Your company has requested that you explore and evaluate outsourcing some or all Facilities Management functions. This is obviously a sensitive issue, yet you need to respond professionally and thoroughly to the request. What is your plan of action for developing this assessment? Have you been faced with this issue before? If so, how was it handled, and what were the long term results and success?

- Speak to colleagues with similar situations and obtain a consensus.
- NCR had a similar situation in that they were consolidating multiple sites. They used information from other companies to create a consensus. They also provided good incentives to employees for rehire. After outsourcing they were able to “In-source” and address their specialized needs with previous employees.
- Only addressed the need for janitorial and used JLL as a resource. Communication was key when made the changes to avoid animosity, but some still found the transition difficult.
- As a vendor, her experience was very complicated from a sensitivity stand point.
- As the head of the SD Unified School District, their functions can’t be outsourced due to the overwhelming demand.
- Partnered with a firm that could cover all bases especially for tracking. They retained their staff and invested in solution software.
- Difficult as a defense contractor due to security. Outsourcing is possible, but it would create additional in-house resources just to escort. Compile a list of items that don’t require a clearance such as landscaping.
- What not to do – Let HR show up and just let everyone know
- Talk openly about change to help deal with anxiety
- Have senior management coach staff on the benefits
- Explain the benefits of the outsourcing measure
Your company is contemplating a restack and remodel intended to attract and support young professionals, who prefer a more open and collaborative workspace. However, your current staffing is primarily seasoned employees who want private offices. You are in charge of managing this project. How do you lead a successful outcome?

- Use furniture "mock-ups" to help staff understand the value
- Rely on vendors to create strategy and design
- Explain benefits of the environment
- Spin the bottom line cost savings to the staff
- Have open forum discussions with staff and get input from them
- Use case studies to explain other companies' success stories
- Build consensus in that these changes align with the company vision for the future

You have been requested to devise a plan to introduce more technology into the FM workplace in 2012. What technology solutions are you entertaining, and what is your implementation plan?

- Create a business case to show how an effective work order system can actually save time...time is money.
- Partner with IT for their expertise.
- Ensure systems can communicate with existing systems, prior to purchase/implementation.
- Check your work orders for trends that may provide some ideas on priorities and or problem areas that need to be addressed.
- Be sure to work with “FACTS” and not just people’s opinions and biases
- Consider a software system that can make this chore easier and more accurate each and every year you have to go through the process.
- Spoke about CAFM programs, implementation is tougher on smaller companies that have not done it before yet larger companies have a vision and have used other software in the past
- Spoke about using Tablets and how it helps Facilities staff
- Spoke about 1-3 year ROI on Systems offered, most times align with lease agreement
- Did not speak about implementation
- All FMs have handheld units to address service tickets.
- Consider offsite data storage
- Identify if a RFP/RFQ would be beneficial
- Rank technology for your company’s priorities. Know your company culture and business needs.
Your company spends a great deal of money on providing kitchen supplies to employees, such as plastic utensils; paper plates, bowls, and cups; paper towels, napkins, etc. Although your company provides recycling services, there is concern about both the expense and waste associated with these products. It’s your responsibility to identify solutions and successfully implement the solution.

- Educate employees on using plastics vs. washable materials
- Provide reusable logo cups to employees
- Communicate/educate on recycling and sustainability efforts

Crime is on the rise in your company’s neighborhood and you’ve been charged with exploring Crime Prevention Through Environmental Design (CPTED). What are the strategies that you will implement to reduce crime, reduce the fear of crime and improve the overall quality of life at your workplace?

- Ensure crime is really the root of the problem by meeting with the police department to review crime maps (by type, frequency & location).
- Partner with neighboring companies to share in the cost of roving security patrols.
- Examine location of parking lots, lighting and landscaping.
You manage multiple buildings of varying sizes, ages, and conditions. You need to develop a Capital Improvements Plan for both scheduling and budgeting purposes. How do you go about assessing the condition of your buildings (you may not have expertise in all areas), prioritizing needs and making a recommendation for budget?

- Align your improvements with business plan of organization (Growth – Contraction of staff – Labs)
- Look at age of buildings
- Then Density
- Higher value items such as roofing and HVAC
- Which buildings are safer than others
- Create a timeline
- Life and safety issues always take priority
- Read building lease if the building is not owned by you.
- Identify what needs to be “maintained” and who (i.e. Landlord, building owner/Property Manager, Company, Department, etc.) has what responsibilities.
- Check past budgets to see what has and has not been budgeted for in the past.
- Meet with Landlord and or Property Manager to see what their thoughts and ideas are for the building(s).
- Meet with Department Heads in your Company to see what they want to be sure is in the budget
- Develop and or update an inventory of all the items that will require a budget,(including but not limited to: the description and condition of every inventory item) in the future and prioritize the list.
- Check with IFMA International to see if they have a template you can use as a starting point to build your own.
- Identify the status of all properties so that you do not spend money updating or improving something that will not be an asset long enough to justify the expenditure.
- Get help from SDG&E who may be able to provide engineering information or information regarding rebates and other discounts. They may even be able to assist with where to find good companies to bid on projects.
You’ve been working with a broker on the lease of a new space and are very close to sealing the deal, but there is an unreasonable expectation regarding the time to obtain permit, which doesn’t take into consideration your company’s internal processes. The leasing party wants to build in a penalty for not obtaining permit by a certain date. How do you assert your position and prevent unrealistic expectation without killing the deal?

- If a good deal can be made then move forward or wait a month before proceeding. Negotiate more time and request the owner be fair with in the negotiations.
- Don’t have a sole source of where you’re going. Have multiple options to choose from so you won’t be trapped into one deal.
- Since the current market is so flooded, don’t consider penalties that will increase or exceed your budget. Force them to provide the best deal possible considering the buyer/lease has all the leverage.
- A lot can be done prior to a permit approval. Complete as much as possible without breaking city codes and being penalized. Demo work, rough-ins with drywall, electrical and plumbing can all be done prior to receiving a permit.

You are charged with implementing more technology focused efficiencies in your department, but you have a predominantly seasoned team who is balking at technology as a solution in today’s FM environment. What is your strategy for gaining acceptance of this technology, and ensuring that utilization is high?

- Tablets are ideal for field data collection. It is fast, efficient, and easy to use even for those who are not technologically literate.
- Try using applications through smartphones to record data. This will give your employees a chance to learn about the technology today with a device they use daily.
- Microsoft Lync through your smartphone or tablet allows users to instant message other employees and connect to conference calls wherever you might be.