

## Case Study Excellence

# EdIFX – Educational Initiative for Facilities

### Project

Educational Initiative for Facilities Excellence –  
Quality Management System

### Deliverable Participants

Facility Operating Plan template  
District Facility Directors, selected Supervisors from  
Bay City Public Schools, Fraser Public Schools,  
Lapeer Community Schools, Rochester Community Schools,  
Wayne-Westland Community Schools  
Review by Michigan School Business Officials Association

### Staffing Duration

MartinCompany principals  
7 months conceptual development  
4 months “sustainable excellence” model  
12 months pilot projects

### Background

Michigan public school districts combat declining enrollment, rising facility operating costs, increased demands to support instructional programs, competition from charter schools and a spike in retirements by experienced maintenance staff. Facilities leadership is not in a position to fund, staff or support the cost of transforming legacy practices with advanced technology or quality initiatives.

### Approach

Martin Company investigated the best facilities practices of more than a dozen districts statewide for three conference presentations, “Small Victories”, “Show Me the Money” and “Sustainable Excellence”. Five of the participating districts came together over a series of months to help identify core competencies that reduce costs, improve reliability, extend asset life and enhanced communication within the facilities staff and with administrators and instructional staff.

### Hurdles

Invariably, facilities teams are understaffed to perform requests, routine maintenance, and projects. Instructional staff and administrators’ expectations are uninformed and often unrealistic. Facilities staff are schooled to react, and their priorities are often thwarted. Despite the best of intentions, efforts to improve processes over-reach the capacities and skills of the K-12 facilities workforce, and as a result, quality processes are stillborn.

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**Outcome**

The participants' insight, candor and persistence eventually yielded a streamlined model for quality processes that can be developed in baby-steps:

The Facility Operating Plan (FOP) elements are:

- Customer Service Agreement
- Computerized Maintenance Management Systems (SchoolDude)
- Workplace Organization (5S) and Visual Management
- Service Contract Management
- Customer Surveys for Data-driven Continuous Improvement
- Reliable Reporting on Performance Improvement Goals

These processes help define the scope and structure of work assignments and service contracts, improve supervision, focus management systems and foster synergy with the instructional and administrative staffs. The FOP is complex, but it can be taken in small increments, and gives management a long range vision for excellence.

Implementation has begun at two districts by targeting the weakest schools in their districts and uses the FOP model to focus, initiate and measure improvements.