision, and values
• Develop strategic goals and objectives
• Validate the operational strategy
• Develop assessment and measurement processes
• Measure, monitor, and report
Needs Assessment:

- Review Policies, Practice, Procedures
- Perform physical assessment of existing facilities
- Develop your O&M Plan (work plan)
- PM, CM, and project work
- O&M Budget
Establish where you want to go . . .

Determine key projects that align with strategic goals

- Identify
- Evaluate
- Prioritize
- Implement
- Evaluate & measure effectiveness of projects or initiatives
What do we measure?

- Member
  - Temperature, cleanliness, responsiveness
- Process
  - Work Processes, PM, CM, DM
- Employee
  - Training, lost time, retention, satisfaction
- Financial
  - Total cost of ownership, budget compliance
<table>
<thead>
<tr>
<th>Metric Description</th>
<th>Std.</th>
<th>Metric Description</th>
<th>Std.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility Condition Index (FCI)</td>
<td>&lt;0.05</td>
<td>Stockroom Turns / Year</td>
<td>2 - 3</td>
</tr>
<tr>
<td>Deferred Maintenance Backlog</td>
<td>Trend</td>
<td>Annual Training Hours</td>
<td>&gt;40 hrs.</td>
</tr>
<tr>
<td>On-the-job Wrench Time</td>
<td>&gt;60%</td>
<td>Maint. Cost / Replacement Cost</td>
<td>3 - 4%</td>
</tr>
<tr>
<td>PM / CM Ratio</td>
<td>70 / 30</td>
<td>Percent Return Work</td>
<td>&lt;5%</td>
</tr>
<tr>
<td>Unscheduled Maintenance Downtime</td>
<td>&lt;2%</td>
<td>Mean Time Between Failures</td>
<td>Trend</td>
</tr>
<tr>
<td>PM Schedule Compliance</td>
<td>&gt;95%</td>
<td>% Failures Assessed: Root Cause</td>
<td>&gt;75%</td>
</tr>
<tr>
<td>CM Schedule Compliance</td>
<td>&gt;90%</td>
<td>Maintenance OT Percentage</td>
<td>5-15%</td>
</tr>
<tr>
<td>Unscheduled Man-Hours</td>
<td>&lt;10%</td>
<td>% WO Covered by Estimates</td>
<td>&gt;90%</td>
</tr>
<tr>
<td>WO Turn-Around Time</td>
<td>Trend</td>
<td>On-Site Supervisor Time</td>
<td>&gt;65%</td>
</tr>
<tr>
<td>Emergency Response Time</td>
<td>&lt;15 min.²</td>
<td>Stockroom On-Time Delivery</td>
<td>&gt;97%</td>
</tr>
<tr>
<td>Stockroom Service Level</td>
<td>&gt;97%</td>
<td>Material / Part Performance</td>
<td>&gt;98%</td>
</tr>
</tbody>
</table>
Agenda

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Comparing Your Club

MAINTENANCE COST PER AREA
(U.S. Dollars per Square Feet)

Work with IFMA’s City and Country Clubs Council

www.ifma-clubs.org
Benchmarking Maintenance

- Capital
- Reactive
- Emerg.
- Unplanned
- Preventive
- Corrective
- Planned

CMAA 2012 – FM Best Practices
Comparing Your Company

Process Management

IFMA’s Operations & Maintenance Benchmarks – Report #32
www.ifma.org
Comparing Your Company

IFMA’s Operations & Maintenance Benchmarks – Report #32

www.ifma.org

Process Management

Don’t be Here!!!
# Process Management – The Detail

## Organizational Goals

- 3. Operate Efficiently
- 4. Effectively allocate resources to maximize utilization

## Sustainability Objectives

- 1. Become Carbon Neutral
- 2. Decrease Water Consumption
- 3. Achieve Energy Star Certification
- 4. Decrease Waste

