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# Facilities Zone Management

Transitioning to a Zone Model for Facilities  
Maintenance and Renovations

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# The Pros and Cons of Zone Management

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## The Challenges of Centralized Maintenance

### Centralized Maintenance Models May Create Inefficiency and Unpredictability

Traditionally, most college and university facilities departments have operated under a **centralized maintenance model**, in which a central facilities unit assigns a single pool of facilities workers to perform maintenance and renovations across campus.

The key advantage of this traditional approach is that it gives the facilities department the flexibility to allocate all of its resources to the highest-priority projects. However, centralized maintenance also creates unpredictability, both for facilities staff and for campus units. Because technicians may work in any building on any day, they rarely learn the peculiarities of a particular building or the unique needs of its occupants, potentially leading to subpar service. Further, because campus units cannot predict which technician will respond to a service call, they may feel distanced from facilities staff or frustrated by the need to repeatedly explain building operations to new workers.

To combat these problems, many institutions are switching to a **zone maintenance model**, in which designated groups of facilities workers serve as first-response units for small “zones” of buildings. These groups proactively visit each building in their zone on a weekly (or even daily) basis and independently handle minor maintenance and repairs, with little involvement from the central facilities office.

## Potential Advantages of Zone Maintenance

### Zone Maintenance Can Increase Effectiveness and Improve Relationships

Zone maintenance may offer several advantages over centralized maintenance models.

- **Zone staff develop deep expertise on each building’s operations.** Their on-the-ground perspective may allow zone staff to spot worsening maintenance problems early on, averting the need for expensive, crisis repairs in the future.
- **Zone staff create durable relationships with building occupants.** These relationships not only build camaraderie and increase the standing of the facilities department on campus, they also lead to a better understanding of the needs of a building’s occupants, enabling the facilities department to meet those needs more effectively.
- **Zone staff can serve as liaisons between the broader facilities department and building occupants.** On occasions when major maintenance needs arise that require help from centralized facilities staff, zone-specific workers can escort new workers to the repair site, provide helpful background information and context, and keep building occupants informed about progress.

# Establishing Zones of Responsibility

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## Defining and Staffing Zones

### Divide the Campus into Zones of Several Geographically Adjacent Buildings

At the heart of zone maintenance are the zones themselves—groups of geographically adjacent buildings that designated workers visit on a regular basis.

The ideal size of a zone will vary depending on the resources of the facilities department and the needs of particular buildings. In general, however, zones should be small enough that staff can regularly visit each building within their area. Ideally, buildings with similar maintenance needs, such as those containing similar laboratories, should be grouped together so that zone staff can develop expertise in serving that type of space.

### Assign Each Zone a Team Skilled in a Wide Range of Day-to-Day Maintenance Tasks

Each zone should be served by facilities workers who can handle a wide range of day-to-day issues: plumbing problems, electrical malfunctions, painting, and so on. At one institution, for example, each maintenance team consists of a plumber, an electrician, and a building tradesman. Typically, one member of each team serves as the team's supervisor, who reports to a higher-level facilities leader such as an associate director.

- **Zone staff should address only "minor labor."** Meaning, tasks requiring less than an hour of work. This ensures that zone staff remain available to handle day-to-day maintenance needs throughout their assigned area, rather than getting bogged down in larger projects. Zone staff should refer more time-consuming projects back to the centralized facility department.
- **Zone staff should pay regular, proactive visits to each building in their zone.** On many campuses, zone staff must visit each building weekly, while others require daily check-ins. The purpose of these check-ins is to proactively discover maintenance issues before they create problems for building occupants or contribute to costly breakdowns.

### Establish a Point of Contact in Each Building to Coordinate Requests from Occupants

To simplify communication and coordination with zone maintenance staff, each building should appoint one of its own employees to serve as a point of contact. This contact should provide day-to-day updates to zone staff about maintenance needs, share messages between zone staff and building occupants, and liaise with facilities management leaders about long-term projects and renovations.

The best person to serve as a point of contact will vary depending on the building's occupants. Buildings occupied by wealthy departments tend to hire a point of contact with previous facilities experience, while departments with less funding typically assign the responsibility to an administrative assistant.

