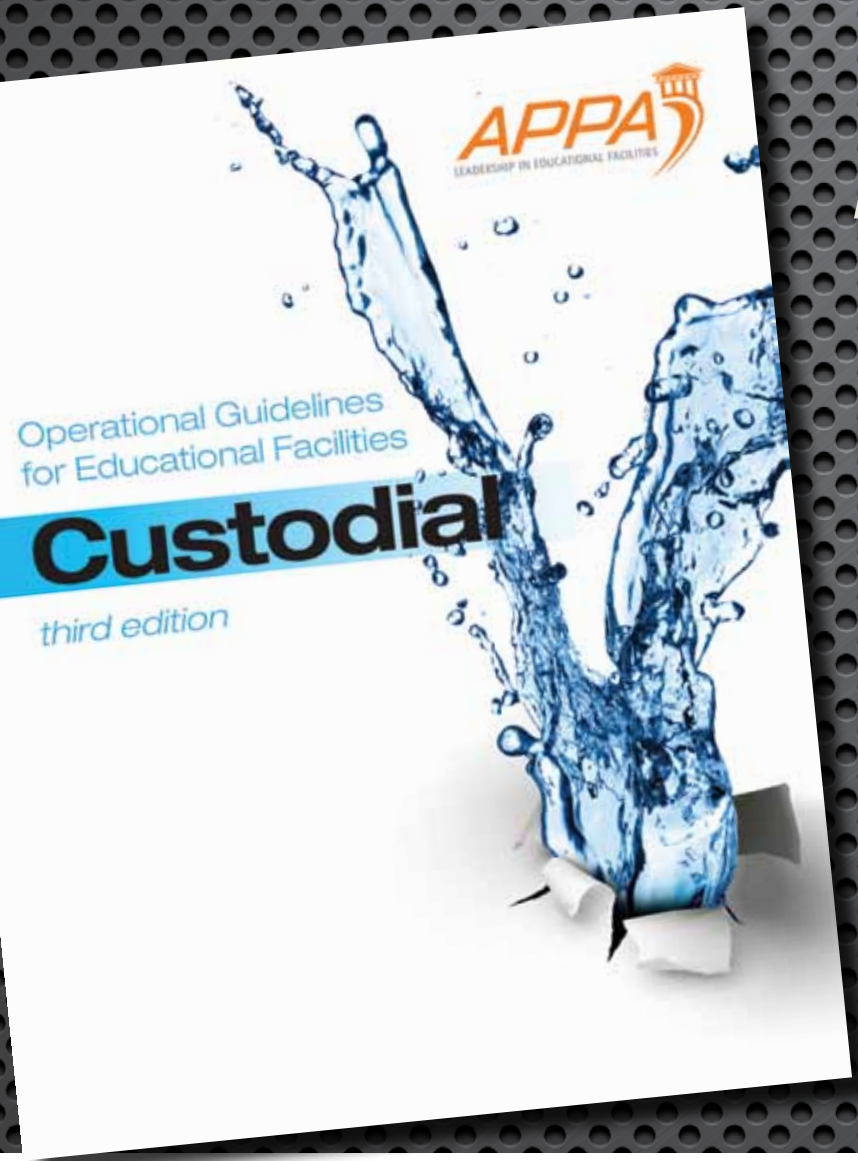


APPA's NEW OPERATIONAL GUIDELINES FOR EDUCATIONAL FACILITIES

Alan S. Bigger, APPA Fellow

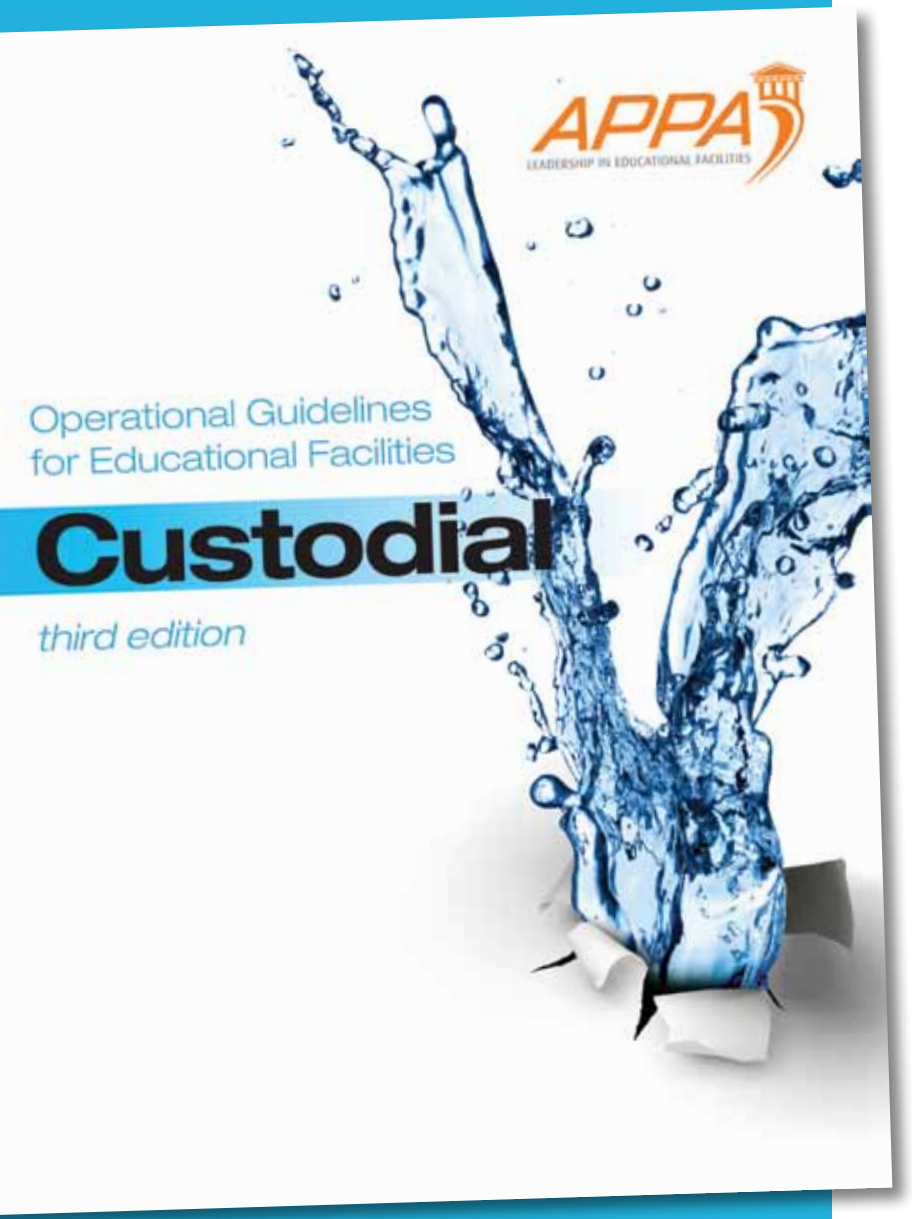
Nearly 25 years ago a group of enlightened APPA members and facilities managers started to discuss an idea and to plant a seed about the need for a document, or series of documents, that would explain the need for staffing facilities operations and the implication of such staffing on levels of service. During the 1980s states and institutions of higher education were facing severe economic issues and the budget axe invariably fell on the facilities management departments of educational institutions. As the demand for increased budget cuts reached seismic proportions, facilities managers scrambled for assistance to validate their staffing requirements and the impact of draconian budget cuts on levels of service. Thus the seed that was planted by the facilities managers in 1987 sprung into a plant, with three leaves, much like a shamrock.

The first leaf of the shamrock was the first edition of APPA's *Custodial Staffing Guidelines for Educational Facilities* published in 1992, then updated and expanded in a second edition published in 1998. This was followed shortly thereafter by APPA's *Operational Guidelines for Grounds Management* in 2001, and APPA's *Maintenance Staffing Guidelines for Educational Facilities* in 2002. These three leaves of the shamrock have become indispensible source publications for proactive leaders that seek to operate and provide efficient and effective services to our stakeholders on campuses across the world.

