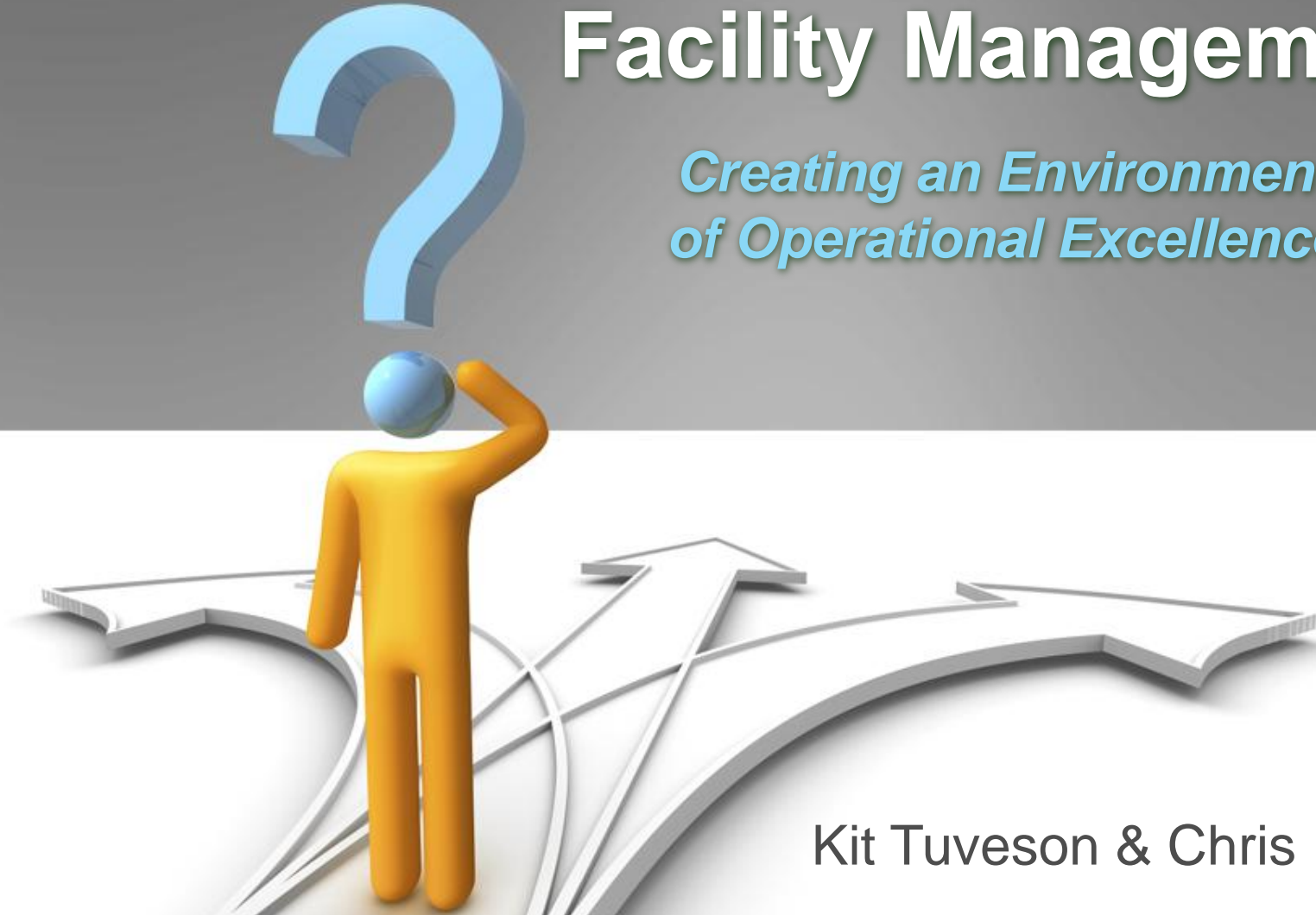


The Best Practices in Facility Management

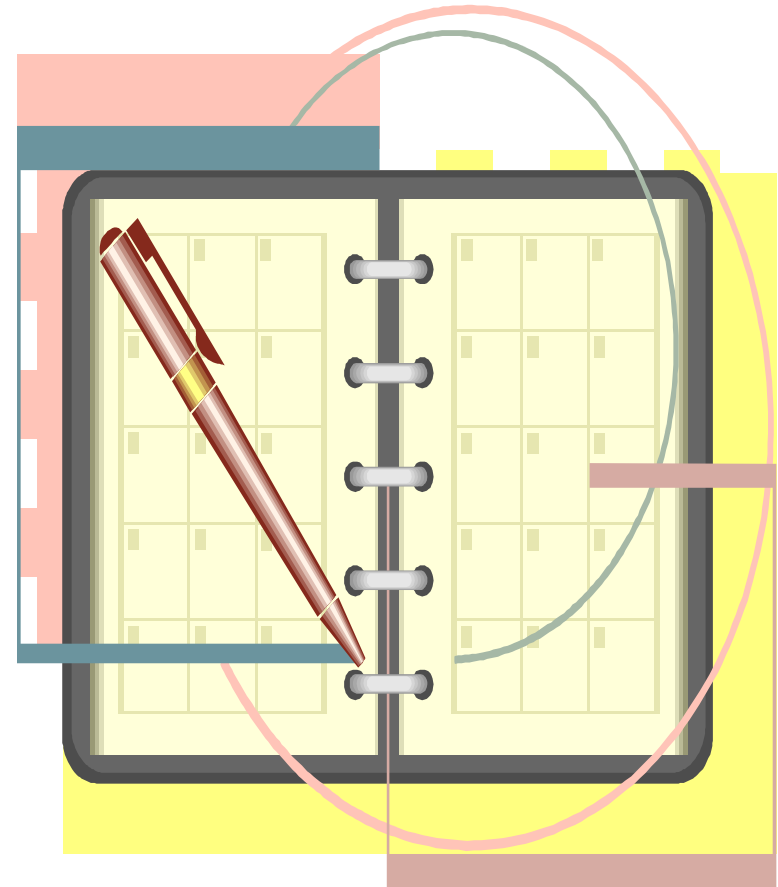
Creating an Environment of Operational Excellence



Kit Tuveson & Chris Hodges

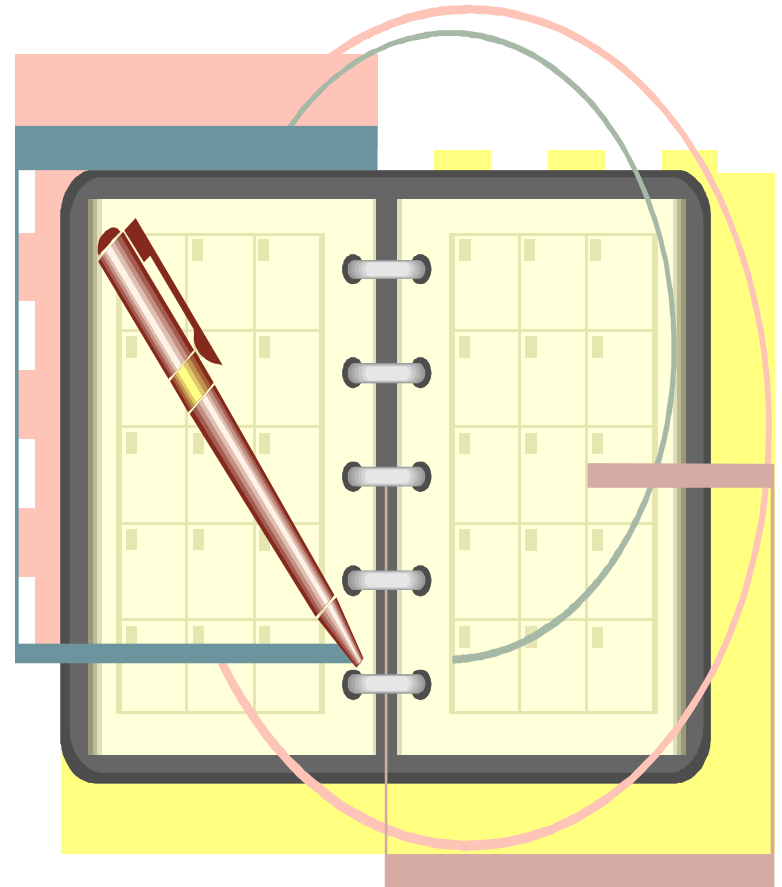
Agenda

- Performance Management
- Process management and best practices in a club environment
- Summary and Exercise



Agenda

- Performance Management
- Process management and best practices in a club environment
- Summary and Exercise



What is your Mission?

