

Facilities Maintenance and Management Research Results

Citywide Research Opportunities Discovered:

- Create **streamlined Citywide contracts** for certain facilities services (which will be determined by bureaus managing facilities).
 - **Monthly meetings** among City staff conducting facilities management and maintenance to discuss ongoing projects and how bureaus might or might not be able to work together at reduced cost to provide services.
 - Create **Citywide storage facility** for other bureaus (and jurisdictions) to use.
 - Create **standing contracts** with certain vendors for small repairs so that bureaus do not have to create contracts every time a simple service is needed.
 - Explore streamlining the process for **sidewalk repairs**.
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OMF Facilities Discussion Notes

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OMF Facilities

- OMF Fac contracts are routinely used up by other bureaus.
- OMF Fac is open to allowing other bureaus to utilize their on-call service contracts.
- There are Citywide contracts in areas of trash, recycling, elevator maintenance, and industrial hygiene (building safety, such as asbestos care).
- OMF Fac does not advertise to other bureaus that they will allow them to use their contracts, because there is limited capacity to each of these contracts and OMF Fac would not want to do the work to set up the contract and then not be able to use it themselves.
- Some jobs cannot be centralized because there is not enough work (i.e. painters).
- Appears that some of the information was not entered by bureaus in a consistent fashion – for example, some bureaus said “Facilities, Vendor” for items using Facilities’ contracts, whereas others just said “Vendor” because Vendors were doing the work (regardless of who managed the contract). Consider adding a row for “contract management”?
- The call button in the elevators dial Facilities Dispatch at 503-823-5252. At night this is forwarded to Security, so we have 24/7 coverage on those calls. Dispatch or Security would call our elevator contractor to respond. Attached is the list of building (some buildings have multiple elevators). Our contract with Otis elevator includes 24/7 response to our more critical buildings. 911 is not actually called

unless there is a medical emergency (eg. Elevator passenger is having a panic attack or heart attack). Both Dispatch and Security are trained to ask if the passenger needs medical help. Hope this helps.

Centralization

OMF – Facilities Division (Facilities) noted that if the City had a centralized facilities management program, the physical location of facilities and property management services could be housed anywhere and even could be a standalone bureau. Facilities expressed interest in approaching facilities management from a centralized viewpoint. It was stated that bureaus can find difficulty in sharing contracts due to the City structure associated with cost recovery on shared contracts. Citywide and on-call contracts can be difficult to describe to Council. If a particular bureau owns a service contract and shares those services with another bureau, the level of funds on the contract for the bureau owning the contract drops as other bureaus use it. This can make the bureau owning the contract appear as going over budget, when in reality, that bureau is practicing good government by sharing their contract.

OPPORTUNITY: Build in some sort of cost recovery for establishing and managing Citywide contracts so that more can be made available to bureaus without OMF Fac having to “absorb” costs.

Union Information

1. OMF Fac and Fire are both 701
2. Parks staff are part of the Labor Union

I-Net Information:

I-Net is an access badging system used in several major locations throughout the City, including the Portland Building, the 1900 Building, the BES Wastewater Treatment Plant, the Emergency 911 Building, the ECC Building, the Park Ranger Office, and the Portland Archives and Records Center. Although it is not “the standard” for the City when it comes to badging systems, it is so highly integrated that replacing it would cost a significant amount of resources.

- Bureaus have had challenges with I-Net – installation and ongoing with vendor
- OMF Fac does not tell other bureaus that I-Net is the standard and they must use them; Procurement and BTS tell bureaus it is a standard. BES was told they had to use it, but they do not. If they do not use it, they must find their own system.
- OMF – Facilities staff will be meeting with representatives from Schneider Electric and ECS to discuss problems with I-Net.
- Would be difficult and expensive to move to a non-proprietary system since all hardware and wiring would need to be replaced or modified.

Opportunity for Collaboration

OMF – Facilities indicated that he is interested in taking part in quarterly or monthly meetings with other facilities division managers to discuss current issues, opportunities

and needs. It was expressed that for the first year, monthly meetings might be more necessary, switching to quarterly meetings in subsequent years, after the group has gotten used to working together. Meeting participants: facilities managers, project managers, and procurement staff.

Current Consolidation

OMF Fac works with BES expertise on underground injection tanks, and in projects with DEQ, OMF Fac routinely works with BES because of their subject matter experts.

OMF Fac is working with PBOT and BES at the 1900 Building to install storm boxes and repair sidewalks using permeable pavement for storm water runoff. This could be an effective demonstration project for other sidewalk replacement needs.

