



Facilities Management Strategic Plan



Jan 2007 – June 2008

teamwork

Table of Contents

1.0 Introduction.....	3
2.0 WVU Facilities Management (FM) Serves!.....	5
3.0 FY07 Operating Budget for FM to Manage WVU.....	5
4.0 WVU Students and Square Feet Growth Over Last 10 Years..	5
5.0 WVU Facilities Management Strategic Plan.....	6
5.1 Vision	6
5.2 Mission	6
5.3 Core Values	6
6.0 Strategic Initiatives–Phase 1 (Jan 2008 –Jan 2008).....	7
6.1 Budget Maximization	8
6.2 Customer Service Feedback and Improvement	9
6.3 Effective Communications	10
6.4 Metrics	12
6.5 Professional Development	13
6.6 Public Relations	15
6.7 Recognition Program	16
6.8 Standard Operating Procedure	17
6.9 Sustainability	18
6.10 Training	19
7.0 Appendix	20
7.1 WVU 2010 Plan.....	20
7.1.1 Vision	20
7.1.2 Mission	20
7.1.3 values	21
7.2 WVU Administration/ Finance.....	23
7.2.1 Vision	23
7.2.2 Mission	23
7.2.3 Values	23

1.0 Introduction

A good strategic plan clearly defines the purpose of the organization and establishes realistic goals and objectives consistent with that mission. Simply stated, strategic planning determines where an organization is going over a fixed period of time. This time period can range from one to as many as ten years, but is usually three to five years. Although it is developed by the management team, the focus of a strategic plan is on the entire organization. A variety of perspectives, models and approaches are used in strategic planning. Goals-based planning is the most common and the model that was used by the Facilities Management planning team. It starts with focus on the organization's vision, mission and values, identifies goals to work toward the mission, outlines strategies to achieve the goals, and includes an action plan (who will do what). Many wonder why we need a strategic plan at all. Work goes on day-to-day, and the urgent and pressing needs of today's problems can be totally absorbing. Is it not enough to just deal with the problems right in front of us, and take each day one at a time? In fact, quite the opposite is true. Many experts believe that it is the absence of a vision and plan that causes organizations to be so reactive, thereby spending a lot of time putting out fires, rather than proactively meeting the needs of customers.

Strategic planning is necessary for any organization of the size and scope of Facilities Management. It clarifies the organization's long-term goals and ensures that all key leaders are "on the same page". It ensures the most effective use is made of the organization's resources by focusing those resources on the key priorities.

When employees share a common vision, it builds strong teams and bridges staff and management. If communicated effectively, it allows employees to develop a sense of ownership of the plan. Good strategic plans have been referred to as “organized chaos”, for they allow organizations to stay grounded and focused even through the most trying of times.

This booklet outlines the 2010 Plan that was developed by WVU’s highest level administrators, the Administration and Finance Division’s Vision and Mission Statement (both attached in the appendix), and the newly-created Strategic Plan for Facilities Management. As you read each one, you will find common threads woven among all the plans that bind them together. Phrases such as “customer service” and words common to all the plans are “integrity”, “quality”, “respect” and “stewardship”.

In the process of developing our plan, ten key initiatives surfaced at each planning session, and were identified as necessary to the success of achieving our goals. These initiatives, which will be our operational priorities through June 2008, are outlined in the booklet, as well as the team leader responsible for each specific one. If you believe that you can add value or insight to any one of these initiatives, I urge you to contact the team leader.

With respect to the plan overall, I welcome your comments and suggestions as we move forward with its implementation.