“We the Chevy Chase Club Staff strive to consistently exceed the expectations of our members and their guests. The Engineering department accomplishes this through a program of preventive and corrective maintenance, by responding in a timely manner to staff and member requests, and by following safe work practices.

The celebration of family, a tradition of civility and a commitment to excellent facilities and services will always be the hallmarks of the Chevy Chase Club.

The mission of Quail Creek Country Club is to enrich the lives of its members by providing a high quality private golf and country club experience, in a fiscally responsible manner, with exceptional recreational and social activities that foster friendship, fellowship and pride.

The Country Club of Virginia is a traditional, private membership, family-oriented social club, dedicated to providing its members quality products, programs, activities, facilities, and services.

Preserve and strengthen the legacy of Wyndemere as a premier community and country club in the greater Naples, Florida area.

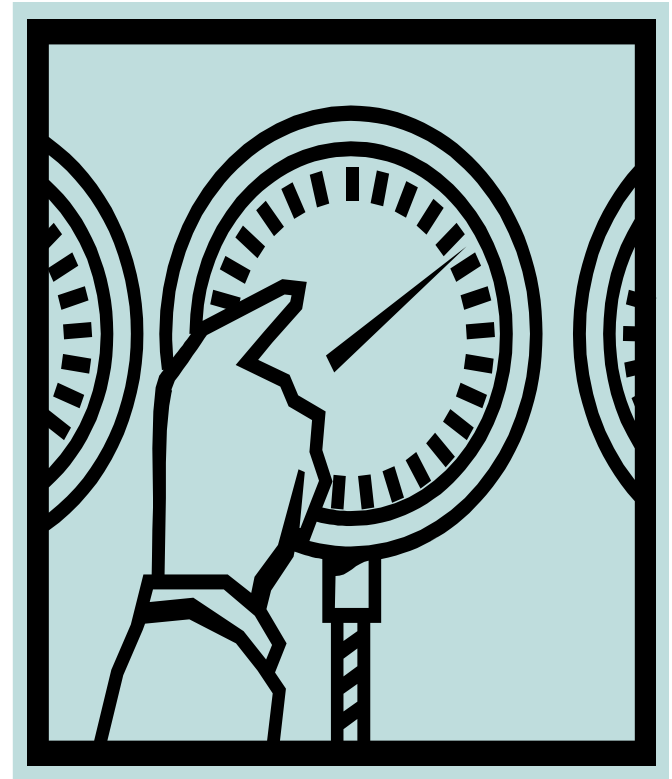


Why Should Facility Managers Care?

You are being pressured by your GM to deliver better results & greater value, but at lower costs

You & your team are being compelled to respond to the need for sustainable facilities

You have much more influence over a facility's effect on the environment & the people in the buildings than those who designed/built them