Fire Bureau Facilities Maintenance and Management Research Notes

Area of opportunity identified during meeting:

- Monthly meetings among City staff conducting facilities management and maintenance to discuss ongoing projects and how bureaus might or might not be able to work together at reduced cost to provide services.
- Shared storage facility with Parks Bureau (Parks expressed interest in their own storage as well).
- Create streamlined Citywide contracts for certain facilities services (which will be determined by bureaus managing facilities).
- 2 of the 3 Fire FMTs are on the latest “eligible to retire” list and the youngest is ~50 years old. They would be interested in succession planning/apprentice programs.
- Would be interested in some sort of system to allow “de minimus” exchanges with other bureaus – e.g. Fire cleaning docks in exchange for Parks trimming some trees – without having to charge each other

Fire Research Highlights:

- Procurement relationship strong.
- OMF Facilities relationship strong.
- Fire manages all its facilities operations outside of the major capital construction and renovation/remodeling pieces which are done in partnership with OMF-Facilities; Project manager with Facilities manages financial, contract management, compliance aspects, Fire involved in providing input for operational aspects; being involved in providing direction on design and construction aspects. Consider these projects as team efforts.
- Relationship with OMF Facilities runs smoothly.

- Fire Bureau owns 30 active stations and four support locations: training building, Fire Marshall's building, Belmont Fire Museum, and the Logistics building.
- Facilities maintenance and management in Fire Bureau is operated by one supervisor, three facilities maintenance technicians (FMTs), and one painter; they used to have more staff (utility workers, carpenters, an electrician) but lost them due to budget cuts. Funding is a challenge.
- The 1998 GO Bond allowed for all stations to get seismic improvements and to accommodate female firefighters. Most are in above average condition, but Fire Bureau is beginning to run into maintenance issues in buildings. Many were renovated 10-15 years ago and useful life being reached on many improvements. Some equipment (e.g. dishwashers) get heavy use and needs to be replaced on quicker timelines than would normally be the case.
- Because of the nature of Fire Bureau, buildings and equipment must be fully operational at all times. Staff said that they use their own people (even firefighters themselves) for repair and maintenance, and sometimes they must contract out if their staff is unavailable.
- Because of the unique nature of their facilities and Fire's need to have control over who is in their buildings (with firefighting/ems staff being called out on a regular basis leaving the facilities unoccupied), Fire believes it's important to have their own staff maintaining them, rather than having Facilities or contracted staff providing maintenance and having access to their buildings. They do not want vendors being left there alone.
- Fire Bureau maintains a unique "Tap Out" system, tied into BOEC/Dispatch, which automatically activates certain systems (lights, alarms, etc.) and shuts down other systems and electrical equipment (e.g. turns off stoves) in the fire houses when an emergency call comes in. This system requires specialized maintenance.
- Fire Bureau was unaware as to the extent that SAP is built into the process of facilities management; they do not use it. Fire staff expressed desire for a dialogue to occur so that all Bureaus know what the other is doing with Facilities management.
- Because Firefighters occupy the stations 24/7, they consider themselves almost as "homeowners" taking care of routine maintenance activities like mowing.
- Fire Bureau's work order system works smoothly (it's "simplistic but clean"), however staff expressed interest in the process becoming streamlined with OMF Facilities, how that would happen was unclear. They don't use their system for billing, just tracking.
- Fire staff expressed interest in a storage location for parts.
- Fire staff expressed interest in streamlining the process for work to get done among bureaus, citing that they will gladly do work for other bureaus without extra charge, depending on the task, if other bureaus would be interested in such

an arrangement. They are not set up to bill for work they do (such as hosing off docks for Parks or clearing fire lanes).

- Fire is using a state contracted vendor for roof inspections.

Parks Facilities Maintenance and Management Research Notes

Areas of opportunity identified during meeting:

- Area of opportunity: Affidavit approach for sidewalks – Could PBOT enter affidavit directly into Parks’ work order system? As it is now, complaints create affidavits which are sent to Parks, then delivered to Parks via mail.
- Area of opportunity: Tort exposure – tension between keeping sidewalks maintained and Citywide goals for an ‘urban canopy’. Conflicting goals. Sidewalk condition is an area worth exploring.