Randy Hudak

Director

2.0 WVU Facilities Management (FM) Serves!

8,566 Staff Members

28,115 Students

Approximately 8.0 Million Square Feet

3.0 FY07 Operating Budget for FM to Manage WVU

FM budget target (personnel and operations) - \$17.4 Million

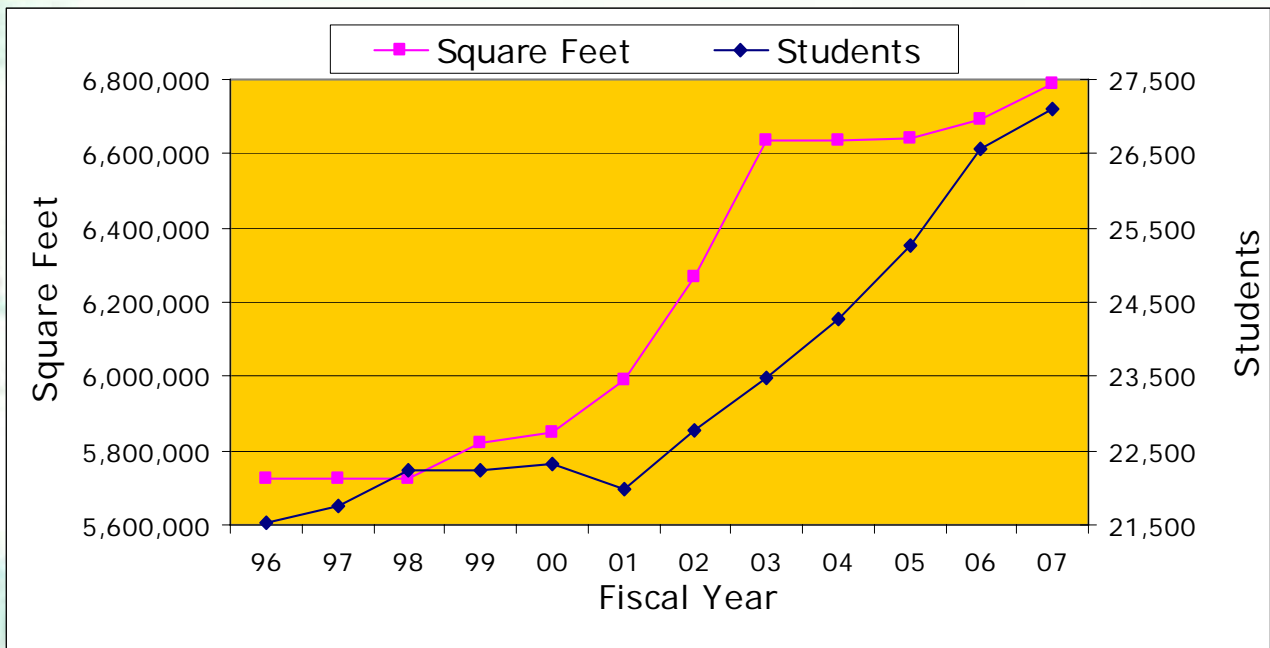
Deferred maintenance budget - \$5.5 Million

Deferred maintenance projects estimation for the period between FY06 and FY16 - \$142 Million

Construction projects for FY05, FY06, and FY07 – Over \$200 million

Annual in-house construction projects (projects team) – Over \$4 million

4.0 WVU Students and Square Feet Growth Over Last 10 Years



5.0 WVU Facilities Management Strategic Plan

5.1 Vision

Commitment to be a nationally recognized Facilities Management leader supporting West Virginia University.

5.2 Mission

Facilities Management creates and manages the campus environment to support the mission of WVU – the flagship institution of West Virginia. Facilities Management provides this service through continuous improvement of our people, processes, and services.

5.3 Core Values

- **Excellence** – Strive to exceed the expectations of our customers.
- **Stewardship** – To use resources effectively and make employees accountable toward achieving this goal. To provide leadership, guidance and encouragement to employees at all levels.
- **Integrity** – To foster an environment based on honesty, equity, fairness, truth, reliability, competency and trust.
- **Service** – Commitment to quality and timely service delivery to our customers.
- **Innovation** – To encourage creativity, new ideas, concepts and technology that are focused toward improving facilities and services we provide.

- **Communications** – To practice open, accurate and timely communication among facilities management team members, the university community and its outside partners.
- **Team Work** – Work together as a team with dignity, professionalism, cooperation and mutual respect.

6. Strategic Initiatives–Phase 1 (Jan 2008 –Jan 2008)

This section represents the key objectives in each strategic initiative, team members and their assigned working dates. Please contact the champions of the respective strategic initiative for more information. The 10 strategic initiatives are as follows:

- 6.1 Budget Maximization
- 6.2 Customer Service Feedback and Improvement
- 6.3 Effective Communications
- 6.4 Metrics
- 6.5 Professional Development
- 6.6 Public Relations
- 6.7 Recognition Program
- 6.8 Standard Operating Procedure (SOP)
- 6.9 Sustainability
- 6.10 Training

6.1 Budget Maximization

Champion – Randy Hudak

Regardless of how effective or efficient an organization becomes, budget always becomes a keystone to continuous improvement and sustainability. Facilities Management is no different; without adequate budget, current work, as well as future initiatives are in jeopardy of delays or failure. The Budget Maximization Committee will develop and evaluate tools for tracking costs and budget, assure revenue is received, and train the staff on terminology to assure the tools are used effectively. In addition, the group will address future budget requests and look for creative ways to utilize the current allocation.

