

IFMA's World Workplace 2009 Conference & Expo

The  
**you**niversal  
Facility Management Experience





# The **BIG** Picture

- Facilities organizations are almost always a component of a larger host organization
- Some facilities organizations are not seen (or do not see themselves) as a critical player in the host organization
- It benefits the organization to see facilities as a partner...

Are we always seen that way?



# Partners:

- Position themselves to be valuable to the host organization
- Consistently demonstrate value to the host organization
- Are strategic and holistic in their thinking and in their actions
- Are generally consulted and considered in advance of decisions



# How can FM position itself to be seen as a partner?

- Strategic Plan
- Communication
- Linked plans
  - ◆ Leadership
  - ◆ Operational Plan
  - ◆ Training and development
    - \* Individual Development Plans
    - \* Partnerships
    - \* Internships





# ☑ Strategic Plan

- Build your Strategic Plan on a business model
- Align your Strategic Plan with the larger organization
- Benchmark processes up front and measure performance
- Link your plans and continuously use them
- Ensure the Facilities Strategic Plan has a positive impact on the larger organization's performance





# Strategic Plans

- Are not one size fits all - there are many ways to create Strategic Plans
- Require heavy involvement from staff – they are the most impacted and can have the most substantial impact on success
- Should be written in a way that is consistent with the organizational culture and practices
- Are active and adaptable





# A Solid Strategic Plan requires...

- People
- Policies
- Processes
- Performance
- Time
- Intellect
- Resources
- Imagination
- Organizational alignment
- Effort



# A good Strategic Plan is:

- the road map for organizational success
- flexible yet comprehensive
- imaginative
- communicated throughout the facilities organization
- communicated throughout the larger organization
- consistently acted on
- measurements - oriented





# Watch out for...

- Confusing, vague or too generic plan
- Unclear goals
- Lack of intellectual or organizational depth
- Inadequate integration with other plans
- Not referring to the plan
- Staff at all levels not using the plan
- Leadership behaving inconsistently with the plan



# Our Strategic Planning Process

- Team convened
- Focus groups conducted
- Surveys conducted
- Results of surveys and focus groups analyzed
- Goals were determined based on analysis

Goals → Objectives → Strategies → Tactics →  
→ Operations → Performance





# How long did it take?

- Began in August 2007
- Facilitator worked on focus groups and with senior staff off-site
- 18 focus groups
- All staff survey
- Much negotiation of the goals, strategies, objectives and tactics
- Released for review in February 2009
- Plan was published in April 2009



# What did it cost?

- One PO for the contractor to facilitate 18 focus groups and provide us with feedback from the groups, and
- One PO for the same contractor to facilitate a two-day offsite senior staff retreat
- Some slight publishing costs





# What's next?

- Plan has been rolled out and adopted
- At the two-day offsite, senior staff identified owners of strategies and tactics
- Each senior staff member has identified working groups and timelines for each activity under their responsibility
- Standardized reporting format developed for keeping all staff informed



# Structure of the Strategic Plan

- Identify key participants
- Determine the process to be used
- Conduct a SWOC analysis
- Establish a realistic timeline
- Utilize the baseline already in place
- Apply the process agreed upon
- Determine the goals using SMART acronym



# What is a SWOC analysis?

## Strengths:

Current organizational competencies, resources, assets and capabilities.

Things that are working for the organization.

## Weaknesses:

Gaps or weaknesses within the organization.

Things that are not working as well for the organization.

## Opportunities:

Areas where the organization might apply or leverage strengths or mitigate weaknesses.

## Challenges:

Things that may happen if weaknesses remain unaddressed.

Risks of not addressing weaknesses or opportunities.



# SMART goals

**S**pecific – easy to know the goal

**M**easurable – easy to know if you reached it

**A**chievable – unrealistic goals are prelude  
to failure

**R**ealistic – not everything is doable, so  
prioritization is important

**T**imeframe – gives goals structure and helps  
monitor progress





# Communication with stakeholders

You should seek multiple ways to know and understand stakeholders and their interests for their benefit and yours...

