



Greater Orlando IFMA Chapter CFM Roundtable



Welcome to the thirteenth 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



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Today, we will review 2 competencies

- Finance
- Human and Environmental
- We will discuss content in the book
- We will review practice questions
- We will have general exam Q&A before closing



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Progress to the CFM goal

- I. Self – assessment (25%)
- II. Study (50%)
- III. Comprehensive exam review (75%)
- IV. PMA (Positive Mental Attitude)
- V. Exam (100%)





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Finance – p79

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*

*Coffee per hour - costs by week/month – familiar common benchmarks



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Finance

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

*Common language – costs of familiar benchmark items



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Finance – p87 Managing the process

... the FM should be familiar with the following concepts and processes:

- Balance Sheet and Income statements
- Return on Investment in whatever format your organization uses
- Life Cycle costing and the time value of money
- Appreciation and depreciation of assets
- Procurement of goods and services

*Common language – costs of familiar benchmark items



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?? Sample question ??

1. Your budget has been cut this year. You know services will suffer if your budget is cut again next year. In the past, you have laid off people to balance the budget. How should you prepare for next years budget cuts?
 - A. Develop a list of service cuts and inform upper management about them.
 - B. Find equipment or contracted services that could allow a budget cut without loss of services.
 - C. Reorganize so people can be cut and accept reduction of service levels.
 - D. Find ways to give selected responsibilities to other departments in the company.



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?? Sample question ??

2. If the present value of the future cash flows from an investment is greater than the initial investment, then:

- A. The expected rate of return has not been achieved
- B. The investment should not be made
- C. The internal rate of return is greater than the expected rate of return
- D. The expected rate of return is too high



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?? Sample question ??

3. Charging an interest rate higher than allowed by law is called?
- A. Good business practice
 - B. A breach in ethics
 - C. Usury
 - D. Jail time



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?? Sample question ??

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?? Sample question ??

4. Variable expenses include all of the following except:

- A. Management and administration
- B. Cleaning
- C. Utilities
- D. Depreciation



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?? Sample question ??

5. 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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?? Sample question ??

5. 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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?? Study question ??

6. A method of evaluating proposed capital investments that sums the installation, energy, maintenance, and replacement salvage costs is called?
- A. Net benefit or savings
 - B. Life cycle cost analysis
 - C. Internal rate of return
 - D. Savings-to-investment ratio



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?? Study question ??

6. A method of evaluating proposed capital investments that sums the installation, energy, maintenance, and replacement salvage costs is called?
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?? Study question ??

7. What information is most important in a charge-back system? (choose 2)
- A. Information needed to explain charges
 - B. Information on corporate standards and accounting principles
 - C. Information delineating causal relationships
 - D. Information that shows financial responsibility
 - E. Information that shows work responsibility



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Finance Learning Activity

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Competency 3: Human and Environmental Factors - p51

The Human & Environmental Factors competency has 2 main area's

1. Develop and implement practices that promote and protect health, safety, security, quality of work life, and the environment and organizational effectiveness
2. Develop and manage emergency preparedness procedures



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Human and Environmental Factors

Components of an Environmental Management Plan

- An environmental policy
- An environmental protection plan
- A monitoring and record keeping system
- Internal inspections
- Internal education and training
- Internal and external environmental reporting
- Environmental audits

Developing Environmentally Conscious Programs

How To Implement An Environmental Management Plan



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Human and Environmental Factors (continued)

How To Maintain A Cost Effective Work Environment

- Energy conservation
- Water conservation
- Recycling programs
- Purchasing
- Planning and design
- Sizing
- Energy use



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Human and Environmental Factors (continued)

Making Sure Your Facility Is In Compliance

Ongoing Compliance Monitoring

- Indoor air quality

Risk Management

Emergency Planning

- Developing an emergency preparedness plan
 - Step one: Evaluate and update current plans
 - Step two: Educate employees
 - Step three: Train employees



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Human and Environmental Factors (continued)

Disaster Planning

- Organization
- Contacts
- Communication
- Alarm procedures

Security Plan

- Personnel
- Working conditions
- Fire safety
- Key management
- Off-site storage
- Physical devices
- Policies and procedures

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Human and Environmental Factors (continued)

Safety Training

Evacuation Planning

- Objective
- Participants
- Communication
- When to evacuate
- Stages
- Evacuation signal
- Alarm
- Meeting point
- Information and instruction

Disaster Recovery

Due Diligence

CFM



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?? Sample questions ??

