Facilities Communication Toolkit

Seven Tools to Improve Communication
Between Facilities and Campus Constituents

Facilities Forum

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How to Use This Tool

Senior Facilities officers (SFOs) increasingly recognize the need to better communicate with campus constituents. Whether providing more communication to customers who have submitted work orders or better signaling the impact that capital projects will have on students, faculty, and staff, transparency and customer service have become more central to the Facilities department. While not a historic focus, institutions recognize that building out a communication plan pay dividends.

To support institutions in these efforts, this toolkit offers seven tools that provide detailed, step-by-step instructions to better communicate with campus constituents. The table below outlines each tool and what it helps Facilities leaders do. The primary audience is the Facilities communication director or Facilities leader. For institutions looking to hire a communication director, see tool 7.

Outline of Communication Tools

Tool	Description
Tool 1: Guide to Building Communications Strategic Plan	Provides guidance on how to develop formal communications strategic plan for Facilities.
Tool 2: Guide to Crafting a Social Media Policy	Equips institutions to establish an effective social media policy.
Tool 3: Guide to Effective Email Communication	Aids the development of formal email policies and trains employees on effectively communicating important information via email.
Tool 4: Guide to Establish Internal Communication Channels	Facilitates the creation of downward and upward communication channels between senior leadership, supervisors, and frontline staff within Facilities.
Tool 5: Guide to Effectively Communicating Facilities Information Through Reports	Illustrates how to communicate effectively when building a report about an important project, change, or initiative to Facilities employees and/or the broader campus community.
Tool 6: Considerations for Effective Poster Design and Creation	Illustrates how to communicate effectively when developing a poster to communicate an important project, change, or initiative to Facilities employees and/or the broader campus community.
Tool 7: Job Description for Facilities Communications Director	Describes the responsibilities and ideal qualifications for a Facilities communications director.

Source: Facilities Forum interviews and analysis.

Tool 1

Guide to Building Communications Strategic Plan

Goal

Use this tool to develop formal communications strategic plan for the Facilities unit.

Intended User

Facilities executive or communications director

Overview

This tool helps users identify and align Facilities goals with institutional priorities. It then maps those goals to various communication channels, which serves as the foundation for a formal communications strategic plan. The goal is to ensure cohesive, effective messaging from all parts of the Facilities unit to campus constituents.

Note: This tool consists of a “crib sheet” with prompts to help users develop a formal communication plan, as well as three worksheets to support the development of specific prompts.

Electronically access this tool: **eab.com/ff/communicationtoolkit**

Source: Facilities Forum interviews and analysis.

Tool 1: Guide to Building Communications Strategy

Facilities Communication Strategy Crib Sheet

This guide outlines all the elements of a Facilities-specific communication strategy document. Note that there is an editable version available for download at eab.com/ff/communicationtoolkit.

A. Mission Statement

A1. Write the institution's mission statement below.

A2. Describe how Facilities supports the institution's mission statement. If the Facilities unit has its own mission statement, explain how the two align.

A3. Describe how the mission statement(s) might impact how and when Facilities communicates with campus.

B. Institutional and Facilities Strategic Priorities

B1. List out the overarching goals of the institution that Facilities seeks to support. These may come from the strategic plan, master plan, president's statement, or board directive.

B2. List out the major goals and priorities of the Facilities unit, either broadly scoped or by function/team.

B3. Describe how the goals of the institution impact and overlap with Facilities' goals and priorities.

B4. Consider how the aligning goals listed above impact how Facilities communicates with campus. *For more detailed guidance on translating institutional and Facilities strategic priorities into specific communication goals, please see the* ***Facilities Goal Identification Worksheet*** *on page 8.*

Source: Facilities Forum interviews and analysis.

Tool 1: Guide to Building Communications Strategy (cont.)

C. Campus Stakeholders and Priorities

C1. List out major groups of campus stakeholders, including their values and primary objective. Stakeholders may include students, faculty, board members, surrounding community, or researchers.

C2. Describe how the values and objectives of stakeholders impact how Facilities works and communicates with them.

D. Communication Channels

D1. Outline how Facilities will use the following channels to advance its communication goals. *For more detailed guidance on how to align communication goals with specific channels, please see the **Communication Channel Translation Worksheet** on page 9.*

- Email
- Social media
- Facilities website
- Staff briefings
- Reports
- Posters
- Presentations

E. Roles and Responsibilities

E1. List out the roles primarily responsible for and involved in Facilities-related communication. For each role, articulate the responsibilities that role owns (e.g., a specific goal or communication channel). *For more detailed guidance on how to determine roles and responsibilities within the Facilities unit, please see the **Roles and Responsibilities Worksheet** on page 10.*

F. Branding

F1. Capture information about institutional or Facilities branding that will impact communication through any media. This includes the templates, preferred colors, approved acronyms, location of official logos and seals, etc.

Source: Facilities Forum interviews and analysis.

Tool 1: Guide to Building Communications Strategy (cont.)

Facilities Goal Identification Worksheet

This worksheet provides guidance to help Facilities leaders identify the communication goals that align with the mission, values, and objectives of their institution and Facilities unit.

1. Review the following goals and consider whether any goal is missing. If so, write it in the blank.

2. Rank the following goals from 1 (highest priority) to 9 (lowest priority). If any goals have been added, the lowest priority will increase accordingly.

Potential Communication Goals

- ☐ Build Facilities reputation, profile, and awareness
- ☐ Increase visibility and understanding amongst customers of services Facilities provides
- ☐ Advance campus understanding of impact of Facilities work
- ☐ Professionalize the Facilities organization
- ☐ Develop trust and commitment from senior leadership
- ☐ Increase respect and recognition for Facilities work
- ☐ Energize Facilities staff and morale
- ☐ Improve staff engagement/ retention and development
- ☐ Improve customer satisfaction and service delivery
- ☐ ______________________________

Source: Facilities Forum interviews and analysis.

Tool 1: Guide to Building Communications Strategy (cont.)

Communication Channel Translation Worksheet

This worksheet provides guidance to help Facilities leaders determine how and when to use specific communication channels (e.g., email, social media) to advance institutional and Facilities priorities. Most Facilities units will use all of the commonly available media methods as part of communication efforts. However, some methods are better suited for advancing certain types of communication goals, while others might be ill-suited for that particular message. For instance, advancing the institution's goal to offer a world-class educational experience can be advanced on any and all channels. By comparison, creating a safe and transparent culture is often best served through more immediate forms of communication.

1. Using the communication mechanism matrix below, determine how the communication methods already in use support the goals identified in B2.

2. Consider whether and how the remaining methods support the institution's communication goals. The matrix offers insight on the intended audience, frequency of communication, and evaluation metrics to help users fully consider the connection between a particular method and potential goals. However, users are encouraged to update the information to better reflect their campus.

Method	Communication Goals the Method Supports	Intended Audience	Frequency	Evaluation
Email communication		All	Daily	Open and click-through rates
Social media platforms (e.g., Facebook, Twitter)		Campus customers	Daily	Likes, comments, follows
Facilities website		Campus customers	Daily	Page view and click-through rates
Staff briefings		Facilities staff	Daily or weekly	Verbal and written feedback from staff
Report		Senior leaders and stakeholders	As needed; at least once a year	Verbal and written feedback from campus stakeholders
Poster		Campus customers and Facilities staff	As needed	Verbal and written feedback from campus stakeholders
Presentation		Senior leaders and stakeholders	As needed	Verbal and written feedback from campus stakeholders

Source: Facilities Forum interviews and analysis.

Tool 1: Guide to Building Communications Strategy (cont.)

Roles and Responsibilities Worksheet

This worksheet provides guidance on assigning responsibility and oversight for the communication strategies to members of the Facilities unit. While many Facilities employees may participate in the communication channels, assigning clear responsibility for the creation, approval, and dissemination of Facilities communication ensures accountability.

1. List out all the Facilities roles that will be directly involved in communicating various messages. Note that the name of individuals holding the roles should not be referenced to make the strategy document viable following transitions. Some examples of roles described here may include:

- Senior Facilities officer
- Facilities director(s)
- Communications director
- Communications intern
- Supervisors

2. Decide which communication responsibilities that role oversees, referencing the goals and methods from sections B and D. This can include a brief history of the role, who reports to that role, and what specific tasks that role has in its portfolio.

3. Translate the information into section D of the crib sheet. The template below is one potential layout for the information.

Involved Parties in Facilities Communication	
Role 1:	**Communication Responsibilities:**
Role 2:	**Communication Responsibilities:**
Role 3	**Communication Responsibilities:**
Role 4:	**Communication Responsibilities:**

Source: Facilities Forum interviews and analysis.

Tool 2

Guide to Crafting a Social Media Policy

Goal

Use this step-by-step tool to establish an effective social media policy.

Intended User

Facilities administrator, communications director, or communications expert within Facilities or central Communications office

Overview

This tool guides Facilities communicators from social media goal creation to implementation to performance tracking, recommending implementers and best practices throughout.

Note: While this tool focuses on the establishment of a formal social media policy, EAB recommends that this policy be reviewed and updated annually to ensure it reflects changing technology, media, and campus climate.

Collaborate with Central Communications Office

If your institution has a central communications office, collaborate with them to develop a Facilities-specific policy.

Electronically access this tool: **eab.com/ff/communicationtoolkit**

Source: Facilities Forum interviews and analysis.

Tool 2: Guide to Crafting a Social Media Policy

Step 1 Outline Policy Goals

Owner: Facilities communications director; Facilities leader

The first step is to identify the institution's goal in establishing or building a social media presence. This will help the communications director and Facilities leaders determine what information to share.

Institutional Priority	Social Media Goal
Become a world-class employer	Support staff engagement through celebrating staff contributions to operations
Build staff engagement	Highlight the value of Facilities to campus by sharing value stories and positive feedback from customers
Create and support a safe campus environment	Monitor for utility outages and emergencies
Support student success	Share new construction projects for academic buildings

Step 2 Choose Channels to Monitor and Post

Owner: Facilities communications director

The second step is to determine which social media channels to monitor and which channels to post on. As posting and monitoring will make up the bulk of an institution's social media presence, it is important to ensure that the channels being passively monitored and actively posted on align with the goals identified in the previous step.

Defining Social Media Terms

- **Monitoring** is a passive presence where an institution tracks but does not respond to or create content on social media websites.
- **Posting** is an active presence where an institution creates original content (or echoes previously created content, either by the institution, an affiliate, or a third-party organization such as the local newspaper) and shares it out on one or multiple social media channels to be consumed by a public audience.

Currently, most institutions do not both monitor and post on every possible channel. The remainder of this step provides guidance on how institutions can decide where to monitor and where to post.

Source: Facilities Forum interviews and analysis.

Tool 2: Guide to Crafting a Social Media Policy (cont.)

Decide which channels to monitor and which channels to post content

Monitoring Social Media Channels

Scan desired channels for specific content through visual inspection or keyword search, or simply by scrolling through feeds. Monitoring social media has two major goals, which map to unique channels and frequency:

1. Gauge mood and interests of staff, faculty, and students.
    - Facebook: weekly or a few times a week
    - Instagram: a few times a week
    - Snapchat: a few times a day
    - Website: as needed to address any comments received on articles
2. Get time-sensitive information and brief notifications such as, utility outages, active threats/lockdowns, and unexpected construction impacts.
    - Twitter: as often as needed, from daily to continuously

Different Channels, Different Urgencies

Monitoring some channels (e.g., Twitter) can be more labor-intensive than others and may provide less return for the time invested. Other channels are more passive and less time-sensitive, such as Facebook, Instagram, Snapchat, and the Facilities website, where comments on posts can be read and responded to two to three times a week as opposed to in real time. The University of British Columbia's solution to the pace of Twitter was to ask their call center to monitor and triage a Twitter account through which customers can place maintenance requests.