# Dividing Work Between Zone and Centralized Staff

## The Continued Role of Centralized Staff

### Centralized Staff Should Perform Large or Specialized Tasks

Although zone staff will handle many maintenance needs within their assigned zone, certain tasks should remain under the control of the centralized facilities department.

In particular, centralized facilities staff should handle complex or major maintenance and renovations. It is neither practical nor efficient for each zone team to include rare or specialized skillsets, such as elevator repair. Instead, these specialized skills should be housed centrally and dispatched across campus as required.

Further, major repairs and renovations that require many hours or days of labor should be handled by centralized staff so that zone staff can remain attentive to day-to-day occupant needs.

#### Centralized Staff



- **Maintain university-wide networks (e.g., utilities)**
- **Manage uniform campus needs (e.g., land care, waste removal)**
- **Conduct specialized labor (e.g., carpentry, roof repairs, lock changes)**

#### Zone-Specific Staff



- **Build relationships between facilities management staff and building occupants**
- **Conduct preventative maintenance during regular building check-ins**
- **Respond quickly to immediate building needs**

### Centralized Staff Should Process Incoming Facilities Requests

The centralized department should also continue to operate a single call center to accept incoming requests for maintenance. Call center responsibilities should include:

- Clarifying maintenance problem with requester
- Placing work orders with zone and unit managers
- Creating invoices
- Processing completed requests.

Upon receiving a request, call center staffers should route the work order to a facilities manager, who should assign zone staff or centralized staff as appropriate to fulfill the request.

Typically, call centers operate during normal business hours and route after-hours requests to an emergency line or third-party service. Call center staff also generally oversee the computerized maintenance management system (CMMS).

# Implementation Guidance

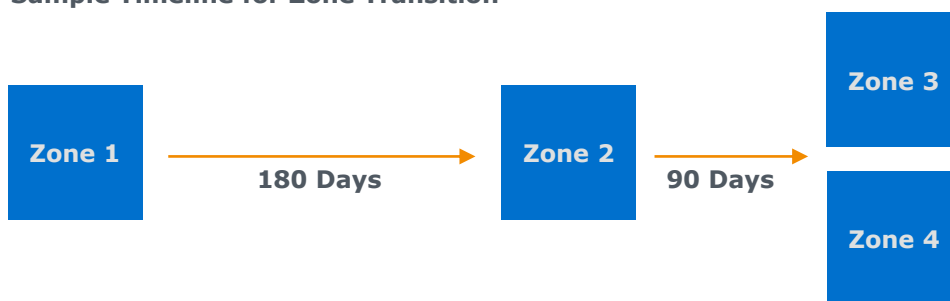
## Preparing for the Switch

### Create Pilot Zones to Gain Experience with the Zone Maintenance Model

To ease into a zone maintenance model, consider transitioning one section of campus to zone maintenance before others. At one institution, the director of facilities management selected a group of buildings with “open-minded” occupants willing to experiment to serve as a pilot zone. After a six-month pilot period, the institution established a second zone, then waited a further 90 days before finally transitioning the remainder of the campus.

Before transitioning to zone maintenance, institutions should hire all necessary staff. Institutions should generally wait until union negotiations to write altered responsibilities into new contracts.

#### Sample Timeline for Zone Transition



### Communicate Changes to the Facilities Model Campus-Wide

To ensure the smoothest possible transition, institutions should take care to communicate the change to zone maintenance to stakeholders across campus.

#### Hold forums before transitions

At one institution, facilities directors seek face-to-face meetings with building contacts before implementing zone or other facilities changes (e.g., reducing services or adding project management fees) to share their reasoning for the changes and to respond to concerns. Directors take attendance so they can email relevant information to any building contacts who cannot attend.

#### Form committees to receive continuous feedback

Building representatives at one institution form an advisory committee that meets each semester with the facilities managers responsible for their zone. Facilities managers also meet with the faculty senate subcommittee on facilities and support services.

#### Hire dedicated outreach staff

At some institutions, facilities departments hire staff with marketing backgrounds to improve campus relations. Responsibilities may include creating and maintaining a customer-friendly website, establishing service expectations, and liaising with building contacts.