Team: Anand Chandrashekarn, Dan Stalnaker, Joe Patten, Sarah Yokum, Tony Sainato

Objectives and Assigned Dates

- Train staff on terminology and process – 2/1/07 to 4/30/07
- Develop comprehensive FY08 budget – 12/1/06 to 4/30/07
- Budget reports – 12/1/06 to 2/28/07
- Budget principles and accountability – 12/1/06 to 6/18/08
- Develop methods for tracking revenue/expenses – 12/1/07 to 6/30/08
- Efficiency gain programs – 6/1/07 to 6/30/08
- Develop capital tracking tool – 1/1/07 to 3/31/07
- Year-end budget report – 3/1/07 to 7/1/07
- Budget allocation modifications – 2/1/07 to 5/31/07

6.2 Customer Service Feedback and Improvement

Champion – Anand Chandrashekar

Customer Service, for any FM organization, is just as important as it would be for manufacturing. An organization cannot accurately assess its success without knowledge of its customer's opinion. Failure to understand the customer dynamics can lead to many alternatives, one being outsourcing. The competition will not overlook the value of customer service and FM must understand the customer's needs in order to be an effective organization. A proactive approach today will prevent a reactive decision in the future.

This strategic initiative will help to identify the customer satisfaction levels through periodic surveys of all the services we provide. Interpretation of the survey results from scores and benchmarking will help the committee to identify the gap between our customer's expectation and the quality of service in measurable terms. Identifying the gap or our organizations desired goals based on quality, time, management, relationship, communications etc, will help us formulate new methods or improve the existing techniques toward higher customer satisfaction levels.

Team: Darryl Lewis, Mark Spiroff, Robert Hellman, Sam Phillips, Tammy Cramer, Tracy Casteel

Objectives and Assigned Dates

- Determine the status of customer satisfaction – 12/1/06 to 2/28/07
- Identify the pitfalls of existing customer service mechanisms - 2/1/07 to 4/30/07
- Develop new improvement methods – 5/1/07 to 7/31/07
- Track and control the policy approved – 8/1/07 to 6/30/08

6.3 Effective Communications

Champion – Bob Campione

The strategic initiative for communications is one of the most important elements for short or long range planning. The development of strong communications tools from the top-down and the bottom-up are very critical to the success of any organization.

The communication task force is focusing on the current forms of communication used by the department to gain a better understanding of the effectiveness of each of these communication components. The goal of this committee is to determine what communications avenues are most effective in reaching employees and strengthening those, as well as working to find new ways of improving the lines of communication. A good communication plan should give the day-to-day work force focus, help set priorities, provide a sense of order and control, encourage cross-communication between management and support staffs, and help to reduce “seat-of-the-pants” and last minute demands from staff and its members.

It is the goal of this committee to provide a good written plan to effectively deal with these issues and find ways to improve and develop the most effective communication tools of this department.

Team: Butch Link, Dave Areford, Neil Eddy, Rom Lemely, Tony Sainato

Objectives and Assigned Dates

- Develop a survey to understand the existing communication tools used by employees in FM – 12/1/06 to 12/31/06
- Survey distribution, collection and analysis – 12/1/06 to 3/31/07

- Establish areas of communications to be targets for improvement – (For example, improving the content and quality of Time-out, Communication Meetings etc.) - 4/1/07 to 5/30/07
- Begin implementation of communications tools – 5/1/07 to 10/30/07
- Resurvey after 6months – 10/1/07 to 11/30/07
- Analyze survey data – 11/1/07 to 4/30/07



6.4 Metrics

Champion – Anand Chandrashekar

If we are to compete in a game, we must know “how to score.” Similarly before improving a process it is important to define “what is” improvement for that process. A process can be measured in different ways based on the data that is collected. Measurements or metrics will help an organization to prioritize their objectives. Metrics can be based on productivity, quality, people, safety, assets, total productive maintenance, financial etc. The Strategic Assessment Model from APPA includes the features of Malcolm Balridge program and Balanced Scorecard for continuous improvement. Utilizing these performance indicators as a benchmark the Facilities Management strategic initiative committee will work to implement one or two meaningful metrics in each area that is determined. Implementation process will include data collection, tracking, controlling and reporting the metrics with the cooperation from respective unit heads.

Team: Gary Boyd, Jerry Howell, Sarah Yokum, Rich Hott, Steve Bodkins, Tony Sainato

Objectives and Assigned Dates

- Importance of metrics – 12/1/06 to 3/31/07
- Implement prioritized and approved metrics – 4/1/07 to 6/30/07
- Implementing balanced score card – 5/1/07 to 6/30/08

6.5 Professional Development

Champion – John Thompson

The goal of this Strategic Initiative is to enhance the professional, management and leadership skills of Facilities Management personnel through a structured Professional Development (PD) program. The target audience is Management and professional level staff. As a part of this initiative, goals will be established for a minimum number of hours per year of PD curriculum. The program will work in conjunction with WVU Human Resources to offer a number of scheduled sessions applicable to a broad audience. The program will also allow personalized Professional Development opportunities based on each employees individual development needs. Potential topics include communication, organization, conflict management, public speaking, effective presentations, and team building.