Posting on Social Media Channels

The major consideration when determining which channels to actively post on is the bandwidth of the communications director to create and share content. Other important considerations for which channels to post content on include the types of content that Facilities wants to share, desire for an active or passive social media presence, and social media use by target customer groups. Finally, time-sensitivity of the channel will play a role in determining the value of posting (e.g., Twitter for real-time updates).

Source: Facilities Forum interviews and analysis.

Tool 2: Guide to Crafting a Social Media Policy (cont.)

Outline of Common Social Media Channels and Uses

Channel	Frequency of Posting	Common Topics Posted	Examples
Facebook	A few times a week	Employee profiles or updates with multiple pictures. Content may include: • Team photos • New construction projects • Large construction updates	Post renderings and updates on new construction or renovations, including renderings, as well as sharing value stories involving Facilities staff
Twitter	As often as needed	Time-sensitive updates and brief notifications such as: • Utility outages • Active threats/lockdown • Unexpected construction impacts	Share details of an electrical outages in a campus building and inform campus that crews are working on the problem with an expected time of resolution of X hours
Instagram	Once a day	Picture-heavy profiles or updates such as: • Value stories • "Day in the life" stories • Beauty of campus • Support campus pride	Photo and caption of a maintenance tech doing preventive maintenance on an HVAC unit in an academic building so it does not fail
Snapchat	Once a day	Quick visual stories and targeted messages to students such as: • Construction updates • Planned outages • New initiatives	Stories of how much students value and appreciate the friendly and supportive custodians and how rewarding custodians find these interactions
Website	Daily or as needed	Hub of new information about Facilities to share construction plans and updates, news stories, new initiatives, awards, and value stories. The website can also serve as an archive for all postings from Facilities, and should cover all content posted via other channels.	Debuting plans to renovate a frequently used lecture hall in an academic building and sharing the expected timeline and construction impacts

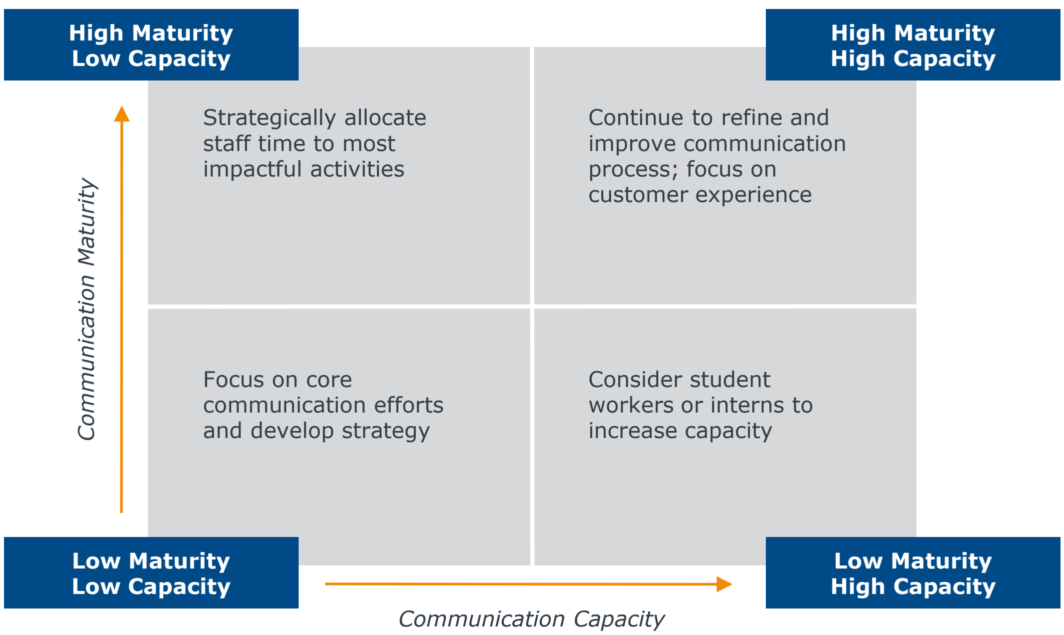
Source: Facilities Forum interviews and analysis.

Tool 2: Guide to Crafting a Social Media Policy (cont.)

Note that launching a Facilities department's social media presence from scratch can be a significant undertaking. To help institutions scale up, departments just beginning to develop and implement a social media policy should begin with regularly posting to and monitoring a website and Facebook. Moderately mature policies may shift priorities to include posting to and monitoring Twitter and Snapchat (capacity permitting). Institutions with the most mature social media policies and greater capacity may include posting to and monitoring Snapchat, as well as increasing the frequency of monitoring (of Twitter, in particular).

The grid below advises how institutions can approach their social media presence based on the maturity and capacity of their operations.

Matrix of Social Media Policy Maturity and Capacity



Source: Facilities Forum interviews and analysis.

Tool 2: Guide to Crafting a Social Media Policy (cont.)

Step 3 Allocate Posting Permissions and Responsibilities

Owner: Facilities communications director

Decide which staff members in the Facilities department will be responsible for posting

If the institution employs a Facilities communications partner, that role should support senior Facilities leaders (and other staff as appropriate) in implementing this social media policy and posting appropriately. These leaders should determine who will be responsible for posting what types of content, and on which media, to prevent duplication.

Most institutions with a social media presence opt to make their posts and activity accessible to the general public. Therefore, access to these accounts should be thoughtfully allocated. Decide which Facilities employees need to post on social media, based on their position, because they communicate to stakeholders frequently or urgently. Some employees can be given social media account access based on the requirements of their job.

Facilities executives. The senior-most Facilities executive and functional heads such as the director of operations and maintenance often have access so they can quickly communicate projects and news to campus. Detailed guidance (including this policy) should be provided to these leaders to aid in posting as these positions need to communicate quickly and frequently with a variety of stakeholders. Removing the necessity to route every communication through the communications partner speeds time to information for campus stakeholders.

Work-study students or interns. Students may be assigned to monitor social media channels but should not be given unsupervised posting responsibilities.

Other employees, such as frontline staff, should be encouraged to send relevant stories to the communication partner or Facilities leader to post. Provide guidance on what stories are relevant and what information should be included in the post request.

Determine how and from whom content will be contributed to each channel

Clearly specify who should communicate what information through which channels. For example, Facilities may decide that project managers in the planning, design, and construction unit must request to have construction impact updates posted on the website, but they can post time-sensitive updates immediately on Twitter. Alternatively, the communications partner may want to make or approve electronic postings from all but the most senior Facilities executives.

Focus on branding and professionalism

Ensure the professionalism of the Facilities brand by strongly emphasizing style rules and the importance of proofreading for any posts. Outline brand requirements for posting format, images, and content. To assist posters in creating appropriate content, provide examples for people to reference.

Source: Facilities Forum interviews and analysis.

Sample Social Media Pages

University of British Columbia Twitter Page (@UBCFixMySpace)

SOURCE: TWITTER SCREENSHOT FROM 6/5/17.

Columbia University Facilities Facebook Page

SOURCE: FACEBOOK SCREENSHOT FROM 6/5/17.

Source: Facilities Forum interviews and analysis.

Tool 2: Guide to Crafting a Social Media Policy (cont.)

Step 4 Create a Process for Handling Feedback

Owner: Facilities communications director

The fourth step is to establish a process for dealing with comments and feedback from social media. When engaging with social media, comments or responses should be dealt with in a consistent way. Determine how to process and respond to feedback or questions. If Facilities plans to enable comments on public posts, comments should be responded to in a timely manner.

1. **Establish a protocol for triaging and allocating feedback or comments to the appropriate person**. The point person for triaging comments will vary depending on the channel used.

   For a high-volume channel like Twitter, a work-study student or intern can sift through tweets or comments and call out any that require response to the communications director. Provide clear instructions, such as to direct any tweets regarding utility outages or elevator emergencies directly to the Facilities executive and head of the physical plant, or to direct any tweets about non-emergency custodial issues to the custodial shop supervisor. An electronic record should be kept of all communications received and sent, to reference in case of questions later.

   A communications staff member or intern can scroll through the lower-volume channels such as Instagram and Facebook and determine which comments merit follow up.

2. **Set up a method of replying to comments,** either by email, in person, or via the method the comment was received (e.g., replying to a comment on a Facebook post). Generally, replying to comments through the channel that they were received is appropriate. However, in severe or sensitive situations, a phone call or email might be merited. If responding to a true emergency, activate emergency plans and use the pre-determined communication channels to respond.

If Facilities has a passive social media presence, replies or other user engagement may not be necessary. However, it is still important to establish a protocol for triaging and allocating feedback or comments to the appropriate person should a response become necessary.

Step 5 Determine how to Measure Social Media Effectiveness

Owner: Facilities communications director

The fifth step is to decide how to measure success of social media efforts. Thoughtfully choosing which metrics to track will help highlight the impact of different behaviors on successfully spreading messages through social media. There are a number of metrics that will help Facilities track the reach and impact of the institution's social media presence.

> Note that many social media channels offer business accounts. Facilities leaders wishing to track metrics will find that business accounts provide utilization metrics more effectively than personal accounts.

Source: Facilities Forum interviews and analysis.

Tool 2: Guide to Crafting a Social Media Policy (cont.)

Key Social Media Metrics

	Metric	Definition	Channel
Inform	Reach	Total number of unique users who have viewed post (how far content is disseminating, potential audience size)	All
	Followers/Friends	Number of fans or people who are seeing regular updates from the Facilities account	All
	Total story completions	Number of unique users who have viewed the last snap of the story	Snapchat, Instagram
	Completion rates	How many people completed viewing the story compared to how many began viewing the story	Snapchat, Instagram
	Unique views	Number of unique users who have viewed the first frame of the story for at least one second	Snapchat, Instagram
Engage	Engagement	Number of unique users who have interacted with post	All
	Likes/Favorites	Number of unique users who have "liked" or "favorited" a post	All
	Shares/Retweets	Number of unique instances that users have reposted or shared Facilities' content with other users on the platform	All
	Comments/Replies	Number of comments received on or replies to a post	All
	Screenshots	Number of screenshots of snaps	Snapchat

Setting Realistic Targets

While tracking these metrics can yield interesting insights about which posts and channels are the most popular, most institutions report that these metrics typically have relatively low performance. As a result, communication staff should not set aggressive targets for these metrics.

Step 6 Codify the Completed Social Media Policy

Owner: Facilities communications director

The sixth step is to codify the completed social media policy. A written policy ensures that the institution's procedure is clear to staff members and that consistency is maintained even with turnover. Save a copy of the policy in an accessible location such as a shared drive or document sharing platform, post to the Facilities website, and disseminate to Facilities employees who will need to reference the policy for posting.

Source: Facilities Forum interviews and analysis.

Tool 3

Guide to Effective Email Communication

Goal

Use this tool when preparing to send emails to Facilities and campus stakeholders, as well as when developing email policies.

Intended User

Facilities leader or communications director

Overview

This tool helps users standardize the format of and information shared in various email notifications. It also includes tips to reduce burden of crafting emails by helping users highlight relevant information and prevent campus email burnout.

Electronically access this tool: **eab.com/ff/communicationtoolkit**

Source: Facilities Forum interviews and analysis.

Tool 3: Guide to Effective Email Communication

Step 1 Select Email Type that Matches the Communication's Purpose

Facilities leaders use email to communicate a wide variety of information to frontline staff, senior leaders, and campus customers. However, the content, structure, and branding of the email must frequently change to effectively communicate the message being delivered.

Staff can use the table across the following two pages to identify to purpose of various emails, as well as how often such emails should be sent. The table also provides considerations of what content to include and how to stylistically design the email to make most important information stand out.

