

## **BEST PRACTICES, Facilities/Facilities Planning**

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**Title:** Building Acceptance–Occupancy Approval Checklist to Improve Turnover of Buildings from Construction to Maintenance & Operati # 328

**Source:** Emory University

**Co Area:**

**Addl Info:** <http://www.appa.org/FacilitiesManager/article.cfm?itemnumber=1188&parentid=1188>

**Abstract:** Scroll down on above URL

The focus of the Checklist is to improve the quality of new buildings or major renovations and the transition of those spaces from construction to building occupancy and maintenance.

Specific benefits to the institution include the following.

- The maintenance/operations staff visit the project multiple times during construction and become familiar with the building and its utility systems before they are concealed with finishes.
- By spending time with the maintenance/operations staff during construction, the project management staff gain experience in issues that improve serviceability of building systems.
- Maintenance/operations staff become more familiar with the building which enables them to resolve building problems more quickly
- Construction is inspected from a maintenance and operations perspective leading to improvements in accessibility of equipment, valves, filters, balancing dampers, etc.
- Maintenance/operations staff are trained on the building systems and their operation months before building occupancy occurs.
- Operations and maintenance manuals and preliminary as-built drawings are received before the buildings are occupied.
- Building problems are avoided during construction that might otherwise lead to difficulty maintaining the facility.
- The architect, contractors, subcontractors, and owner's project team understand what is required of them in the construction closeout process and when it is required so that systematic completion is achieved and accountability for that outcome is in place.

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**Title:** Best Practice for Maintenance Management of Listed Buildings # 583

**Source:** University of the West of England

**Co Area:**

**Addl Info:** <http://www.maintainourheritage.co.uk/pdf/report.pdf>

**Abstract:** This report is about the maintenance of historic buildings. Maintenance is recognized philosophically as the optimum strategy for the care of buildings. Yet there has only ever been a policy of passive endorsement of maintenance, not the pro-active encouragement and support it needs.

This report is the culmination of our wide-ranging research programme entitled 'Maintaining Value' on maintenance issues. We want this report to stimulate debate and rethinking. We believe the time is ripe for a wholesale change in policy and practice – in Government, the construction industry, the professions, local authorities and owners – to promote the maintenance of historic buildings.

This report is not only for professionals and practitioners. Maintenance is about attitudes as well as expertise and it is a cultural, economic, environmental and social issue as well as a technical one. The target audience is wide, covering all those with an interest and responsibility for those issues.

## **BEST PRACTICES, Facilities/Facilities Planning**

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**Title:** Towards Best Practices in Facilities Management: Incorporating Sustainability into FM at the Caribbean Higher Ed Institute of the F # 858

**Source:** ACHEA Conference

**Co Area:**

**Addl Info:** <http://sta.uwi.edu/achea/downloads/ACHEA%202007/JohnNTelesford.pdf>

**Abstract:** Higher education institutions (HEI's) such as universities, community colleges, technical and vocational schools and research institutions should have high performance facilities if they are to maintain competitiveness and be attractive to faculty and students into the future. Facilities management is an administrative function that is important in assisting HEI's in achieving the necessary performance required by their facilities to move towards the campus of the future. In fact research has shown that increased competition and energy/environment were high driving forces that will cause universities to move to more ecologically sustainable buildings that can provide that competitive edge. It was also shown that the overall quality of the HEI's physical facilities impacted on student recruitment and retention. Sustainability or ecological sustainable development (ESD) is a key enabler of the higher education institution of the future. The facilities management professional within the HEI is in the best position to incorporate sustainability into the business as usual administration of the HEI. This can be achieved through sustainable facilities management or SFM.

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**Title:** Adopting Leadership in Energy and Environmental Design (LEED) and "LEED"ing the Way: By the University, For the University # 908

**Source:** University of Florida

**Co Area:**

**Addl Info:** <http://www.sacubo.org/awards/bestpractices/archive/2008bp/>

**Abstract:** Many other universities turn to consultant to lead them through the Leadership in Energy and Environmental Design (LEED) certification process. UF Facilities Planning and Construction Division took the lead and started to manage the LEED certification process for its projects. This saved every project thousands of dollars. Case study presented on every certified project to share lesson learned from our project certification with anyone who is interested in pursuing the LEED certification, and use these lessons learned in the next projects. We have stream lined the process of the LEED for New Construction certification and last November we added LEED for Existing Buildings to our goal to target the existing building because there are more existing building than new construction, and these buildings are in need of becoming more energy efficient and healthy places to work.

Over the last 6 years University of Florida has learned how to improve and master this process to the benefit of all projects all over the University resulting in an entirely new breed of buildings at UF, the LEED certified green buildings. This new generation of new buildings are energy efficient, healthy place to life and work, and improve productivity.

## **BEST PRACTICES, Facilities/Facilities Planning**

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**Title:** Claims Management Tracking Reports # 980

**Source:** University of Virginia

**Co Area:**

**Addl Info:** <http://www.sacubo.org/awards/bestpractices/archive/2009bp/>

**Abstract:** The need to develop claims management tracking reports was an initiative that was instituted in order to be informed about the claims activity throughout the University. Prior to developing a monthly tracking report, it was not generally known how many general liability, automobile, crime, boiler & machinery, or property claims were incurred in a given fiscal year. More importantly, the financial cost of self-insured programs would not be known until it was reviewed at the end of the year, which meant there would be little, if any, warning of an impending deficit in the loss retention accounts.

It was decided, therefore, that we wanted to know how many claims were occurring throughout the University. We wanted to know what general categories they fell into, such as liability, property, boiler & machinery, automobile and other areas. We also wanted to get a handle on how long it was taking to settle losses that fell within our self-insured retention for property, boiler & machinery, and automobile physical damage. In addition, we wanted reports that would let us know what the financial impact has been for incurred losses, and we wanted to maintain accurate historical data to use in projecting future losses for funding purposes. Finally, we wanted to maintain a record of how well we were handling subrogation losses on behalf of the University, since it involved recovering damages incurred by the University from third parties who were at fault.

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**Title:** Assessment Tools - Documentation Templates # 984

**Source:** University of West Georgia

**Co Area:** Institutional Effectiveness

**Addl Info:** <http://www.sacubo.org/awards/bestpractices/archive/2009bp/>

**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.

## **BEST PRACTICES, Facilities/Facilities Planning**

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**Title:** Implementing an Integrated Capital Project Management and Accounting System for Project Managers' Use # 1055

**Source:** Georgia Institute of Technology **Co Area:** Financial Affairs

**Addl Info:** <http://www.sacubo.org/docs/bestpractices/2010/Accounting.pdf>

**Abstract:** Georgia Tech recently implemented an integrated capital project management and accounting system using (1) Facility Focus, a Maximus product, for tracking capital project finance and budgeting information, and (2) a web-based interface using user defined fields (UDFs) within Facility Focus for project status reporting. The purpose of the project was created a centralized portal for tracking and reporting of construction projects on an Institute wide basis.

The project was initiated in the Facilities Division of Georgia Tech. However, because data entry and reporting has a web-based interface, all crucial organizations on campus have access to the financial data and reports. This includes project managers at Facilities, OIT and colleges, as well as the Budget Office, Financial Services and Controller's Office. The system was designed for project status briefing for senior management, bimonthly status reports of project managers across the Institute, and the financial officers at the college.