



Oregon

# Land Development Services Department

To: Casey Garrett, Facilities Service Manager  
Date: August 11, 2015  
Re: Six Months Performance Progress Review

You have been serving as Facilities Services Manager for a little more than six months now and I would like to review with you your growths into the position, progress toward achievement of initial goals we discussed at your hiring, other accomplishments during your first six months, and goals that we need to focus on going forward this year and beyond.

## **GROWTH INTO POSITION**

During your first six months, you have quickly assimilated the information you needed to have to understand facilities operations. With a fresh perspective and great initiative you have begun a review of facility needs, key operations, functions and contracted services. You are a fast learner and bring a great background in construction, contracting and facilities systems to the position. You have already reached a point where you require minimal day to day direction and have made substantial progress on first year goals set for the position.

## **PROGRESS TOWARD ACHIEVEMENT OF FIRST YEAR GOALS**

### **1. Develop and maintain strong and effective working relationships with Department managers and staff who are occupants of the facilities to whom you provide facilities services.**

In your short tenure you have already established a positive working relationship with Department staff. You have looked for ways to improve the work order system and have been responsive to service requests. Your coordination with the Sheriff's Office and Road Department regarding ways to more effectively provide facilities services has been appreciated by both and has set the stage for greater efficiencies and cost savings in the future. I have heard directly from the Assessment and Taxation and District Attorneys Office about how helpful you have been in addressing facilities issues for them. In particular, you have already built a good foundation of cooperation with the Board of Commissioners. An example of this is their review and approval of a realignment of staffing made possible in part by your plan to have staff assume some of the operations previously done by contractors.

### **2. Effectively learn your duties as a Facilities Services Manager with Columbia County, which include developing and managing your program's budget in consultation with the Director and managing the personnel assigned to Facilities Services.**

As noted, you have quickly grown into the position. You have shown a willingness to understand the program budget and have found cost efficiencies and savings which can be redirected into program improvements and long deferred projects. Experiencing some resistance by existing Facilities staff to your new perspective and ideas, you have worked with the LDS Director and the HR Director to build a stronger and more cohesive team as you encouraged

your staff to offer ideas and feel a part of needed changes to the program. You have recognized the unique preferences, skills and abilities of your staff and given each of them opportunities to make their job more challenging and enjoyable. You have done a preliminary assessment of training needs and began to direct staff into training opportunities as available.

### **3. Serve on the County Risk Management Committee**

You have been assigned by the Director to attend the RMC meetings on the third Tuesday of the month in the Riverview Meeting Room at 3pm. A key focus of your work with the RMC will be the role as County Safety Manager. This is a role that you will need to focus on in the coming months and this group, along with the Safety Committee in which you participate, will be key for consultation and planning of projects and activities that help reduce risks and provide security to people and facilities.

### **4. Safety:**

#### **Serve as co-ordinator of the County Safety Committee and hold an annual evacuation drills consistent with the Courthouse Evacuation Plan.**

The Facilities Services Director, per the job description is expected to assume the role as County Safety Manager in the planning, organizing coordinating the physical phases of County fire, safety and security operations. In that role you serve in a leadership role on the County Safety Committee. The goal of reviewing, updating, and implementing the Courthouse Evacuation Plan in the form of at least one annual evacuation drill and post assessment remains to be met in the remaining six months of the year.

#### **Develop or update, employee safety procedures for Facility Services staff.**

You have done a preliminary review of safety procedures and began the identification of needed changes directed at improved employee safety. Although not made clear in this goal, the expectation is that you will begin to assume a greater role as safety training coordinator for all County staff. In that role you would make sure the first aid supplies are continuously available, defibulator equipment is functioning and periodic training opportunities are made available to staff at large.

### **5. Budget and Financial Management**

#### **Together with the Director prepare the FY 17 Facility Services portion of the Land Development Services Department budget beginning in January 2016.**

This goal will be addressed as we begin the FY 16 budget process in December 2015. The Director will coordinate with you in the preparation of the Facilities budget request for inclusion in the LDS budget request.

#### **Learn use of Springbrook Software to monitor your budget, control expenditures, and track purchase orders and expenditures etc**

You have learned to navigate, access and use financial information for the Facilities Program and learned to prepare and use purchase orders.

#### **Learn how to access and use the State Purchasing system known as ORPIN.**

You have become familiar with ORPIN and used it to research pricing for facilities products and services.