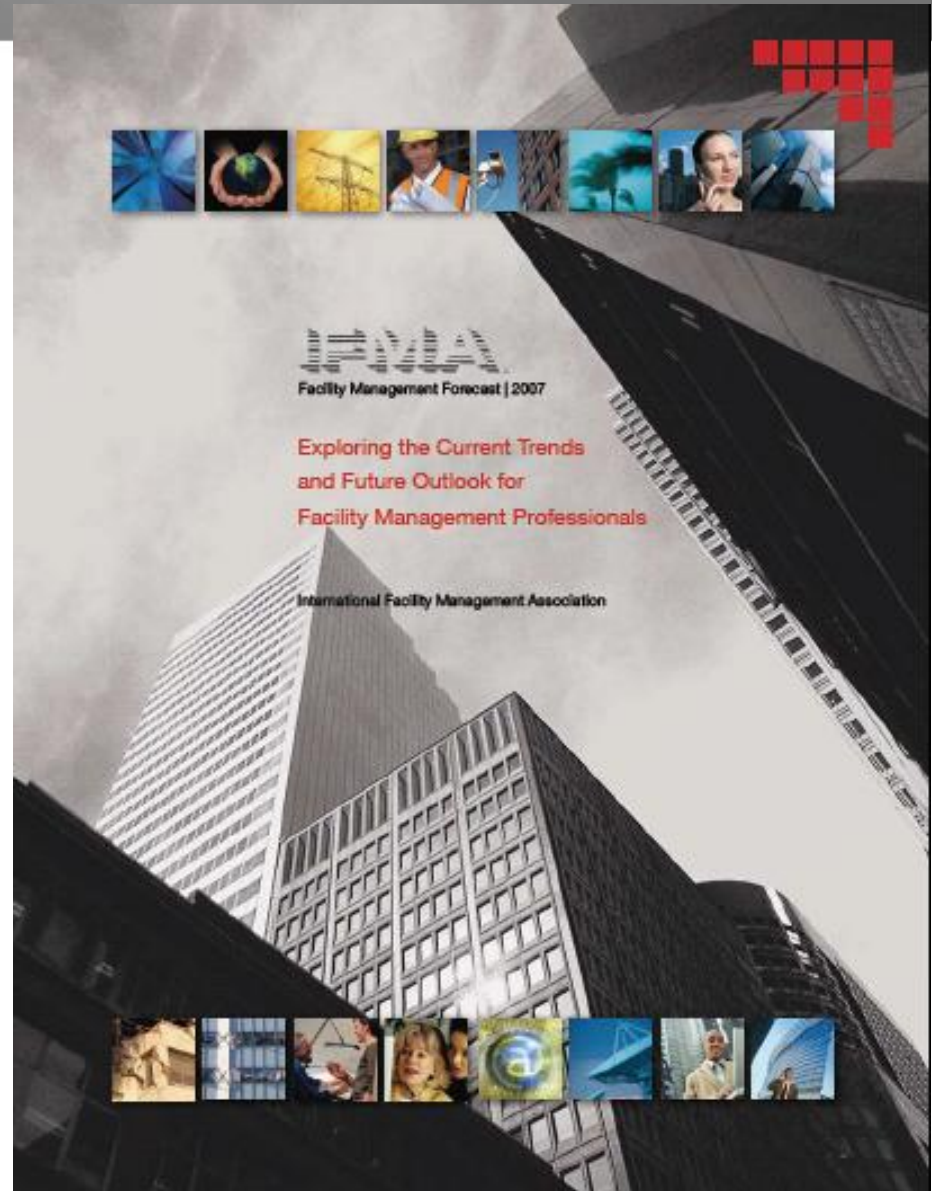


The importance of a sound strategy

Trend Number 1

Linking facility management to strategy – including workplace culture and branding

- Ensure that facilities support the club culture and brand
- Facilities and their appearance impact member perceptions and expectations of quality
- Service levels and supplier performance must be clearly specified and measured
- Strategic facilities plans assure long term viability of operations



Building a Strategy

✓ What is strategy?

. . . Your hypothesis or best guess on *how* you can achieve success, fulfill your mission



Balanced Scorecard (BSC)

A strategic planning and management system of metrics to align business activities to vision and strategy, improve internal and external communications and monitor performance against key goals.

