



Greater Orlando IFMA Chapter CFM Roundtable

Welcome to the 8th CFM roundtable
presented by

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Special thanks to our host TAMI BERRY of SPRINT



Greater Orlando IFMA Chapter CFM Roundtable

Welcome to the eighth CFM roundtable presented by
The Greater Orlando IFMA Chapter. Today's facilitator:

**Geoff Allen, CFM, President, IFMA Orlando
Office Manager - Glatting Jackson Kercher Anglin, Inc.**

CFM



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TODAY'S OBJECTIVES

- Overview of the new exam format and study guide.
- Critical thinking review
- Leadership and Management review
- Sample exam questions
- Questions and discussion



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**New CFM Exam Review Course Manual –
accompanying Workbook and self-study guide
\$199 online at www.ifma.org/learning**

This document was developed to provide potential candidates with an overview of the CFM exam. It will give readers useful information regarding what to expect on the exam; however, it was not created to serve as a detailed study source. Review of this document will in no way guarantee that the reader will pass the CFM exam.



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Other ways to prepare for the exam

- **CFM 54 question self-assessment test \$39.95**
- **CFM Exam review course April 28/29 Denver**
- **Wait for Orlando's exam review (est June)**



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Chapter 1: Critical thinking

Why does it matter?

In IFMA's 2007 Current trends and Future Outlook for FM professionals, the #1 trend is Linking facility management to the business strategy.



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Chapter 1: Critical thinking

Critical thinking focuses on reframing issues so that the right problems are addressed, distinguishing systematic patterns from random events, and identifying acceptable risks in alternative decisions. In this chapter, you will learn how to make better decisions within group or department settings, recognizing the more network-oriented and decentralized organizational structures of today's companies.



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Chapter 1: Critical Thinking

Systems thinking: From single issues to Complexity

Systems thinking requires us to see big, whole pictures. Most people find systems thinking to be extremely difficult, for several reasons.



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Chapter 1: Critical Thinking

Systems thinking: From single issues to Complexity

Systems thinking is complex, involves gathering lots of data and synthesizing it. Most people find that their brains ultimately hit overload.



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Chapter 1: Critical Thinking

Systems thinking: From single issues to Complexity

Systems thought is often expressed in sets of differential equations, which most people find difficult to comprehend.



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Chapter 1: Critical Thinking

Systems thinking: From single issues to Complexity

While systems thinking is non-linear (it goes around and around), most people value thinking “straight.”



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Chapter 1: Critical Thinking

Systems thinking: From single issues to Complexity

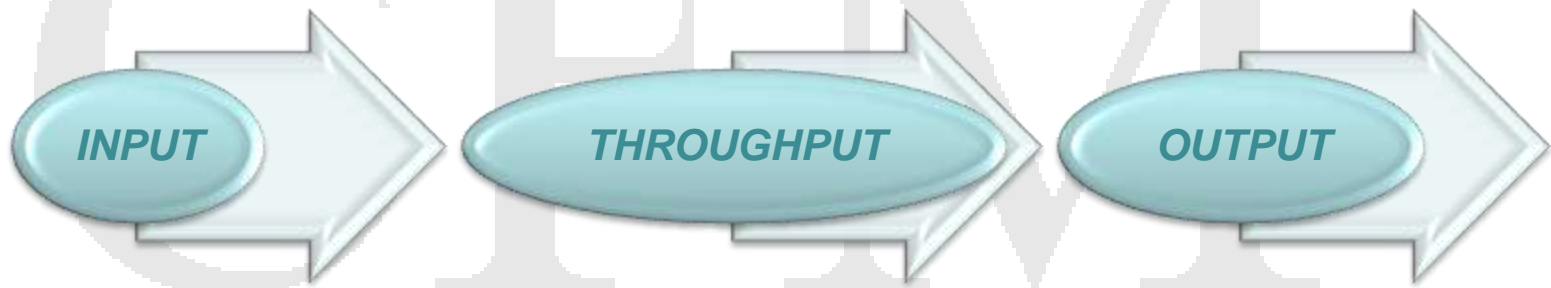
We tend to like simple, single explanations. “just give me the bottom line!” Systems, on the other hand, perversely taunt us with the assertion that there is almost never just one cause for any result; results of systems stem from the interaction of multiple causes.



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Chapter 1: Critical Thinking

System Thinking Simplified: General systems theory - Cyclical concept



Requests for service

Work orders
Maintenance workers
Tools
Supplies

Repairs
Customer satisfaction

EXAMPLE OF A WORK ORDER SYSTEM CYCLE



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Chapter 1: Critical Thinking

FM as a system: "Do what it takes" approach to FM



Competencies:

