

FM



FM
Success
Starts
Here



PAGE 20

COMING THIS SPRING!

IFMA FACILITY FUSION

(PAGE 28)

When stepping into a new facility position—whether it's your first time managing the built environment or you're an experienced facility manager starting a new job—you want to hit the ground running. User requests, emergencies and budget issues won't wait, and your ability to quickly gather critical pieces of information will pave the way to a successful transition.

**Are all building drawings current?
When was the last modification?**

Building drawings are the lifeblood of the built environment and should be among the first pieces of information you gather. Knowing the location of electronic as well as hard copy files can save you valuable time later. Also, awareness of any out-of-date drawings could prevent an embarrassing or even dangerous mistake down the road. Learn who's responsible for modifying the drawings. If it's an outside source such as an architect, contact them to

FM Success Starts Here

JULIE KNUDSON

The following questions are designed to root out key information quickly so you can gain insight into the true scope of your new role, understand how best to work with other departments to meet your goals, and learn the ins and outs of how your new employer operates. Checking off each area on this list is a quick way to jumpstart your facility management career.

**This article won a
2010 Editors' Pick Award!**





introduce yourself and find out their fee structure for making changes. It's a good idea to batch changes when possible but if modifications are significant, it's better to bite the bullet and do them as soon as possible. While you're familiarizing yourself with the drawing files, use this opportunity to work with your team and the information technology (IT) group to determine how documents are stored and protected. Hard copies should be neatly stored in hanging or flat files built just for this purpose and electronic copies should be automatically backed up to an off-site location that can be accessed remotely. A variety of people—building inspectors, emergency responders and internal team members—rely on your drawings. Treat them as a vital part of your infrastructure from day one.

What are our current obligations and responsibilities?

Another top priority should be laying your hands on copies of all existing contracts, vendor lists and maintenance agreements. Before you tackle the challenges that are sure to come, you need to understand your current obligations. When evaluating opportunities to save money, there are a number of avenues to explore. How are costs impacted by consolidating services, leveraging buying levels, grouping individual site services under a national contract, or bringing currently outsourced services in-house? Your ability to reduce costs or modify service levels may be hampered by existing contracts, so getting the details early will help you set reasonable goals. This is also a good time to learn how negotiations and buying decisions are made, who is involved during major contract discussions and what help other departments can offer.

What's the status of disaster preparedness and recovery planning?

The importance of this function warrants a few follow-up questions: What are the responsibilities of my group? Has everyone received the proper training and tools to accom-

plish their assigned tasks? How frequently are preparedness drills run and who manages them? When an emergency strikes, you'll have no time for research. Find out now what planning is already in place and confirm that your team is ready to participate. You're also likely to be coordinating activities with other groups such as IT, human resources (HR) and the executive team. Read the minutes from past meetings to learn what planning has already been done. Determine the scope of your group's responsibilities during every sort of emergency and then discuss their understanding of what's expected of them. Be specific when asking about support tools or additional training they may require—such as handheld radios, passwords for remote access to building drawings, and operator training to view and control security cameras—anything that will be critical when assisting emergency responders or coordinating recovery activities. Once you have a good understanding of the current lay of the land, you'll be able to add any necessary training or equipment to your budget.

How are budgets created and expenditure levels communicated?

The budget process involves different mechanisms in every company. Learn how information such as monthly actuals and deviations are distributed, when reports and data are due, and what the finance department expects from you when it's time to formulate the budget for the next year. Sometimes the formal budget process doesn't resemble the real world, so tap the historical knowledge of your team. Are deadlines frequently changed? Is it common to go through multiple rounds of cuts and negotiations? Are expense and capital budgets formulated using the same methodology? Are there other groups in the company whose activities impact your budget? Staffing levels often affect space and other costs, so HR will be a critical partner. Data center heating, ventilating and air-conditioning costs may be impacted by new equipment or services—talk with IT to determine their plans. Also work with your team to understand past purchasing patterns, as this information will be help-



ful when identifying potential areas for cost control going forward. If your company relies on an intranet or other shared access point for disseminating information, test your login and password early to ensure that you are ready to go.

Where are specifications books, operations and maintenance manuals and standard operating procedures stored?