The BSC - a Performance Management Tool



The BSC - a Performance Management Tool



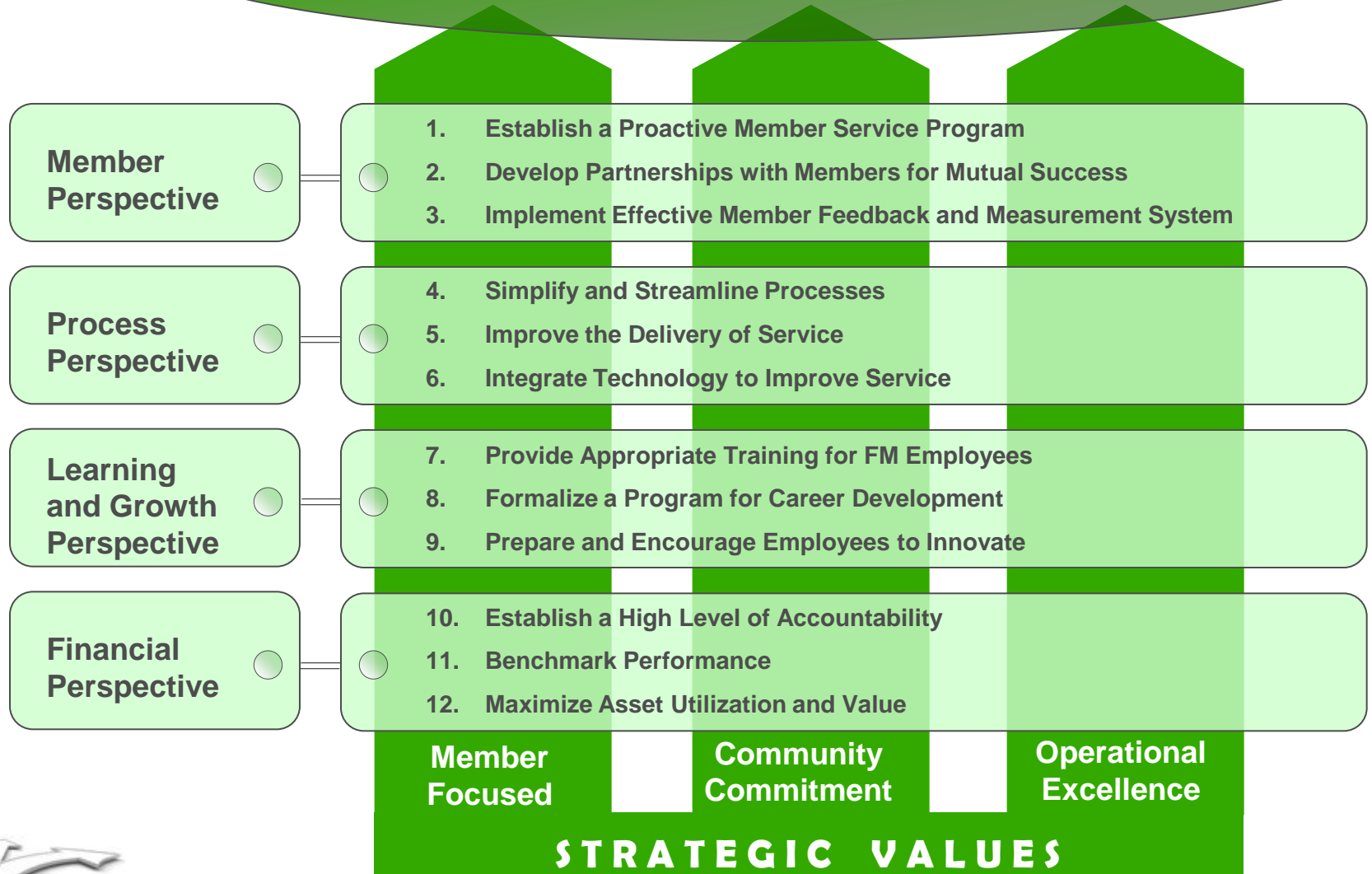
VISION

"We are the most respected club with engaged members who enjoy and respect the excellent facilities, quality services and family orientation of our club"

