



INTRODUCTION:

The objective of this BPM audit program is to demonstrate a process of identifying specific business functions associated with a company's core business services and or products and identify a series of questions related to service deliverables to establish a performance benchmark and future management action plans.

Applying business process management (**BPM**), which is a method of efficiently aligning an organization with the wants and needs of clients. BPM is a holistic management approach that promotes business effectiveness and efficiency while striving for innovation, flexibility and integration with technology. As organizations strive for attainment of their objectives, BPM attempts to continuously improve processes - the process to define, measure and improve your processes – a 'process optimization' process. The following audit process can be adapted for any business type, simply identify the functional areas and then establish the performance questions.

TABLE OF CONTENTS

- A.** Organizational Structure
- B.** Maintenance & Operations / Elevator: Questions for Plant Operations & Maintenance Manager / Other Maintenance & Operations Issues - Questions for Plant Operations & Maintenance Manager
- C.** Contracts / Questions for Facility Manager / Security / Janitorial / Grounds
- D.** Energy
- E.** Waste Management
- F.** Tax & Insurance
- G.** Finance & Reporting
- H.** Project Management
- I.** Regulatory Compliance
- J.** Quality/Training Programs
- K.** Facility Planning
- L.** Questions for Department Head



Column 1
Questions for Client Staff

Column 2
Guide to Recommendations

A. Organizational Structure

Questions for Facility Manager

1. What facilities does your organization manage?	1. Is the organization leveraging resources from or to nearby locations?
2. Do job descriptions exist?	2. Determine if different from the work performed.
3. Are any departments unionized?	3. Union status impacts degree of recommendations.
4. What services are contracted?	4. Determine if they are fully utilizing contractors: security, janitorial, windows, grounds, building operations, etc.
5. What is overtime as a percentage of total work hours?	5. Too much overtime is too expensive. No overtime indicates underutilized staff.
6. Review labor agreements, if any exist.	6.

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Column 1
Questions for Client Staff

Column 2
Guide to Recommendations

B. Maintenance & Operations

Work Order System: Questions for Plant Operations & Maintenance Manager

1. Do you have a work order system? Name? What is included: maintenance, moves, utilities, security, and housekeeping?	1. Work order system essential for productive staff.
2. Is there an automated Preventive Maintenance System in place?	2. Access system performance and operating expenditure.
3. What is included in PM System? Group relamping, steam trap program, roof needs, asbestos locations & abatements, etc.	3. Determine if PM system is being used optimally.
4. What is percentage of PM work to reactive work?	4. Optimally, PM work accounts for 40-50% of total work hour time - highest staff productivity.
5. Who receives customer service calls (maintenance, utility, moves, etc.)? Who generates work order? Who generates PM work? Who inputs to system? How often is the system updated?	5. These duties can be consolidated for most efficiency.
6. Do you have a scheduler / planner?	6.
7. How are dispatches made? Beeper? Beeper w/message? Radio?	7. Radio is effective means of communication.
8. Is there trouble call follow-up?	8. How does Facilities determine customer is satisfied?
9. Does a work order/trouble ticket analysis system exist? If so, are PM routines adjusted on the analysis?	9. Work order system analysis and staff adjustment ensures highest staff productivity based on unique facility needs.



**Column 1
Questions for Client Staff**

**Column 2
Guide to Recommendations**

Elevator: Questions for Plant Operations & Maintenance Manager

1. Understand elevator configuration.	1.
2. Discuss elevator performance in quantitative and qualitative form. Review trouble call logs.	2. Determine degree of elevator problems.
3. Review elevator maintenance agreement. Compare with service provided.	3.
4. Verify payment of invoices conform to contract.	4.