Parks Research Highlights:

- Facilities planning, construction, maintenance and management provided by a variety of groups within Parks – much is under the Planning Design and Asset Management Division (Central Services, Construction Management, Capital Projects, Planning and Central Services) with much of the day to day taken care of by operational staff in Parks and Recreation Services (“Services”) and City Nature. Real Property Management and agreements handled by the Property, Acquisitions and Services manager in the Director’s office.
- Central Services includes: heavy equipment, skilled trades, structures, and turf & irrigation.
- Parks just moved over to “ActiveNet” for all reservations. Are piloting reserving picnic areas without human facilitator (online), but are not ready to use ActiveNet to have folks book rooms for meetings, other park facilities.
- Separate contract with PHC: Parks has their own PHC contract separate from the OMF – Facilities ‘Citywide’ contract. Also use Procurement held contracts for portable toilets and trash hauling. Think these could be improved.
- Parks stated that they possess the procurement capacity to handle contracts for women and minority contracts and on-call contracts under \$50,000.
- There is an ongoing dialogue with Procurement around labor contracting: DCTU (District Council Trade Unions). Communication piece goes through Procurement, vs. individual members going to union representative
- They have evolving technology needs to address security – security measures vary between community centers and other facilities. Just rolled out their first ‘lockdown’ system in the Charles Jordan Community Center. Facility can be locked down from a single point in building. Want to do this to all facilities (community centers). Particular security issues that they’re concerned about include gang activity, theft and vandalism. Technology needs may include security cameras; real time access to “video” remotely and to tapes; intercoms; lock down systems, etc.

- Regarding “Strategic Energy Management”, Parks is part of the Energy Trust cohort for Strategic Energy Resource Reduction.
- Parks Facilities possesses 2 supervisors, each with 32 staff to manage. Specialized staff includes carpenters, painters, plumbers, electricians, FMTs.
- Challenging to maintain proactive approach with the lack of capacity to manage daily operations. Operate reactively most of the time.
- Parks is dissatisfied with employee moves provided through OMF Facilities.
- Parks is dissatisfied with the contract administration with the janitorial company – there are times when Parks staff has to prompt company to do their job multiple times before it gets done.
- Sidewalk Maintenance – Parks thinks there must be a better way to manage sidewalk maintenance issues both proactively and reactively. When there is a complaint or inspection of sidewalks, PBOT sends the affidavits to “PP&R”. Can take a while to get to the right place. If Parks is going to have someone out to fix (likely vendor, since they do not do own flatwork), they have to enter into their work order system and would want to address for full site, not just one area. They recognize that there are situations where one Parks goal (for trees and urban canopy) conflicts with another (maintenance of their sidewalks and access). Also concerned about liability and tort exposure, and wanting to be able to address these situations in most cost-efficient manner. Believe there are opportunities to improve with Parks, PBOT, Risk Management and Facilities working together on an improved process.

PBOT Facilities Maintenance and Management Research Notes

Areas of opportunity identified during meeting:

- Interested in developing cost-effective arrangement with OMF Facilities – for instance, PBOT is interested in jumping on OMF Facilities’ “striping” contract the Project Management Division owns. Interested in exploring areas where contract efficiency can be improved.
- Revise policy regarding what is considered standard operations and maintenance by OMF-Facilities – anything over \$10,000 is NOT included as O&M, but PBOT must pay for “Project Management” for things like annual pressure washing in excess of the max dollar amount allowed for it to be considered an O&M service. PBOT believes they would save a lot of money if this service could be managed by internal staff or managed as O&M.
- Encourage BIBS’ Facilities Maintenance Technicians (FMT’s) to use PBOT’s storerooms to procure, receive and issue needed parts, reducing the number of trips the FMT has to make to purchase items. Many of PBOT’s vendors deliver items the day following a request.

PBOT Research Highlights:

- PBOT expressed concern that OMF Facilities thinks they are performing a certain service (i.e. painting), when in fact PBOT is using their own staff or contracting out for services due to poor turnaround time by OMF Facilities on work order requests. They recognized this as a somewhat unavoidable issue due to scope of work OMF Facilities covers. Recognized that the FMT for the Maintenance Operations is also FMT for a number of other facilities and can't cover all to the level of service they'd like.
- Need for improved IA's between bureaus and OMF Facilities as well as service level agreements. They need to have better information about what to expect, what the full costs will be, etc. They aren't always able to determine what is the most cost-effective way to do things (vendor, facilities, own staff, own staff being paid OT).
- Sometimes find that the full scope of information about a maintenance issue that they have shared with dispatch is not passed along to the FMT, requiring additional work on the part of PBOT.
- Citywide contracts have been very beneficial for PBOT.
- When there are existing contracts set up, PBOT decides internally whether or not it is cost/time effective to perform a service in-house, vended to contractor, or through OMF Facilities.
- Union contract with DCTU prevents PBOT from using Utility Workers to change their own light bulbs. PBOT is charged \$109 per hour for a Facilities staff member to come change a light bulb, and this deters use of Facilities for minor services. Would like to be able to use own staff for some simple things if labor agreements would allow that to happen.
- PBOT is interested in using their centralized "Stores" for receiving parts because they have many contracts with vendors and believe they can receive parts faster if they were to manage the orders and have them delivered directly to Stores rather than having FMTs have to go out and acquire parts (and charging PBOT for the time).