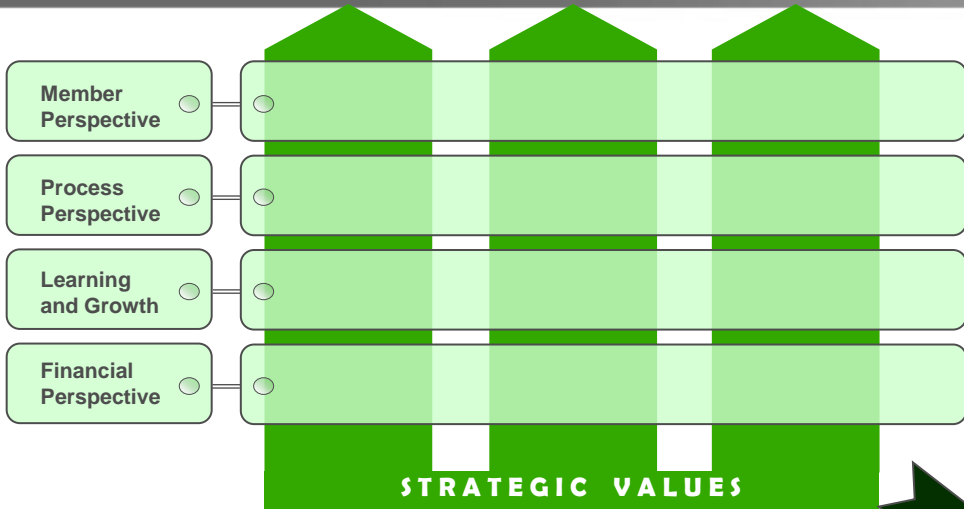


MISSION

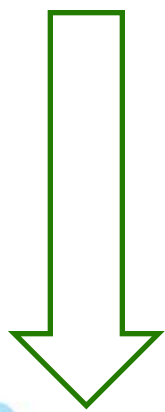
“The Facility Management function provides world class services through a dedicated, diverse, and professional workforce, committed to providing a safe environment for members and activities by preserving the integrity of our facilities.”



MISSION
 "The Office of Facility Management provides world class services through a dedicated, diverse, and professional workforce, committed to providing a safe environment for people and collections by preserving the integrity of our facilities."



How do we get from here to there?



Alignment

- Vision
- Mission
- Values
- Operational Plan



	Objectives	Measures	Targets	Trends	Initiatives
Customer	Increase utilization of services	1. Patient satisfaction	95%-tile	95%	Implement customer service Implement marketing plan
		2. Average daily census	> 250	175	
Processes	Provide high quality services	1. % ER patient triaged within 15 minutes of arrival	90%-tile	85%	Review ER patient flow process and streamline Review ER staffing to ensure adequacy
		2. Medication errors per dose	< 2%	2%	
L & G	Motivate, recognize and retain staff	1. Employee satisfaction	> 95%	96%	Develop performance based compensation Develop peer recognition program
		2. Turnover rate	5%	10%	
Financial	Operate in the black with 5% margin by increasing revenues	1. Net revenue increase over prior year	5%	0%	Review billing and collections processes for accuracy and timeliness Develop incentive program for AR staff
		2. Decrease net days in accounts receivable	60 days	80 days	

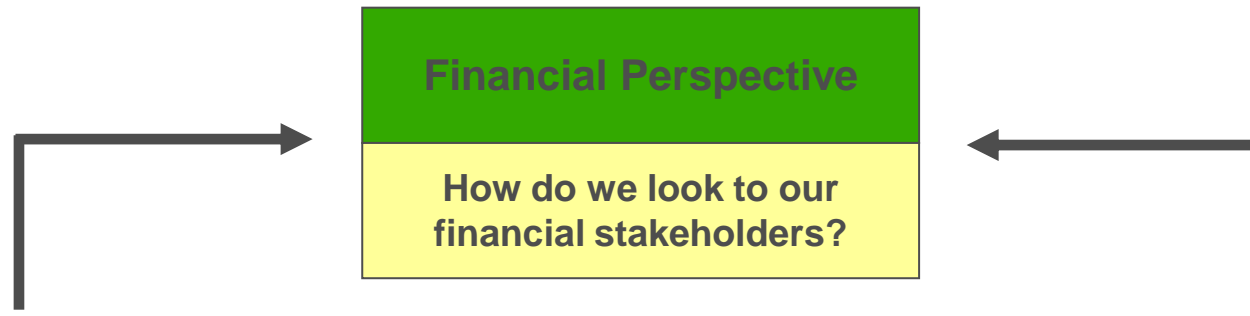
Characteristics of High-Performance Teams

High-performance Organizations:

- Develop a superior service attitude
- Develop strategies that are clear, consistent, and well thought out
- Adhere to high ethical standards
- Provide leadership that is clear, fair, and talent oriented
- Provide clear performance measures
- Allow employees to use their skills, knowledge and experience to create unique solutions for customers
- Promote the organization as a good place to work