Breakdown of Types of Email Communication

	Internal Emails (Including Daily Announcements)	Capital Project Initiation Email	Updates on Construction Impacts	Planned Utilities Outages
Purpose	Provide brief, succinct information to individual impacted by content of email	Inform campus community about upcoming capital projects	Notify campus community about status of constructions and effects to normal campus activity	Prepare campus community for disruptions due to utilities repairs or improvements
Frequency	Daily	As needed	Weekly to monthly, depending on nature and impact of construction	As needed, at least a week ahead of time
Branding	Keep it simple; use consistent fonts and a limited color scheme.	Align the font and color choices with either the institutional brand or Facilities brand (if established). Balance graphics and text with white space to reduce effort required to digest information.	Keep it simple; selectively use bolding, underlining, and italics to call out titles or the most important information.	Use approved logos, consistent fonts, and a limited color scheme to increase perceptions of professionalism and signal importance of information.
Content to Include	Important points that people need to know to do job safely, upcoming Facilities Management and HR initiatives, and relevant project updates. **Note**: these emails are often read to frontline staff by supervisors at the beginning of a shift.	• Important details including: ○ Project name ○ Facilities contact info ○ Important dates/milestones ○ Link to media stories • Renderings of new space	• Who, what, when, where, why, for how long, and who to contact with questions or concerns • What Facilities is doing to mitigate the disruption to impacted parties	• Who, what, when, where, why, for how long, and who to contact with questions or concerns • What Facilities is doing to mitigate the disruption to impacted parties

Source: Facilities Forum interviews and analysis.

Tool 3: Guide to Effective Email Communication (cont.)

Breakdown of Types of Email Communication (cont.)

	Changes to Maintenance or Service Schedule	Email Newsletter	Responding to Emergencies	Facilities Staff Spotlights
Purpose	Disseminate information about changes to regular Facilities services (e.g., custodial, waste removal)	Share routine, non-urgent information internally and with campus community	Share urgent, important information with impacted stakeholders quickly	Display ways that staff are providing value to and enhancing the community
Frequency	As needed, at least a week ahead of change	Weekly, monthly, or bimonthly	As needed	Weekly
Branding	Use approved logos, consistent fonts, and a limited color scheme to increase perceptions of professionalism. This helps impacted customers recognize the deliberate manner in which this change is taking place, easing frustrations.	Use consistent fonts and colors, as well as ample white space. Align the font and color choices with either the institutional brand or Facilities brand (if established). Check with the department or central communications office for a newsletter template (e.g., PowerPoint or Word templates with institution's approved colors and layouts).	Keep it simple; selectively use bolding, underlining, and italics to call out titles or the most important information for people skimming or looking at notice quickly.	Balance graphics and text with white space. Incorporating white space into a document creates more "hooks" for the reader's eye and reduces the effort required to digest the information. Increasing line spacing and margins (of both text and graphics) creates more white space in a document.
Content to Include	• Who, what, when, where, why, for how long, and who to contact with questions or concerns • What Facilities is doing to mitigate the disruption to impacted parties		*During emergency*: Provide info about parts of campus impacted, appropriate response if impacted, estimated duration *Following emergency*: Provide info about parts of campus impacted, cause and resolution, ultimate duration, which units responded, and how to prevent in the future	How staff have positively impacted community; any positive/value stories or compliments from customers

Source: Facilities Forum interviews and analysis.

Sample Emails

The following pages showcase sample emails from three institutions used to communicate a variety of messages. The boxes on the right highlight key structural elements and design decisions for Facilities leaders to consider when crafting their own email templates.

The Ohio State University Custodial Services Update Email

FACILITIES OPERATIONS AND DEVELOPMENT

August 25, 2016

Changes to Custodial Services

Starting Thursday, September 1, custodians will empty office deskside trash and recycling bins **once weekly**. Centrally located waste receptacles will continue to be **emptied daily**, and we encourage everyone to **dispose of food waste in the central locations**. Service is not changing for classrooms, restrooms, laboratories, conference rooms, breakrooms, kitchenettes or common areas, which will continue to be serviced daily. The weekly schedule applies only to office deskside trash and recycling bins.

Facilities Operations and Development successfully piloted this service model with other school programs, including its own staff, and found it to be a healthful and sustainable practice.

Flyers will be posted in your building identifying central locations, and we encourage you to share this information to your building occupants. Review a list of included buildings and the service schedule.

We thank you for your help in making this transition a success. Review FAQs and let your zone leader know if any issues arise.

Service Schedule

Bolded text calls out key details for those skimming the message

Information on pilot and testing on Facilities staff eases concerns about results of change

Email part of multi-modal strategy including flyers, website, word of mouth

Source: The Ohio State University, Columbus, OH; Facilities Forum interviews and analysis.

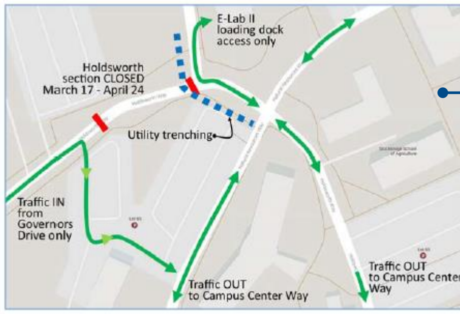
Tool 3: Guide to Effective Email Communication (cont.)

University of Massachusetts Amherst Road Closure Email

From: James Hunt
Sent: Thursday, March 16, 2017 3:00 PM
To: 'info@facil.umass.edu' <info@facil.umass.edu>
Subject: F&CS Construction Advisory: Section of Holdsworth Way CLOSED March 17-April 24

Section of Holdsworth Way Closed March 17-April 24

Beginning tomorrow, Friday, March 17, a section of Holdsworth Way near the North Service Drive intersection will be CLOSED for utility trenching work as part of the North Chiller Upgrade Project. The area may remain closed through April 24, with the possibility of an earlier completion date. Northerly traffic on Holdsworth Way will be detoured to pass through lower Parking Lot 65. Exiting traffic will be directed down Natural Resources Road or Flint Way to Campus Center Way. Please take note of directional signage and fencing in the area.



Questions about this project should be directed to the Design & Construction Management capital projects manager, Ted Mendoza, at tmendoza@facil.umass.edu or 5-6564.

Jim Hunt
Communications Manager
Facilities & Campus Services
University of Massachusetts
360 Campus Center Way
Amherst, MA 01003

Map clearly illustrates traffic changes alongside more detailed information in text

Email provides contact information for readers with additional questions

Dalhousie University Construction Update Email

Fitness Centre - Construction Update No. 2017-01 January 5, 2017

1. Current Project Status
With the beginning of a new calendar year it is a perfect time for a project update. Concrete foundations are over halfway complete.

2. Rock Breaking Underway
Concrete work will continue through the winter months. Underground services (plumbing and electrical) beneath the building are currently being installed. In areas under the change rooms, where the plumbing is particularly congested, additional rock breaking is necessary. This rock breaking will occur over the next 3 weeks, weather permitting. Truck traffic delivering materials to site will continue through this period as well.

3. Schedule
Winter months are difficult on construction progress, but activities will continue as weather permits. The target of early 2018 remains a realistic goal for construction completion.

4. Other
Please feel free to share this notice with anyone you feel may find it of interest. This notice will be added to the project website (fm.dal.ca and click link to Campus Development).

Title clearly defines project and date of update

Numbering and selective bolding ensures email is organized and easy to scan

Email signals university's focus on transparent communication

Source: Dalhousie University, Halifax, NS; University of Massachusetts Amherst, Amherst, MA; Facilities Forum interviews and analysis.

Tool 3: Guide to Effective Email Communication (cont.)

Step 2 Draft Email that Clearly Articulates Intent and Action

While emails are a familiar form of communication, leveraging them for the mass distribution of information requires effort. The following table provides nine tips for crafting an effective email.

Tips for Writing Effective Emails

Tip	Implementation Guidance	Example
Know the intention or purpose of the email before hitting send.	Is the purpose of the email to share information or request action? The main points should be clearly articulated upfront. • **Sharing information** takes place when the email author has news (e.g., a new policy), update (e.g., information about an ongoing project that impacts Facilities employees), or recognition (e.g., a customer satisfaction story to circulate among team members) that needs to be shared with a broader audience. • **Requesting action** occurs when the email author needs the email recipient's help or action to achieve a goal.	**Sharing information** requires language such as "Attached is a policy for your reference" or "Updates to a previous report". **Requesting action** from recipients requires language such as "Please respond with your comments" or "Create this document and disseminate it to your direct reports".
Highlight follow-up actions expected from recipient(s).	What actions should happen as a result of this email? Make the expected action clear to the addressees by calling out who is responsible for which part of the action.	For example, "[*Name 1*], please send [*document*] to [*Name 2*]."
Provide only as much context as necessary.	Think through the background information required for recipient(s) to understand the email and take appropriate action. To ensure recipients grasp the email's key takeaway(s), leave out extraneous detail. Only provide the context necessary for message comprehension to keep the message short.	Instead of sending the vice president of finance and administration an email saying, "we cut down on windshield time by 35%", write "we reduced the amount of time that our staff spend traveling to and from the job site by 35%, which translates into an additional X hours a week for Y team to complete more planned work."
Include relevant supporting graphics.	Text-heavy emails can be hard for recipients to digest. Use a quotation, statistic, image, or photo to break up the text and make the message being communicated more compelling and accessible. Data supports requests or stories more effectively than anecdotes, and graphs are a powerful way to communicate changes.	When circulating an update on workplace safety, include a statistic or graphic. For instance, cite that workplaces that implement and use safety and health management systems can reduce injury and illness costs by 20% to 40% might provide additional encouragement for supervisors to review OHSA regulations at their next meeting with frontline staff.[1]
Avoid jargon unless it is certain that the recipient(s) understands it.	Clearly define any terms that the recipient(s) might not be familiar with, including acronyms. Note that even names of systems or regulations can count as jargon. If unsure, ask a non-technical person to check it before hitting send.	An employee in the Office of Finance and Administration may not know the meaning of OSHA (Occupational Safety & Health Administration) or FCI (Facility Condition Index).

1) OSHA, "Safety and Health Add Value," https://www.osha.gov/Publications/safety-health-addvalue.html.

Source: Facilities Forum interviews and analysis.

Tool 3: Guide to Effective Email Communication (cont.)

Step 3 Send Email at Appropriate Time

The remaining four tips below focus on how to deliver the email after it has been written. While delivering an email may seem as simple as hitting send, Facilities leaders and communications directors should carefully consider when and how they send their digital messages to achieve the highest view and response rates.

Tips for Sending Effective Emails

Tip	Implementation Guidance
Proofread emails before sending.	Read emails out loud to check for comprehension. To avoid unnecessary back-and-forth with recipients, ask someone else to read an important communication that will be widely disseminated or is targeted to an important stakeholder.
Target emails to as few people as possible—do not reply-all unless absolutely necessary and appropriate.	Reply-all emails can spam the inboxes of readers who do not need the information and reduces the likelihood that those recipients will open important email from the same sender in the future.
Time emails to arrive at prime reading hours for the audience.	Leverage the "delayed send" function to time emails to prime reading hours for the audience. Sending emails during prime reading hours increases the chances of the recipient reading and responding to it quickly, instead of putting it on a to-do list or letting it fall further down the queue. Prime reading hours for senior leaders may be in the early morning (before meetings start). Frontline supervisors may check their emails during breaks. Leveraging understanding of those times can increase the visibility of emails.
Know when not to use email to communicate. Some messages are best delivered in person or over the phone.	How a message should be delivered will vary depending on the audience and the content. For sensitive or highly-personal topics, err on the side of an in-person conversation. Employees will have a chance to respond in the moment and are more like to feel heard and respected. Additionally, bear in mind that emails can become public once they have been sent.

Source: Facilities Forum interviews and analysis.

Tool 4

Guide to Establish Internal Communication Channels

Goal

Use this tool to create downward and upward communication channels between senior leadership, supervisors, and frontline staff within Facilities.

Intended User

Facilities leaders, communications director, and frontline supervisors

Overview

The tool explains how to create communication channels within Facilities that enable information to flow from senior leaders down to frontline staff, and vice versa. It provides step-wise guidance for the creation of those channels and offers prompts and templates to support the organization of information.