## Initiatives

<table>
<thead>
<tr>
<th>Importance</th>
<th>Initiatives</th>
<th>Measures</th>
<th>Targets</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Calculate Emissions Inventory</td>
<td>Decrease in Carbon Emissions</td>
<td>15% Decrease</td>
<td>12%</td>
</tr>
<tr>
<td>2.</td>
<td>Purchase Energy Star Equipment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Purchase Offsets</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td>Install waterless urinals</td>
<td>Decrease in Water Consumption</td>
<td>10% Decrease</td>
<td>0%</td>
</tr>
<tr>
<td>2.</td>
<td>Install automatic flushers.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td>Lighting retrofit project.</td>
<td>Decrease in Energy Consumption</td>
<td>20% Decrease</td>
<td>22%</td>
</tr>
<tr>
<td>2.</td>
<td>Perform an energy audit.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Purchase energy star products.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td>Institute a double sided printing policy.</td>
<td>Decrease waste to landfill</td>
<td>10% Decrease</td>
<td>12%</td>
</tr>
<tr>
<td>2.</td>
<td>Provide recycling bins at every desk.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Internal Processes

- Process Management
### Key Performance Indicators

#### Balanced Scorecard Perspective and Strategic Objectives

<table>
<thead>
<tr>
<th>Perspective</th>
<th>Measurement</th>
<th>Target</th>
<th>Information Provided</th>
<th>Input / Data Required</th>
<th>Mainsaver</th>
<th>Priority</th>
<th>Type Metric</th>
<th>KPI Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance</td>
<td>Customer Satisfaction</td>
<td>85-90%</td>
<td>Survey results of complaint CM WOs</td>
<td>Customer satisfaction survey data</td>
<td>1</td>
<td>1.2</td>
<td>Performance</td>
<td>2</td>
</tr>
<tr>
<td>Internal Process</td>
<td>PM Schedule Completion Rate</td>
<td>85-90%</td>
<td>Ensure prompt implementation</td>
<td>PM shadowing schedule and completion times</td>
<td>1</td>
<td>1.3</td>
<td>Process</td>
<td>2</td>
</tr>
<tr>
<td>Customer</td>
<td>Percent of Leave with Customer Feedback</td>
<td>&gt;10%</td>
<td>Measuring feedback on work orders</td>
<td>No. of feedback forms generated and returned</td>
<td>1</td>
<td>2</td>
<td>Customer</td>
<td>2</td>
</tr>
</tbody>
</table>

#### Financial Perspective

- **Change in GSF Maintained**
- **Total Cost of Ownership (TCO)**
- **Mission Priority Project Completion Rate**
- **Actual O&M Expenses to Budget**
- **Unscheduled Leave**
- **Overtime Usage**
- **Lost Time Accidents**
- **Staff Innovations**
- **Number of Preventable Breakdowns**
- **Number of Licenses or Trades Credentialing**
- **Number of CFM or EFP Certifications**
- **Staffing Needs and Gap Analysis**
- **Staff Turnover**
- **Open Work Orders (WO) by Type**
- **Temperature/Relative Humidity**
- **Unscheduled Downtime**
- **PM Schedule Completion Rate**
- **Materials On-Time Delivery**
- **Percent WO with Customer Feedback**
- **Emergency Response Times**

#### Learning and Growth Perspective

- **Employee Satisfaction Rating**
- **Annual Staff Training Hours**
- **Facility Costs Benchmarking**
- **Staff Turnover**
- **Number of CPE or EFP Certifications**
- **Number of Internal Promotions or Ext. Hires**
- **Number of Licenses or Trades Credentialing**
- **Staff Innovations**
- **Number of Preventable Breakdowns**
- **Number of Licenses or Trades Credentialing**
- **Number of CFM or EFP Certifications**
- **Staffing Needs and Gap Analysis**
- **Staff Turnover**
- **Open Work Orders (WO) by Type**
- **Temperature/Relative Humidity**
- **Unscheduled Downtime**
- **PM Schedule Completion Rate**
- **Materials On-Time Delivery**
- **Percent WO with Customer Feedback**
- **Emergency Response Times**