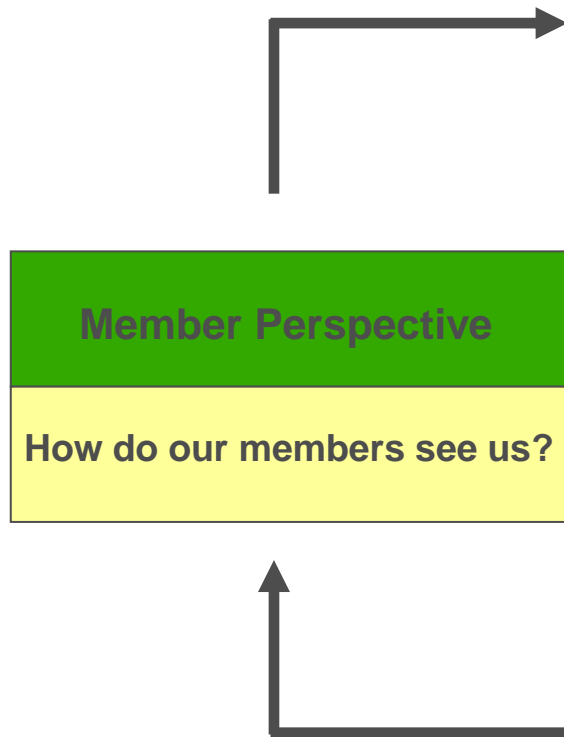
Benefits of a High-Performance FM Team



- Reduce costs
- Maximize return-on-investment (ROI)
- Minimize total cost of ownership (TCO)
- Maximize asset value and life cycle



Benefits of a High-Performance FM Team

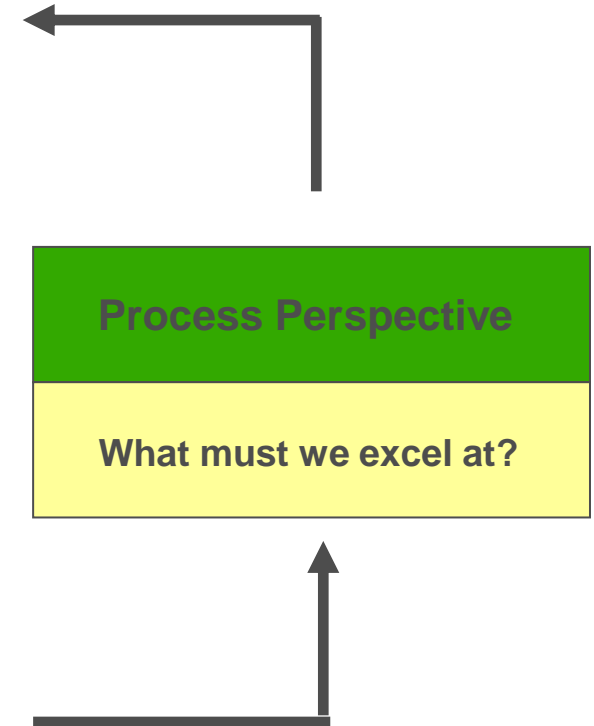


- Improves member satisfaction
- Fully supports strategic business initiatives
- Inspires confidence in stewardship
- Enhances and reinforces reputation



Benefits of a High-Performance FM Team

- Enhance operational efficiencies and effectiveness
- Optimize process performance
- Continuously monitor improved performance excellence