Other Maintenance & Operations Issues - Questions for Plant Operations & Maintenance Manager

1. Are maintenance and operations performed in-house or are they outsourced?	1.
2. Have maintenance and operations costs been benchmarked to the external market? When? How often?	2. Benchmarking every X years to determine if costs are competitive.
3. Do national contracts for supplies exist? If so, are they being utilized?	3.
4. Are building inspections being performed on a systematic and regular basis? How often? Who conducts? Are deficiencies noted and added to work order / PM system? Are capital costs projects identified and planned based on inspections?	4. Inspections should be conducted regularly using standard checklist. Facilities staff should leverage security and janitorial staff can be trained to conduct inspections of general facility issues - can increase productivity of Facilities staff significantly while improving quality. Including inspections as part of systematic work order scheduling and capital project budgeting will improve planning and increase productivity.
5. Specialized functions provided by the FM group: Are there any 24 hour, 7 day operational requirements (e.g. data space cooling)? Is maintenance responsible for moves? Is waste water treatment performed at the facility? Is there a cogeneration plant?	5. If yes, this may explain higher staff costs or need for building automation.
6. Does the facility have asbestos? PMPCS? Previous environmental reports?	6. Review any reports and update project information accordingly.



**Column 1
Questions for Client Staff**

**Column 2
Guide to Recommendations**

7. Is there a user chargeback system for demand-sensitive activities?	7. Putting more accountability on user can help control costs.
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Questions for Maintenance Mechanic

This is not an interview to determine an individual's specific qualifications or performance capabilities for a job with MPCS. Instead, it should be used to determine if the overall labor force composition matches the facility requirements. As a precautionary note, be clear with the interviewee that this is not an interview for a job, but a part of the facility assessment. Try to obtain as much pertinent information from the employee as possible, give ample time for full answers.

1. What are your key responsibilities?	Are personnel being closely managed? Are skill levels being used wisely?
2. How do your official responsibilities correspond to your actual responsibilities?	Do employee functions overlap? Do employees seem to be productive?
3. What is a typical day like? (scheduled work, customer calls, downtime)	
4. With whom do you typically interface on a daily basis?	
5. What type of meetings do you attend?	
6. In your day to day role, what areas of improvement could you suggest?	
7. What cross-training have you received? What training would you like to have?	



**Column 1
Questions for Client Staff**

**Column 2
Guide to Recommendations**

C. Contracts

Questions for Facility Manager

1. Do you have a standard bid process? Is the process administered at the facility level or multi-location?	1.																																																												
2. Are standard specifications utilized? Do you use internally developed specifications or contractor developed specifications?	2. Internally developed specifications provide more control over contract.																																																												
3. Are service contracts grouped for multiple location volume discounts?	3.																																																												
4. Examine specifications for clarity, completeness, scope, insurance/indemnification, termination and basis for price.	4.																																																												
5. How often are contracts rebid?	5. Periodic rebidding is essential for negotiating low rates.																																																												
6. What controls in place to ensure work is being performed to contract specifications.	6.																																																												
7. Are payments being made for work that should be covered by the contract?	7.																																																												
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Column 1
Questions for Client Staff

Column 2
Guide to Recommendations

>Duck/sheet metal fab	_____	_____	_____	
>Air balancing	_____	_____	_____	
>Exhaust hood certification	_____	_____	_____	
>Hepa filtration/DOP test	_____	_____	_____	
Elevators	_____	_____	_____	
Window washing	_____	_____	_____	
Pest control	_____	_____	_____	
Recycling	_____	_____	_____	
Building automation system	_____	_____	_____	
Snow removal	_____	_____	_____	
Fire systems	_____	_____	_____	
>Extinguishers	_____	_____	_____	
>Kitchen/hood systems	_____	_____	_____	
Relamping	_____	_____	_____	
>Group	_____	_____	_____	
>Spot	_____	_____	_____	
Parking garage	_____	_____	_____	
Paving/seal coating	_____	_____	_____	
Environmental services	_____	_____	_____	
Carpentry	_____	_____	_____	
Masonry	_____	_____	_____	
Machine shop	_____	_____	_____	
Plumbing/piping	_____	_____	_____	
Roof maintenance	_____	_____	_____	
Vehicle maintenance	_____	_____	_____	
Card readers	_____	_____	_____	
Alarms, doors, fire	_____	_____	_____	
Other	_____	_____	_____	

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Column 1
Questions for Client Staff

Column 2
Guide to Recommendations

Contracts: Security

1. What are security requirements?	1. Identify security strategy, special security needs.
2. Review security contract and compare to existing practice.	2.
3. Benchmark security costs to market.	3.
4. Who supervises the guards?	4.
5. What are the ranks of the guards?	5. Company should not be paying for too many high-level guards. Avoid rank creep.
6. Are extra guard hours charged back to cost causer?	6. Controlling costs will be easier because user will be more thoughtful about needs.
7. Is there a guard at the loading dock? What mailroom personnel work at the loading dock?	7. Reduce headcount by eliminating cross-training one person.
8. Is automation being utilized? For what purpose?	8. Determine if automation serve purpose.
9. How many facility entrances (non-emergency) are there? Are these controlled by guard, key card access, or other means?	9. Indicates security profile. Match security objectives to security strategy.
10. Verify payment invoices conform to contracts.	10.
11. Are guard hours comparable to the local market? Are hourly rates comparable to the local market?	11.