#### Strategic Objectives

1. Establish a proactive customer service program
2. Ensure partnership with customers for mutual success
3. Implement effective customer feedback and management system

#### Value Proposition

- **Maximize asset utilization**
- **Establish a high level of accountability**
- **Formulate a program for career development**
- **Prepare and encourage employees to implement new techniques**

#### Balanced Scorecard Perspective and Strategic Objectives

- **Customer Perspective**
- **Process Perspective**
- **Learning and Growth Perspective**
- **Financial Perspective**

CMAA 2012 – FM Best Practices
<table>
<thead>
<tr>
<th>Balanced Scorecard Perspective and Strategic Objectives</th>
<th>Measurement</th>
<th>Target</th>
<th>Information Provided</th>
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</thead>
<tbody>
<tr>
<td><strong>Customer Perspective</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1. Establish a proactive customer service program</td>
<td>Custodial QA Inspection Hits</td>
<td>&lt;5 / Insp.</td>
<td>5-10 / Insp.</td>
</tr>
<tr>
<td></td>
<td>Emergency Response Times</td>
<td>&lt;15 min.</td>
<td>15-30 min.</td>
</tr>
<tr>
<td></td>
<td>Percent of Rework (call backs)</td>
<td>&lt;3%</td>
<td>3-5%</td>
</tr>
<tr>
<td>2. Develop partnerships with customers for mutual success</td>
<td>On-Site Supervisor Time</td>
<td>&gt;65%</td>
<td>40-65%</td>
</tr>
<tr>
<td></td>
<td>Annual Customer Expectations Calibration</td>
<td>APPA L1</td>
<td>APPA L2</td>
</tr>
<tr>
<td></td>
<td>Proactive Manager Contacts w/ Customers</td>
<td>&gt;1/qtr</td>
<td>1/qtr</td>
</tr>
<tr>
<td>3. Implement effective customer service, feedback and measurement system</td>
<td>Customer Satisfaction</td>
<td>&gt;95%</td>
<td>90-95%</td>
</tr>
<tr>
<td></td>
<td>Percent WO with Customer Feedback</td>
<td>&gt;15%</td>
<td>10-15%</td>
</tr>
<tr>
<td></td>
<td>Top Ten WO Trouble Codes</td>
<td># / Time</td>
<td># / Time</td>
</tr>
<tr>
<td><strong>Process Perspective</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Simplify and streamline processes</td>
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<tr>
<td>5. Improve the delivery of service</td>
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<tr>
<td>6. Integrate technology to improve service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Adopt best practices to improve service</td>
<td></td>
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<tr>
<td><strong>Learning and Growth Perspective</strong></td>
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<tr>
<td>8. Provide appropriate training for our employees</td>
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<tr>
<td>9. Formalize a program for career development</td>
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</table>

<table>
<thead>
<tr>
<th>Balanced Scorecard Perspective and Strategic Objective</th>
<th>Measurement</th>
<th>Target</th>
<th>Information Provided</th>
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<tbody>
<tr>
<td><strong>Member Perspective</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Establish a proactive member service program</td>
<td>Custodial QA Inspection Hits</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Emergency Response Times</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Percent of Rework (call backs)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Develop partnerships with members &amp; all departments for mutual success</td>
<td>On-Site Supervisor Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Annual Customer Expectations Calibration</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Proactive Manager Contacts w/ Customers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Implement effective member service and all departments feedback and measurement system</td>
<td>Members Satisfaction</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Percent WO with Members/ Dept Feedback</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Top Ten WO Trouble Codes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Measurement</th>
<th>Target</th>
<th>Information Provided</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of CFM or EFP Certifications</td>
<td>&gt;5/year</td>
<td>3-5/year</td>
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<tr>
<td>Number of Internal Promotions vs. Ext. Hires</td>
<td>&gt;90%</td>
<td>75-90%</td>
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</table>
## KPIs – Detailed Metrics

