

Title: Facilities Best Practices Don't Have to Break the Bank

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The Office of Facilities Management and Reliability (OFMR) of the Smithsonian Institution has an in-house workforce of approximately 900 employees who are responsible for the operations and maintenance of almost 13 million square feet of space in facilities that welcome 30 million visitors each year. Several years ago, we realized that our own responses to situations in the past—addressing the facilities perspective, rather than the bigger organizational picture—may have diminished the value of our facilities organization. By recognizing that operating and maintaining the built environment ultimately serves our visitors, ensures collections integrity, and allows the Smithsonian staff to conduct research, we sought to position OFMR as a key partner in the success of the entire Smithsonian Institution and not just the facilities department.

Over the last few years, the Office of Facilities Management and Reliability has worked to gain credibility in the Smithsonian Institution as well as in the facilities profession as a whole. This paper describes four areas of concentrated effort. To identify each of these areas, we looked to organizations that are currently known to implement “best practices” and sought to learn from them, adapt their practices and ideas to meet our needs, or to simply build on their principles to create and design our own programs. The four successful aspects of facility management we took note of are: strategic planning, strong organizational communications, a carefully coordinated internship program, and targeted training and development.

Every successful organization, regardless of size, should have a strategic plan that is dynamic and adaptable to changing circumstances and realities (see “Checklist 1”). OFMR developed a comprehensive strategic plan that is aligned with the larger Smithsonian Institution strategic plan, so that the future direction of OFMR is consistent with the future vision of the Smithsonian. OFMR sought to ensure that our strategic plan would be used as a guiding document that would be referred to frequently. This required the OFMR strategic plan to be written in a format that was engaging, clear and relevant to OFMR staff as well as Smithsonian staff.

In preparation for the strategic planning process, our organization first had to gain an understanding of the process for developing strategic plans as a whole. There are as many ways to develop a strategic plan as there are strategic plans and no one way is more “correct” than another. It is critical that the strategic plan strikes the right balance between engaging, inspiring, and informational, so facilities staff and customers have a clear idea of the FM organization’s goals and strategies over the next five years.

When developing a strategic plan, be careful to avoid common traps that often occur. These traps often include not allowing enough time for a clear plan to be mapped out and written, trying to write the plan in a vacuum, having a plan that is too vague (or one that is too specific), identifying goals that may not be realistic or achievable, being overconfident about what you can accomplish or, alternatively, not being confident enough in terms of what you can accomplish.

In addition to strategic planning efforts, effective communication is part of our foundation for organizational success. Clear, effective communication should be both a specific goal as well as a strategy when sharing information and should be embedded into all aspects of supervision, leadership and management. It is also very important that the receiver's perspective be considered in delivery of information; just as people learn differently, people pick up on information differently and you may find that some people are better at retaining a message they hear, while others must see information in writing before they can retain it.

In OFMR, communication is pursued in a number of ways and through a variety of events which are noted on the attached checklist (see “Checklist 2”). We have an annual “Open House” where we exhibit our equipment, supplies, and materials, as well as live presentations that demonstrate our staff's talents.

People in organizations seldom understand the complexities of facility management and this annual “Open House” provides us with the opportunity to share our story and educate our customers.

To further strengthen communication, OFMR publishes several newsletters that are circulated to staff and stakeholders, highlighting many of the unique requirements of our work. We also publish an annual report; much like any business enterprise. This document serves as our archival record of accomplishments during the previous year and, using this document, OFMR gives an annual presentation that is open to the entire Smithsonian.

We are organized by geographic zones and every zone has a monthly “all-hands meeting,” where the zone executives discuss current initiatives or issues, recognize employees, and discuss priorities and other information they need to share in order for all staff to know the context of the work they perform. Quarterly, all OFMR employees meet for a one-hour presentation, led by the director, in which organizational successes during the previous three months are highlighted and employees are offered the opportunity to ask questions about the organization.