**Column 1
Questions for Client Staff**

**Column 2
Guide to Recommendations**

Contracts: Janitorial

<p>1. Understand janitorial cost components. If contracted, are cleaning equipment and cleaning/paper supplies included?</p>	<p>1. Be careful about benchmarking apples to apples.</p>																																	
<p>2. Identify the following for janitorial employees performing and/or managing services work. General cleaners (janitors, matrons, maids) do only cleaning tasks, while handy persons (porters) do other work (deliver packages, hang pictures, etc.) in addition to cleaning chores.</p> <table border="0"> <thead> <tr> <th style="text-align: left;"><u>Title</u></th> <th style="text-align: center;"><u># staff</u></th> <th style="text-align: center;"><u>total # hours/week</u></th> </tr> </thead> <tbody> <tr> <td colspan="3"><i>Day</i></td> </tr> <tr> <td>General Cleaners</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Handy Persons</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Group Leaders</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Supervisors</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td colspan="3"><i>Night</i></td> </tr> <tr> <td>General Cleaners</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Handy Persons</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Group Leaders</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Supervisors</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> </tbody> </table>	<u>Title</u>	<u># staff</u>	<u>total # hours/week</u>	<i>Day</i>			General Cleaners	_____	_____	Handy Persons	_____	_____	Group Leaders	_____	_____	Supervisors	_____	_____	<i>Night</i>			General Cleaners	_____	_____	Handy Persons	_____	_____	Group Leaders	_____	_____	Supervisors	_____	_____	<p>2. To be used in benchmarking.</p>
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<p>3. What is the cleanable square feet? (%carpeted, quarry/tile, resilient covered, wood, concrete, asphalt paved.)</p>	<p>3. To be used in benchmarking.</p>																																	
<p>4. Is cleaning rate established based on cleanable SF?</p>	<p>4. Need for benchmarking.</p>																																	
<p>5. Are vacant spaces cleaned? If contracted, does contract contain a vacancy credit clause?</p>	<p>5. Control costs by adjusting specifications to needs.</p>																																	



**Column 1
Questions for Client Staff**

**Column 2
Guide to Recommendations**

6. Is the cleaning crew scheduled on 4-hour or 8-hour shift?	6. Consolidating cleaning to 4 hours, using larger staff, will reduce utility costs because can turn off lighting for additional 4 hours.
7. What are cleaning specifications? What are specifications for each type of space: office, common areas, bathrooms, warehouse, etc? What is frequency of cleaning? How often are office waste baskets emptied? Is the facility multi-shift, which would drive up cleaning frequency?	7. Cleaning costs can be reduced by limiting full cleaning, such as office waste emptying, to 3 times per week.
8. Are special cleaning services included, such as carpet cleaning, floor waxing, etc.? How frequently?	8.
9. Based on walk-through tour, what is quality of cleaning?	9.
10. Understand other miscellaneous house services: pest control, interior plants, window washing, etc. Benchmark prices to market.	10.
11. How many interior live plants? How many varieties?	11. Look for ways to reduce number of live plants - some could be replaced with silk.

Contracts: Grounds

1. Understand what services are provided in-house, what services are contracted: landscaping, bulb replacement, parking lot sweep, snow removal, irrigation, etc. Benchmark to market prices.	1. Are activities consolidated under one manager? Are prices competitive to market benchmark?
2. What is the intensity of landscaping? How does it compare to surrounding market?	2. Look for ways to reduce amount of manicured lawn, especially as compared to market.
3. Does the landscaper bag clippings?	3. It may be more cost effective to mulch.



