



# Greater Orlando IFMA Chapter CFM Roundtable

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**Welcome to the fifteenth CFM roundtable presented by The Greater Orlando IFMA Chapter.**

## **Today's facilitator:**

Geoff Allen, CFM, LEED AP

Past President, IFMA Orlando

Office Manager - Glatting Jackson Kercher Anglin

Special thanks to host David Dunn, CFM City of Orlando



# Greater Orlando IFMA Chapter CFM Roundtable

Today, we will review 2 competencies

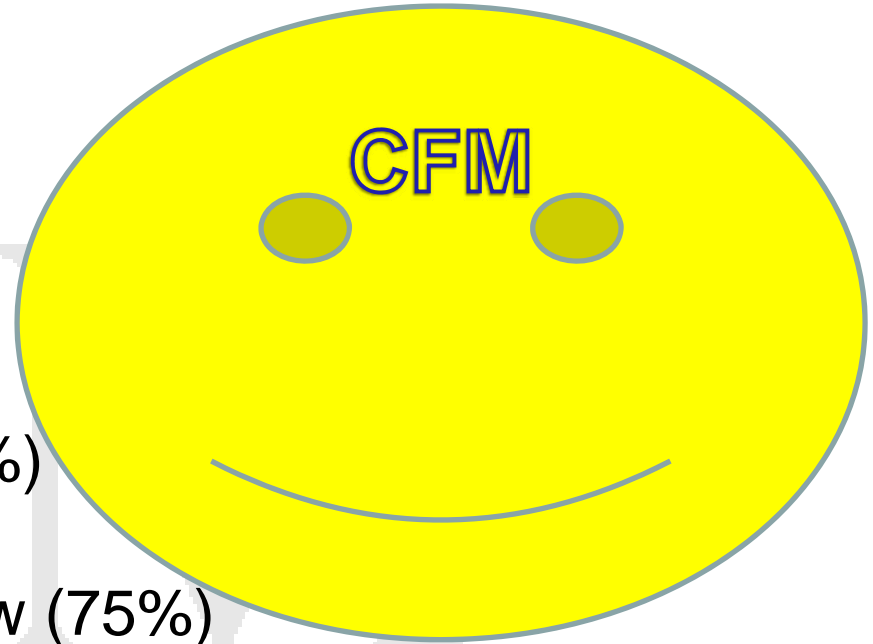
- Quality Assessment and Innovation
- Technology
- We will discuss content in the book
- We will review practice questions
- We will have general exam Q&A before closing



# Greater Orlando IFMA Chapter CFM Roundtable

Progress to the CFM goal

- I. Self – assessment (25%)
- II. Study learning material (50%)
- III. Comprehensive exam review (75%)
- IV. PMA (Positive Mental Attitude)
- V. Exam (100%)---
- VI. Helping others become CFM's "priceless" (110%)





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## Quality assessment and innovation Overview (p89 manual)

The fundamental discipline that a fm needs to measure and improve quality is systems thinking. Systems thinking is the ability to see how all the components of a facility relate to each other.



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## Quality assessment and innovation Overview (cont)

### **Key concepts: (p42 wkbook)**

A competent facility manager should have a general understanding and a working knowledge of the following:

- The basics of quality
- Setting FM quality standards
- Measuring, analyzing and reporting FM data
- Fostering innovation in the FM function



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## Quality assessment and innovation

### Basic approaches to quality

- Mapping Business processes
  - Relationship maps
  - Process chart
- Benchmarking
  - 10 things benchmarking is not
  - Approaches to benchmarking
- Data Reliability and Validity



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## Quality assessment and innovation

More Basic approaches to quality

- Randomization p127
- Levels of service
  - APPA Maint LOS chart
- Balanced Scorecard
- QMS & ISO 9000:2000
- Six Sigma – DMAIC
- Deming, Kaizen, Gemba



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## Questions for Assessment and innovation

45. What is the best way to assess the quality of services your department has been giving to occupants? (choose 3)

- A. Self-assessment
- B. Informal conversations with occupants
- C. Occupant surveys
- D. Hire an outside firm to assess services
- E. Surveys completed after individual jobs are completed
- F. If you receive complaints



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## Questions for Assessment and innovation

47. You must reduce a level of service for a task performed by your housekeeping contractor. What is the best method for determining what services you can reduce?