**Become familiar with the County's procurement ordinance including required procedures for various kinds of purchases and contracts.**

You have quickly learned the County's procurement system. You assumed management of two major facility project procurements; the Courthouse Re-roof and Courthouse Elevator projects. In addition, you carried out other various procurements for contract services which you effectively used to control costs and achieve operational efficiencies.

**Set up a system to keep records of invoices that are processed by the Facilities Management Program**

Not reviewed at this time. You will need to update me on work on this.

**Other Accomplishments:**

You have identified substantial savings in some of our major facilities operations contracts and have shifted much work to our staff. This has allowed the County to add a third Facilities Services staff person which will allow the program to add or enhance some support functions at a lower cost to client Departments and programs. I commend you for your great initiative and results in this area.

## **6. Project Management**

You have demonstrated considerable skill in this area. You quickly got up to speed on projects which were planned or were in progress and have either made significant progress on or brought several to completion (ie Courthouse Re-Roof, Water Service Main, State Courts Office remodel, County Counsel's Office Remodel).

**Set up a filing system for all facility project documents such as those related to procurement of contracts, materials and services; project plans and drawings and project status reporting to the Director and Board as appropriate.**

You have established a filing system for program documents. You have updated and organized facilities as built drawings and integrated many of these into Auto Cad format. This has greatly facilitated design of facilities remodel and construction projects. There is a future need is to coordinate with the Director on regular reporting of the status of facility projects which can be use to also update the Board of Commissioners as necessary.

**Oversee the contract procurement and construction management for the following projects subject to funding in FY 16 budget:**

**Courthouse Re-roof. Bid Courthouse Re-roof by April 2015. Complete project by September 1, 2015.**

As a result of your careful analysis of re-roof alternative materials and methods, the County was able to realize substantial savings for this project. The project was completed on time and considerably under budget. I commend you for the way in which you got up to speed on this project, improved project design and completed it on time and under budget.

**Courthouse Elevator Replacement. Bid Courthouse Elevator Modernization Project by April 2015 and execute contract before June 30, 2015.**

The grant agreement with the DOJ and contract for work was completed by June

30, 2015 giving the County one year to complete the work. The contract cost is well within the amount of the DOJ grant and the project was well coordinated by you with the DOJ and State Court Administrator. By mutual agreement construction on this project has been deferred in favor of completion of the Courthouse Re-roof. However, a project schedule is needed to keep the Director and Board of Commissioners informed of the timing of the project and arrangements for third floor access and continuity of operations during construction.

**Courthouse Water Main Replacement. This project should be scheduled soon and planned so as to minimize disruptions in operations. Needs presentation of project request to Board and their approval.**

Project approval was obtained, contract procured and work completed with negligible impacts on operations within budget.

**Computer Server Room Move in consultation with Jean Ripa, IT Director. Schedule to be determined. Project approved by Board.**

This project awaits a timing decision by the IT Director. She is beginning to contact firms who can provide the technical services necessary to move the computing equipment and perform the related software and wiring work. You have been coordinating with her on this project and will be a key part of the project team in the physical aspects of the move. Based on when the IT Director is ready to proceed, we should collaborate with her on a schedule and a plan for continuity of operations during the move.

**Security Cameras on 2<sup>nd</sup> Floor. Budget approval and scheduling to be determined. Needs presentation of project request to Board and their approval.**

A project update and proposed schedule is needed on this project in coordination with affected Departments, Director and Board of Commissioners.

**Courthouse PA System Upgrade. Budget approval and scheduling to be determined. Needs presentation of project request to Board and their approval.**

A project update and proposed schedule is needed on this project in coordination with affected Departments, Director and Board of Commissioners.

**Other Accomplishments:**

You have implemented a new project management software system that promises to provide more timely and effective work order management and accounting as well as better communication and coordination of work with staff.

## **7. Facilities Maintenance**

**Secure/Implement a web based Maintenance Management System to include work orders, preventive maintenance scheduling, hours, supplies, maintenance staff assignments.**

You have aggressively reviewed various software tools and selected FMX, which has proven to be a great choice, with features that we can use in the future to provide timely information to guide routine and preventive maintenance, budget development, project development, pre-order supplies and provide an easy client tool to initiate and monitor work orders.

**Prepare network accessible comprehensive routine and preventative maintenance schedule.**

As noted, the FMX system that you selected has enhanced our tracking, scheduling and documentation of routine and preventive maintenance. Use of the system will help us extend the useful life of our equipment and building systems.