<table>
<thead>
<tr>
<th>Balanced Scorecard Perspective and Strategic Objectives</th>
<th>Measurement</th>
<th>G</th>
<th>Y</th>
<th>R</th>
<th>Information Provided</th>
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<tbody>
<tr>
<td><strong>Customer Perspective</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Establish a proactive customer service program</td>
<td>Custodial QA Inspection Hits</td>
<td>&lt;5 / Inspect</td>
<td>5-10 / Inspect</td>
<td>&gt;10 / Inspect</td>
<td>Confirm quality of service, ID trends</td>
</tr>
<tr>
<td>2. Develop partnerships with customers for mutual success</td>
<td>Emergency Response Time</td>
<td>&lt;15 min.</td>
<td>15-30 min.</td>
<td>&gt;30 min.</td>
<td>Measure of time to respond to emergencies</td>
</tr>
<tr>
<td>3. Implement effective customer service feedback and management system</td>
<td>Percent of Repairs Initiated</td>
<td>&lt;3%</td>
<td>3-5%</td>
<td>&gt;5%</td>
<td>Work quality. Repeat call on closed WO</td>
</tr>
<tr>
<td></td>
<td>PM Schedule Completion Rate</td>
<td>&gt;6%</td>
<td>40-65%</td>
<td>&lt;40%</td>
<td>Measure of supervisor interaction with members &amp; management</td>
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<tr>
<td></td>
<td>Customer Satisfaction</td>
<td>&gt;95%</td>
<td>90-95%</td>
<td>&lt;90%</td>
<td>Measurement of APPA level of service</td>
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<tr>
<td></td>
<td>Proactive Manager Contacts w/ Customers</td>
<td>&gt;1/qtr</td>
<td>1/qtr</td>
<td>None</td>
<td>Proactive solicitation and PR to customers for feedback</td>
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<tr>
<td></td>
<td>Percent WO with Customer Feedback</td>
<td>&gt;15%</td>
<td>10-15%</td>
<td>&lt;10%</td>
<td>Measure of customer feedback on work orders</td>
</tr>
<tr>
<td></td>
<td>Top Ten WO Trouble Codes</td>
<td># &amp; Type</td>
<td># &amp; Type</td>
<td># &amp; Type</td>
<td>Trade skill requirements</td>
</tr>
<tr>
<td><strong>Process Perspective</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Improve the delivery of services</td>
<td>Workforce Productivity</td>
<td>&gt;60%</td>
<td>45-60%</td>
<td>&lt;45%</td>
<td>Time spent on PM or CM (wrench turning)</td>
</tr>
<tr>
<td>5. Develop partnerships with customers for mutual success</td>
<td>Performance of PM Programs</td>
<td>&gt;15%</td>
<td>90%</td>
<td>&lt;40%</td>
<td>Measure of increased maintenance requirements</td>
</tr>
<tr>
<td>6. Implement effective customer service feedback and management system</td>
<td>Cost of Breakdown Repairs</td>
<td>24-40 hrs</td>
<td>TBD</td>
<td>TBD</td>
<td>Proactive solicitation and PR to customers for feedback</td>
</tr>
<tr>
<td>7. Implement effective customer service feedback and management system</td>
<td>Cost of Breakdown Repairs</td>
<td>24-40 hrs</td>
<td>TBD</td>
<td>TBD</td>