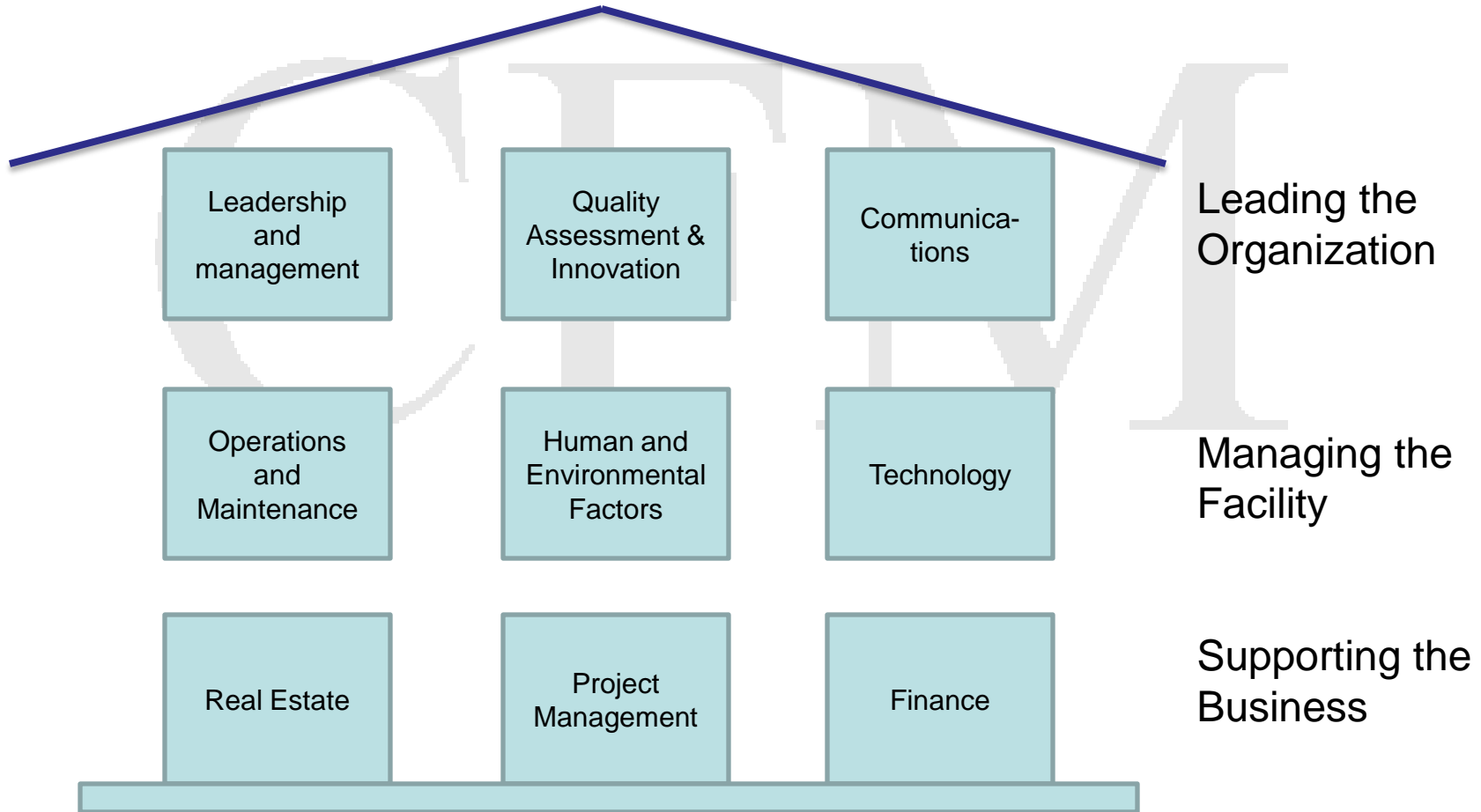
- Communication
- Finance
- Human and Environmental Management
- Leadership and Management
- Operations and maintenance
- Planning and Project Management
- Quality and innovation
- Real Estate
- Technology



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Chapter 1: Critical Thinking

FM as a system: Building Metaphor for FM





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Chapter 1: Critical Thinking Examples

▪ **Business issues:** We must understand not only our business, but, in detail, how we affect the company / agency that we support. We must know the language of business and be able to use capital budget evaluation tools.

▪ **The cost of ownership:** There are initial and ongoing costs of facility ownership. Management must understand and provide for those costs throughout the life of the facility.

▪ **Life-cycle costing:** As a general rule, all economic analyses and comparisons should be based on life-cycle costs. Considering only capital or initial costs often generates comparisons leading to bad decisions.

▪ **Integration of services:** Consider one example: Interior illumination design may be based solely on appearance and violate the principals of a good energy management program simply because no one bothered to integrate the two services of design and operations.

▪ **Design for operations and maintenance:** Operators and maintainers, even if they are contractors, must be actively involved in the design review process.



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Chapter 1: Critical Thinking Examples

▪ **Responsibility:** Facility Management functions should be grouped with budget programs with a manager responsible and accountable for each.

▪ **Cost-effectiveness:** The key is to properly identify and compare costs; the comparison must be made over time.

▪ **Constant efficiency improvement:** Efficiency should be judged through benchmarking, user feedback, and through close contact with the customer (building occupant).