Quick access to these materials will be handy in a time crunch. Become familiar with the location and indexing of your group's documentation. Identify opportunities to use electronic reference material when possible—since space considerations, automatic updates and sharing information outside your group may make this format beneficial in the long run. For both electronic and hard copy documentation, be sure you understand who is responsible for adding to and maintaining the materials your group uses. If anything requires routine updating, put it on the de-

partment's calendar now. Establishing good document management practices up front will emphasize its importance to the rest of your team.

Are all preventive maintenance and other routine tasks up to date?

Knowing the current state of all preventive maintenance tasks and routine repairs or replacements is important when preparing your department's budget to cover services as well as equipment and spare parts. This information will also help you better understand your group's normal workload and may pinpoint areas for increased efficiency. Review data from any computerized maintenance management system or other system being used, and then talk with your technicians, engineers and operators. Ask if there are repair or maintenance tasks they routinely conduct that aren't included in the normal property management schedule for a particular piece of equipment. Is your team utilizing all the services included in equipment warranties or maintenance agreements? If you're spending too much time or money replacing and repairing items, involve the manufacturer to determine if everything is operating properly or investigate the feasibility of a replacement.

What are the terms of our current lease agreements?

A thorough review of existing lease agreements will show you potential opportunities for savings—through amending the terms of the lease, utilizing outside services your landlord is required to provide, or leveraging available tenant improvement dollars. You may also uncover responsibilities that have fallen off the radar of the executive group,

Information every FM should have

- Organizational chart for the entire company, including titles and/or pay grades.
- Chart of financial accounts to help you evaluate invoices for approval.
- Building drawings to establish where people, equipment and resources are located.
- Contact lists for your department, key executive team members and vendors.
- Emergency, evacuation and disaster recovery plans.
- Key control list(s) with key hierarchy.
- Budgets for current and previous years.
- Facility procedures. (If these don't exist in written form, work with your team to get the information out of their heads and on paper.)
- Contracts for all major vendors and critical building components.
- Job descriptions for all employees under your direction.
- Calendar of events if your company is event driven, such as a theatre or museum.

such as acting as a landlord for a small sub-tenant. Be sure to seek out lease agreements for all locations in your portfolio. Take the time to understand your options under the rights of first refusal. Now is also a good time to contact the landlord or property management company and introduce yourself as their new primary point of contact.

How is continuing education approved and budgeted?

Hopefully you inquired about the continuing education policy during the interview process. You may be subject to a waiting period, so find out how quickly you can get into the program. It's best to have a clear idea of which classes you want to take right away, then discuss course objectives and final goals with your supervisor. Be ready to demonstrate the direct benefit your additional skills and knowledge will bring to the company, in the event you encounter push-back during the initial discussions. With

continued budget cuts happening across the industry, there's a chance your employer won't approve some or all of your continuing education plan. You don't want to lose too much time during a transition from one employer to the next and having an action plan in place—and a contingency plan in the event you're required to pay for tuition yourself—will allow you to move forward as quickly as your new employer's policies and your own budget will allow.

When looking for answers to these questions, you're likely to find that much of the initial knowledge comes from your own team. Their experience and understanding of how things get done in your new organization is vital, so devote ample time to picking their brains. Other department leaders will be able to offer tips on navigating the budget process and the mechanics of sharing information internally. Human resources, your supervisor and members of the senior

staff can explain expectations surrounding goal setting, mentoring, performance monitoring and career development.

Throughout this process, you're likely to uncover a number of major projects in need of attention. If you find a significant amount of work needs to be done, it's time to dust off your triage skills. Note which areas have outstanding action items and then prioritize those tasks based on urgency and availability of resources. By establishing clear and realistic goals, you'll position yourself and your team for success. **FMJ**



Julie Knudson has more than 15 years of experience managing a multi-facility environment. She previously served on the board for the Seattle Chapter of IFMA. Knudson is principal at Olympic Bay Management where she consults on select projects and uses her owner-side experience to advise industry vendors on ways to create better relationships with facility managers. She may be contacted at +1-425-374-4664 or julie@olympicbay.com.

LET IFMA DELIVER THE JOBS TO YOU!

Set up a personal Job Alert today on IFMA's JOBnet search engine.

Make sure you don't miss out on a new opportunity!
 You can also search jobs and post or create résumés.
 Let IFMA provide you with the resources you need to land your dream job.

Log on today! jobnet.ifma.org