Electronically access this tool: **eab.com/ff/communicationtoolkit**

Source: Facilities Forum interviews and analysis.

Tool 4: Guide to Establish Internal Communication Channels

Establishing a Downward Communication Channel

To optimize departmental information sharing, Facilities must establish a channel of communication between senior leaders and frontline employees. The process below captures an effective communication channel. Typically, a communications director or Facilities leader consolidates information to be shared on a weekly basis. The director then shares this information with frontline supervisors, either via email or in person, and answers any questions they may have or anticipate from staff. Finally, supervisors share the update with frontline employees.

Weekly Communication Update Process

1 **Gather** information

- **Owner:** Facilities leader/communications director
- Gathers relevant information to share with employees

2 **Create** talking points document

- **Owner:** Facilities leader/communications director
- Translates updates into standardized talking points for consumption and sharing

Active Ingredient: Talking Points Document

Frontline supervisors need a list of talking points to share at team meetings. While this document can take many forms (e.g., email, bulleted list), this tool provides guidance on how to gather and organize the necessary information.

3 **Educate** supervisors

- **Owner:** Facilities leader/communications director
- Shares information (digitally or in person) with supervisors so they can update frontline staff

4 **Share** info with frontline staff

- **Owner:** Frontline supervisors
- Circulates information to staff members at regular team meetings

5 **Circulate** upward feedback

- **Owner:** Frontline supervisors
- Circulate feedback and questions from frontline staff with senior leaders to close the loop

While weekly team meetings are a common occurrence on most campuses, some Facilities departments are less familiar with gathering and circulating information to share from across the institution. This tool elaborates on the steps outlined above to simplifies the process for gather and organizing information to share with frontline employees. Note that the tool also provides guidance on a critical final step: ensuring an upward communication channel also exists so information can travel from frontline employees back to senior leaders.

Source: University of British Columbia, "Information Toolkit Template", http://vpfinance.ubc.ca/staff/communication-tools/communications-templates/; Facilities Forum interviews and analysis.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

Step 1 Gather pertinent information to share with Facilities employees

Owner: Communications director

Gather the necessary information to communicate to frontline supervisors and employees on a weekly or biweekly basis (frequency will depend on the timing of team meetings, *see step 3*). Some institutions centralize this information in a master updates document, accessible online or maintained by a Facilities staff member. Regardless of how the information is maintained, communication directors can solicit contributions from Facilities directors, assistant directors, managers, supervisors, frontline employees, or communications directors from other areas of campus (including the central office). Institutions can establish a dedicated email address for employees to submit information.

The list provides example information to gather and share with Facilities employees.

Example Information to Share with Facilities employees

- Capital project proposals, initiations, or updates
- Major preventive maintenance efforts (e.g., summer dormitory work)
- Changes in HR policies
- Changes in service levels
- Building utility outages
- Changes to staffing or internal organization
- Major campus events and Facilities' response or involvement
- Internal Facilities events, such as department-wide meetings or celebrations
- Major shift in funding or budget situation
- Updated metrics relevant to Facilities' strategic goals

Note: This information also serves as a communications pipeline, as some of this information may be repurposed for a newsletter, social media, or website articles.

Step 2 Organize information into accessible standardized template

Owner: Communications director

Organize the information into a document that supervisors can use to first learn about the updates and then share with frontline employees. Using a standardized template for the weekly updates helps accelerate the absorption of information for both supervisors and employees, as well as simplifying the creation process for communication staff. The template should cover:

- Initiative/project/event details
- Scale of impact (e.g., disruption to schedule)
- Duration of initiative/project/event
- Information Facilities employees need to answer questions from campus community

The following template provides more guidance on what information to provide.

Source: University of British Columbia, "Information Toolkit Template", http://vpfinance.ubc.ca/staff/communication-tools/communications-templates/; Facilities Forum interviews and analysis.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

Sample Template

[Insert institution logo here]

Facilities Management Update for Week of *[time frame]*

Announcements [*Consider the prompts below for each item*]

Template Prompts	Details
Who	Who will be impacted by this communication? Will this impact the interactions frontline staff have with customers, managers, or peers?
What	What is Facilities doing or what action that will be taken? For example: • Capital project announcement • Program or initiative launch • Upcoming event • Building closure • Change in Facilities policy
When	Both when this information should be communicated to frontline staff (e.g., date of team meeting), as well as relevant dates. Write dates in any format that will be quickly meaningful, such as a: • Specific date (e.g., June 12) • Reoccurrence (e.g., weekly) • Time period (e.g., December-March) • Quarter (e.g., Q3)
Where	Relevant locations (on or off campus).
How	Exactly what will happen in concise sentences. How will this be communicated to the wider campus? This corresponds to how the action will be implemented. For example: • Email sent to Building Administrators from the Facility Managers • Digital signage goes live • Meeting with union leadership Specify the tone of this information (e.g., somber, hopeful, exciting) to help staff understand the message appropriately.
Why	Why Facilities is taking this action, phrased in language targeted to intended audience. Why should the intended audience care about this action?

Frequently Asked Questions *[Either questions frontline staff might ask or questions staff should be prepared to answer from campus customers]*

Source: University of British Columbia, "Information Toolkit Template", http://vpfinance.ubc.ca/staff/communication-tools/communications-templates/; Facilities Forum interviews and analysis.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

Step 3 Equip frontline supervisors to communicate content to their teams

Owner: Communication director, frontline supervisors

Once the master updates document is complete, share it with frontline supervisors—either in person or via email—and ensure they fully understand the content and can answer any questions they anticipate their employees may have. Effectively addressing frontline supervisor questions and concerns builds confidence in leadership and ensures transparency within the Facilities unit.

Facilities leaders can share information and establish venues for staff to ask questions several ways, including: regular team meetings of frontline supervisors with facilities leader(s) or communications director; office hours; and email correspondence.

Step 4 Disseminate information at team meetings

Owner: Frontline supervisors

Establish meetings (e.g., weekly, biweekly) where frontline supervisors meet with their teams to communicate and discuss new information. Institutions that already have standing meetings must ensure that supervisors dedicate time at each one to sharing updates and answering staff questions.

Considerations

Frequency

The frequency of communication depends on the needs and scheduling constraints of the Facilities unit; **weekly** or **biweekly** meetings are recommended.

Communication Technique

Supervisors have the option of **sharing paper documents** with the team or simply **reading the updates out loud**. As people have different learning styles, sharing information through multiple channels is often the most effective.

Source: University of British Columbia, "Information Toolkit Template", http://vpfinance.ubc.ca/staff/communication-tools/communications-templates/; Facilities Forum interviews and analysis.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

Step 5 Create an upward communication channel

Owner: Facilities leader, Communication director

Establish a channel to ensure that questions or feedback from frontline employees that frontline supervisors cannot answer are communicated upward. It is critical to ensure that the institution has a process for information to travel to senior leaders so they can respond to feedback and concern in a timely manner. The communication team should establish an email address where staff can send questions or inquiries. Frontline supervisors (or staff themselves) can also send questions and comments raised in meetings to appropriate contacts for evaluation and action.

The five considerations below guide Facilities departments in the creation of an upward communication channel.

Five Considerations for Establishing an Upward Communication Channel

1. **Determine which type of questions should be responded to via email versus in person.** Many questions can be responded to via email. However, if staff are not able to check email regularly or if there is a lack of trust between Facilities staff and management, it is recommended to follow-up in person. Generally, following up in person is preferred when the question was posed in person or if an issue is particularly sensitive or personal.

2. **Create channels for staff to contact skip-level managers.** In some cases, staff may prefer to send question or concerns to their skip-level manager. For example, a technician may want help from her skip-level manager in resolving a conflict with her supervisor, or a custodian might want to submit a confidential complaint about a co-worker's unsafe behavior without fear of retribution. Provide an organization chart with email addresses so staff can approach their skip-level manager with concerns or feedback about their supervisor. Assure staff that such communications will remain confidential.

3. **Inform staff of where to send confidential or anonymous feedback and questions.** Leaders should provide HR contact information (including a phone number) for staff to leave anonymous feedback and an email address for sensitive or confidential questions. This contact information should be refreshed with staff regularly, included in the staff handbook, and posted in the staff breakroom or shops.

4. **Establish a process to triage and answer questions.** A more junior staff member should triage comments and respond to lower-complexity questions. Designate one senior Facilities leader to respond to more complex questions.

5. **Decide when to share information with all staff.** Sometimes the answer to a question should be shared with a larger section of the staff through regular team meetings or a newsletter. Follow up with the original questioner to demonstrate action and responsiveness.

Source: Facilities Forum interviews and analysis.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

University of British Columbia Talking Points Document

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Information toolkit

DES go live

October, 2015

In this toolkit you'll find:

- *Key dates*
- *Information points*
- *Questions & Answers*

INSTRUCTIONS – PLEASE READ

Source: University of British Columbia, Vancouver, BC.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

University of British Columbia Talking Points Document

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This document is used to support managers and supervisors in sharing important information with employees and creating an environment that encourages a two-way dialogue.

USING THIS TOOLKIT

- *Communicating important information is a crucial part of your role and is an essential step when it comes to successfully implementing change.*
- *Use the **Information Points** below to support conversations with employees, in person, where possible.*
- *Learn the messages and use your own language and local context to create two-way conversations with employees.*
- *Allow time for questions. It's okay if you can't answer a question; collect feedback and email it to managingdirector.buildingops@ubc.ca.*

CHECKLIST

- ☐ Read this toolkit and become familiar with the information.
- ☐ Do you need to set up a meeting with your team to answer questions and provide an overview of what's changing?
- ☐ Ensure that your team is aware of this information and upcoming events.

Source: University of British Columbia, Vancouver, BC.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

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OUR INTENTION: *To minimize the impact to our campus users from transitioning from a steam DES to a hot water DES. Our communications will help people prepare for possible short-term impacts in their space—whether real or perceived—and cope with impacts when they do occur by being transparent and supportive. – Dave Woodson*

How we're communicating

DATE	ITEM	ACTION
Wednesday, October 7th	Staff launch of information and toolkits	Hard copy toolkit to identified stakeholders.
Wednesday, October 14th	Outline expected project impact and reporting ask.	Email to building admins
Wednesday October 14th	Passive reminder that this year is different and to report issues to service Centre	Posters for fridge and doorways, newsletter content for all BLDGs
Month of October	Prepare and support high-risk clients and buildings.	FMs to reach out
Month of November	Gather data on high-risk clients and buildings and report back.	FMs to reach out

Source: University of British Columbia, Vancouver, BC.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

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Speaking points

DES

1. We are at the end of the economic life for our campus powerhouse, its boilers, and associated steam district energy system. We are leveraging this incredible opportunity to modernize our district energy infrastructure and deliver significant financial and environmental benefits to UBC.
2. Design development and construction has been going on for 5 years, and we are collectively looking forward to the completion of this project. By the end of 2016 all campus buildings serviced by the old steam system will be heated by our new efficient hot water DES.
3. District hot water is not new technology. It has been employed successfully in campus and municipal settings in similar climates to BC's Lower Mainland.
4. We will achieve even greater value though the efficiency of our new energy centre (in comparison to the old powerhouse), which is not only more energy efficient to operate, but also more cost effective.

Your building

1. In most cases, the DES conversion only brings heat energy to your building in the form of hot water instead of steam. Inside your building, your normal heating system (which is typically hot water) is still in operation and will operate exactly the same way it has in the past. If you've been on campus for a few winters, you'll remember that the start-up of the heating systems can have some hiccups.
2. We've carefully considered each building on campus and have tried to anticipate what you may experience when the system goes live. The scope of this project is substantial, and we are anticipating it will not go perfectly. The Building Operations and Energy and Water teams are ready to respond and tweak the system to ensure that the campus is minimally impacted during the final phase of this project.