One of the unique features about a shamrock is that it has three leaves, distinctive leaves, yet tied to one another by a mutual stem. APPA has been that stem through the decades and has fed and nurtured facilities management professionals with cutting-edge publications. The new and improved *Operational Guidelines* for Custodial, Grounds, and Maintenance are an outgrowth of that support. Not only are these books distinctive, there are themes that flow through each book to include staffing guidelines, sustainability, benchmarking, position descriptions, use of computerized maintenance and management systems, and outsourcing options. The books are

SETTING STANDARDS FOR CUSTODIAL OPERATIONS

BY CASEY J. WICK



In general, standards serve as fixed mile markers on the path to achieving goals and objectives. They create a measurable system by which to determine progress or regression toward or away from predetermined outcomes. In terms of custodial operations, numerous types of recognized standards are used to measure operational parameters. Among those standards are the following:

Training	Social
Production	Management
Staffing	Ethical
Conduct	Productivity
Appearance	Procedural
Association	Process
Equipment	Regulatory
Safety	Product

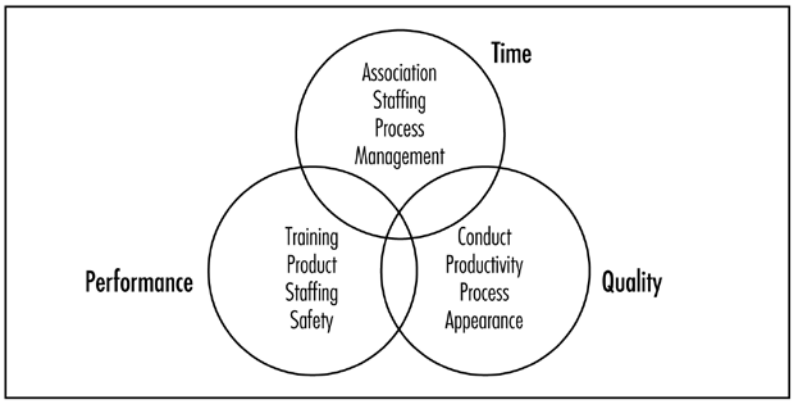
As is evident from the list above, the number and variety of standards associated with custodial work is extensive and can be difficult to comprehend. It is therefore helpful to organize such standards into meaningful groups or categories for the purpose of evaluation and application. Figure 1 illustrates both the overlapping and interdependent nature of standards common to the custodial field. More important, the diagram also illustrates how several standards can be grouped together in broader categories for evaluation and application purposes.

Time Standards include standards based on performance pace and chronological outcomes. In other words, how long will it take to perform one single task or series of tasks? The "Normalized Base Times" identified in the new Custodial Guidelines publication offer custodial managers a powerful tool with which to objectively justify full-time equivalent requests, create reasonable and fair workloads, and facilitate daily and weekly scheduling.

It is important to note that time standards are not related only to task performance. Time standards are also critical factors in circumstances such as chemical dwell time, equipment maintenance schedules, and regulatory compliance matters.

Performance Standards include standards that are designed to objectively define targeted levels of performance or outcomes. Universal examples of performance standards are those relating to safety guidelines and hazard minimization. Such safety and

Figure 2: Maintenance Activities as a Percentage of Total Resources



hazard minimization standards also show how many standards can be categorized into a number of different categories.

For example, while safety standards are certainly performance standards in terms of how a certain task is to be performed and what personal protective equipment is to be used, they also reasonably fit into the category of time standards when consideration is given to time-related occupational exposure limits such as decibel levels. Performance standards related to custodial operations are most frequently thought of in terms of attaining a predetermined and defined level of cleanliness, and therefore establish an understandable and accurate means of evaluating cleaning performance.

In conjunction with such standards, custodial managers are tasked with maintaining an expected level of cleanliness within their respective facilities. The five levels of cleanliness defined in the APPA guidelines describe observable levels of cleanliness that can be used during an inspection to measure performance.

Performance standards not only create a useful means of measuring actual cleaning outcomes, they also facilitate staff training and communication of expectations. Ultimately, they help create a shared understanding of expectations and clear, easily understandable communications.

Quality Standards and performance standards are often viewed as one and the same. However, while performance and quality standards do overlap more than most other types of standards, they should be viewed as distinct and concerned with unique circumstances.

Quality standards are more closely based on a 360-degree perspective on service delivery. For example, a restroom surface that has been cleaned to meet observable cleanliness levels will likely be judged as meeting both performance and quality standards. Yet, even though the surface appears clean, bright, and shiny and there are no visible signs of soil, it may still harbor contaminants and undesirable pathogens (especially if the product used is a neutral cleaner rather than a disinfectant).