- A. Develop a survey for all site employees regarding level of service they feel they are receiving and make decision based on results
- B. Email all site employees regarding the anticipated change and ask for opinions
- C. Leave it up to the contractor to decide which services should be reduced
- D. Determine based on own experience and opinions and reduce services during a trial period



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## Questions for Assessment and innovation

48. An exercise in best practices indicates that your company can benefit from drastic changes in work processes. You distribute an overview of the findings and recommendations. It is critical that your plan be accepted by the right people in your company.

Who do you need to send the plan to in order to receive acceptance?

- A. Facility Management staff
- B. Upper management
- C. All employees
- D. Directly affected management



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## Quality assessment and innovation Learning Activity

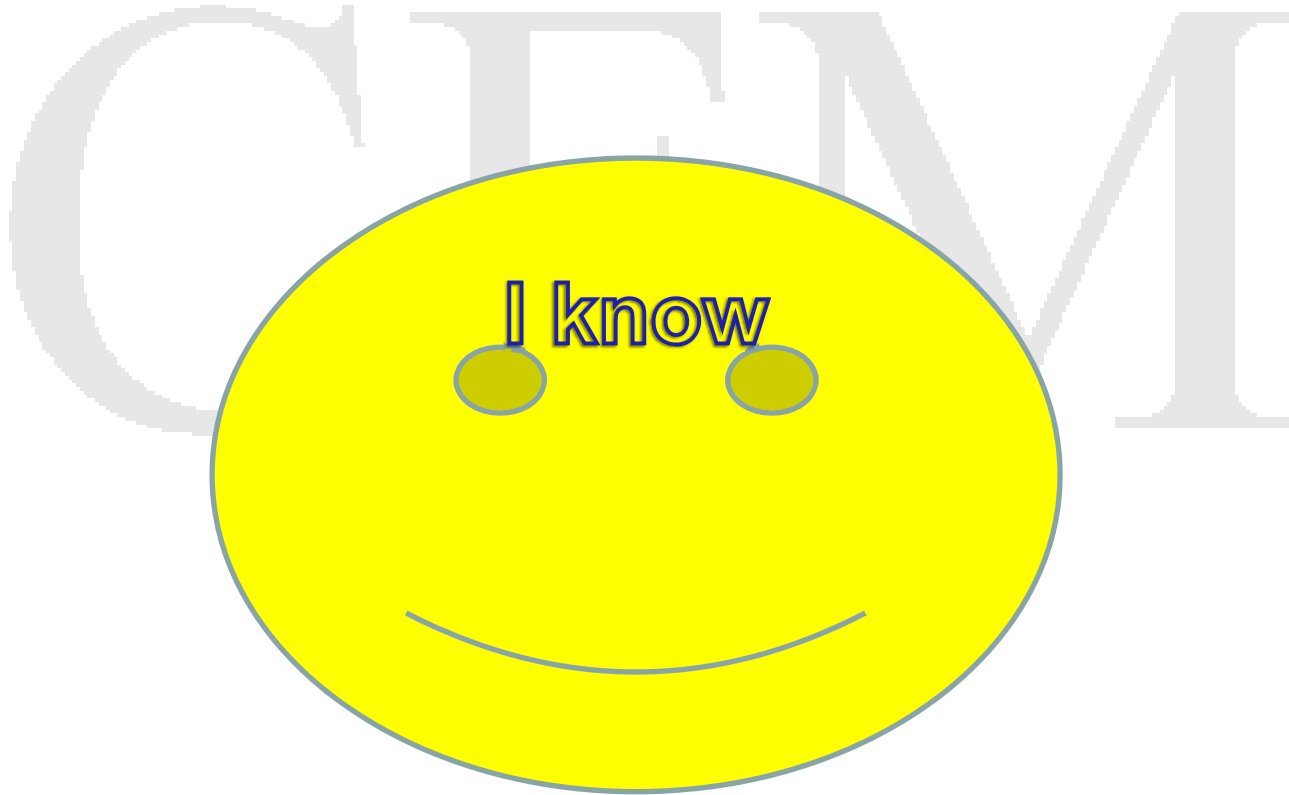
CFM





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## Quality assessment and innovation Learning Activity 7-1 p 43