<td>Proactive solicitation and PR to customers for feedback</td>
</tr>
<tr>
<td>8. Implement effective customer service feedback and management system</td>
<td>Staffing &amp; unplanned work by trade</td>
<td>&lt;5 / Insp</td>
<td>&lt;65%</td>
<td>&gt;100/year</td>
<td>Measure of accountability of workforce efforts to estimated effort</td>
</tr>
<tr>
<td>9. Implement effective customer service feedback and management system</td>
<td>Customer Satisfaction</td>
<td>&gt;7.5%</td>
<td>&gt;90%</td>
<td>&lt;50/year</td>
<td>Measure of accountability of workforce efforts to estimated effort</td>
</tr>
<tr>
<td>10. Implement effective customer service feedback and management system</td>
<td>Financial Perspective</td>
<td>&gt;95%</td>
<td>90-95%</td>
<td>&lt;90%</td>
<td>Measure of accountability of workforce efforts to estimated effort</td>
</tr>
<tr>
<td>11. Implement effective customer service feedback and management system</td>
<td>Proactive Manager Contacts w/ Customers</td>
<td>&gt;1/qtr</td>
<td>1/qtr</td>
<td>None</td>
<td>Proactive solicitation and PR to customers for feedback</td>
</tr>
<tr>
<td>12. Implement effective customer service feedback and management system</td>
<td>Percent WO with Customer Feedback</td>
<td>&gt;15%</td>
<td>10-15%</td>
<td>&lt;10%</td>
<td>Measure of customer feedback on work orders</td>
</tr>
<tr>
<td>13. Implement effective customer service feedback and management system</td>
<td>Top Ten WO Trouble Codes</td>
<td># &amp; Type</td>
<td># &amp; Type</td>
<td># &amp; Type</td>
<td>Trade skill requirements</td>
</tr>
<tr>
<td><strong>Learning and Growth Perspective</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Implement effective customer service feedback and management system</td>
<td>Learning and Growth Perspective</td>
<td>&gt;95%</td>
<td>90-95%</td>
<td>&lt;90%</td>
<td>Measure of accountability of workforce efforts to estimated effort</td>
</tr>
<tr>
<td>15. Implement effective customer service feedback and management system</td>
<td>Financial Perspective</td>
<td>&gt;95%</td>
<td>90-95%</td>
<td>&lt;90%</td>
<td>Measure of accountability of workforce efforts to estimated effort</td>
</tr>
<tr>
<td>16. Implement effective customer service feedback and management system</td>
<td>Proactive Manager Contacts w/ Customers</td>
<td>&gt;1/qtr</td>
<td>1/qtr</td>
<td>None</td>
<td>Proactive solicitation and PR to customers for feedback</td>
</tr>
<tr>
<td>17. Implement effective customer service feedback and management system</td>
<td>Percent WO with Customer Feedback</td>
<td>&gt;15%</td>
<td>10-15%</td>
<td>&lt;10%</td>
<td>Measure of customer feedback on work orders</td>
</tr>
<tr>
<td>18. Implement effective customer service feedback and management system</td>
<td>Top Ten WO Trouble Codes</td>
<td># &amp; Type</td>
<td># &amp; Type</td>
<td># &amp; Type</td>
<td>Trade skill requirements</td>
</tr>
</tbody>
</table>