Column 1
Questions for Client Staff

Column 2
Guide to Recommendations

D. Energy

<p>4. What utilities are provided at the facility?</p> <table border="0"> <tr> <td style="border-bottom: 1px solid black;">Utility</td> <td style="border-bottom: 1px solid black;">Supplier:</td> </tr> <tr> <td>Electricity</td> <td>_____</td> </tr> <tr> <td>Natural Gas</td> <td>_____</td> </tr> <tr> <td>Water</td> <td>_____</td> </tr> <tr> <td>Sewage</td> <td>_____</td> </tr> <tr> <td>Fuel Oil</td> <td>_____</td> </tr> <tr> <td>Steam</td> <td>_____</td> </tr> </table>	Utility	Supplier:	Electricity	_____	Natural Gas	_____	Water	_____	Sewage	_____	Fuel Oil	_____	Steam	_____	<p>1.</p>
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Electricity	_____														
Natural Gas	_____														
Water	_____														
Sewage	_____														
Fuel Oil	_____														
Steam	_____														
<p>5. Provide 18-24 months of utility bill information for the facility. Obtain a 24 hour electrical load profile (summer and winter), and rate analysis from the utility provider. Have invoices for lamps and ballasts available. Be prepared to provide information to the team regarding the sequence of controls with respect to HVAC operating conditions.</p>	<p>2.</p>														
<p>6. Document basis for water and sewer charges, relate to usage patterns at the facility.</p>	<p>3.</p>														
<p>7. Document historical costs for electric, water and sewer.</p>	<p>4.</p>														
<p>8. Benchmark utility costs with the market.</p>	<p>5.</p>														
<p>9. What is lighting configuration: number/type of bulbs, ballasts, fixtures.</p>	<p>6.</p>														
<p>10. Has a study for lighting retrofit been performed? If yes, what were the findings?</p>	<p>7. Lighting retrofit can reduce energy consumption. Retrofit programs are often supported by local utility. Supplier will often contribute to financing.</p>														
<p>11. Do you practice group relamping or spot relamping for lighting maintenance?</p>	<p>8. Group relamping increases staff productivity.</p>														
<p>12. Who does your lighting maintenance? (vendor, janitor, mechanic, etc.)</p>	<p>9. Lighting maintenance should not be done by an over skilled person.</p>														
<p>13. Have you conducted an energy bill analysis?</p>	<p>10. Service firms do this to great savings success.</p>														
<p>14. Is the facility provided with energy conservation equipment such as:</p>	<p>11.</p>														



**Column 1
Questions for Client Staff**

**Column 2
Guide to Recommendations**

<p>a. energy efficient motors _____</p> <p>b. high efficient lamps, ballasts, fixtures, etc. _____</p> <p>c. plate and frame heat exchangers _____</p>	
<p>15. What are temperature standards for facility? day/night/summer/winter What hours do you provide HVAC to your building occupants?</p>	<p>12. Stricter temperature standards and reducing off-hour HVAC services will reduce total energy consumption.</p>
<p>16. Do you have a computerized Energy Management System in place? If no, has a feasibility analysis been performed? If yes, have projected savings been achieved? What features are being used - optimum start/stop, out of hours setback, economizer cycle, holiday schedule, demand control, lighting control, etc.?</p>	<p>13. EMS can significantly reduce energy consumption. EMS should be used aggressively: shut off non-essential lighting during peak usage times, early shut-off at off-hours, cycling fan units off for 15 minutes each hour, using well pumps at off-peak times, etc.</p>
<p>17. Is cooling tower make-up water metered separately for sewer credit?</p>	<p>14.Reduce sewer charges by up to X%.</p>
<p>18. Is your chilled water provided by central plant chillers? If yes, where is the location of the chiller in the facility? What equipment type, capacity and number of units are there?</p> <p>Centrifugal Compressor _____</p> <p>Absorption Chiller _____</p> <p>Reciprocating Compressors _____</p> <p>Helical-Screw Compressors _____</p>	<p>15.</p>
<p>19. Can the chilled water discharge temperature be raised without impacting operations?</p>	<p>16. Reduces chiller run time.</p>
<p>20. Does a refrigerant conservation and management process exist?</p>	<p>17. Conserves refrigerant. Provides plan for chiller retro fit/ replacement.</p>
<p>21. Are operating engineers required by state regulations or local jurisdictional requirements to operate and monitor the heating and/or cooling systems installed in the facility?</p>	<p>18. If yes, impacts staffing requirements.</p>
<p>22. Is air conditioning to the primary structure provided by package units?</p>	<p>19.</p>