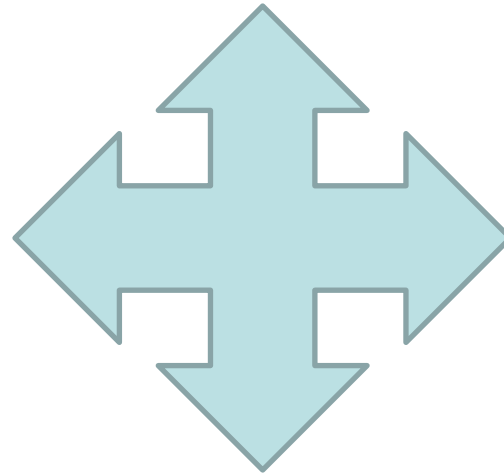
- Surveys
- Recurring meetings
- Formal partnering agreements
- Special events
- Annual reports





# ☑ Communication with staff

- Horizontal and vertical communication
- Standing meetings
- Town Hall forums
- Newsletters
- Walkabouts
- Public recognition for those working on the Strategic Plan and special initiatives
- Attitude should reflect expectation





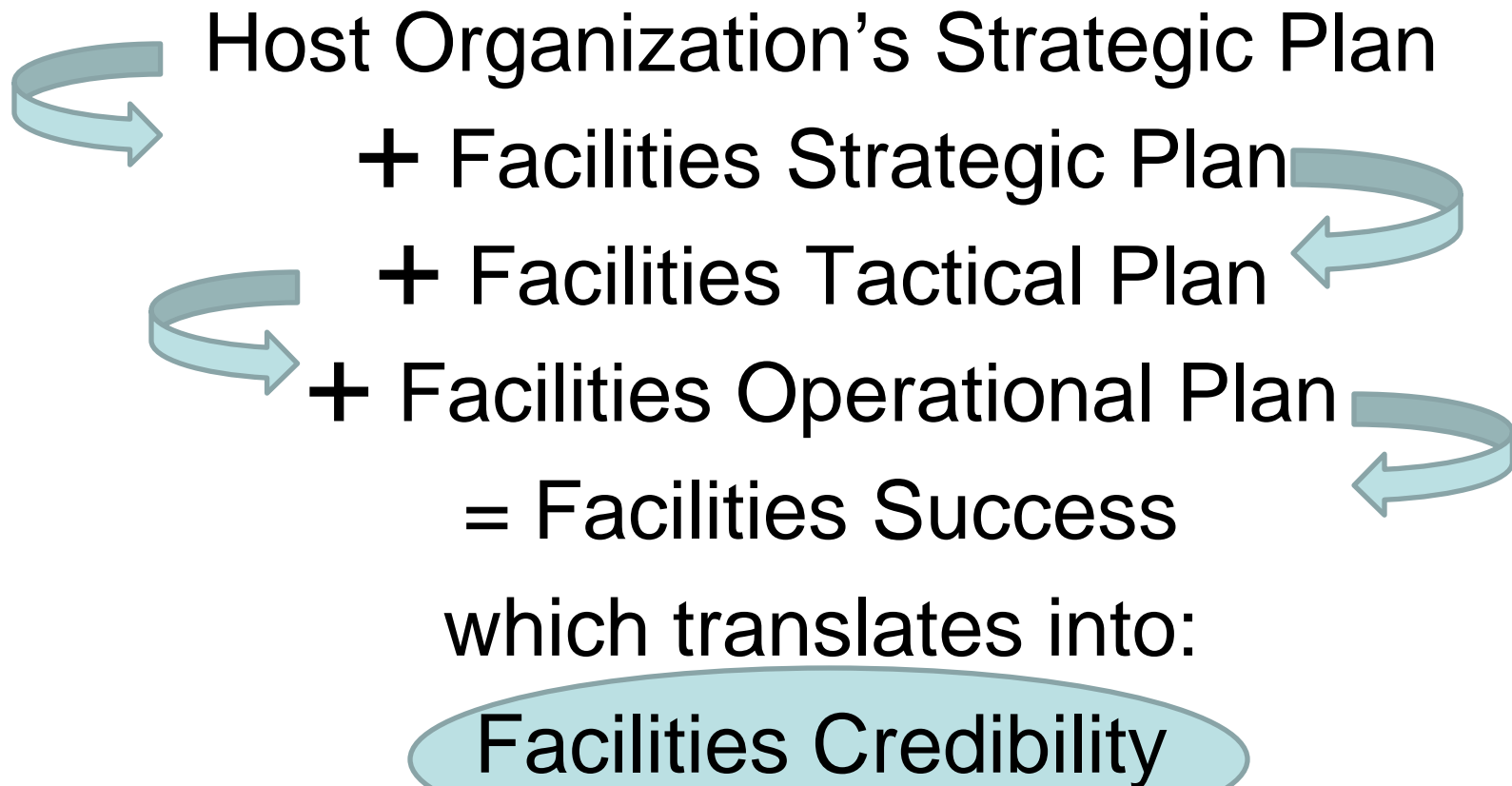
# Suggestions to facilitate success

- Senior leadership should meet off-site prior to proceeding to develop a Strategic Plan
- This gathering should be facilitated and well-planned (including follow-up steps)
- All levels of supervisors should have standing meetings with their staff
- Senior leadership should be the example of the way they want business conducted
- Consider implementing an intern program





# ☑ Linking Plans





# ☑ Leadership's Role

- Provide strong, adaptable leadership
- Understand and support training and development
- Invest in training so staff are current in their profession
- Always keep staff informed
- Ensure IDPs are in place for all staff
- Offer staff opportunities to work on projects or in different roles





# ☑ Benefits of an Operational Plan

- Helps supervisors be more effective in planning, prioritizing and executing work
- Links supervisor's daily workload to the larger organizational goals
- Smoother work execution controls cost, improves results and increases stakeholder satisfaction
- Satisfied stakeholders = Facilities credibility



# Determining training

- Identify the competencies and skills required to perform the work:
  - to serve as a baseline for current performance, and
  - to clearly identify the path for career development
- Provide staff with Individual Development Plans
- Develop partnerships with organizations that provide the identified important training
- Be open to unconventional opportunities
- Team with similar organizations to achieve economies of scale





# The to Training

Training should be viewed for the business **impact**, not for the cost or activity of someone attending.

Every person who attends training or any professional development activity should report to their peers about how they can apply what they learned to the organization.