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Source: University of British Columbia, Vancouver, BC.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

University of British Columbia Talking Points Document

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Questions & Answers

1. What is changing with my building's heat and hot water?
   UBC's Energy and Water Services Department operates a district energy system (DES) to distribute heat energy to most of our buildings. In these DES systems, heat is generated at a central site (the campus energy centre) and then distributed by hot water through a system of pipes to 130 buildings on campus, where devices called heat exchangers transfer the heat energy from the district hot water to the building hot water system. The building hot water is then circulated through the building to radiators and heating coils for heating or heating drinkable water that comes out of our hot water taps.

   Over the past five years, the system we use to supply heat energy to your building has been redeveloped. Your building's heat and domestic hot water used to be supplied by steam generated at our central steam boiler facility or 'powerhouse' (located behind the Sauder school of Business) and distributed to your building where it is transferred to your buildings energy system. With the completion of our new DES and the commissioning of our new Campus Energy Centre (located behind the new Pharmacy building, across from the Life Science Centre) we will now be using hot water to supply your building's heat and domestic hot water systems.

2. Why did we need to change our District Energy System (DES)?
   The current steam infrastructure has been serving the UBC campus in one form or another since the early parts of the last century. Our 'newest' boiler was installed in 1969. While our steam infrastructure has been well run and dependable, it has reached the end of its service life. Engineering reviews has placed the price to maintain and modernize the current system at over 190 million dollars.

   After reviewing our opportunities to modernize the system, UBC came to the conclusion that replacing the system would be both cheaper in initial capital investment and that self-financing was possible through the significant operating savings UBC would achieve through operating a more efficient modern system.

   This five-year, $88 million conversion project began in 2011. When the conversion project ends in 2016, the new hot water system will heat over 130 UBC buildings, including over 800,000 square metres (8.6 million square feet) of floor space for hot air and domestic hot water. It is estimated that, despite all of the growth on the campus since 2007, the DES will reduce UBC's:
   - Thermal energy use by 24 per cent,
   - Green House Gas (GHG) emissions by over 22 per cent (compared to the 2007 baseline), and
   - Operational and energy costs by $5.5 million per year.

   The project involves:
   - 11 kilometres of insulated pipes
   - Over 100 energy transfer stations across campus
   - A 60 megawatt, natural gas-powered Campus Energy Centre (CEC) hot water plant.
   - The demolition of the existing UBC steam powerhouse and de-

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Source: University of British Columbia, Vancouver, BC.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

University of British Columbia Talking Points Document

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commissioning of the existing steam system

3. Why is the new system using hot water? Why not a new steam system?
   Firstly, we found that the cost for updating our current steam system to a modern standard would be $190 million. The cost of building a new hot water system would be $88 million. The upfront costs we're a large part of the decision.

   Secondly, the hot water system is more efficient means of transferring thermal energy for building heating systems. New standard for modern systems is hot water proven to be more efficient. That means the ongoing operating costs would be lower as well. That means we can see a payback for our new system in a much shorter time.

4. How does the change from steam to hot water affect me?
   When the heating, ventilation, and cooling (HVAC) systems in our buildings are working as designed, we typically don't notice them. The buildings of UBC are here to support us in our daily work or studies. Our intention is that this will be the case for you.

   While the new DES has changed how we're delivering heat energy to your building, in the great majority of cases, nothing has changed inside your building. The radiator in your workspace will be the same, the way it runs will be the same, and your experience with your heating will be the same. That means if you we're having local issues with your heating comfort, these issues probably won't be resolved by changing over from the steam DES to the hot water DES.

   Every year when we the heating demand in our building rises in the fall, the systems in our campus buildings we experience 'seasonal' issues. What's different this year is that the system that supplies your heat energy has been modified. Depending on how complex your building system is you may experience side-effects that will be noticeable in your workspace. This year, more than any other year, we want to hear in detail about issues you may have with your heat or hot water. We want to make certain that, even though the majority of these issues will be related to seasonal start up, that our new DES is working.

5. What preventative actions have you taken so that things will work as planned?
   We have been connecting buildings to the new hot water system over the past six months so we can assess, respond, and easily identify issues before we even need to turn on the heat. As the weather turns colder we will see the demand load on the system increase dramatically. This is where we will find out if there are further unexpected issues.

6. What are you expecting that is out of the ordinary?
   The buildings at UBC have been built, updated, retrofitted, and worked on across a century. Because of this it is very difficult to talk about a "typical building" and what can be considered ordinary. Each building has their own unique heating systems. In general these are the various building system types and how they may be impacted by the new hot water system:

   Case 1: Nothing has changed inside your building.

Source: University of British Columbia, Vancouver, BC.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

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Steam-to-hot-water heat exchangers have been replaced with hot-water-to-hot-water heat exchangers. The system inside your building will continue to operate exactly as it did before—only now the energy to heat the system is provided by hot water instead of steam. It's important to note, that if your heating system had peculiarities last year, the replacement of the heat exchangers will not necessarily address these issues.

Case 2: Your building's internal hot water heating system is near the end of its service life, but it has been connected to new hot-water-to-hot-water heat exchangers.
As a result of your building's internal heating system's age, the water circulating in it is likely chunky and dirty and the pipes may be partially obstructed. Because of this, your building's new heat exchanger's filters may get plugged and need regular cleaning and service, causing gaps in heat. There are four buildings on campus that we potentially have this condition. We are attempting to mitigate this risk by cleaning the buildings water system.

In some cases, as permanent solution, internal hot water systems can be flushed, cleaning the pipes. However, due to the age of the pipes in your building's heating system, this may expose pinhole leaks that were plugged by debris… leading to possible building-wide pipe repairs;

Case 3: Your building heats the air supply directly from steam-to-air heat exchange (steam coils) through air handling units. Those coils have now been replaced.
The electronic control settings of the new coil may need to be adjusted as the system goes through its first full winter cycle. This may result in troubleshooting of the system with variations in temperature. Because hot water carries less energy than steam, as we run hot water through these units instead of steam, there may be different settings required inside your building to get the same heating performance. Some of these changes will happen remotely and invisibly through our centralized electronic building management system (BMS) while other settings will need to be adjusted manually requiring site visits leading to possible service gaps during the repairs.

Case 4: Your building was using multiple steam radiators in the building (no steam–to-hot-water heat exchanger) and the building is nearing the end of its economic life.
In these select cases we are still using steam infrastructure, as the cost to replace it would be greater than the remaining economic life of the building. In these select cases your building will remain on steam service until the building is replaced. You will not be part of the DES system.

In some cases, keeping the steam system going was not practical. In those select cases we have installed a new electric baseboard system and the old steam infrastructure was disabled or removed.

Case 5: Your building was using steam radiators in the building (no steam–to-hot-water heat exchanger) and has continuing economic life.
In a handful of cases we will be running DES hot water though the buildings' internal steam radiator system. Because hot water carries less energy than steam, there may be different settings required inside your building to get the same heating performance. Some of these changes will happen remotely through our electronic

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Source: University of British Columbia, Vancouver, BC.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

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building management system (BMS) while other settings will need to be adjusted manually requiring site visits and possible service gaps during the repairs.

A project of the complexity and duration of the DES conversion can also have errors and omissions that can affect the system's performance:

Case 6: Your building's infrastructure has a new or existing component fail, which stops the system from working as expected.
In all cases of equipment failure, Building Operations, Energy and Water Services, and Project Services will be responding immediately to assess and repair the issue.
In the case of new components, we will work with the contractor who built the system after the fact to be reimbursed for construction deficiencies under our warranty. Most of these changes will need to be adjusted manually requiring site visits leading to possible service gaps during the repairs.
In cases of serious impact, we will endeavor to repair the system using our own staff and resources and negotiate with the contractor for warranty reimbursement after the fact so as to minimize service outages.

Case 7: Your building is affected by design errors such as undersized heat exchanger, missing infrastructure, or other unforeseen issues.
In rare cases there may have been an engineering oversight that leads to the system being unable to work as expected or unable to service areas completely. In these cases, we are working with the engineers who designed the system to rapidly assess and repair the design deficiencies under our warranty.

7. What can I do if I notice something out of the ordinary with my heating or cooling?
It's easy to help, just call us right away. What you're experiencing might be regular hiccups associated with cooler weather or they could indicate a more serious issue. This year, we have enhanced tracking heating issues in a new system that will help us with root cause analysis… where we will attempt to ensure all heating issues are mitigated in a timely fashion.

8. Once an issue has been identified, how will you prioritize heating or cooling issues?
Once we have received your call, it's not just logged to identify issues: we have people and systems identified to address heating issues as quickly as possible. Because resources are not infinite, we have identified the following priority list:
    1. **Whole buildings** – When an entire building has a heating failure.
    2. **Animal care** – When research animals are affected by heating or cooling.
    3. **Risk to research** – When temperature-sensitive equipment or processes will be affected.
    4. **Lecture halls** – When large student spaces are affected by significant heating or cooling issues.
    5. **Single rooms** – When individual work spaces or classrooms are below 17° or above 28°

9. What if my heating issue isn't the number one priority? How will you escalate problems so my issue will be addressed?
Our Facilities Managers will work with building administrators to ensure that nothing gets overlooked. Your facilities managers will take a personal interest in managing issues

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Source: University of British Columbia, Vancouver, BC.

Tool 4: Guide to Establish Internal Communication Channels (cont.)

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directly with senior leadership and our trades.

10. If my heat is not working, can I just install a space heater?
    If there's an issue in your building, our Facilities Managers will work with Building Administrators to ensure that your building has interim solutions that will work with your building's infrastructure. While many people have access to space heaters, many of our buildings power systems were not designed to take the load of everyone plugging in—as a result you may knock out power to tour building as breakers and other protective measures automatically kick in.

11. If my heat is not working, can I just install a space heater?
    If there's an issue in your building, our Facilities Managers will work with Building Administrators to ensure that your building has interim solutions that will work with your building's infrastructure. While many people have access to space heaters, many of our buildings power systems were not designed to take the load of everyone plugging in—as a result you may knock out power to tour building as breakers and other protective measures automatically kick in.

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Source: University of British Columbia, Vancouver, BC.

Tool 5

Guide to Effectively Communicating Facilities Information Through Reports

Goal

Use this tool when preparing a report to communicate an important project, change, or initiative to Facilities employees and/or the broader campus community.

Intended User

Facilities leader or communications director

Overview

This tool helps users balance providing the right amount of context without overwhelming the recipient with information. It provides the key components of effective communication through a report, specifically exploring content recommendations and formatting tips and tricks to ensure the final deliverable is both concise and professional.

Electronically access this tool: **eab.com/ff/communicationtoolkit**

Source: Facilities Forum interviews and analysis.

Tool 5: Guide to Effectively Communicating Facilities Information Through Reports

Considerations for Content to Include in Facilities Reports

1 **Tailor the report to the intended audience** by including details relevant to their role and goals. Potential audiences include institutional senior leaders, deans, the board, or legislators. Knowing the intended audience enables Facilities leaders craft a customized message and more effectively advance the goal of the report. The table below provides examples of tailoring reports to different audiences.