Water Bureau Facilities Maintenance and Management Research Notes

Areas of opportunity identified during meeting:

- Wendy Gibson in OMF Facilities is working to create a Citywide surplus property storage facility that would be used by City of Portland, Multnomah County, and Metro.
- Streamline contracting process between OMF Facilities and other bureaus.
- Create standing contracts with certain vendors for small repairs so that bureaus do not have to create contracts every time a simple service is needed.
- May be opportunity to partner with Parks for Powell Butte visitor center.

Water Research Highlights:

- Water Bureau has crew of maintenance staff doing lawn mowing at all locations but four – for those locations, Water has an IA with Parks for lawn care.
- Water uses its own staff to collect garbage at their sites; they do not go through Parks.
- Access control: Water Bureau does not use badging system at most sites; they use key codes and keys. The Water security dispatch center at ECC makes their keys/smart keys. They use
- Water has electricians, carpenters, plumbers, painters, who can do much of their own maintenance work. When they need someone from outside the bureau (because they don't have someone or who they do have is not available) it's often quicker to just do a small contract with a vendor. For example: Water Bureau stated that if they have a broken toilet, they would usually contract out for it to be fixed rather than call around to see if someone from outside the bureau was available. They would be interested in using other bureaus' available staff if their own or Facilities were unavailable, if it were easy to identify and get them doing the work ("talent pool" to draw from).
- Water uses own staff for facilities maintenance activities that can be planned in advance to keep certain staff occupied when they aren't able to work on other priorities (e.g. industrial painters to paint interiors when weather doesn't allow work out of doors).
- Contracting with vendors vs. contracting with OMF Facilities: Water Bureau staff stated that there is a 19% markup to go through OMF for facilities maintenance. If there were an established contract that streamlined the process, Water Bureau would go through OMF Facilities for services.
- Water staff expressed a desire to see OMF Facilities expand its staff capacity so that contracts can be entered into with time sensitive turnaround feasible.
- Have had some experiences where the quality of work provided through facilities hasn't met their standards (e.g. painting of 5th and 6th floor areas).
- For the floor they own in the Portland Building, they find it easier to manage themselves, rather than go through Facilities.
- They have one playground which is managed by Parks.

BES Facilities Maintenance and Management Research Notes

Areas of opportunity identified during meeting:

- Potential opportunity for improvement in area of contracting for facilities-related services when working both with OMF Facilities and Procurement processes.
- Access Control and Badges: They would like to quit and start over – they find that the vendor (PCS?) is non-responsive to needs; we don't have agreements in place for maintenance. Believe that Parks bailed on system for the same reason

BES Research Highlights:

- Wastewater division has just 3 or 4 buildings that are only office buildings; the majority of BES buildings are connected to the process of wastewater treatment. (2 at Columbia Boulevard, 1 at Tryon Creek, 1 Pump Station Maintenance)
- BES works heavily with PBOT for property research, title search, easements and agreement striking (common use of ROW). BES is the caretaker of “orphan things” in the right of way
- Building maintenance is done at the larger level, and sometimes smaller needs go unmet.
- BES develops Facilities Plans (10 year plan), major capital improvement project plans (5 year plan), RR&M plans (1 year plan), and they have a facilities shop to handle everything that the previous three plans do not cover (minor daily operational issues).
- Wastewater has access to 20 millwrights, 20 electricians, and 20 mechanics, and they rotate on jobs as needed.
- BES has its own work order system (Synergen).
- BES owns floors 10 and 11 in the Portland Building as assets; leases property at Pioneer Tower.
- Own 550 property assets – mostly open space or areas that appear as such. Most of BES’ efforts regarding facilities maintenance for these is on above-grade projects (above ground) – illegal camping, disposal, leasing activities.
- For traditional general maintenance, BES partners with OMF Facilities.
- BES manages some of their building/property leases; OMF Facilities manages the majority. Examples: BES directly leasing Swan Island property to UPS; partnering with OMF-Facilities at Terminal One. Gilds Lake is managed by Facilities property management.
- For the Swan Island Boat Ramp, BES contracts directly for garbage, sweeper; lighting is done by vendor; landscape and boat dock are maintained by Parks.
- BES issues own permits for test wells (in ROW and on BES property) and for film entry; manages subleases, since they impact how BES can use properties
- BES will be participant in the structural assessment contract (RFP out of Facilities)
- Grey to Green program manages all acquisitions in house with City Attorney involvement; outside of BES’s capital group

Example of current partnership:

- Materials and Testing Lab: PBOT owns the grounds and the building, and BES occupies the space with their staff. PBOT gives a 50% discount on rent to BES, with the stipulation that BES provide the facilities maintenance to the building. BES provides this facilities maintenance through an IA with OMF Facilities. (Bureaus involved: BES, PBOT, OMF).