We survey our employees periodically—about every 18 months—in addition to participating in the annual Smithsonian Employee Perspective Survey. When OFMR prepared its most-recent strategic plan, these survey results played a prominent role in determining goals and objectives. We seek feedback from employees and stakeholders continuously, since that is how we learn what we do well and where we need to improve. We continuously work at teambuilding within the senior leadership by having retreats twice yearly, as well as planning teambuilding activities and events within each geographic zone to facilitate improved communication, performance, and cooperation among employees.

Clear communication begins on an employee’s first day in OFMR. We welcome new employees with a formal orientation to OFMR that is separate from the Smithsonian Office of Human Resources’ new employee orientation. At the OFMR New Employee Orientation, we share the history of OFMR and discuss the expectations we have of our employees, share with them the type of organization they are now part of, provide them with the opportunity to meet senior leadership staff and also foster the communication underpinnings that contribute to our success.

We continuously communicate our data to other FM organizations through benchmarking. This allows us to share “best practices,” while adapting strategies that will support OFMR in doing the work of the Smithsonian in ways that are lean, efficient, and productive, and that represent the best use of our resources.

Just like every other organization, the Smithsonian has “significant, mission-critical jobs that capable interns can handle—or at least participate in.”¹ Unfortunately, many organizations do not make an effort to engage interns in this mission-critical work. Over the past five years, OFMR has chosen to embed interns within significant efforts that have saved both time and money. These intern projects have helped to ensure a safer work environment, contributed to leaner operations, as well as to significant sustainability efforts.

Examples of recent intern projects include a project that tested and evaluated emergency response procedures, a project that jumpstarted OFMR’s effort to move organizational file sharing and scheduling to the Microsoft SharePoint platform, and another that documented, in AutoCad, all fire sprinkler shutoff valves found throughout several million square feet of museum space. As you can see, each of these unique projects contributes to OFMR’s ability to serve its museum customers, to implement best practices, and to become a more efficient operation, all while supplementing the work experience of young professionals.

Successful FM internships do not just happen—they must be cultivated, managed, and evaluated to ensure that both the intern, as well as the FM organization, draws as much as possible from the experience (see “Checklist 3”). The intern’s supervisor should take care to start the internship off with a

thorough new employee orientation, select reasonably-scaled projects that challenge the intern and contribute to the value of the organization, as well as ensure that the final project and process are evaluated, with input from the intern. With a little planning—and not much money—your FM organization can soon benefit from this creative workforce and their fresh ideas. And, who knows? You may find future employees among the interns who will be able to build on their internship experience to bring even more knowledge and enthusiasm to the organization.

There are a variety of careers within most facilities organizations. Many facilities organizations are staffed with engineering technicians, building engineers, maintenance workers, custodial workers, gardeners, carpenters, electricians, plumbers, mail clerks, drivers and contract oversight staff and the list continues. With this variety of jobs, it is critical to make sure that employees are given the opportunity to stay current in their profession so that knowledge can benefit the organization. Things are changing so rapidly that a college graduate could return in seven years to study for the same degree, yet be exposed to new information. This rapid cycle of change is not limited to college graduates; it is in every profession – whether or not a college degree is required. Electricians need to stay current on code requirements, operating engineers need to know about new equipment and systems if they are to operate and maintain it efficiently, custodial requirements are significantly impacted by sustainability and green chemicals and processes. By every measure, organizations that train staff are more successful (see “Checklist 4”).

To supplement the training program, the annual performance evaluation can be an opportunity for the supervisor and employee to discuss which skill development needs to take place for the employee to be most effective in his or her role. Once during the year is not enough, but this occasion should be considered a baseline. Hopefully, the organization has an Individual Development Plan (IDP) that accompanies the Performance Plan. The IDP should address formal skills training, on the job training, short-term goals for each employee and supervisor and longer-term goals for both.

In addition, providing rotational assignments for staff is a great opportunity for current staff to learn new skills or explore different responsibilities and for the organization to get special projects accomplished. A rotational assignment is a temporary assignment, for a mutually agreed upon timeframe, that is, in many ways, similar to an internship. OFMR has an annual rotational assignment program that averages around 30 participants and provides each participant the chance to learn new skills and add these new skills and responsibilities to his or her resume.

