

Assessment Tools – Documentation Templates

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Abstract

Based on previous assessment experiences with SACS, Georgia Oglethorpe Award Inc., and the APPA Award of Excellence, Campus Planning and Facilities at the University of West Georgia flexed their IT training and abilities in developing an electronic documentation template to serve as a key referral resource for a system-wide peer review as well as an EPA audit.

The template proved to be instrumental in providing examiners timely accessibility to the required documentation in advance of the audits, so that more time could be spent on inspections and interviews.

In addition to cost savings on multiple paper copies of numerous documents, postage, and administrative fees, having the template on the department's website also improved examination efficiency.

Introduction of the Organization

The Department of Campus Planning and Facilities (CP&F) of the University of West Georgia (UWG) provides facility, grounds, logistics, maintenance, construction planning, risk management, and environmental health and safety support to the fifth largest campus within the University System of Georgia (USG). Located in Carrollton, Georgia, UWG is committed to the pursuit of “educational excellence in a personal environment.” This commitment is supported through the diligent efforts of CP&F using cost-effectiveness, continuous improvement, employee input, customer input, safety, and environmentally responsible methodology.

Serving within UWG’s Business and Finance Division, CP&F is comprised of three departments: Campus Planning and Development (CP&D), Facilities and Grounds (F&G), and Risk Management/ Environmental Health and Safety (RM/EHS). With a full-time staff of 140, CP&F is charged with the responsibility of operating, maintaining, and supporting a 645 acre campus with 90 facilities (2,062,500 ft²), while ensuring a safe, well maintained and aesthetically pleasing environment for over 11,200 students, 1,000 faculty and staff, and the surrounding community.

Statement of the Problem/Initiative

At the conclusion of the Facilities Officers Conference in October 2007, a forum was conducted on the development of a Facilities Peer Review within the University System of Georgia (USG) for the purpose of evaluating facilities operations and maintenance (O&M) practices at each institution and helping to set realistic goals for improvement.

A working group of USG facilities professionals evaluated existing programs such as the APPA Management Evaluation Program in developing criteria that addresses the need to define and standardize O&M core data elements across the USG, to develop and communicate a common set of performance metrics for facilities O&M, and to set practical institutional targets for continuous improvement.

Based on previous assessments with SACS, the Georgia Oglethorpe Award, Inc., and the APPA Award of Excellence, CP&F was eager to become one of the first institutions within the USG to be evaluated. Having reviewed the documentation that was required, they determined that it would be more efficient to post the information on their website in order to maximize the accessibility for the examiner. The peer review for UWG was conducted from February 25 - 27, 2008. Thanks to the documentation template, the examiners were afforded more time to assess the deployment of the department's mission, vision, and policies in action through increased tours and interviews with employees and customers.

Having experienced how convenient this template worked for the USG Facilities Peer Review, RM/EHS decided that this tool would also be beneficial for an Environmental Protection Agency (EPA) audit that was scheduled at UWG the following month. RM/EHS personnel worked swiftly to develop the template, list the requirements, and hyperlink the documentation. As with the USG Facilities Peer Review, EPA auditors were complimentary towards this tool and were able to conduct their inspections more efficiently and effectively.

Implementation

Challenged by increasing requests for webpage updates from the campus community, the Internet Technical Services (ITS) at UWG implemented RedDot Web

Content Management Solutions in January 2007 to allow the various departments across campus to update their information with ease and consistency. Four members of the CP&F staff were trained in this application and had already been assigned the goal of updating the department's website by the end of the fiscal year in June.

Because of the staff's experience with previous assessments and now website applications, the idea of accessing the required documentation from the web was developed overnight. The documentation lists for both the peer review and EPA audit were categorized by their criteria into a spreadsheet. Those documents that were already accessible on the web (e.g. organizational charts, master plan, utility information, goals and objectives) were converted into hyperlinks while the other documentation was converted into the necessary files and were then uploaded into hyperlinks.

Benefits

In addition to making these audits more efficient for the examiners, other benefits to this project included:

- Reduced administrative time assembling hard copies of the documentation.
- Reduced costs in printing 7 copies of each document which would have included paper and additional ink cartridges.
- Increased on-campus interview time with employees and valued customers.
- Improved teamwork among staff leadership in dealing with complex requirements and delivering those requirements in a timely manner.

- Created a positive impression on the examiners in advance of the audit in terms of having the documentation available to review. The closing remarks in each of the reviews were very complimentary to the organization that was performed.
- Provided other institutions with an accessible example of the template for future audits.

The documentation web pages for each of the reviews may be accessed at the following links:

USG Peer Review - http://www.westga.edu/cpf/index_3000.php

EPA Self Audit - http://www.westga.edu/cpf/index_3664.php

Retrospect

The success of this effort is attributed to three key components:

1. The ability of the organization to use existing resources to deal with ever-changing requirements.
2. The flexibility of staff in training outside their normal scope of operation.
3. Past experience with such assessments as SACS, Georgia Oglethorpe Award Inc. – a Malcolm Baldrige criteria, and the APPA Award of Excellence. Not only did this prepare CP&F in understanding the requirements of the review and audit, but it also improved the teamwork within leadership to deal with complex issues, and the ability to complete tasks in a timely manner with the desired, measurable, and reportable results.

While CP&F is primarily dedicated to enhancing the campus grounds, facilities, and environment, it continues to be proactive in its approach to continuous

improvement. CP&F employs such instruments as organizational assessments, technology upgrades, customer/market feedback, employee assessments, performance metrics, and benchmarking opportunities to help monitor its performance and gauge its future development. As it looks forward to future expansion as a campus and institution, it remains cognizant of the challenges in resources, energy, service expectations, environment, and competition. Performance measurement data, facility reinvestment, customer service, safety, and energy resources remain the drivers for its sustainability and continued success.

“Professionally we serve, personally we care”