# ☑ Individual Development Plans

- IDP establishes a baseline of knowledge
- IDP should be agreed upon by the employee and the supervisor
- IDP identifies path of professional development
- IDP should be based on organizational performance requirements
- IDP requires supervisors and employees to communicate in the moment ... **for the future**
- IDP can facilitate organizational partnerships





# ☑ Organizational Partnerships

Organizational partnerships are effective in focusing on training and organizational performance

- Assist in providing training for improved organizational performance
- Support the profession
- Support the employee
- Provide “state of the art” education
- Encourage professional credentials
- Impact the bottom line





# ☑ A Successful Internship Program

A Facility Management internship program has many organizational benefits:

- Fresh perspective on facilities work
- Knowledge of current trends
- Supplement current staff
- Current staff can mentor and teach
- Energize staff
- Accomplish projects





# Best Practices for Internships

Some ideas to ensure the success of a Facility Management Internship Program:

- ✓ A mentor to work with the intern
- ✓ A well defined project with associated benchmarks
- ✓ An orientation and treatment as a professional
- ✓ Mutual evaluations at mid-point and completion
- ✓ A product that reflects the work they performed
- ✓ A presentation to the Facilities staff is very useful
- ✓ Can partner with non-traditional programs



# ☑ The most important element

- ↳ Leadership is the strongest thread in organizational success
  - ↳ It is required for the process of envisioning, coordinating, adopting and executing strong organizational performance through a solid Strategic Plan
- ↳ An FM organization that performs well and is responsive, prepared, professional, tech-savvy and well-aligned with the host organization...





# ☑ The rest of the story

... will be seen as a key partner in the success of the business and be asked to participate in the development of the most strategic decisions of the host organization.

**That's CREDIBILITY!**



# Follow-on

- Questions
- Ideas
- Issues
- Challenges
- Successes
- Best practices to share



Thank you for attending...  
see you in *Atlanta!*

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