

By Matt Adams



APPA has many tools that aid in the breakdown of the change process, making what may seem

- availability of resources,
- effective communication of all activities and goals associated with the change,
- creating “buy-in” with staff and customers, and finally,
- effective management tools for the change process.

AN OVERVIEW

- effective use of resources measured by key performance indicators (KPIs)
- strategic planning
- continual process improvement (Plan-Do-Check-Act)
- staff inclusion and buy-in
- two-way communication with customers and staff at all levels
- customer service-driven decision making, and
- efficient utilization of technology.

In addition, the SLT selected guiding principles to

positively influence all decisions and actions taken during the transformation. These principles are as follows:

- need to be essential,
- empowerment,
- systems focus,
- outward mindset, and
- revolutionary data utilization.

The SLT also utilized key tools, best practices, and a partnership with APPA. The content comes from many APPA publications, such as the Body of Knowledge (BOK), *Operational Guidelines for Educational Facilities*, (custodial, grounds, and maintenance), and *Effective and Innovative Practices for the Strategic Facilities Manager*. In addition, the content taught in both the Institute and Leadership Academy of APPA U provides for facilities management tools for this task. From these significant resources, the SLT selected the following key elements of the transformation process, which are the foundations of the APPA Award for Excellence:

- Balanced Scorecard
- prioritization and ownership
- the Hoshin Kanri planning process coupled with the Head-Heart-Hand change management system
- systematic KPI development
- hyper communication
- direct partnership with APPA for research and advancement of industry best practices, self-assessment, and utilization of the APPA Facilities Management Evaluation Program (FMEP).

THE BALANCED SCORECARD AND SEVEN ASSESSMENT AREAS

The process began with APPA's Balanced Scorecard. This taxonomy was created when APPA customized the Malcolm Baldrige Criteria for Performance Excellence to this industry, resulting in the four categories of the Balanced Scorecard:

- financial perspective
- internal perspective
- innovation and learning perspective
- customer perspective.

Embedded within the four categories of the Balanced Scorecard are the seven assessment areas, as specified by APPA:

- leadership
- facilities strategic and operational planning
- customer focus

- assessment and information analysis
- development of management of human resources
- core processes
- performance measurement.

It is important to recognize that these seven areas also form the basic outline of assessment and criteria for both the APPA FMEP and the Award for Excellence. In this way, utilizing APPA's Balanced Scorecard ensures that all organizational transformation activities are highly systematized and aimed at achieving excellence within our industry, as defined and measured by APPA. This is a repeatable rubric that every member can use to start and guide the process of transformation.

A GROUP EFFORT

Starting with the Balanced Scorecard and the seven assessment areas, the University of Chicago worked with several external industry experts and internal staff to perform an initial gap analysis by comparing the current facility services organization characteristics to those specified as ideal by APPA vis-à-vis the FMEP and Award for Excellence.

This gap analysis initially resulted in more than 150 potential recommendations for improvement in each of the seven areas in question. The recommendations were vetted and prioritized, became formal initiatives, and were assigned to one or more members of the SLT. Specific accountability was assigned as well. Each senior leader was expected to execute the changes in partnership with his or her staff according to the framework of the master Hoshin planning table. Hoshin Kanri is a system that literally translates to "plan for change." This system originated in the Far East and has been used successfully in industry for decades.

The University of Chicago has renamed the Hoshin system the "Impact" system to simplify communication within the department. This system is based on the "Plan-Do-Check-Act" total quality management approach of the famous management theorist and engineer W. Edwards Deming. The Hoshin system is widely available online and is easily adapted to the APPA Balanced Scorecard, the seven areas of assessment, and the resulting set of initiatives from a gap analysis.

The SLT meets biweekly using the Hoshin/Impact tools to report progress and create a cadence of accountability. The team established KPIs at the start of the process to allow for the establishment of a baseline set of measurements, later enabling

successful documentation of continual improvement. This is a critical element to an APPA-based transformation. APPA considers utilizing data to direct and improve operational performance as paramount for organizational success.


Consistent with the best practices promoted by APPA in many APPA U courses, effective communication is considered a high priority for the UC team.

In fact, to emphasize this belief, it is referred to as “Hyper Communication.” The objectives of hyper communication include a summary of anticipated employee engagement, early and often; setting the tone for a culture that will rethink assumptions and be thoughtful and creative in devising more effective ways to operate; maximizing communications channels that invite and encourage engagement; feedback at all levels of the organization; and demonstration of significantly increased leadership, transparency, and trust.

GOING FORWARD

In addition to using the APPA FMEP, the UC team is committed to go beyond simply participating in APPA events. To do this, the SLT and other team members are encouraged not only to attend, but to also participate in the advancement of industry best practices and the areas of the Balanced Scorecard associated with their technical or management disciplines.

Areas of partnership are reviewed as a part of the impact planning system, and include—but are not limited to—hosting the Drive-In Workshops and the Supervisor’s Toolkit; hosting the Leadership Academy on campus; and sponsoring and participating in Center for Facilities Research (CFaR) research projects, regional meetings, chapter meetings, APPA U, vendor Lunch and Learns, *Facilities Manager* magazine, other APPA publications, and the APPA mentoring program.

The goal for the SLT team is to become a champion for one or more areas of best-practice knowledge associated with our industry. This goal requires more than just reading books and taking classes, but actually owning the knowledge and partnering to transform the Facility Services Department. 

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