Team: Arlie Foreman, Bill Sanson, Dan Stalnaker, Rob Moyer

Objectives and Assigned Dates

- Develop written Professional Development Plan with committee focusing on the following areas – 2/1/07 to 3/31/07
 - Management and leadership
 - WVU Human Resources
 - Effective communication
 - Organizational skills
 - Networking w/peer institutions
 - Establish requirement for PD hours/year

- Communicate plan to managers and supervisors – 4/1/07 to 5/31/07
- Develop schedule for PD sessions based on input from target audience – 3/1/07 to 6/30/08
- Hold PD sessions applicable to broad audience: semi monthly – 5/1/07 to 6/30/08
- Develop a data base for tracking participation in PD sessions – 2/1/07 to 5/31/07
- Monitor progress against metric and report results bi-annually – 6/1/07 to 6/30/08

6.6 Public Relations

Champion – Kim Hartsell

Facilities Management's Public Relations group is a planned unit designed to influence a positive opinion, coordinate staff communication programs, and develop a rapport with the university community. Facilities Management Public Relations team will organize non-profit fund-raising programs and increase patronage of our services. Facilities Management's Public Relations group will strive for positive attitudes and communication between Facilities Management and the West Virginia University Community.

Team: Linda Pickering, Pat Kisner, Joann Crabtree, John Sommers, Stefanie Propst , Tracy Casteel,

Objectives and Assigned Dates

- Educating WVU on "who we are" and "what we do"
- Internal social events-teambuilding among staff – Month of December and June
- Foster University relationship. Monthly follow-up with department representative – Every Month of 2007
- Foster external PR communications through WVU Spirit publications and FM Time-out – Month of January, March, June and September

6.7 Recognition Program

Champion – Baron Smith

The Recognition Program Strategic Initiative is necessary to recognize our most valuable resource, the Employees of Facilities Management. A cross functional team has been formed that will address the following areas: the Employee of the Month program, developing/enhancing motivation programs, rewarding employees for exemplary attitude and work, and whether to implement a suggestion box for Facilities Management staff. Surveys will be sent out and participation will be greatly appreciated as the committee feels that it is critical to have input from the employees. Guidelines and procedures will be established for each objective listed in the Recognition Program to ensure fairness and equal application.

Team: Anand Chandrashekar, Dan Brown, George Hall, Harold Gillespie, Kelly Boyd, Kenny Zara, Richard Weber, Steve Bodkins, Vance Roby

Objectives and Assigned Dates

- Employee of the month/year – 12/1/07 to 1/31/08
- Enhance/develop motivation program – 2/1/07 to 7/31/07
- Reward employees for exemplary attitude and work – 8/1/07 to 1/1/08
- Suggestion box – 2/1/08 to 6/30/08

6.8 Standard Operating Procedures (SOP)

Champion – Joe Patten

The reason for developing standard operating procedures for Facilities Management is to document those features of operations that lend themselves to a definite or standardized procedure without loss of effectiveness. Thorough SOPs can be used as the basis for providing standardized training for employees new to a particular job and for those who need re-training. When the proper procedures are outlined in an SOP, any co-worker can coach another to help improve work skills. Properly maintained written SOPs can chronicle the best knowledge that can serve new workers when older ones move on.

Team: Dan Stalaker, John Thompson, Tony Sainato

Objectives and Assigned Dates

- Develop SOP format standards – 1/2/07 to 3/1/07
- Identify SOP table of contents for each FM department – 3/2/07 to 5/31/07
- Establish Committee's to write SOP's – 6/1/07 to 6/30/08
- Develop Design standards – 3/2/07 to 6/30/08

6.9 Sustainability

Champion – Barbara Angeletti

In the interest of promoting wise stewardship of existing resources and moving West Virginia University toward becoming a more sustainable campus, a committee was formed to evaluate the current status of sustainability at WVU. The committee is addressing construction practices, water and energy conservation and management, recycling, storm water and wastewater management, transportation and land management. The committee is comprised of individuals from Facilities Management, Environmental Health & Safety, the National Environmental Services Center at the NRCCE, and WVU Student Government, all of whom share a vested interest in the adoption of better sustainable practices at WVU. The mission of the WVU Sustainability Committee is to facilitate the adoption of a sustainable campus initiative by providing guidance and recommendations to the university toward the development of a sound sustainability policy. The most immediate goal of the committee is the creation of a written policy statement that will be sent to university administration for signature which, when signed, would provide the basis for the committee to establish a framework for action.