Audience	Common Goals	Information to Include
Deans	Reports created for deans will provide updates on ongoing construction projects and future plans for the buildings deans occupy and potentially solicit buy-in for the Facilities capital renewal plan.	• Current projects that impact the buildings deans inhabit, including updates on project impacts (e.g., noise, building accessibility, parking), timelines, and completion dates • Functional changes to layout and style of space with accompanying photos and/or renderings • How each project improves life on campus, including brief case studies if applicable (e.g., how HVAC updates have improved classroom conditions, how more reliable infrastructure safeguards and supports ongoing research) • General overview of the Facilities capital renewal plan to preview future work and solicit feedback from academic leaders
CBO	Reports targeted at the chief business officer may aim to generate support for and interest in funding specific projects or a broad renewal plan, and provide updates on previously funded projects.	• Current projects with timelines and completion dates • Business cases for proposed projects, including potential return on investment • Connections between proposed projects and broader strategic goals for the institution
Legislators	Reports produced for legislators will likely focus on securing funding for a broad renewal plan.	• Capital projects successfully completed in the past to demonstrate responsible stewardship of resources • Proposed projects including business cases • How capital renewal plan and specific projects will positively impact campus reputation, program offerings, and the surrounding community • Connections between renewal plan and broader strategic goals for the institution
Broader Campus Community	Reports designed for the broader campus community will serve to update and inform the campus about current and future projects.	• General overview of the Facilities capital renewal plan to preview future work • Successfully completed capital projects • How capital renewal plan and specific projects will positively impact campus reputation, program offerings, and the surrounding community • How each project improves the campus experience, including brief case studies (e.g., how HVAC updates have improved classroom conditions, how work on campus roads has improved traffic flow)

Even if the report is written specifically for one audience, it can be distributed to multiple stakeholders. Choose how widely the report will be disseminated based on the goals of the report. For instance, a board-level report can be circulated among senior campus leaders. However, it is possible circulating with the broader campus could do more harm than good if the report lacks sufficient context or explanation.

Source: Baker J, "Restore the Core," April 1, 2010, https://www.facilities.umd.edu/documents/restore%20the%20core.pdf; Facilities Forum interviews and analysis.

Tool 5: Guide to Effectively Communicating Facilities Information Through Reports (cont.)

Considerations for Content to Include in Facilities Reports

2 **Showcase big wins** through examples of recent projects completed for, in collaboration with, or with funding from the target audience. These projects demonstrate that Facilities is making investments in assets that both advance institutional goals and support the priorities of the intended audience. Depending on the recipient of the report, it can also be a step towards showcasing that Facilities is a good steward of scarce institutional resources.

Current Program for the Core Buildings

Funded by University of Maryland

H. J. Patterson Wing 2 3rd Floor: Internally funded renovation (FY 2010) at a cost of $4.7 million

Journalism Building: Internally funded renovation (FY 2009/2010) at a cost of $7.1 million

Shoemaker Hall: Internally funded (FY 2008-2010) at a cost of $9.02 million

Included in Governor's FY 2011-2015 CIP

University Teaching Center: Including renovation of Holzapfel Hall (FY 2012-2015) at a cost of $60.2 million

Chemistry Wings 1 and 2: Renovation (FY 2013-2015 and beyond) at a cost of $74.4 million

3 **Make targeted funding requests.** If one goal of the report is to request funding, limit requests to projects that are most urgent and/or are of interest to the target audience. The goal is to communicate the magnitude of the problems facing campus and create urgency without overwhelming the audience with too many asks.

4 **Describe why each project is important to the success of the institution,** highlighting how the projects (and any funding requests) in the report specifically benefit the intended audience. Facilities must link projects to a specific strategic goal (e.g., supporting research and student success, boosting recruitment). By clearly showing the audience how projects support the mission and strategic goals of the institution, Facilities leaders improve their chances of achieving their goal, whether it is generating interest or securing funding. For example, the University of Hartford's Facilities leader was told that the institution would not invest in irrigation project. The Facilities leader reframed the project as an opportunity to increase curb appeal and enrollment and received funds immediately.

Another example comes from the University of Maryland, College Park's (UMD) 2010 *Restore the Core* report:

These conditions cost the campus scarce operating funds each time an emergency repair is needed, waste utilities, and result in cancelled classes, interrupted research, and down time for students, faculty, researchers and staff.

The following pages look at just some of the buildings that make up the university. While words tell the story, a picture is worth a thousand words. Better yet, a tour during or immediately following an emergency response is sobering.

The University must obtain the capital funding needed to *Restore The Core* so our facilities can support our world-class university.

Source: Baker J, "Restore the Core," April 1, 2010, https://www.facilities.umd.edu/documents/restore%20the%20core.pdf; University of Hartford, Hartford, CT; Facilities Forum interviews and analysis.

Tool 5: Guide to Effectively Communicating Facilities Information Through Reports (cont.)

Considerations for Formatting Facilities Reports

5 Begin the report with an **executive summary** to highlight important takeaways upfront. The goal of an executive summary is for the reader to understand the focus and purpose of the report and entice the reader to continue reading. UMD began its 2010 report Restore the Core by summarizing the problem in compelling and urgent language.

Restore the Core!

The Need to Renew the Oldest Buildings on Campus and the Heart of the University

The core of the university is housed in buildings that were constructed before 1950 and no longer meet the university's needs. While the stately columns and Georgian architecture look nice from afar, we must look behind the walls to learn the real story.

Heating and cooling systems waste significant amounts of energy and cannot provide year-round temperature and humidity control. Radiators cannot meet the needs of a research university.

The electrical systems are over subscribed, do not meet current safety codes, and are supported by fuses and other components that are no longer manufactured. The electric systems can not meet the needs of today's technology.

Building foundation drains have long since failed, causing major flooding of many buildings during every major and most modest rain events. The floods destroy research, create mold problems, and interrupt the mission of the university.

The buildings are served by an invisible underground system of pipes, wires, drains, etc., which fail regularly resulting in additional flooding, loss of heating, cooling, humidity control, and disruption to academic and administrative activities, costing hundreds of thousands dollars each year.

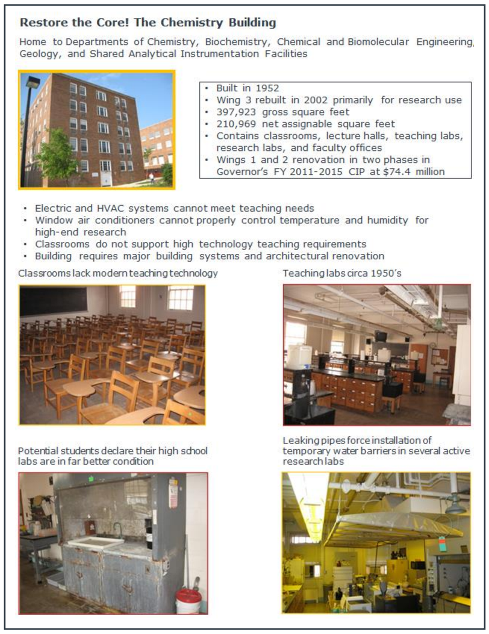
Source: Baker J, "Restore the Core," April 1, 2010, https://www.facilities.umd.edu/documents/restore%20the%20core.pdf; Facilities Forum interviews and analysis.

Tool 5: Guide to Effectively Communicating Facilities Information Through Reports (cont.)

Considerations for Formatting Facilities Reports

6 **Communicate one project, building, system, or space per page.** Maintaining a narrowly scoped focus minimizes clutter and improves readability. It also speeds time to report creation by standardizing the information that should be included on each page. Most importantly, this ensures the report is consumable regardless of whether the reader starts at the beginning or opens to a random page. Organize projects within the report based on the report's goals.

Example Page from UMD's *Restore the Core* Report



Restore the Core! The Chemistry Building

Home to Departments of Chemistry, Biochemistry, Chemical and Biomolecular Engineering, Geology, and Shared Analytical Instrumentation Facilities

- Built in 1952
- Wing 3 rebuilt in 2002 primarily for research use
- 397,923 gross square feet
- 210,969 net assignable square feet
- Contains classrooms, lecture halls, teaching labs, research labs, and faculty offices
- Wings 1 and 2 renovation in two phases in Governor's FY 2011-2015 CIP at $74.4 million

- Electric and HVAC systems cannot meet teaching needs
- Window air conditioners cannot properly control temperature and humidity for high-end research
- Classrooms do not support high technology teaching requirements
- Building requires major building systems and architectural renovation

Classrooms lack modern teaching technology

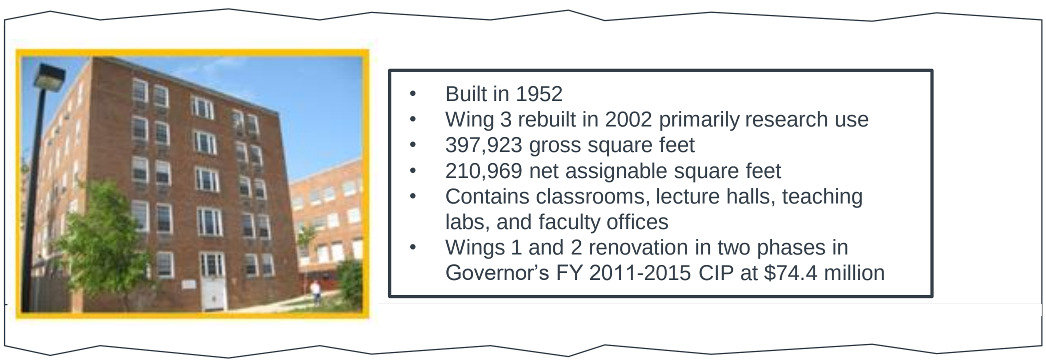
Teaching labs circa 1950's

Potential students declare their high school labs are in far better condition

Leaking pipes force installation of temporary water barriers in several active research labs

7 **Bullet out important background information** to provide sufficient context for the project/building/system/space. Background information includes:

- Name and location of project, including building(s) and stakeholders impacted
- Target completion date
- Brief summary of work completed (i.e., what was constructed, renovated, or maintained) and by whom (e.g., Facilities, external contractor)
- Contact information within Facilities department



- Built in 1952
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Tool 5: Guide to Effectively Communicating Facilities Information Through Reports (cont.)

Considerations for Formatting Facilities Reports

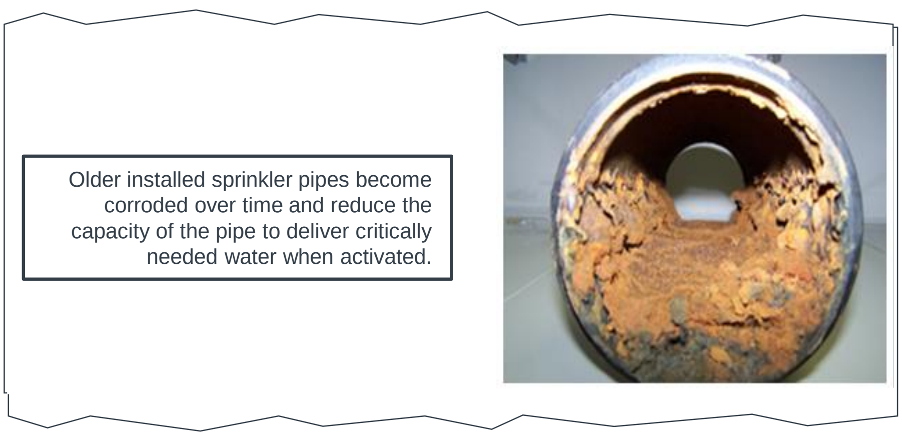
8 Use **pictures and simple graphs** to communicate visual information. Pictures should be clearly labeled with contents and location (if applicable). Call out specific takeaways for each picture, such as infrastructure failures or unique features of renderings of future spaces.

- For a completed project, include before and after pictures
- For an update on an ongoing project, include pictures showing progress
- For funding requests, include pictures of failing systems and components (and detail why the systems are failing)

All graphs should be accompanied by a brief description of key takeaways. This will enable readers to quickly scan and extract the important information.

- Use bright colors and big numbers to call out important data points
- Make graphs as accessible as possible by including titles, axis labels, and legends; color-coding the graph is helpful, but keep colors to a limited number to avoid overwhelming the reader

Pictures of Corroded Pipes at UMD



Source: Baker J, "Restore the Core," April 1, 2010, https://www.facilities.umd.edu/documents/restore%20the%20core.pdf; Cosner Sr. D, "Failing Infrastructure Creates Invisible Crisis at University of Maryland," June 1, 2012, https://www.facilities.umd.edu/documents/Invisible%20Crisis.pdf; Facilities Forum interviews and analysis.

Tool 5: Guide to Effectively Communicating Facilities Information Through Reports (cont.)