**Fostering innovation in the FM function**



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What did you learn?

CFM





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## IFMA Orlando's Balanced Scorecard process

Initiated in February 2007. Ongoing revision, annual re-assessment. 5 yr plan. Note top priority, top line...

CFM roundtable 😊



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## Technology

The role of technology grows fast and continuously given the rate and volume of change that occurs in practice. No definitive textbook exists, in fact, one could probably not be produced today given this fact!

### **KEY concepts:**

**A competent facility manager should have a general understanding and a working knowledge of the following:**

- Technology across the enterprise and in the built environment
- Using technology as a tool to manage facilities
- Strategies for selecting, managing, and optimizing FM technology
- See workbook p 52 for the full list



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## Technology (continued)

Competencies in the technology area:

Plan, direct, manage/support the organizations technological infrastructure

- Voice, information data, building systems, media operating systems

Plan direct, and manage FM business and Operational technologies

- Ensure appropriate technologies are assessed, implemented, and maintained to support the “business” of facility management.

Ex: CMMS, CAFM, CAD, project mgmt, asset mgmt, cost analysis, etc.



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## Technology (continued)

The competent FM must be well versed in the proper role of technology in the workplace..... To increase overall productivity for his/her operation and for the general organization client.



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## Technology concepts

### IT help desk and FM functions

Both organizations have a need to develop and maintain a systematic way to deal with a large volume of work requests and service calls

### Automation of FM Operations

GIS, COTS, CAFM, CMMS, BAS, ERP, DMS, CPS, PMS, BIM

### Technology Optimization Process

1. Shareholder requirements
2. Strategic technology plan
3. Process analysis... steps 4-8 on p 110 manual



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## Technology concepts

### Components of a Strategic Technology plan

- A. Needs Assessment and goal validation
- B. Technology Industry Overview
- C. Strategic technology plan

### Preparing a Strategic Technology Plan

Component parts

### Key elements of CMMS/CAFM

System selection

FM technology cost analysis

Implementation

Managing the process



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## Technology questions

56. You have just decided to implement new facility management technology (CMMS/CAFM) at your facility. The next step is to justify the need for the automation to senior management. What are the three key benefits of the implementation? (choose 3)

- A. Enhanced productivity of the workforce
- B. Reduced maintenance failures
- C. Improved budget projections
- D. Reduced personnel costs
- E. Minimized training requirements



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## Technology questions

58. The integration of comprehensive automated systems into FM processes has several benefits. Select the best 2 benefits (choose 2)
- A. Provide better data for budgeting and estimating purposes
  - B. Reduce utility costs
  - C. Overcome the issue of being a support function
  - D. Reduce labor costs



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## Technology questions

62. You are responsible for developing a disaster recovery plan for your company's automated systems. What are the most common problems of an effective IT disaster recovery plan? (choose 2)
- A. Plan focuses on keeping the computer system running and not keeping the business operational
  - B. The plan cannot be accomplished
  - C. The plan is not closely coordinated between IT and FM
  - D. IT and CFO personnel develop detailed plans



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## Technology Learning Activity

