



7

Facility Maintenance Practices

Costing You Money

By Mark L. Heroux, CPMM

How can college facilities managers do more with less while effectively managing their institution's critical operations? One way is to avoid these "seven worst practices" outlined by facility management experts. Written for those who want to stay ahead of the curve, deliver high service levels and keep costs down, this article provides insights and reminders about the importance of good maintenance procedures and processes. The list—which includes errors of commission as well as omission—will help staff better focus their time and energies where they will have the biggest impact.

Educational facilities managers and staff are a great bunch, often with very full plates, given their charge to ensure the proper care and maintenance of the campuses they oversee. Their main goal is to keep things working, respond to problems, and stay ahead of the ever-changing needs of aging building components and the diverse needs of administration, faculty, and students. They must juggle many balls and serve many masters. They play an important role, with oversight of critical operational and safety issues that affect the entire organization.

There is also the constant pressure for facilities operations to do better, and—as the executive management of today’s higher education institutions look to tighten their belts—to do more with less. Today’s facilities manager and staff must embrace best practices and new, more effective approaches.

But where to start? The checklist that follows offers a summary of what we call the “seven worst practices” found on today’s campuses. These include errors of all kinds—both what facilities managers do wrong and what they fail to do right.

Evaluating your campus on how you rate on each of these items will provide some real insights into how you can turn them around to improve your operations. This list, therefore, is offered for your review, amusement, and inspiration. If you find yourself guilty of a few of these mistakes, please know that simple awareness is a step in the right direction, because as the saying goes, “We can all do better when we *know* better.” In that light, we ask you to kindly share this list with your facility management colleagues.

In our experience, avoiding these worst practices will make a significant impact on your performance.

1 NOT USING THE CMMS—ERROR OF OMISSION

Far too few organizations avail themselves of even half the capability of some of today’s leading computerized maintenance management systems (CMMS)—and that’s both a real shame and an opportunity. We have seen organizations invest considerable time and money to find the “right” CMMS, only to have it gather dust from lack of use. When we review facility maintenance processes, we find the following:

- Failure to track inventory
- Failure to track time
- Failure to enter work orders
- Failure to enter preventive maintenance tasks
- Failure to close out work orders
- Failure to create reports
- Your additions here

In our data-driven world, information from the CMSS can be a powerful management and productivity tool. Its report capabilities can provide great visibility into how your operations are performing—but only if data is entered completely and consistently. Many colleges, universities, and schools only partially track their activities. To glean useful data, staff must be trained and measured in their use of the CMMS. All staff must understand that its use is not optional, but instead a critical part of operations.

If your staff is not fully utilizing this tool, you are not getting the full value from your technology investment. Worse, it might mean that you have blinders on when it comes to some critical information about how you and your team are performing. When you truly embrace your CMMS, what you get is increased visibility into what is going on day to day and month to month. This data can help you make better management decisions.

2 FAILURE TO DEVELOP A DEFERRED MAINTENANCE PLAN—ERROR OF OMISSION

We often witness a disconnect on this topic between executive management and facility staff.

Deferred maintenance activities are critical but poorly understood, and often not given proper attention. One earnest university president recently told us that his campus had little in the way of accumulated deferred maintenance. Wishful thinking! Only a few days prior, as part of our staff interviews, his own chief facilities officer disclosed that there was no current or valid facilities condition assessment for the institution’s buildings and grounds. Having a deferred maintenance plan—and keeping it updated—is a much-needed tool that executive management can use to improve their planning and budgeting and overall facilities operations. More importantly, it can help executive management prevent being blindsided.

Ignorance is not bliss when emergency issues arise that could have been avoided or mitigated by a good deferred maintenance plan. No one wins when this happens, and the sudden awakening is often accompanied by the need to write big checks. In our experience, high-performing leaders know the projected full-project cost for the backlog of carefully documented facilities needs, and they make institutional decisions around how long it will take to retire that deficit and how to make sure the work gets done.

In addition, when your vendors don’t have a clear view of who last worked on an asset and no one is tracking when maintenance on a given asset is due, cost overruns rule the day. Documenting and updating a good preventive maintenance plan or policy and procedures manual will help you make sure that assets are in good working order for as long as possible and allow you to better budget for the future.

3 FAILURE TO BUDGET FOR CAPITAL MAINTENANCE—ERROR OF OMISSION

Realistic budgets are important. The concept behind a depreciation schedule for capital assets is that facilities get “used up” over time. The accounting depreciation schedule often doesn’t match the actual rate of consumption.

Well-intentioned leaders may make a conscious allocation of funds for facilities capital maintenance, but often this allocation is either intuitive or based on what they think they can afford. Rarely is the allotment based on a carefully debated and designed process. And here again, surprises often come unexpectedly, jeopardizing other projects or even cutting into core budget areas. Good fiscal policy calls for honestly assessing and planning for these expenses, and the sharpest board members, trustees, and stockholders will insist upon it in a timely manner.