**Complete and Implement a Key Control Plan for Courthouse/Annex. Review Justice Facility Key Control plan for possible updates and improvements.**

This continues to be a pressing need and should be a focus of attention in the coming months. An electronic database with key assignments based on level of authority and need to access criteria, key tracking and key retrieval from employees leaving the County should be addressed in the system.

## **8. Vendor and Contractor Management**

**Review the status of all current contracts for Facilities services, vendor agreement/purchase orders.**

You have excelled in this area and have achieved much. Your review and re-tooling of the HVAC and janitorial supplies contracts have resulted in significant savings and efficiency. Your efforts to make use of the current skills of staff and/or to train staff of new or expanded roles in facility maintenance is very commendable. You have proven to be a valuable asset to the County in this area.

**Contact/meet with each contractor or vendor to review establish good personal working relationships, review contract requirements and expectations, address any ongoing performance issues.**

Your review of contracts has also given you the opportunity to work with contractors to get the best results from them for the County. When necessary you have not hesitated to modify scopes of services, reduce or terminate contractual relationships in the County's interest. A future focus should be to continue to work with our janitorial services contractor, CCMH-Sunrise, to improve cleaning performance and observe security protocols.

**Prepare/revise a master contracts/purchase order/vendor list with contractor/vendor name, contact person, contact information, date of contract or PO, expiration of contract or PO .**

Not reviewed. A contracts database with the above referenced information should be developed and maintained. This will provide quick reference for contracts, procurement documentation, effective dates, terms of service, expiration dates, key performance targets, current contact information etc.

## **FUTURE ACTION ON GOALS**

The following is a list of needed actions related to established goals as a guide for your future efforts this year. We may want to refine this after our discussion of the goals, progress status and work to be done. It is not expected that all of these items will be completed in the next six months, only that they are items that I would like you to be working on.

1. Attend RMC meetings and provide input in your role as County Safety Manager and liaison to the County Safety Committee.
2. Review and update the County's Evacuation Plan, review it at a Department Head meeting, implement an annual evacuation drill, and conduct a post-assessment. Consideration should be given to resources now available for Emergency Management and regional agencies involved with the Cascadia Earthquake planning project.
3. Continue to work collaboratively with your staff, providing opportunities for their involvement in the planning and implementation of projects and appropriate training to take on new activities.
4. Provide the Director and Board periodic updates on the status of new and ongoing projects. This can simply be in the form of an email summarizing significant projects and activities or using the template I developed for the Building Services Manager on a frequency we can discuss. As the following projects become ripe for development, coordinate with the affected Departments and provide the Director and Board a project overview, implementation schedule and plan and cost/budget information before proceeding. It is understood that priorities and scheduling for these projects will depend on budget and project approval by the Board and affected Department Heads.
  - PA System
  - Data Center Move
  - Second Floor Courthouse Security Cameras
  - Key Control System
  - Fleet Management In Coordination with Public Works Department
5. Establish and maintain a contracts/vendor database and reference index for quick reference information on contractor/vendor, contract/purchase order term, contact representative, scope of service, performance targets, if any, and contract location.
6. Complete and Implement a Key Control Plan for Courthouse/Annex. Review Justice Facility Key Control plan for possible updates and improvements. Initiate work on this task in the next few months.
7. In our job offer letter, we provided an incentive to you for achieving the Facility Management Professional certification from the IFMA in your first six months. I'm sure you will agree there have been a lot of other priorities that have taken precedence over your work on this. But if you still intend to achieve this certification, I would be willing to extend the time frame for another four months to December 9, 2015 with this salary step incentive.

The above summary is only a partial view, from my perspective, of what you have

accomplished. We can expect that our work program going forward will need to adapt to changes in Board priorities, budgetary considerations and other factors.


Casey, you have taken on a difficult job with skill and energy. You came into a situation in which many key projects and activities had been deferred or even abandoned. Your initiatives to improve how we do Facilities Maintenance, reduce costs and simplify processes has been impressive considering that this has been your first six months. You have started your tenure with the County by establishing good professional relationships with myself, the Department Heads and their staff, and the Board.

Please consider this six month check-in as a tool in focusing your efforts during the next six months and beyond. Also consider this as my opportunity to encourage you in the great work you are doing for Columbia County. Great start!

  
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Todd Dugdale, Land Development Services Director

  
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Date:

  
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Casey Garrett, Facilities Services Manager

  
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Date