Although training certainly does cost money, it is possible to control costs with some creativity and the development of partnerships. Community colleges and university continuing education programs are generally very open to teaching classes for a quite reasonable fee and/or offering a modest discount if an organization sends a designated number of students. Professional associations are also good candidates for partnering – they often already have well-developed courses that are very focused on the expertise of the profession. Partnering with other organizations that need training provides some economy of scale (and therefore efficiency or savings). For example, at the Smithsonian, we offer opportunities for our colleagues from other museums to attend classes with our staff at our rate. State governments often have grants or training programs that are available, as well, and these programs can be particularly effective.

Organizations should continuously look at their demographics and stay ahead of the curve by engaging in workforce and succession planning. Baby-boomers have now begun to leave the ranks of workers and that rate is expected to increase as more workers age into retirement. Successful organizations should be determining the steps to take to ensure that their workforce is well trained and prepared to perform the duties that fulfill the organizational responsibility.

Very few organizations have all of the resources they would like to ensure that they continuously perform at the top of their game. In the facilities world, salaries generally account for about 90% of the organization's costs. We should make certain that our employees understand the strategic direction of our organizations, make sure we communicate clearly and respectfully with everyone in our sphere of

influence, provide opportunities for new talent to reenergize our organization and train employees to fulfill our responsibilities and obligations to the organization that pays our salary.

Would you overlook performing maintenance on your equipment for years and still expect it to perform well? Of course not, because we understand that paying attention to equipment and doing what needs to be done at the right time for a modest cost will help us avoid larger costs and more dire situations in the future. The same holds true of our people, who are far more valuable to our organizations than our equipment – be clear, straight, fair and genuine with them and you will get a significant return on your investment in them and your organization will perform like a star!

Checklist 1: Steps for Creating a Meaningful Strategic Plan for your Organization

1. List the organizational goals for having a strategic plan (using your Mission, Vision and Values will be helpful guidelines)
2. Determine documents that the strategic plan must co-exist with
3. Assemble a working group which represents a cross-section of the organization
4. Have the group develop two surveys to gain greater understanding of what the plan should address: <ul style="list-style-type: none">• one survey for customers, clients and guests• one survey for facilities staff
5. Have the working group analyze the survey results and identify areas of greatest concern
6. Have a facilitator lead the group in a SWOC* analysis
7. Based on the survey results and the SWOC* analysis, identify the overarching strategic goals
8. After identifying the goals, identify the owner of each goal
9. Have the owners work together to identify the objectives of the goal and the owners of the objectives
10. Develop strategies, tactics and timelines for the goals and objectives
11. Draft the plan to include the goals, objectives, strategies and tactics
12. Circulate the plan to senior facilities staff to allow them to review it prior to final publication
13. Make changes and send out to clients, customers and employees

* SWOC=*Strengths, Weaknesses, Opportunities, Challenges*

Checklist 2: Steps to Effective Communication in your FM Organization

<p>1. Communicating info about projects and initiatives to all staff:</p> <ul style="list-style-type: none">• Hold quarterly “Town Hall” meetings with all FM staff to ensure that each member understands the financial picture, progress in ongoing initiatives, and upcoming projects, and—perhaps most importantly—describe the attendees general roles toward achieving these initiatives and projects.• Hold monthly departmental “All Hands” meetings to break down current and upcoming efforts within your specific department of the FM organization. Be sure to describe the roles various attendees play in achieving these goals.• Bulletin boards, email blasts to supplement face-to-face communication.
<p>2. Communicating with new employees.</p> <p>Be sure to provide documentation of and take time to personally describe:</p> <ul style="list-style-type: none">• Organizational policies• Professional etiquette within you organization• Organizational safety standards• Other issues such as security credentials, access, attendance processes, etc• On-the-job expectations
<p>3. 360° communications:</p> <ul style="list-style-type: none">• The organizational leadership team should take time to perform a 360° evaluation – getting feedback from peers, subordinates, superiors and stakeholders in order to learn how their audience feels about their communication and what they can do to improve it.• Following the assessment, the team should make an effort to draw from previously overlooked sources of information, as well as to better-inform/communicate with those parties identified as under-informed in past circumstances.
<p>4. Communicating with stakeholders</p> <ul style="list-style-type: none">• Hold an annual “FM Open House” so that stakeholders can learn more about the goings-on within the FM organization. These open houses can be a fun way to demonstrate how your FM team works to serve both stakeholders and their facilities on a daily basis. Have employees demonstrate their skills to visitors.• Prepare and circulate an annual report to stakeholders that documents and describes ongoing and upcoming FM efforts in clear language.• Circulate newsletters to stakeholders that describe specific efforts and strategies that they can help the FM team implement. Examples include a “sustainability” and “technology” newsletters.• Ask stakeholders what they wish they knew more about in their facility and then be creative with your response – a tour, photographs, YouTube video or any other way you believe will be interesting and engaging to them.
<p>5. Benchmarking</p> <ul style="list-style-type: none">• Contribute data about your facility operation to a benchmarking effort• Learn—and implement—lean, efficient, and productive best practices from similar facilities