**Information Provided**

- **Target**: Measures of ability of division to achieve mission
- **G**: Cost of Breakdown Repairs
- **Y**: Cost of Breakdown Repairs
- **R**: Cost of Breakdown Repairs
- **Information Provided**: Cost of Breakdown Repairs
<table>
<thead>
<tr>
<th>Balanced Scorecard Perspective and Strategic Objectives</th>
<th>Measurement</th>
<th>Target</th>
<th>Information Provided</th>
<th>Input / Data Required</th>
<th>Mainesaver</th>
<th>Priority</th>
<th>Type Metric</th>
<th>KPI Level</th>
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<tbody>
<tr>
<td><strong>Customer Perspective</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1. Establish a proactive customer service program</td>
<td>Customer QA Inspection Time</td>
<td>&lt;5 hrs</td>
<td>5-10 hrs</td>
<td>&gt;10 hrs</td>
<td>Confirm quality of service, ID trends</td>
<td>Customer QA inspections and WOs generated from QA Insp.</td>
<td>✓</td>
<td>3</td>
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<tr>
<td>2. Develop partnerships with customers for mutual success</td>
<td>Emergency Response Time</td>
<td>&lt;15 min</td>
<td>15-30 min</td>
<td>&gt;30 min</td>
<td>Measure of time to respond to customer requests</td>
<td>WO generation time and time to site (or repair)</td>
<td>✓</td>
<td>1</td>
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<tr>
<td>3. Implement effective customer service and measurement system</td>
<td>Percent of Work Orders with Customers</td>
<td>&gt;85%</td>
<td>90-95%</td>
<td>&lt;90%</td>
<td>Survey results of completed CM WOs</td>
<td>Customer satisfaction survey data</td>
<td>✓</td>
<td>1</td>
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<td><strong>Process Perspective</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Simplify and streamline processes</td>
<td>Workforce Productivity</td>
<td>&gt;60%</td>
<td>45-60%</td>
<td>&lt;45%</td>
<td>Time spent on PM or CM (wrench turning)</td>
<td>Time records of WO labor for PM and CM (wrench turning)</td>
<td>✓</td>
<td>2</td>
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<tr>
<td><strong>Learning and Growth Perspective</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Improve the delivery process</td>
<td>Number QA inspections and WOs generated from QA Insp.</td>
<td>✓</td>
<td>3</td>
<td>Outcome</td>
<td>2</td>
<td></td>
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</tr>
<tr>
<td>6. Integrate technology</td>
<td>WO generation time and time to site (or repair)</td>
<td>✓</td>
<td>1</td>
<td>Process</td>
<td>2,3</td>
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<tr>
<td>7. Adopt best practices</td>
<td>Fault code for return work request</td>
<td>✓</td>
<td>2</td>
<td>Outcome</td>
<td>2</td>
<td></td>
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<tr>
<td>8. Provide appropriate training</td>
<td>Time sheet with code for field supervision time</td>
<td>✓</td>
<td>1</td>
<td>Outcome</td>
<td>3</td>
<td></td>
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<tr>
<td>9. Foster a high performance</td>
<td>Refer to APPA LOS for maintenance and custodial services</td>
<td>3</td>
<td>Process</td>
<td>2</td>
<td></td>
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<td></td>
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<tr>
<td>10. Prepare and grow</td>
<td>M.D. Anderson specific</td>
<td>2</td>
<td>Process</td>
<td>2,3</td>
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<tr>
<td><strong>Financial Perspective</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>11. Exceed a high level</td>
<td>Customer satisfaction survey data</td>
<td>✓</td>
<td>1</td>
<td>Outcome</td>
<td>1,2</td>
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<tr>
<td>12. Align department</td>
<td>No. of departments feedback forms generated and returned</td>
<td>✓</td>
<td>3</td>
<td>Process</td>
<td>2,3</td>
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<tr>
<td>13. Benchmark patches</td>
<td>No. WOs sorted by Fault code</td>
<td>✓</td>
<td>2</td>
<td>Process</td>
<td>2,3</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
Performance Management

- Planning
- Customer Focus
- Performance Results
- Measurement & Analysis
- Workforce Development
- Process Management
- Leadership
Best Practices and High-performance Management

Process Management

• Using technology as an enabler (IWMS/CMMS)
• The BSC as a performance management tool
• Benchmarking against other organizations
• Sustainable operations
• Networking for improvement
Benefits of High-performance Management

- Reduce costs
- Maximize return-on-investment (ROI)
- Minimize total cost of ownership (TCO)
- Maximize asset value and life cycle

**Financial Perspective**

- How do we look to our financial stakeholders?
  - Improves member satisfaction
  - Fully supports strategic business initiatives
  - Inspires confidence in stewardship
  - Enhances and reinforces reputation

**Member Perspective**

- How do our members see us?
  - Enhance operational efficiencies and effectiveness
  - Optimize process performance
  - Continuously monitor improved performance excellence

**Process Perspective**

- What must we excel at?
  - Build pride - and attract and retain the best employees
  - Commits to continual improvement
  - Values education and career progression

**Learning and Growth Perspective**

- Can our FM team continue to improve and create value?
Thank You!

The Best Practices in Facility Management:

*Creating an Environment of Operational Excellence*

Teena G. Shouse, CFM, IFMA Fellow
Associate – Facility Engineering Associates
Teena.shouse@feapc.com