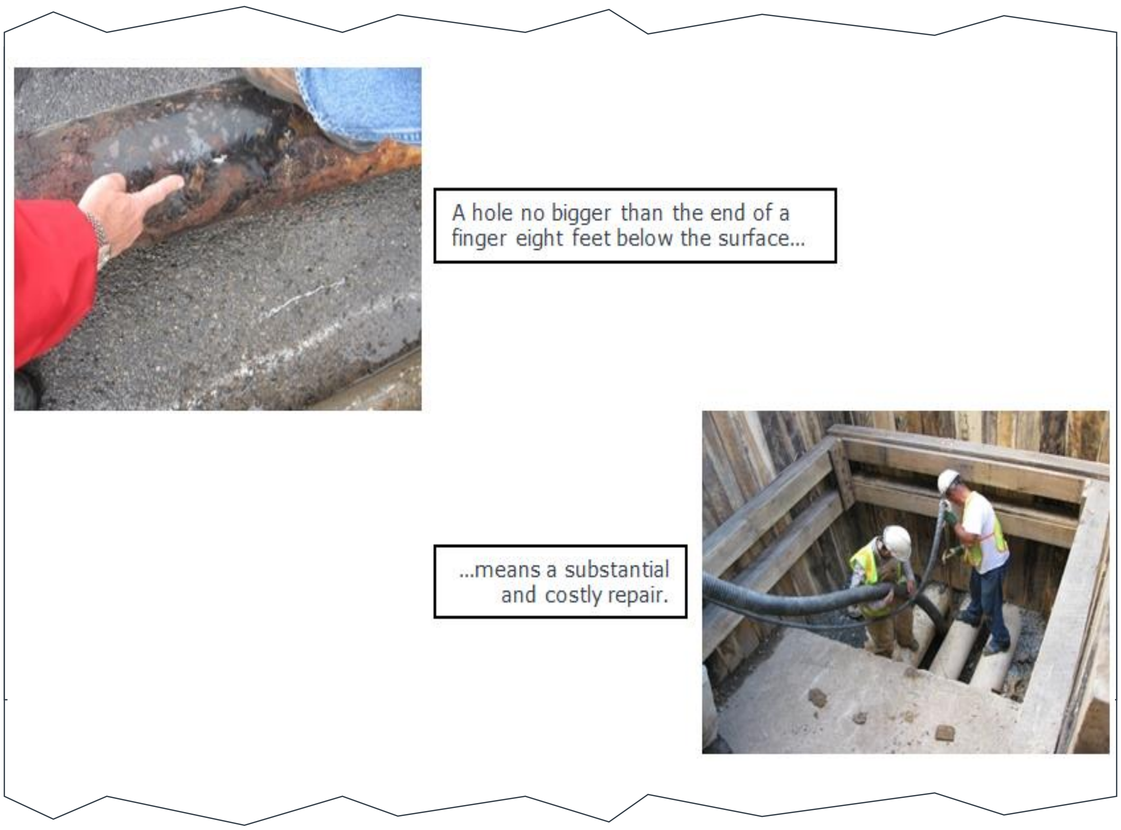
Considerations for Formatting Facilities Reports

9 **Use short, simple sentences and concise language**. Aim to be as non-technical as possible with report language. Target the writing style for laypeople by excluding jargon and unfamiliar terms. The goal is to make the report as easy to read as possible so the reader can focus on processing the request.

When it is necessary to include Facilities-specific terms in the report, define them within the report or in a glossary of terms to the reader can understand[1]. Some terms that merit definitions may include:

- Facilities Condition Index (FCI): Ratio that measures the cost to correct condition deficiencies and return an asset to its original condition, divided by the current replacement value of that asset.
- Building or room utilization rate: Space utilization metric defined as the number of hours a building or classroom is occupied across the academic week (e.g., from 8 a.m. to 5 p.m., Monday through Friday).
- Building Automation System/Building Management System (BAS/BMS): Centralized, remote, automatic control of multiple systems within a single building (or serving multiple buildings), particularly mechanical and electrical systems such as HVAC, lighting, and fire systems. For example, the BAS shuts down a room's HVAC on evenings and weekends even if the occupant has left the air conditioning on.

An Explanation of an Infrastructure Problem at UMD



1) A good starting point for definitions is the APPA Glossary. This glossary of terms is publically accessible and does not require an APPA membership. Access the glossary at: http://www.appa.org/research/glossary.cfm.

Source: Baker J, "Restore the Core," April 1, 2010, https://www.facilities.umd.edu/documents/restore%20the%20core.pdf; Cosner Sr. D, "Failing Infrastructure Creates Invisible Crisis at University of Maryland," June 1, 2012, https://www.facilities.umd.edu/documents/Invisible%20Crisis.pdf; Facilities Forum interviews and analysis.

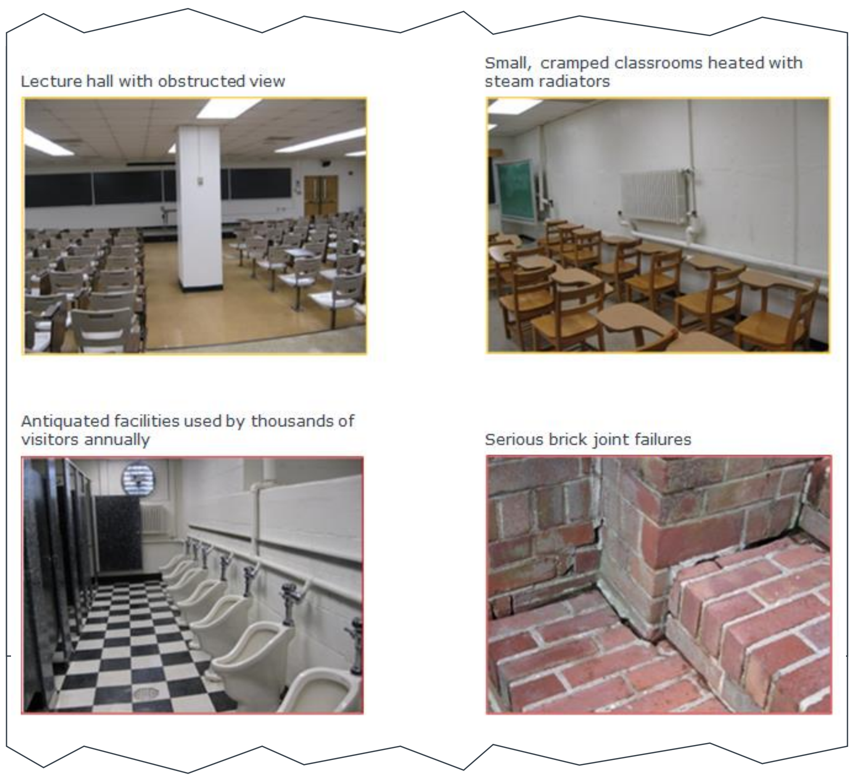
Tool 5: Guide to Effectively Communicating Facilities Information Through Reports (cont.)

Considerations for Formatting Facilities Reports

10 **Use consistent fonts and colors, as well as ample white space.** Align the font and color choices with either the institutional brand or the Facilities brand (if established). Check with the departmental or central communications office for a report template (e.g., PowerPoint or Word templates with institution's approved colors and layouts).

If there are no standardized fonts or color schemes, consider implementing them within the Facilities department. Using consistent fonts and a limited color scheme across documents and media increases the perception of professionalism and signals to readers that the communication is from Facilities, which can draw attention on a campus overflowing with information. Use bolding, underlining, and italics selectively, only to call out titles or important information.

Beyond limiting the number of colors, balance graphics and text with white space. Incorporating white space into a document creates more "hooks" for the reader's eye and reduces the effort required to digest the information. Increasing line spacing and margins (of both text and graphics) allows for more white space in a document.



11 **Check the report carefully for grammatical errors and overall comprehension**. Ask someone not involved in report creation to proofread the report to check for errors and possible issues with clarity. Determine what target stakeholders need to know about the project and remove words that do not provide essential information. This will improve comprehension and readability.

12 **Produce electronic versions for display on kiosks or screens**, which is a sustainable solution for campuses moving away from or eliminating printed documents. Electronic versions can also be emailed to legislators or posted on Facilities' or the institution's website for wider distribution.

Source: Baker J, "Restore the Core," April 1, 2010, https://www.facilities.umd.edu/documents/restore%20the%20core.pdf; Facilities Forum interviews and analysis.

Tool 6

Considerations for Effective Poster Design and Creation

Goal

Use this tool when preparing a poster to communicate an important project, change, or initiative to Facilities employees and/or the broader campus community.

Intended User

Facilities leader or communications director

Overview

This tool helps users distill broad projects or initiatives into the key takeaways the audience needs to know. It also ensures that the format is as accessible as possible while also aligning with institutional branding.

Electronically access this tool: **eab.com/ff/communicationtoolkit**

Source: Facilities Forum interviews and analysis.

Tool 6: Considerations for Effective Poster Design and Creation

1. **Communicate at most one topic, project, building, system, or space per page.** Maintaining a narrowly scoped focus minimizes clutter and improves readability. It also speeds time to poster creation by standardizing the information that should be included on each page.

2. **Bullet out important information** to provide context, including:
   - Name and location of project, including building(s) and stakeholders impacted
   - Target completion date
   - Brief summary of work completed (such as what was constructed, renovated, or maintained) and by whom (e.g., Facilities, external contractor)
   - Contact information within Facilities department

3. Where applicable, **topline how the project or initiative will improve the campus,** highlighting how the target audience will benefit. This will reduce pushback on the negative impacts of the work on stakeholders.

4. **Use pictures and simple graphs to communicate visual information**. Pictures should be clearly labeled with contents and location (if applicable). Call out specific takeaways for each picture, such as infrastructure failures or unique features of renderings of future spaces.
   - For a completed project, include "before" and "after" pictures
   - For an update on an ongoing project, include pictures showing progress
   - For funding requests, include pictures of failing systems and components (and detail why the systems are failing)

   All graphs should be accompanied by a brief description of key takeaways. This will enable readers to quickly scan and extract the important information.
   - Use bright colors and big numbers to call out important data points
   - Make graphs as accessible as possible by including titles, axis labels, and legends; color-coding the graph is helpful, but keep colors to a limited number to avoid overwhelming the reader.

5. **Use short, simple sentences and concise language**. Aim to be as non-technical as possible with language. Target the writing style for laypeople by excluding jargon and unfamiliar terms. The goal is to make the poster as easy to read as possible. When it is necessary to include Facilities-specific terms in the report, define them within the report or in a glossary of terms to the reader can understand[1]. Some terms that merit definitions may include:
   - **Facilities Condition Index** (FCI): Ratio that measures the cost to correct condition deficiencies and return an asset to its original condition, divided by the current replacement value of that asset.
   - **Building or room utilization rate**: Space utilization metric defined as the number of hours a building or classroom is occupied across the academic week (e.g., from 8 a.m. to 5 p.m., Monday through Friday).

1) A good starting point for definitions is the APPA Glossary. This glossary of terms is publically accessible and does not require an APPA membership. Access the glossary at: http://www.appa.org/research/glossary.cfm.

Source: Facilities Forum interviews and analysis.

Tool 6: Considerations for Effective Poster Design and Creation (cont.)

6. **Use consistent fonts and colors, as well as ample white space.** Align the font and color choices with either the institutional brand or Facilities brand (if established). Check with the department or central communications office for a poster template (e.g., PowerPoint or Word templates with institution's approved colors and layouts).

   If there are no standardized fonts or color schemes, consider implementing them within the Facilities department. Using consistent fonts and a limited color scheme across documents and media increases the perception of professionalism and signals to readers that the communication is from Facilities, which can draw attention on a campus overflowing with information. Selectively use bolding, underlining, and italics to call out titles or the most important information.

