



Greater Orlando IFMA Chapter CFM Roundtable

Welcome to the 3rd CFM roundtable

presented by

The Greater Orlando IFMA Chapter

Special thanks to our host TAMI BERRY of SPRINT



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Welcome to the third CFM roundtable presented by The Greater Orlando IFMA Chapter. Today's facilitators:

John Mitrovka, CFM, IIDA
First Vice President, Florida Space Planning Manager - SunTrust Bank

Geoff Allen, CFM, President of IFMA Orlando
Office Services Manager - Glatting Jackson Kercher Anglin.

In the first roundtable we discussed:

- | | |
|----------------------------------|--|
| • Respect of the CFM designation | • How to apply for the CFM exam |
| • The 9 competency areas | • The different study guides available |
| • Value of the exam review class | • Testing methods and facilities |
| • Test format | |



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In the second roundtable we reviewed the first three competencies:

- Operations and maintenance
- Real estate
- Human and environmental factors

Today, we will review the 2nd set of 3 competencies:

- Planning and Project management
- Leadership and management
- Finance



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Planning and Project Management Overview

A strong linkage between the function of Facility Management and the Vision, Goals, and Strategies of the business is essential for success.

A clear understanding of the overall business plan is required to provide a framework in which to develop, review, and implement the real estate strategic and tactical plans. Identified projects then support these plans.

These plans and resulting projects will support the goals of the business, and in many cases, provide a direction for the business.



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Planning and Project Management Overview

Construction, renovation, and relocation projects are some of the most visible deliverables of the Facility Management team.

Well planned and managed projects will reinforce the value the Facility Management team brings to your company.

Although all projects differ in some way, they all have one thing in common - the project management process.



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Planning and Project Management Competency Areas

1. Understand your organization's business plan:

- The corporate Vision, Mission, and Strategies
- How the Facility Management team's objectives link to the goals of the organization and how you Add Value
- Talk the talk - understand the terminology
- Walk the walk - navigating the corporate culture!

2. Manage Project Planning

- Plan and manage all phases of projects
- Develop a project summary scope statement
- Identify project team and roles and responsibilities
- Develop project plan



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Planning and Project Management Competency Areas

3. Manage Project Programming and Design

- Programming validates user needs and establishes effective space utilization through space and FF & E standards
- Understand industry accepted space measurement standards
- Interpret construction documents prepared by design professionals (Architects, Interior Designers and MEPs)

4. Manage Construction and Occupancy

- New construction, renovations, and relocations
- Identify project team and the roles/responsibilities
- Establish and employ processes to measure, track and report progress



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Planning and Project Management Competency Areas

- ### 4. Manage Construction and Occupancy *(cont.)*
- Understand the basic construction contract process
 - Understand the basic types of permitting
 - Manage relocations (installation of FF & E, moves, etc..)
 - Close-out project
 - Post-occupancy evaluation



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Questions for Planning and Project Management

1. The objective of the facility plan has its origin in a corporation's
 - A. Accounting plan
 - B. Strategic and operational plans
 - C. Personal plans
 - D. MIS plan
2. In the facility planning process, strategic planning decisions can occur:
 - A. In the first quarter
 - B. At mid-year
 - C. In the last quarter
 - D. At any time
3. Good facility planning makes a significant contribution to the corporate:
 - A. Bottom line
 - B. Environment
 - C. Standards
 - D. Community



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Leadership and management - Overview

A competent CFM should be able to:

- Recognized how to assess the needs of the people, places and processes in developing and sustaining the facility function.
- Recognize the differences between corporate and public operations in terms of the facility function.
- Assess business trends and their potential impact on company policies and practices.
- Develop a mission statement for the facility function organization that ties into and supports the core business mission and visions statements, goals, and objectives.
- Plan functional activities and services to sustain the workplace environment.
- Organize the facility function in a structure that addresses need-driven services and customer-service driven services.
- Develop the facility function business plan to support the core business plans.
- Manage the FM program in a constantly changing culture and environment.



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Leadership and management (continued)

1. Develop a strategic facilities plan

- Create a mission for the facility function
- Assess business trends
- Plan facility function activities
- Organize the facility function operation

2. Manage personnel assigned to the facility function

- Plan staffing needs and requirements
- Hire, contract, reassign, retain, lay-off and terminate staff
- Coordinate personnel assignments including cross training and Help Desk assignments
- Coordinate work performed as contracted services
- Evaluate performance
- Support personnel (personal/professional) development
- Provide leadership



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Leadership and management (continued)

3. Administer the facility function

- Administer policies, procedures and practices
- Administer the acquisition, distribution and use of material resources
- Maintain documentation systems

4. Manage the delivery of facility services

- Plan for the delivery of services
- Assure services are being delivered
- Evaluate service delivery



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Questions for Leadership & Management

1. The annual report can be used to report all of the following except:
 - A. Critical maintenance actions
 - B. Changes in facility strategy
 - C. Project proposals
 - D. Budget impact on facilities

2. Organized project documentation is important for all of the following reasons except:
 - A. Time is saved retrieving information
 - B. Credibility is preserved
 - C. Occupants feel like part of the process
 - D. all decisions can be referenced

3. To demonstrate trends in workload, the facility manager must:
 - A. Use the industry standard as a benchmark
 - B. Use the budgeting justification information
 - C. Have access to the corporate revenue data
 - D. Have access to data form several years



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Finance

Why do I need to know this ? Nationally, the lack of financial acumen is often expressed as upper management's number one reason for dissatisfaction with FM performance *.

Competency area & performances:

- **Manage the finances of the facility function**
 - Analyze financial information
 - Manage charge back systems
 - Prepare budgets
 - Manage the budget
 - Monitor revenues and expenditures to contain costs
 - Manage the financial obligations of the facility function

* Coffee per hour



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Finance – Terms you should be familiar with

See handout

CFM



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Questions for Finance

1. Variable expenses include all of the following except:
 - A. Management and administration
 - B. Cleaning
 - C. Utilities
 - D. Depreciation

2. Given an overall capitalization rate of 12.5% and a net operating income of \$100,000, which of the following is the indicated value?
 - A. \$12,500
 - B. \$80,000
 - C. \$800,000
 - D. \$1,250,000

3. Approximately how long will it take to double your money if you receive a 4% yield on your investment?
 - A. 19 years
 - B. 18 years
 - C. 4 years
 - D. 12 years



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Thank you for participating in the 3rd CFM roundtable

At our next roundtable we will review the final three competency areas:

- Quality assessment and innovation
- Communication
- Technology

- **THANK YOU FOR FILLING OUT YOUR FEEDBACK BEFORE LEAVING !**