▪ **In-house vs. Outsourcing:** There is, and will continue to be, strong support for contracting out facility management services. Each facility manager should have clearly defined in his or her own mind what functions must be controlled in-house. The manager must be willing to fight for the resources to perform those functions. Those functions are generally managerial, not technical, in nature.

▪ **Quality of life:** The facility manager must actively promote and protect the quality of life of the company's employees. A safe and healthy workplace is the minimum; a workplace where the facility promotes individual and group productivity should be the goal.



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Chapter 1: Critical Thinking Summary

SUMMARY

As you work your way through this manual, you will see lots of material about the broad range of things a facility manager is expected to know about their job and their profession. If you keep all of these concepts in the framework of an FM system, you will be able to dispel a lot of the confusion and instill order to the nine core competencies. Ultimately, you will be able to grasp those ever-important roll-up concepts that will lead you to the designation of Certified Facility Manager.



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Chapter 3: Leadership and Management

Key Concepts: A competent fm should have a general understanding and a working knowledge of the following:

- **Aligning the FM Function with Customers**
- **The facility manager as Leader**
- **Leadership & Management Tools and Techniques**



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Chapter 3: Leadership and Management

OVERVIEW: The facility manager is a planner, organizer, leader, coordinator, and evaluator. Fundamental management skills are required in the day-to-day activities of the facility manager.



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Leadership and Management Sample questions ?

- 9. A building occupant has directed a complaint to the CEO about poor ventilation and lighting. The CEO has asked you to respond directly to the occupant by the next business day. How would you respond and what mode of communication would you use?**
- A. Have your building mechanic evaluate the ventilation against ASHRAE standards**
 - B. Hire a lighting consultant to take light meter readings**
 - C. Develop a plan to investigate the problems and outline the appropriate steps in a written memo**
 - D. Ask one of your staff members to visit the individual immediately**



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Leadership and Management Sample questions ?

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Leadership and Management sample questions

- 10. Which of the following represent a typical visions statement? (choose 2)**
- A. Facilities management will be the premier facilities department in the state.**
 - B. To provide our facility function customers with total confidence in our FM solutions and to treat all employees with fairness and dignity.**
 - C. Facilities management will be an organization which meets customer expectations 100% of the time and the most desirable facilities management organization in which to work in state government.**
 - D. Facilities management will provide safe, clean, comfortable and well lit facilities to ensure the University's success.**
 - E. The Division of facilities management is a customer-driven support organization responsible for providing facilities management services to all agencies and offices, within available resources.**



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Leadership and Management sample questions

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Leadership and Management sample questions

11. All of the following explain the benefits of outsourcing, except?
- A. Less oversight and management necessary
 - B. Better access to specific technical skills and expertise
 - C. Reduced costs
 - D. Simplified personnel decisions



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Leadership and Management sample questions

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Leadership and Management sample questions

12. The skills necessary to be a successful facility manager in today's world are (choose 2).

- A. Care taker
- B. Policy writer
- C. Business leadership
- D. Operator
- E. Public relations



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Leadership and Management sample questions

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Leadership and Management sample questions

- 13. You just received the results of a customer service survey that indicates that your services do not meet your customers expectations. You call a staff meeting to describe the results of the survey and to discuss and improvement plan. What is the most important thing you can do to ensure that your staff aids in improving the delivery of service?**
- A. Come to the meeting with the improvement plan outlined**
 - B. Hire staff to clean up the backlog**
 - C. Ask for ideas from staff on how to improve the services and develop an improvement plan with them**
 - D. Set targets for staff to meet to ensure all services will be delivered on time and on budget**



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Leadership and Management sample questions

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Leadership and Management sample questions

14. Three keys to successful management include (choose 3):

- A. Onward and upward
- B. Plan your strategy
- C. Monitor results
- D. Don't think just do
- E. Review progress



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Leadership and Management sample questions

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Leadership and Management sample questions

15. The three highest levels of leadership influence are achieved when people follow because:

- A. ...they have to**
- B. ...they want to**
- C. ...of what you have done for the organization**
- D. ...what you have done for them**
- E. ...who you are and what you represent**



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Leadership and Management sample questions

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Leadership & Management Group Learning Activity 2-4:

List 5 FM services that would be the most efficient and economical to outsource. Explain why.

- 1.
- 2.
- 3.
- 4.
- 5.

List 3 services you would want to keep in-house and what the primary reasons are to do so.

- 1.
- 2.
- 3.



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Leadership and Management sample questions

Individual Learning Activity 2-5:

List your organizations vision and mission statements.

Describe how your facility management group is aligned with that vision and mission.



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Leadership & Management Individual Activity 2-2:

List one leadership attribute that a facility manager needs to be an effective leader for each competency.

Operations and maintenance

Leadership and management

Human and environmental factors

Planning & project management

Real estate

Finance

Quality Assessment and Innovation

Communications

Technology



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Questions and discussion

NEXT TIME
Operations and Maintenance
&
Real Estate

Tuesday, April 1 11:30 – 1:00



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Thank you for participating in the 7th CFM roundtable

Our next roundtable will be Tuesday April 1 11:30 – 1:00

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