Most facility departments need to spend more time to research and properly budget for capital maintenance. Facility managers need to take initiative and raise questions about anticipated future capital needs. A “head in the sand” approach will always backfire in this critical area.

4 SPENDING CAPITAL MAINTENANCE MONEY ON OTHER THINGS—ERROR OF COMMISSION

To the undisciplined, many items call out to be purchased and allocated elsewhere, either because they were not included in the budget at all or grossly underbudgeted. On examination, we have seen organizations incorrectly put the following in the capital maintenance bucket:

- Code-mandated upgrades
- Insertion of new technology
- Alterations for changing uses
- Building additions
- New fixtures, furnishings, or equipment
- Routine and customary maintenance
- Or even (gasp!) new construction

Such creative accounting is very poor practice. For every dollar of capital maintenance money diverted to other uses, a dollar is added to the backlog of deferred maintenance. Budget categories should be assigned correctly, in spite of political pressures.



Developing Preventive Maintenance Policies and Procedures

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We are always looking to be more efficient, so we wanted to better manage our cost controls for preventive maintenance. To do that, we needed to make sure we understood and documented the required maintenance tasks for each of our assets. Quite simply, this is not something that can be done well on an ad hoc basis. We committed to developing a written policy and procedures plan for facilities management that included preventive maintenance. This plan benefits us in four ways:

1. It gives us clearer priorities, so work gets done when it is needed.
2. Everyone who touches an asset (including outside vendors) is on the same page about the status of an asset's maintenance.
3. Our staff can get their heads around preventive maintenance—always a complex part of facility operations.
4. We can actively manage preventive maintenance work and associated costs better than before.

5 GIVING SPECIAL TREATMENT TO PREFERRED VENDORS—ERROR OF COMMISSION

Although it can be comfortable to pick up the phone and call a known vendor whenever a problem arises, there need to be written rules around pricing, quoting, and other practices. There should also be an arm's length relationship between any organization and its business partners.

Good business practices are designed to establish rules that support your organization and protect its interests. We have many times observed practices that, through negligence or intent, make it easy for vendors to take advantage of organizations, who pay a heavy cost for their lack of checks and balances.

Oversight is important to ensure that business is conducted fairly and that proper value is received for goods and services. We have seen preferred vendors with:

- No set rates
- No unit prices
- No term agreements
- No competition for their work

We see this all the time, but proper procedures are required to ensure cost-effective, quality buying of products and services. We understand that organizations will have favorite vendors and believe that good service should be rewarded, but not at the expense of prudence and common sense.

6 FAILURE TO PREPARE A PREVENTIVE MAINTENANCE PLAN—ERROR OF OMISSION

As the saying goes, you only need to brush the teeth you want to keep. An ounce of prevention goes a long way toward keeping infrastructure safe and extending its life, but all too often, otherwise smart and successful organizations sometimes turn a blind eye to what's right in front of them.

Today's facility operations managers need to see that it is truly part of their job to educate other departments about facilities practices and how those practices impact their organization. They need to stress the importance of good maintenance procedures and processes in all their interactions with management and other departments. Too often, facility managers and their staff are not vocal about this. Staying silent does both their departments and their institutions a disservice.

7 FAILURE TO FOCUS: DISTRACTIONS RULE THE DAY—ERROR OF COMMISSION

It can seem a frantic world for facilities maintenance staff, running back and forth between one task and another, responding to the loudest requests instead of the most important ones. The unfocused facilities management department has staff bogged down in addressing trivial

instead of strategic tasks, working busily but not efficiently or effectively. This malady comes with a number of familiar symptoms, including mounting work backlogs, work being rushed or performed inadequately, outside contractors being called in on a regular basis, unattended preventive maintenance, blown budgets, and deteriorating customer satisfaction.

At times this is exacerbated by internal culture. Other departments in the organization may take advantage of facilities staff being willing to please, to the detriment of smart facilities practices. A mechanic may not want to say no to the “while you’re at it” request. If facility staff are the only ones prepared to deliver manual labor, other departments may routinely ask for help with moving, setup services, or other “favours” that lie outside the facility department’s official responsibilities. It is important for facility management departments to chart their institutions’ needs for these kinds of services so that they can be properly accounted for and managed. It’s not fair to your facilities staff or your organization to do otherwise.

CLOSING

If a number of these practices hit close to home, please note that these are common patterns seen throughout educational facilities organizations, businesses, and governments—all are equally guilty. And remember that an organization’s size, large or small, is no guard against such practices—even organizations with highly skilled management teams and well-trained facilities staff can fall into these traps.

Eliminating these worst practices will help you and your staff focus your time and energies where they will have the biggest impact. If your institution wants to stay ahead of the curve, deliver high service levels, and keep costs down, your facility department must continue to educate itself. Help is available, either by reading articles like this one, getting more training, and/or obtaining outside counsel from experts when it’s needed. There is no need to reinvent the wheel. ☎

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