1. Many facility air conditioning units contain ozone depleting CFC refrigerants. EPA regulations:
 - A. Prohibit purchasing CFC refrigerants R12 and R22
 - B. Prohibit purchasing CFC refrigerants R11 and R21
 - C. Prohibit producing CFC refrigerants R11 and R12
 - D. Prohibit purchasing CFC refrigerants R11 and R22



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?? Sample questions ??

2. The category of OSHA fines that carry the highest penalties is:

- A. Serious
- B. Repeat
- C. Willful
- D. Fatal



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?? Sample questions ??

3. Ergonomics generally studies:

- A. Workplace comfort and efficiency
- B. Worker's interactions with each other
- C. Exercise and stress in the workplace
- D. Productivity related to stress



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?? Sample questions ??

4. What provisions of a disaster plan are most important?

Choose 3:

- A. Designation of back-up work sites
- B. Procedures for communication with external agencies
- C. Emergency internal communication procedures
- D. Procedures to minimize business losses
- E. Procedures to minimize harm and injury to staff and building occupants



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Human and Environmental Learning Activity

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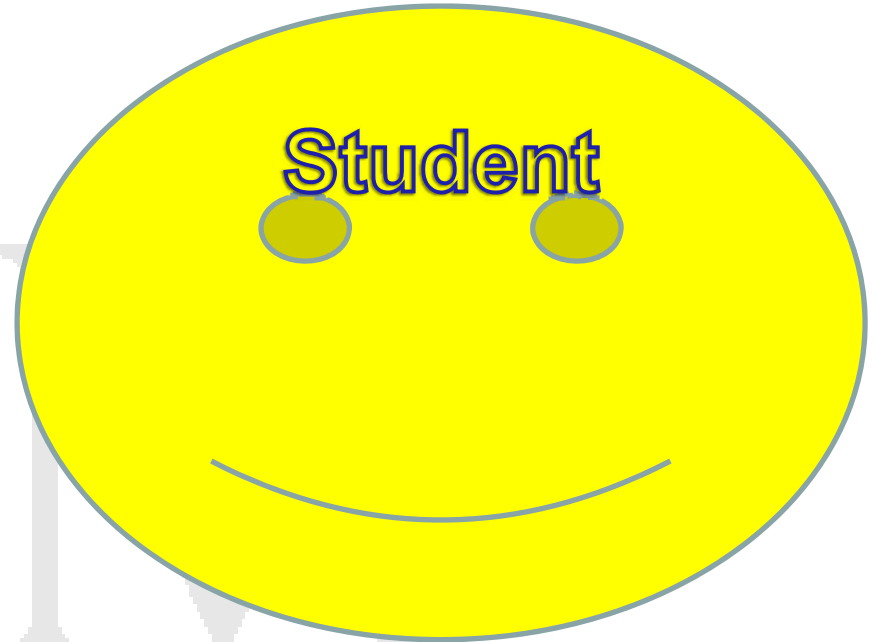




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Preparing for the Exam

- I. p116 glossary
- II. Rollups
- III. Sample exam questions w multiple answers
- IV. Mnemonics / memory pegs ex: PPBEE
- V. Time of day schedule





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**Thank you for participating
in the 13th CFM roundtable**

Watch the IFMA Orlando Website Calendar for the next roundtable schedule? Typically the first Tuesday of the month 11:30-1:00.

- **THANK YOU FOR FILLING OUT YOUR
EVALUATION FORM BEFORE LEAVING !**



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