**9-1 List 10 features of a CMMS/CAFM system, that, if implemented, could improve your facility's operations**





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## Preparing for the Exam

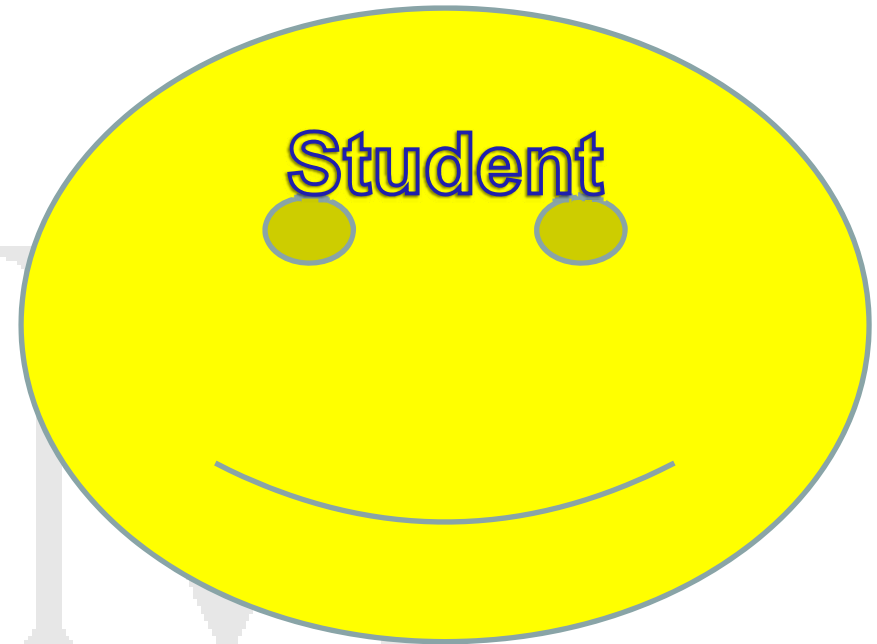
I. p116 glossary

II. Rollups

III. Sample exam questions w multiple answers

IV. Mnemonics / memory pegs

V. Time of day schedule

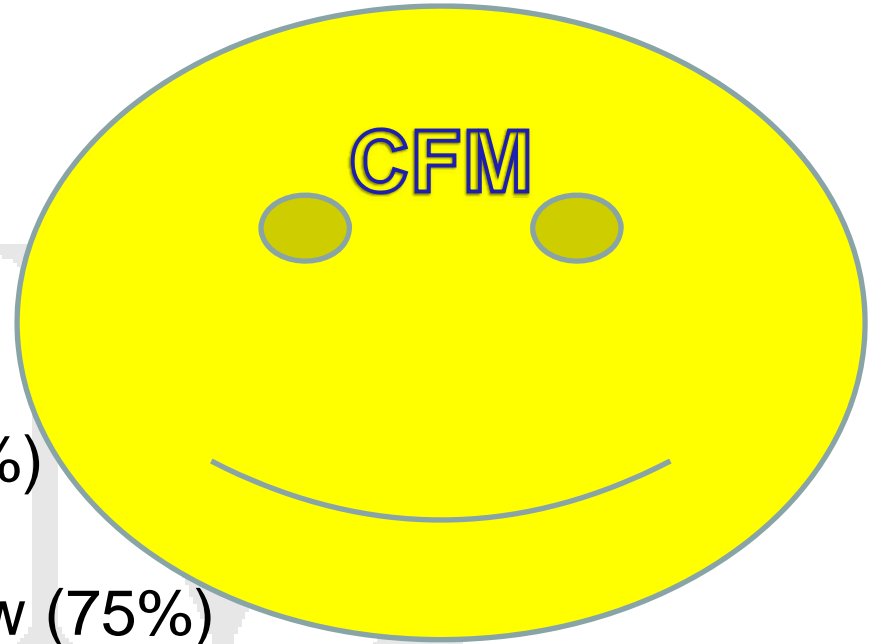




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## Thank you for participating in the 15th CFM roundtable

The 16<sup>th</sup> CFM roundtable will occur July 7. Mark your calendar, and watch the IFMA Orlando Website Calendar for details.



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- THANK YOU FOR FILLING OUT YOUR EVALUATION FORM BEFORE YOU GO !