Quality standards are designed to take into account the entire service cycle and address all aspects collectively. Likewise, quality standards are useful tools when one takes a holistic approach to service delivery. Facilitating standards such as customer interactions and service follow-through is a primary concern regarding quality standards. Quality standards within custodial operations are the foundation for developing structured and appropriate quality plans and service quality measurements, designing a feedback cycle, and developing an appropriate and functional continuous improvement plan.

Management Standards. Effective management provides the foundation for success in each of the areas cited above. The bottom line is that achieving effective performance and quality demands the implementation of a professional management structure that ensures that a custodial operation has the necessary pieces in place to operate as efficiently as possible and with a full commitment to customer satisfaction. APPA has various programs available to assist in determining the effectiveness of a facilities management organization, including a standardized self-audit program and the Facilities Management Evaluation Program (FMEP).

In addition, ISSA—The Worldwide Cleaning Industry Association—has outlined the primary characteristics of a quality, customer-focused cleaning organization in its Cleaning Industry Management Standard (CIMS). Developed through a consensus-based process, the CIMS program offers a road map for all cleaning service organizations—including both building service contractors and in-house cleaning service providers—in the development of an effective management structure.

For many years, APPA members have utilized industry best practices such as those afforded by the U.S. Green Building Council, Green Seal, and the Environmental Protection Agency. ISSA's CIMS program offers a set of "environmental preferability" criteria that serve as the basis for a comprehensive green cleaning program. Taken together, CIMS and CIMS-Green Building (CIMS-GB) provide a key tool that an institutional custodial department can use to improve the likelihood of success. Institutions that self-perform service can use the CIMS standard to develop and maintain quality management within

their own organizations, while those that use a third-party contracted service can use CIMS/CIMS-GB as a powerful prequalification tool when selecting an outside provider. More information is available at *www.issa.com/cims*.

STANDARDIZATION

Once the general concepts of standards are understood, they can be applied within an institution in a process of standardization. Standardization is generally defined as "establishing common rules and procedures that apply uniformly." Standardization principles are not a new concept. The birth of standardization is rooted in Fredrick W. Taylor's visionary work from the mid- to late-1800s, which forms the basis for what is described in contemporary management theory as Scientific Management.

Scientific Management is defined as developing performance standards on the basis of systematic observation and experimentation. Working primarily in the steel industry, Taylor studied operations and collected extensive data on peak performance standards. He then analyzed the data and used the results to define procedures that would yield the greatest output while minimizing waste. Taylor's methods caused output and quality to increase dramatically while at the same time lowering costs. These two factors—increased productivity and quality coupled with decreased waste—lie at the heart of a standardization program. It must be noted, though, that Taylor's work is generally viewed as obtuse toward employees and considers individuals as economic objects and not as human beings. Management scholars still debate this belief today. However, the positive impact of introducing standards into a cleaning operation has been proven time and again.

IMPLEMENTING STANDARDS

Custodial managers often find determining which standards are valid, appropriate, and effective to be quite a challenge. A well-thought-out and effective standardization program can range from one that is developed completely in-house to one

that has been developed by a not-for-profit trade association or other industry expert. Regardless of the source of the program, thoughtful and committed implementation remains crucial to the successful integration of the system. Defining and adopting a set of standards is only the first step. The timing, scope, and control of the program are as vital to success as adopting appropriate standards.

One thing to keep in mind is that the strategies employed during implementation need to be directly related to the operation in which they will be applied. For example, operations that occur in multiple facilities and at multiple locations face unique challenges as managers seek to achieve implementation across several facilities. The following questions need to be asked: How can widespread implementation be achieved? Is it best to take small steps in all facilities at once or fully transition one facility at a time? What is the best method of tracking results? At its core, implementation should be viewed as guiding the transition and making minor adjustments along the way as necessary. Can this be done effectively across several locations, or would the one facility at a time be a better approach? These are just a few of the many considerations managers must address during and after implementation of a standards program.

SUMMARY

The benefits of developing and implementing a standards program are countless, and effective standardization can yield great returns. Professional cleaning operations are a model environment in which to implement standardization principals. The repetitive nature of the industry creates a situation in which consistently desirable results form the foundation for success. Minimizing variations in performance will improve the overall level of services delivered.

Standards also can become the basis for goal development and cohesive performance efforts among employees. Creating an environment in which all members of an operation know and understand what is expected of them will undoubtedly boost morale and improve cooperative team efforts.

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