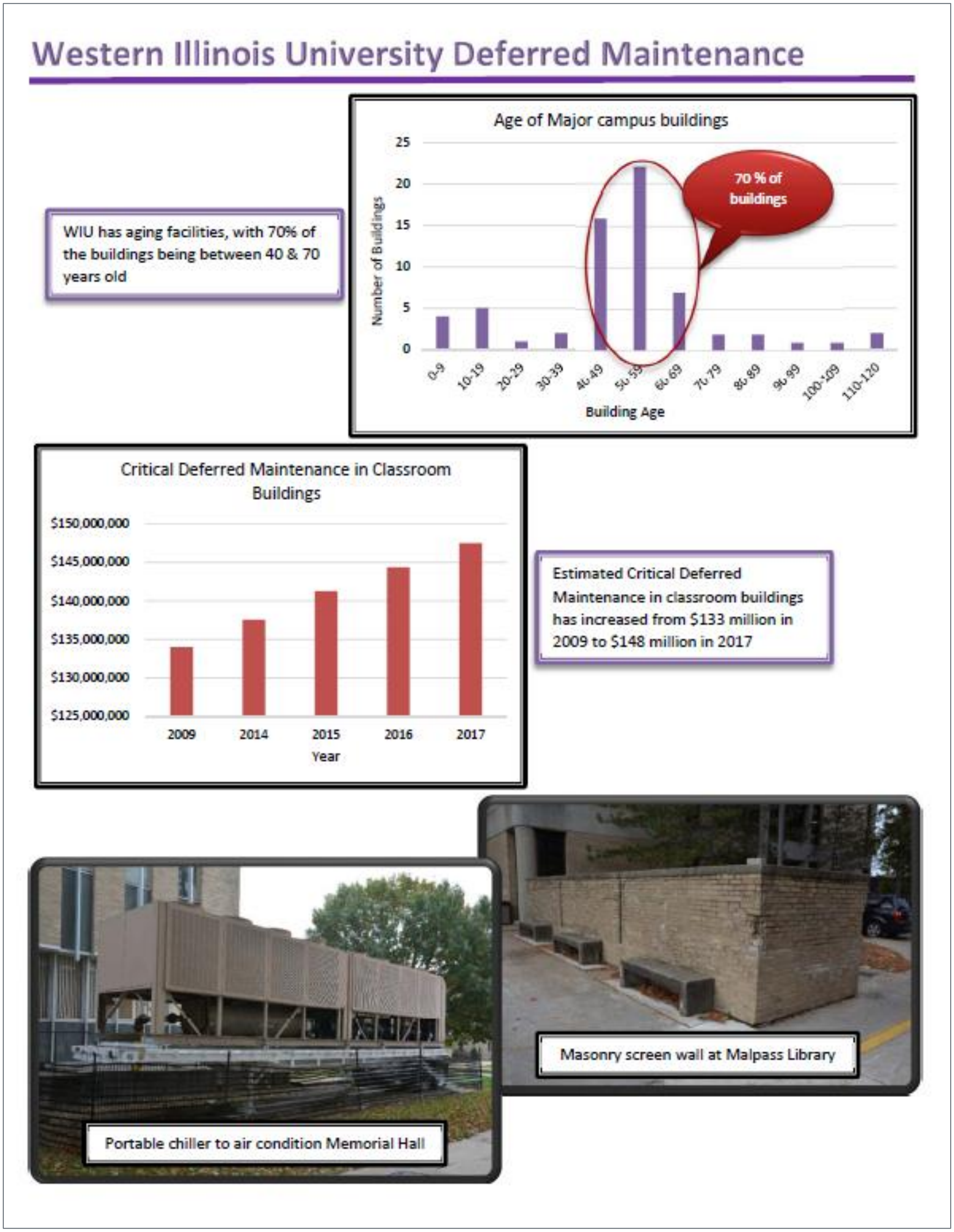
   Beyond limiting the number of colors, balance graphics and text with white space. Incorporating white space into a document creates more "hooks" for the reader's eye and reduces the effort required to digest the information. Increasing line spacing and margins (of both text and graphics) allows for more white space in a document.

7. **Check the poster carefully for grammatical errors and overall comprehension**. Ask someone not involved in poster creation to proofread the poster to check for errors and possible issues with clarity. Determine what target stakeholders need to know about the project and remove words that do not provide essential information. This will improve comprehension and readability.

8. **Post in a highly visible location or produce electronic versions for display on kiosks or screens**, which is a sustainable solution for campuses moving away from or eliminating printed documents. Electronic versions can also be emailed to stakeholders or posted on Facilities' or the institution's website for wider distribution.

Source: Facilities Forum interviews and analysis.

Western Illinois University Deferred Maintenance Poster Example, Front

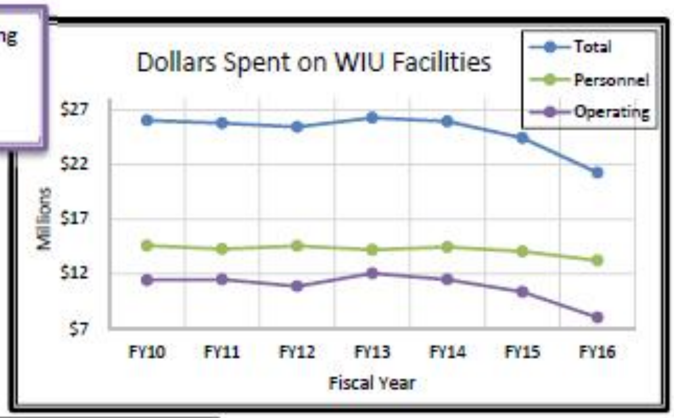


Source: Western Illinois University, Macomb, IL.

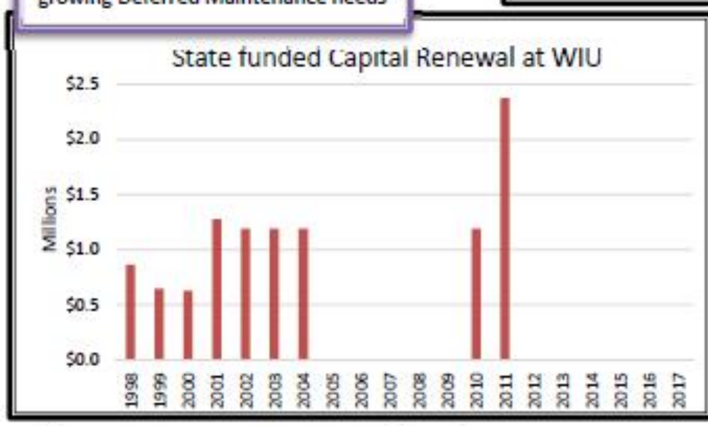
Tool 6: Considerations for Effective Poster Design and Creation (cont.)

Western Illinois University Deferred Maintenance Poster Example, Back

Adjusted for inflation, total operating dollars spent on Facilities has decreased by 26% since 2010



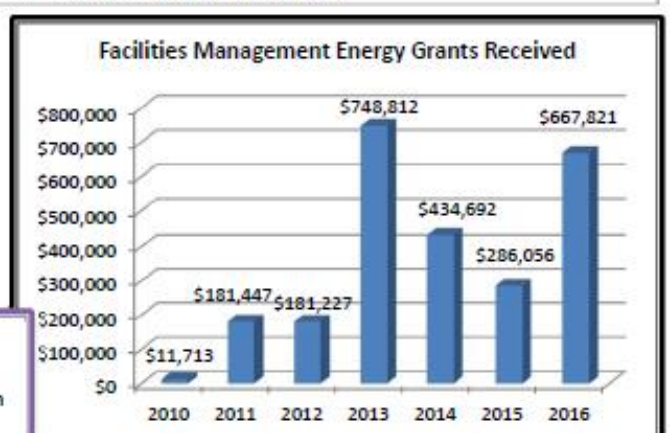
Reduction of Capital Renewal impacts growing Deferred Maintenance needs




Science Laboratory


Failing Steam tunnel roof

- To replace reduced State funding, WIU used student fees to issue COPS in 2010/2011 for $21.3M
  - $5M Phase I Steam Line replacement
  - $5M 2010 Heating Plant Utility work/ boiler refurbishment
  - $1.5M Roof replacements
  - $5M Phase II & III Steam Line replacement
  - $3.5M Art Department Lab, Science Lab, and Nursing classroom upgrades
  - $1.3M Chiller, pump, coil work



Since 2010, Facilities Management has received over $2.5 million in DCEO grants for energy conservation initiatives

Source: Western Illinois University, Macomb, IL.

Tool 7

Job Description for Facilities Communications Director

Goal

Use this job description to create a Facilities communications director position and encourage applications from qualified candidates.

Intended User

Facilities executive and/or hiring manager

Overview

This job description outlines essential capabilities and responsibilities of a Facilities communications director. This role is scoped to ensure the director can build communication channels, establish standardized processes, and effectively disseminate information to cross-campus audiences. Institutions should customize the description to fit their institutional hiring requirements.

Note: This role typically reports directly to the Facilities leader, with a dotted line reporting relationship to the central communications director.

Electronically access this tool: **eab.com/ff/communicationtoolkit**

Source: Facilities Forum interviews and analysis.

Tool 7: Job Description for Facilities Communications Director

I. Position Purpose

The Facilities communications director ensures effective communication and fosters relationships with the institution and all of its stakeholders, including students, faculty, staff, the surrounding community, and the state/federal/provincial government. This position also develops a department-wide communications strategy and creates supporting materials.

II. Position Responsibilities

- Develop, codify, and execute the annual strategic communications plan for Facilities unit
  - Meet with unit leaders and supervisors to understand goals of each group
  - Develop unit-specific communication strategies
  - Manage and promote Facilities' reputation
  - Track and evaluate metrics related to communication strategies and initiatives
- Develop communications plans for large capital projects
  - Create templates for signage and email communications
- Advance institution goals by engaging stakeholders in achieving Facilities strategic vision and objectives
  - Work with senior Facilities leaders to resolve complex reputational issues
  - Guide which and how decisions are communicated to stakeholders
  - Identify, produce, and share content across multiple channels, including website, social media, newsletter, video, articles, and signage/posters
    - Develop and distribute templates for signage and posters
    - Collect interesting and relevant stories from students, staff, and other stakeholders
    - Produce content to share across multiple channels, including feature articles, short articles, newsletters, videos, and posts for social media
  - Share stories that highlight the value of Facilities
- Help staff communicate effectively with key stakeholders
  - Support frontline staff and manager communications with senior Facilities leaders through organizing town halls, email channels, and soliciting regular feedback
  - Support Facilities leader's communications in meetings with the chief business officer, the board, the legislature, or other senior leaders through preparation for presentations and brief supporting documents
- Ensure alignment with institutional and Facilities unit brand(s)
  - If necessary, establish Facilities-specific branding based on the institutional branding
  - Improve the image and brand recognition of Facilities
  - Refine and distribute information to support staff compliance with Facilities' brand
- Manage team of work-study students
  - Hire interns or work-study students to support portfolio
  - Guide interns or work-study students in identifying content and monitoring social media channels

Source: Facilities Forum interviews and analysis.

Tool 7: Job Description for Facilities Communications Director (cont.)

III. Work Experience/Qualifications

- Three to five years of experience supporting communications, developing strategies, building relationships, marketing, writing, social media, and solving complex problems
- Demonstrated success delivering communications in a customer-service oriented environment, both internally and externally
- Willingness to walk around campus to talk with staff on their job sites and collect relevant information
- Facilities-specific experience in higher education preferred, but not required

Source: Facilities Forum interviews and analysis.

Advisors to Our Work

Columbia University
La-Verna Fountain
Vice President, Strategic Communications and Construction Business Initiatives

Dan Held
Director, Communications

Noah Lichtman
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Former Managing Director, Building Operations

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University of Calgary
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Director, Facilities & Campus Services Administrative Services

Jim Hunt
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University of Texas at Dallas
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