**Column 1
Questions for Client Staff**

**Column 2
Guide to Recommendations**

23. What are local power company energy reduction incentives? Document local company tariff and electric usage patterns at the facility.	20. Is there an opportunity for facility to receive incentives from local power utility?
E. Waste Management	
24. Indicate the number and size of outside garbage units (dumpster/containers.)	1. It is more expensive for a hauler to pick up many small units than a few large units.
25. Do the units compact waste or are they open containers?	2. It is cost effective to compact because fewer pick-ups are required.
26. What is the cost per pull of each container?	3.
27. What is monthly rental cost for each unit?	4.
28. What type of materials is being recycled? Indicate the tonnage/weight of each commodity.	5.
29. What type of revenue is received for these commodities? Specify per pound, per container, indicate volume or weight capacity of the container.	6.
30. What type of collection system is being used for recycling? (two cans under desk / central receptacles)	7.
31. Who collects and stores the recyclables? (Contracted personnel, outside recycling vendors, in-house employees)	8.
32. Verify appropriate environmental protections are included in contracts.	9.



Column 1
Questions for Client Staff

Column 2
Guide to Recommendations

F. Tax & Insurance

1. What has changed since the last tax assessment? Has the use changed? Has the occupancy changed?	1. Is there opportunity to reduce assessment value?
2. When was the last appeal?	2. Appeals have been highly successful in certain municipalities.
3. What is the tax rate?	3. Compare to market benchmark.
4. Does a risk class analysis exist? If so, when was it last reviewed?	4. Aggressively control insurance costs.

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Column 1
Questions for Client Staff

Column 2
Guide to Recommendations

G. Finance & Reporting

1. Understand financial reporting system and obtain reports.	1.
2. Understand process for monitoring expenditures and variance reporting.	2.
3. What is definition of expense vs. capital. Are all department managers consistent in their understanding?	3.

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**Column 1
Questions for Client Staff**

**Column 2
Guide to Recommendations**

H. Project Management

1. What is average annual capital budget?	1. Assess workload.
2. Who acts as owner's rep?	2. Owner's rep should be experienced...
3. Is a general contractor used?	3. General contractor beneficial for projects over...
4. Do you have a preferred vendor list?	4.
5. Is there standard project management process? Does it include standards for budget process, bidding, contractors/subcontractors management (such as lien releases, insurance provisions, safety compliance, etc.)?	5.
6. Do you have a cost commitment tracking database?	6. Necessary to control budget.
7. Do you have a scheduling database?	7. Necessary to efficiently manage several projects.
8. What is the process for approving change orders?	8.
9. When using in-house staff for construction projects, is their time charged to project?	9.
10. What percentage is design fee compared to total project costs?	10. Design fee should be about 8%-12% of total costs.
11. Who is responsible for closing the job?	11. Often this responsibility is left to finance/accounting. The project manager can control the process better if he/she manages closing.

Project Management - Other areas to review

1. Review 2 sample construction files. What percentage of costs is from change orders?	1. Ideally, change orders account for no more than 8% of total costs.
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Column 1
Questions for Client Staff

Column 2
Guide to Recommendations

I. Regulatory Compliance

2. Do you have a standard program to manage the following regulatory issues?

<u>Area</u>	<u>Yes</u>	<u>No</u>	<u>Non-Issue</u>
ADA	_____	_____	_____
Right-to-Know	_____	_____	_____
Site Safety	_____	_____	_____
Asbestos	_____	_____	_____
CFC	_____	_____	_____
Site Evacuation	_____	_____	_____
Lock-out/Tag-out	_____	_____	_____
Blood Borne Pathogens	_____	_____	_____
Other _____	_____	_____	_____

1. Area for auditor to provide value-add. Highlight liability for customer.

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Column 1
Questions for Client Staff

Column 2
Guide to Recommendations

J. Quality/Training Programs

1. Do you have a formal Quality Program? What are its components?	1.
2. Do you conduct a customer satisfaction survey? How often?	2.
3. What is your policy regarding Facility staff certification? Do you participate in BOMA / IFMA programs?	3.
4. How is training conducted internally?	4.

