FOCUS on FACILITIES
Diocese of Cleveland Facilities Services Corporation

Failure to Plan – Plan to Fail
Taking Ownership of a Building

Benjamin Franklin has been credited with the quote, *"If you fail to plan, you are planning to fail*." We consider this quote to be the cornerstone to our *Focus on Facilities* columns because we want to raise awareness to facility management, as well as asset management and plan accordingly. This planning can be categorized in planning your next day, seasonal tasks and responsibilities, and next year plans.

Planning Your Day should be done the day before so that when you arrive at the building you already have your "things-to-do" list. Of course, unscheduled issues can and will occur so each day's tasks need to be prioritized into A, B, and C with "A" being tasks that must be done that day e.g., survey the building today for safety and health compliance. "B" tasks need to be completed as well but with less priority such as walking through the building inspecting the mechanical and electrical systems e.g., completing scheduled preventive maintenance (PM) work order(s). "C" tasks are important but could be delayed due to unscheduled issues arising but, that said, those tasks that don't get completed should be documented and assigned a new date to complete the work e.g., empty the end-of-day trash.

This past November 2020 *Focus on Facilities* column, "Embracing Checklists for Your Job Responsibilities" we addressed the benefits of having standardized checklists available to use as a facility management tool and this type of approach will help the facility person perform their job on a daily, weekly, monthly and quarterly basis. When implementing applicable checklist(s) to one's work

schedule at the end of the day this individual will have completed the documentation of work performed that others may be required to review and/or sign off as finished work. This benefit of completing and documenting these assignments is the ability to maintain records of what has been done e.g., reviewing fire extinguisher pressure gage readings to assure safety compliance. The bi-product of using checklists is the benefit the user receives from their efficient documentation that the tasks have been completed and the personal satisfaction of work well done.

When it comes to the seasonal, as well as next year planning our *Focus on Facilities* January 2020 column "What is Energy Retrofit & Retro-Commissioning?" we introduced facility management to these two topics associated with mechanical and electrical equipment/systems, as

well as the building itself e.g., infrared thermal imaging. Individuals involved with facility management know it isn't just completing the day-to-day responsibilities. There is the lessons-learned and planning to continuously improve the building and its performance whether it is to make it a healthier occupant facility, safer facility, or more energy efficient facility. Each of these 3-tasks require planning beginning with collecting data, such as reviewing the utility bills or researching how to make the building safer and healthier. This type of planning similar to the day-to-day, weekly, monthly, and seasonal planning is required or the responsibilities will result in failure setting back the building in the efforts to continuously improve.

Reasons why "no plan = failure" often begins with the lack of buy-in from the facility personnel or the occupants themselves failing to what management wants to achieve. It is easier to simply discount the goal or the tasks at-hand than to embrace the idea. When this negativity appears to be evolving then the facility management needs to observe and note that maybe the objectives and assignments are not clear to those responsible to carry out or comply with the plan. Often too, improvement activities and job responsibilities can lose momentum over time because of the inherent "routine" of the task. One of the benefits to completing a checklist, as well as posting these results is the satisfaction of completing the work and subliminal notification to others in the building that work is being performed for their benefit, as well as for facility management's benefit.

Every plan should have milestones to meet in addition to completion dates and these need to be known, embraced, and completion celebrated to help maintain a positive building environment. Delays, ineffective supervision and unable to provide the tools and materials required to do the job will contribute to the negativity of performing and completing the tasks. For facility management each tasks/goal needs to be planned to succeed and not just scheduled. There needs to be an understanding of what it will take to complete this task within the overall management plan, such as:

- Goal a.k.a. "Theme"
- Inventory of task and each task assignment
- Task due date
- Results documented including photograph(s) where applicable.

Without a documented and organized "roadmap-to-success", the plan can be open to be scrutinized. A tracking method for the plan will help avoid distractions, misunderstanding, and second-guessing by others. So, remember, *"If you fail to plan, you are planning to fail!!!*"

For more information:
facilities@dioceseofcleveland.org

Facilities Services Corporation
Catholic Diocese of Cleveland