Checklist 3: Steps to a Successful Internship Program for your FM Organization

1. List your organizational goals for having an internship program
2. Determine if it will be paid or unpaid
3. Create a list of potential responsibilities and objectives
4. Identify the supervisors
5. Write project descriptions (these will serve as the intern's position description)
6. Advertise the internship opportunity (at universities, online—including on your org.'s website, etc.)
7. Review prospective interns and make selections
8. Notify the intern as soon as possible with a "Welcome Letter" containing logistical information
9. Identify and prepare a space for an intern
10. Orient/onboard the intern, in terms of: <ul style="list-style-type: none">• policies• expectations• project description• etiquette• other issues such as security credentials, access, attendance processes, etc.
11. Seek ways to maximize collaboration between the intern and your organization ² <ul style="list-style-type: none">• Involve the intern early on in as many organizational experiences and practices as possible. Make sure you do not underestimate the complexity of tasks the intern can handle.• Identify reasonably-scaled projects that have been deferred due to budget cuts or other difficulties, allowing interns to take on these projects.• If you feel a project is beyond the intern's qualifications, identify portions of the project that the intern can complete.• Ask interns for their opinion about organizational practices. Oftentimes they have ideas for simplifying protocol, completing projects more efficiently, etc.• Try not to assign the intern with mundane duties or ask that they perform secretarial work. Instead, try to immerse them in a range of organizational activities.• Conduct ongoing evaluation throughout the internship.
12. Offboard the intern, making sure to: <ul style="list-style-type: none">• Ask for a project write-up and presentation• Conduct a final evaluation• Correspond with university if for academic credit• Conduct an exit interview• Discuss the need for a letter of recommendation
13. Supervisor conducts an After Action Review (AAR)

Checklist 4: Steps for Determining Professional Development and Training for your Organization

1. Be strategic! Training employees is an investment in the organization and the employee that will have payback in terms of higher productivity, cost avoidance, improved efficiencies and better morale
2. List the different professions within the organization
3. Identify competencies for those professions
4. From the competencies, identify career paths
5. Determine the skills that are needed for each career path
6. Assess the current skill level of each employee relative to his/her career path
7. Compare the skills that are needed and the skills that are currently available
8. The delta is the performance gap that should be addressed
9. Seek or develop training opportunities that address the skills gap from these sources: <ul style="list-style-type: none">• Continuing education office through local college or community college• Professional association (such as IFMA)• Partner with similarly placed organizations• State, local government programs or grants• Rotational opportunities within your organization• Ask your employees where good training in their profession is available
10. Utilize the performance management process by identifying areas for training
11. Look for trends in the organization to see if you can “bundle” similar needs into a training package
12. Keep looking at the workforce demographics to make sure your organization has a pipeline of prepared employees who can backfill the retirees

¹ Cupps, Stephen and Kurt E. Olmosk. “Developing Effective Internships Within Public Sector Organizations.” *Public Personnel Management* 37: 3, p. 305.

² *Ibid.*, p. 309.