



## Facilities Management – Facilities Information Systems

### AUX FIS Brainstorming Session Agenda

**Location: FM FIS Conference Room 231**

**Date: April 5, 2011 Time: 2:00 PM**

**Purpose of Meeting:** This brainstorm session is being held to discuss AUX plans and determination of end results for discussion. Documentation of these decisions will ensure that all information is satisfactorily captured according to the stated expected outcomes.

**Facilitator:** Ray Dinello, FIS

**Attendees:**

**Absentees:**

Ray Galleno

Donna Cox

**Coordinator:** Pamela Duff, FIS

Lyn Woodruff

## AGENDA

Time	Topic	Attendees	Facilitators
2:00 PM	<p>Introduction &amp; Agenda Overview</p> <ul style="list-style-type: none"> <li>• Purpose of Brainstorm Session</li> </ul> <p>Ray provided an overview</p> <p>Other groups involved: FO are trying to determine how to do business better; strategically</p> <p>EQUIPMENT: Ray G. provided a list of equipment consolidated from Asset Mgmt, Kristie etc.</p>		RD
2:10 PM	<p><u>Future Goals of AUX:</u></p> <ol style="list-style-type: none"> <li>1. Use info to track the assets. <ul style="list-style-type: none"> <li>• Purchase details – Service Manuals, Spec Sheets</li> <li>• Location</li> <li>• Warranty info</li> </ul> </li> <li>2. Lifecycle (replacement cost)</li> <li>3. Monitor Vital Equipment / Priority PM (Identification e.g. refrigeration units or health and safety) <p>Identification also of parts for vital eq</p> <p>Identify distributor(s) who would keep on hand or pay for cost of parts within warehouse</p> <p>Ray G stated they have specific certified repair in area</p> </li> <li>4. Cost of repair v/s Cost of replacement</li> <li>5. Forecasting Repair and PM (Average of maintenance repair cost)</li> <li>6. Contract Mgmt e.g. Hoods (Reports for forecast by quarter, etc)</li> <li>7. Service/Response (associated to Monitoring vital equipment) <p>Currently no inventory is kept for parts replacement</p> </li> </ol>		

## 8. Trend/ EQ Service

Ray G. stated they are requiring spec sheets and manuals; however not all are readily available

Ray G. suggested use of Internal WR: Use work order to track movement of work order; specialty repair (similar to SAC process)

Has been looking/discussing a Licensed Certified Refrigeration person; however with budget costs.

Ray stated our group know they need to address this and possibly need to may go back to look at the service level agreement

Service Level Need Position: Ray G. stated if they can identify a need for a specialty they can justify a position they fund so they track labor hours

Rays proposal: Ray suggested maybe look at services expected (do away with Reimbursable WRs) with right service people and then if workload increases then get a budget that is documented within Service level agreement and any emergency would be reimbursable (emergency funds budget set aside)

Draw up proposal for Management of EQ; changes in structure, specialties and personnel. Annual funding based upon service level. e.g. Specialty shop for AUX.

Ray G. goal is to standardize for one source of parts and info.

Zones concept: Currently issue because Buildings fall in different zone areas.

- How AUX will manage Preventive Maintenance approvals, Schedules, funds, etc...?

### **Proposal- different structure for AUX service to address increased level of needed service and address use of new model**

1. Ray suggestion a shop focused upon AUX: Emergency funds, Inventory. Parts budget
  - Coordinator-operations/business person who works for AUX-customer focused to insure issues are addressed. Report to Ray G.
  - Supervisor: (high level tech) understanding of EQ and environment for AUX
  - Admin/PA:
  - Technicians: Specialty/Certified
  - 3<sup>rd</sup> shift PM: also emergency response-a team lead for PMs Nights and Weekend / FM Support
  -
2. For Buildings: shop would serve as a Liaison for building maintenance

Ray D. mentioned new eq use (EDA) will assist with changes/shift.

Ray G. is looking at money and inquired of the cost recovery amount needed that he is sure Phil is looking at.

**Current:** What is needed to activate and start on PMs asap. He is ready to activate PMs for walk-ins but Ray G. wants to know what they are going to do for PMs

Refrigeration person certified

Lyn will provide a list of all Walk ins and suggested maintenance. Esp. Student Union. Then address door unites

### **Current State - AUX PM Needs/Determinations:**

1. Refrigeration's Person Certified
  - PM Templates
  - Walk ins/Door Units
  - Under counter Units—Small units

Determine a way for a way that new purchased eq is entered to update and track all EQ for PMs

Ray G. sated it is in Banner

Ray mentioned flagging info or suggestion of an email notice that new eq has been purchased and will soon need to be entered into system

- Major Equipment identification and monitoring (High priority equipment)

Also issue on tracking moveable eq.- a way to formalize a move or changes in EQ location.

Quick and easy way to track EQ moved – suggestion use of EDA to scan and flag any moved eq.

Ray mentioned the new addition of the AUX services module within Archibus.

Ray mentioned use of EDA to scan eq.

**Proposal Addition:** Ray G. mentioned working the use of EDA into their plan for EQ inventory/tracking.

Use For asset tracking:

Currently when EQ comes in, all areas get deliveries.

- How to maintain a real time or close to real time Equipment Inventory?

Ray proposed EDA use for inventory:

1. Bar coded / added to inventory: Notification sent – New onsite EQ- add barcode, scan and enter into system: bar code provided based upon Purchase. PM set up

**New EQ workflow:** Add new EQ form-bar code printed—EQ label added

Trigger from form - Based upon standard (EQ) PM added, identify if new or replacement- based upon man-hours, coordinate and schedule PM

Warranty/Lifecycle – info on replacement-PO info on cost. Suggestion before flag when warranty is up to contact vendor or route to coordinator to contact

Want to track if tech showed up to complete work/scan eq to identify when onsite for repairs/service.

2. Inventory –Car Code: Monthly each time PM is completed. Update info and track where EQ is located and any location changes-scan bar code (EDA)
3. Old Barcode-Surplus form. Currently AUX hires a mover to take to surplus: flag and /stop PM – Deactivate from inventory. History is kept on EQ – decommission old eq

Scanned electronic doc: Specs, POs etc may be added to EQ data.

Report each month after PMs indicating list of EQ unknown

Ray G. Stated his tracking threshold is over \$1000

Ray G inquired about notification (no value M to track)

Ray D. mentioned a PM-Notify--Schedule – just a check to verify

- What Key Performance Indicators can we put in place to insure that above areas are being addressed?

Need to determine How to monitor service? Key performance indicators/ reports

-Reduce repair costs

-EQ: Last longer

-Use work order to track speed of service on vital eq

- Survey for AUX customer service
- Compare Years-breakdown comparison in efficiency.

ACTION ITEMS

Ray D stated that they would need to later look at details of all plan/proposal and determine specifics

RD

Action Items:

Ray D. will provide a proposal: current state. Middle state and future (personnel, process flows and system). Discuss with Phil

Ray G. stated he can provide the EQ for barcode. Refrigeration unit PMs need to be started.

FIS can establish another meeting

Ray G. will get some notes together and send to Ray.

Then meet to come up with a written plan.

In meantime identify PMs, procedures, etc

Ray D sated he would need a budget for EQ/labeling before he could implement Bar Coding

Will need to determine the Road Map to get to future plan.

3:50 PM

Brainstorm Session Wrap Up

RD

Review Next Steps / Action Item Assignments, if applicable

4:00 PM

*Adjourn*