

IFMA's World Workplace  
**2009 Conference & Expo**

**itci** information technology council

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***Technology & It's Impact  
on IFMA's CFM Core Competencies  
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IFMA's World Workplace 2009 Conference & Expo  
The **you**iversal  
Facility Management Experience

Orange  
County  
Convention  
Center  
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Technology and its Impact on IFMA's CFM Competencies

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## Introduction

- Core Competencies
- Why we left off Tech Competencies
- Our approach to this presentation



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## Competencies Overview

- Operations and Maintenance
- Real Estate
- Human and Environmental Factors
- Planning and Project Management
- Leadership and Management
- Finance
- Quality Assessment and Innovation
- Communications



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## Technology and its Impact on IFMA's CFM Competencies

### Operations and Maintenance



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### Operations and Maintenance



Competency 1. Oversee acquisition, installation, operation, maintenance and disposition of building systems

#### **Performances**

- Assess a facility's need for building systems.
- Recommend building systems.
- Oversee the acquisition, installation, and operation of building systems.
- Recommend policies.
- Establish practices and procedures.
- Determine and administer the allocation of building systems' resources.
- Monitor and evaluate how well building systems perform.
- Manage corrective, preventive and predictive maintenance.
- Develop emergency procedures.
- Implement disaster recover plans.



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## Operations and Maintenance

Competency 2. Manage the maintenance of building structures and permanent interiors

**Performances**

- Evaluate building structures and permanent interiors.
- Manage the maintenance and cleaning needs of building structures and permanent interior elements.

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## Operations and Maintenance

Competency 3. Oversee acquisition, installation, operation, maintenance and disposal of furniture and equipment.

**Performances**

- Assess needs and oversee acquisitions.
- Recommend policies.
- Establish standards, practices and procedures.
- Evaluate furniture and equipment performance.
- Manage the maintenance and cleaning of furniture and equipment.

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## Operations and Maintenance

Competency 4. Oversee acquisition, installation, operation, maintenance and disposition of grounds and exterior elements.

### *Performances*

- Assess the effect of climate and extreme environmental conditions.
- Assess the need for alterations in grounds and exterior elements.
- Recommend policies.
- Establish standards, practices and procedures.
- Evaluate the performance of grounds and exterior elements.
- Manage the maintenance and custodial needs of grounds and exterior elements.



## Operations and Maintenance



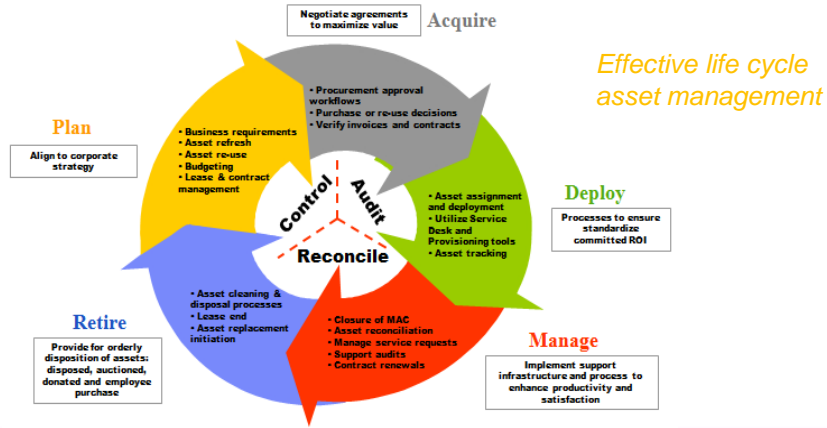
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# Operations and Maintenance



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# Real Estate



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## Real Estate

Competency 1. Manage and implement the real estate master planning process.

**Performances**

- Manage the development and implementation of a real estate master plan for the organization.
- Maintain the real estate master plan.
- Evaluate and recommend action on development decisions.

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## Real Estate

Competency 2 Manage real estate assets.

**Performances**

- Manage the acquisition and disposition of company leased and owned property.
- Evaluate and recommend action on development decisions.
- Direct highest and best use studies.
- Evaluate the effects of economic change on real estate assets.
- Evaluate the effects of proposed real estate changes on different business units.

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## Real Estate

Competency 2 Continued - Manage real estate assets.

### *Performances*

- Manage the real estate lease portfolio.
- Inventory, track and report real estate assets.
- Maintain real estate documents.
- Manage development support services for other functions.



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## Human & Environmental Factors



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## Human and Environmental Factors

Competency 1. Develop and implement practices that promote and protect health, safety, security, the quality of work life, the environment and organizational effectiveness.