Team: Brad Field, Clement Solomon, Dave Dixon, Greg Adolfson, Lisa Saurborn, Mike Trantham, Paul Hanko

Objectives and Assigned Dates

- Address sustainability as a whole - identify current status and set goals for the future – 12/1/06 to 6/1/07
- Identify specific initiatives and set direction and goals for committee within initiative – 12/1/06 to 6/30/07

6.10 Training

Champion – Daniel Batson

Training is the foundation upon which the future of all organizations rests. In response to today's technological advancements, Facilities Management must respond with training that will increase skill levels among its employees. A skilled and highly trained workforce is Facilities Management's biggest asset. As our workforce changes, we will continue to provide appropriate training to prepare ourselves to adapt to evolving technology, maximize employee skills, and pass on knowledge. A comprehensive training program is one avenue to ensuring that we will have the expertise to build, maintain and preserve WVU's largest capital resource—its facilities.

Team: Dan Stalnaker, Gary Boyd, Paul Kelly, Tony Sainato

Objectives and Assigned Dates

- Develop a comprehensive 'Pilot Apprenticeship Program' – prior to 7/1/07
- Develop training plans and goals – 12/1/06 to 1/31/07
- Identify training coordinator – 1/1/07 to 5/31/07
- Schedule standard track training – 11/1/07 to 12/31/07
- Monitor progress against metric – 5/1/08 to 6/30/08

7.0 Appendix

7.1 WVU 2010 Plan

7.1.1 Vision

West Virginia University is a student-centered learning community meeting the changing needs of West Virginia and the nation through a commitment to excellence in teaching, research, service, and technology.

7.1.2 Mission

West Virginia University was founded in 1868 as a land-grant university: the federal government gave the state of West Virginia land to establish a public university that would provide a broad segment of the population a practical education that had direct relevance to their daily lives. Over 100 years later, WVU remains true to that central land-grant mission. Today WVU also serves a unique role as the state's only doctoral degree-granting research university with comprehensive health science programs. Only eleven higher education institutions nationally are land-grant research universities with comprehensive Health Sciences. Because of its land-grant tradition and research status, WVU has an obligation to:

- Provide high-quality programs at the undergraduate, graduate, and professional levels;
- Stimulate and foster both basic and applied research and scholarship;
- Engage in and encourage other creative and artistic work;
- Bring the resources of the University to all segments of society through continuing education, extension, and public service activities;

- Contribute to the development and enhancement of West Virginia's economic, educational, social, and health status through its programs of instruction and research and through its programs of outreach;
- Use technology as a vehicle to engage the student, empower the faculty, infuse the curriculum, enhance research capabilities, and fulfill the duty to serve the state;
- Promote diversity to enrich the institution and the society it serves and practice principles of social justice, equal opportunity, and affirmative action.

7.1.3 Values

The following values guide the University's mission:

- **Excellence.** To excel, WVU continually sets high standards for teaching, research, and service. The University seeks the best possible faculty, staff, students and administrators, and expects them to maintain these standards.
- **Stewardship.** West Virginia entrusts its University to preserve its rich traditions and secure the future of the University and its students. Resources must be used effectively. WVU must hold itself accountable to those who provide the institution with resources.
- **Integrity.** The University fosters a campus community based on truth, fairness, responsibility, and trust, and encourages intellectual debates as a means to promote understanding.

• **Innovation.** Introducing new ideas is the key to success in the 21st century. The University values the role of creativity and technology in developing new ideas for its students and the state.

• **Communication.** Innovation, integrity, accountability, and high scholarly standards all depend on clear messages between and among faculty, students, staff, administrators, the community, and the state. WVU is committed to respectful discourse and the exchange of ideas.



7.2 WVU Administration/Finance

7.2.1 Vision

West Virginia University is a student-centered learning community meeting the changing needs of the people of West Virginia and our nation through teaching, research, service and technology.

7.2.2 Mission

The Division of Administration, Finance and Human Resources supports the university's vision by:

- Improving services offered to its customers;
- Driving costs from the system; and
- Supporting and challenging its employees.

7.2.3 Values

- Communicate in a clear, concise, open and responsive manner.
- Act with respect and integrity.
- Focus on customer needs in our actions and decisions.
- Model leadership behavior that dynamically improves services.
- Deliver quality services in a timely manner.
- Be creative, innovative and take acceptable risks to improve services.
- Provide employee development opportunities and reward meritorious performance