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Column 1
Questions for Client Staff

Column 2
Guide to Recommendations

K. Facility Planning

<p>1. What department is responsible for Facility Planning?</p> <table border="0"> <thead> <tr> <th style="text-align: left;"><u>Service</u></th> <th style="text-align: left;"><u>Who / What Department</u></th> </tr> </thead> <tbody> <tr><td>Designs facility plan</td><td>_____</td></tr> <tr><td>Sets space standards</td><td>_____</td></tr> <tr><td>Purchases furniture</td><td>_____</td></tr> <tr><td>Orders furniture</td><td>_____</td></tr> <tr><td>Tracks facility vacancies</td><td>_____</td></tr> <tr><td>Determines space allocation</td><td>_____</td></tr> <tr><td>Maintains CAD drawings</td><td>_____</td></tr> <tr><td>Revises CAD drawings</td><td>_____</td></tr> <tr><td>Coordinates Telecom / MIS</td><td>_____</td></tr> <tr><td>Coordinate moves</td><td>_____</td></tr> <tr><td>Perform the move</td><td>_____</td></tr> </tbody> </table>	<u>Service</u>	<u>Who / What Department</u>	Designs facility plan	_____	Sets space standards	_____	Purchases furniture	_____	Orders furniture	_____	Tracks facility vacancies	_____	Determines space allocation	_____	Maintains CAD drawings	_____	Revises CAD drawings	_____	Coordinates Telecom / MIS	_____	Coordinate moves	_____	Perform the move	_____	<p>1.</p>
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<p>2. What is cost per move: for person/contents only? for telecom/furniture included?</p>	<p>2.</p>																								
<p>3. What are space standards? For offices? For cubicles?</p>	<p>3.</p>																								
<p>4. Do you have a national furniture contract?</p>	<p>4.</p>																								
<p>5. Do you have a furniture inventory tracking system?</p>	<p>5.</p>																								
<p>6. What is SF/employee? Compare to industry benchmark and internal standard. Calculate difference and compute occupancy cost impact.</p>	<p>6. Area of tremendous savings. Corporate moving towards "universal planning concept" which has one size office, one size cubicle for most efficient moves, planning. (Senior mgmt allocated two offices, one for private office, one for private conference room.)</p>																								



**Column 1
Questions for Client Staff**

**Column 2
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L. Questions for Department Head

This interview is most important. Always ask open-ended questions. Revise the following questions to reflect specific issues relevant to the department.

Department Function	1.
1. For which buildings is your department responsible?	2.
2. What is the gross and rentable square feet of these buildings?	3.
3. What is the function of your department?	4.
4. Are all of these functions being performed?	5.
5. Are you performing additional functions that are not officially in your domain?	6.
6. Do functions overlap between departments?	7.
7. Are certain functions being overlooked or neglected?	8.
8. Is construction input encouraged fro department employees?	9.
9. To what extent are service contracts utilized?	10.
10. How often are contracts renegotiated?	11.
Department Head Responsibilities	
1. What are your key responsibilities?	1.
2. Who is your direct supervisor?	2.
3. To what department do you ultimately report?	3.
4. How long have you been with the company? How long in your position?	4.
5. What technical abilities do you have and how do they coincide with the requirements of the position?	5.



Column 1
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Organization	
1. Is the organization chart accurate and comprehensive? Has the size of the organization changed significantly in the past two years?	1.
2. Does the "actual" chain of command match the organization chart?	2.
3. Do job descriptions exist?	3.
4. How does payroll allocation relate to the organization chart (are expenses billed back to user departments)?	4.
5. Has a centralized function been studied for close proximity locations?	5.
6. What major operating / management services are contracted?	6.
Department Employees	
1. How do you determine employee productivity standards?	1.
2. How often is employee performance evaluated?	2.
3. Do employees perform specific or technical functions?	3.
4. Are responsibilities rotated among employees?	4.
5. What is your department policy on technical certification?	5.
6. Do employees work in teams?	6.
7. Is there an employee development program, such as periodic training, mentor system, etc.?	7.
Performance Objectives	
1. What are your yearly performance goals?	
2. How is performance measured, using what systems?	