### *Performances*

- Evaluate and manage the facility's support of organizational goals and objectives.
- Monitor changes in laws and regulations.
- Assure the facility and its operation comply with laws and regulations.
- Monitor and assure changes in the facility function and services.
- Monitor changes in the people who use and visit the facility.
- Monitor information and trends about human and environmental concerns.
- Provide training to maintain safe and effective use of the facility.
- Direct the development and administration of environmentally conscious programs.
- Conduct due diligence studies.



## Human and Environmental Factors

Competency 2. Develop and manage emergency preparedness procedures.

### *Performances*

- Develop emergency plans.
- Assure people are trained in emergency procedures.
- Assure all emergency systems and procedures are tested as planned.
- Assure emergency drills and conducted.
- Develop disaster recovery plans.



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## Planning & Project Management



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## Planning and Project Management



Competency 1. Develop facility plans.

### *Performances*

Interpret the overall business goals and the organizational strategies used to accomplish those goals.

Develop long-term, interim and short-term facility plans.

Maintain long-term, interim and short-term facility plans.


Evaluate long-term, interim and short-term facility plans.



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## Planning and Project Management

Competency 2. Plan and manage all phases of projects.

- Define the scope of the project.
- Identify the project team.
- Develop the project plan.
- Generate alternative strategies.
- Identify needed resources.
- Develop bid specifications.
- Set compliance and performance criteria.
- Secure necessary resources.
- Develop and coordinate the approval process.
- Coordinate project tasks.
- Monitor the project.
- Identify and evaluate changes.
- Control change orders.
- Evaluate the results of the project

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## Planning and Project Management

Competency 3. Manage programming and design.

***Performances***

- Manage the programming phase.
- Evaluate the adequacy of the program.
- Manage the design phase.
- Evaluate the design.

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## Planning and Project Management

Competency 4. Manage construction and relocations

### *Performances*

Manage construction projects.

Evaluate how well construction projects meet business goals.

Manage relocation projects.

Evaluate how well moves are performed.



## Leadership & Management



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## Leadership & Management

Competency 1. Plan and organize the facility function.

### *Performances*

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



## Leadership & Management

Competency 2. Manage personnel assigned to the facility function.

### *Performances*

- Plan staffing needs and requirements.
- Hire, contract, reassign, retrain, right-size.
- Coordinate personnel assignments.
- Coordinate work performed as contracted services.
- Evaluate performance.
- Support personnel development.
- Provide leadership



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## Leadership & Management

Competency 3. Administer the facility function.

### Performances

- Administer policies, procedures and practices.
- Administer the acquisition, distribution and use of materials
- Maintain documentation systems.

Competency 4. Manage the delivery of facility services.

### Performances

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



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## Finance



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## Finance

Competency 1. Manage the finances of the facility function

### *Performances*

- Analyze financial information.
- Manage chargeback systems.
- Prepare budgets.
- Manage the budget.
- Monitor revenues and expenditures to contain costs.
- Manage the financial obligations of the facility function.



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## Quality Assessment & Innovation




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## Quality Assessment & Innovation


Competency 1. Manage the process of assessing the quality of services and the facility's effectiveness.

**Performances**

- Assure customer surveys are conducted.
- Assure processes are documented.
- Select methods to collect data.
- Establish standards.
- Analyze data.
- Improve the facility and service delivery processes.
- Monitor and promote the quality process.

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## Quality Assessment & Innovation

Competency 2. Manage the benchmarking process.

**Performances**

- Establish benchmarks.
- Determine the potential for improved performance.
- Integrate findings into the facility management function and business goals.

Competency 3. Manage audit activities.

**Performances**

- Comply with laws and regulations.
- Conduct internal studies.
- Conduct mandatory audits as required by regulation.

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## Quality Assessment & Innovation



Competency 4. Manage developmental efforts of facility services to make innovative improvements in facilities and facility services.

### *Performances*

- Investigate ways to improve facility services.
- Assess risks and opportunities.
- Conduct pilot tests when developing new procedures.



## Communications



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## Communications



Competency 1. Communicate effectively.

### *Performances*

- Use effective communication strategies.
- Give directions.
- Actively clarify interpretations and confirm understanding.
- Make oral presentations.
- Actively listen.
- Present information visually.
- Communicate in writing.



## Communications



Competency 1. Continued, Communicate effectively.

### *Performances*

- Use communication technologies.
- Conduct effective meetings.
- Comprehend written and graphic information.
- Comprehend financial and technical information.
- Negotiate for services, resources, information and commitments.
- Establish personal and professional networks.



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## Questions & Answers



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 The Gartner Group - <http://www.gartner.com/technology/home.jsp>  
 Plant Services - <http://www.plantservices.com>  
 Review Centre - <http://www.reviewcentre.com>  
 Thomas - <http://www.thomasnet.com>  
 CNET - <http://download.cnet.com>  
 Top Ten Reviews - <http://project-management-software-review.toptenreviews.com/>

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