Benefits of a High-Performance FM Team

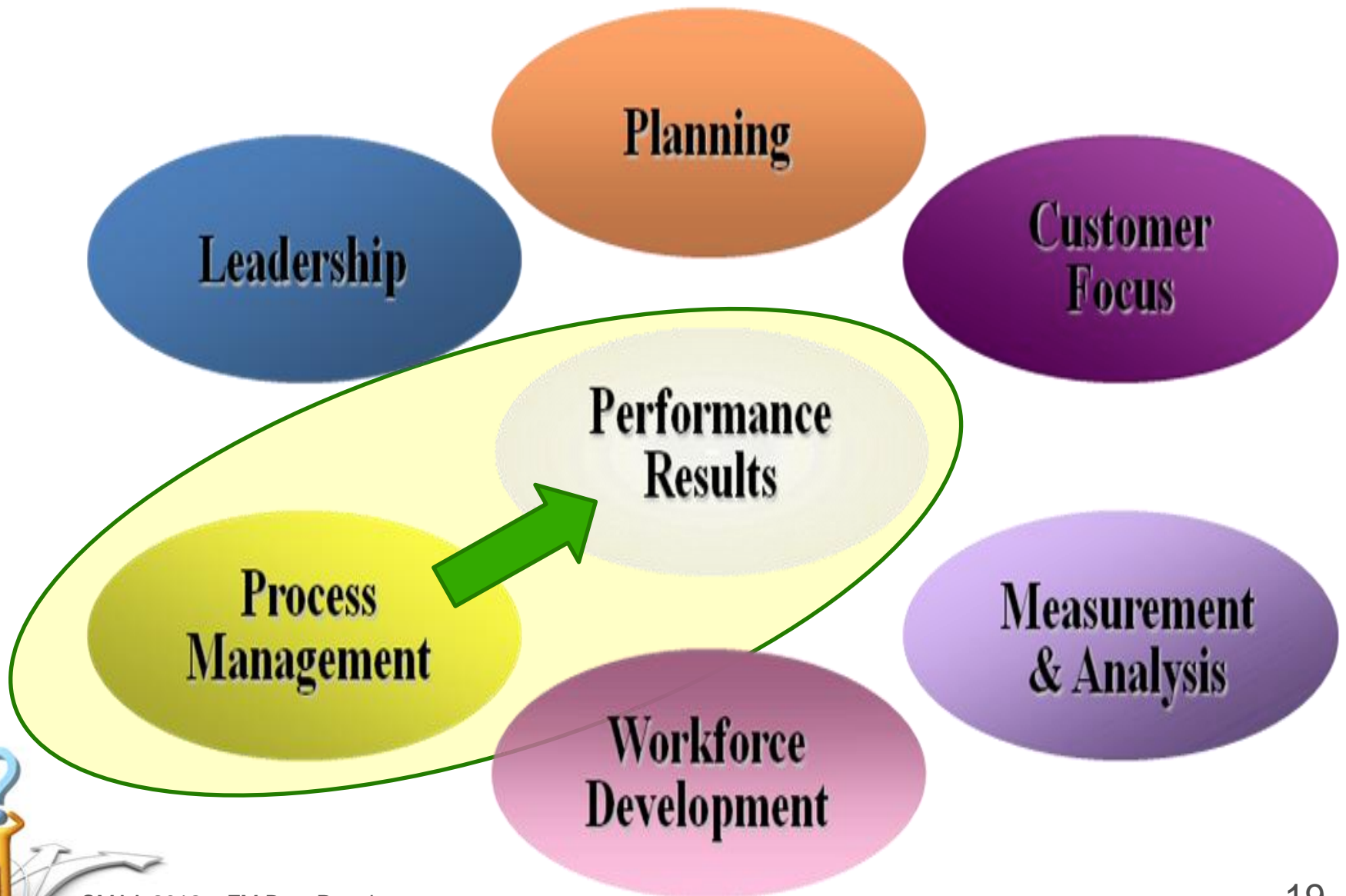
- Build pride - and attract and retain the best employees
- Commits to continual improvement
- Values education and career progression



Performance Management Model



Performance Management Model



Strategic Operational Planning

Key Steps

- Evaluate the culture
- Align with the mission, vision, and values
- Develop strategic goals and objectives
- Validate the operational strategy
- Develop assessment and measurement processes
- Measure, monitor, and report



Establish where you are . . .

Needs Assessment:

- Reviewing Policies, Practice, Procedures
- Performing physical assessment of existing facilities
- Develop your O&M Plan (work plan)
- PM, CM, and project work
- O&M Budget



Establish where you want to go . . .

Determine the key projects that align with strategic goals

- Identify
- Evaluate
- Prioritize
- Implement
- Evaluate & measure effectiveness of projects or initiatives



What do we measure?

- Member
 - Temperature, cleanliness, responsiveness
- Process
 - Work Processes, PM, CM, DM
- Employee
 - Training, lost time, retention, satisfaction
- Financial
 - Total cost of ownership, budget compliance

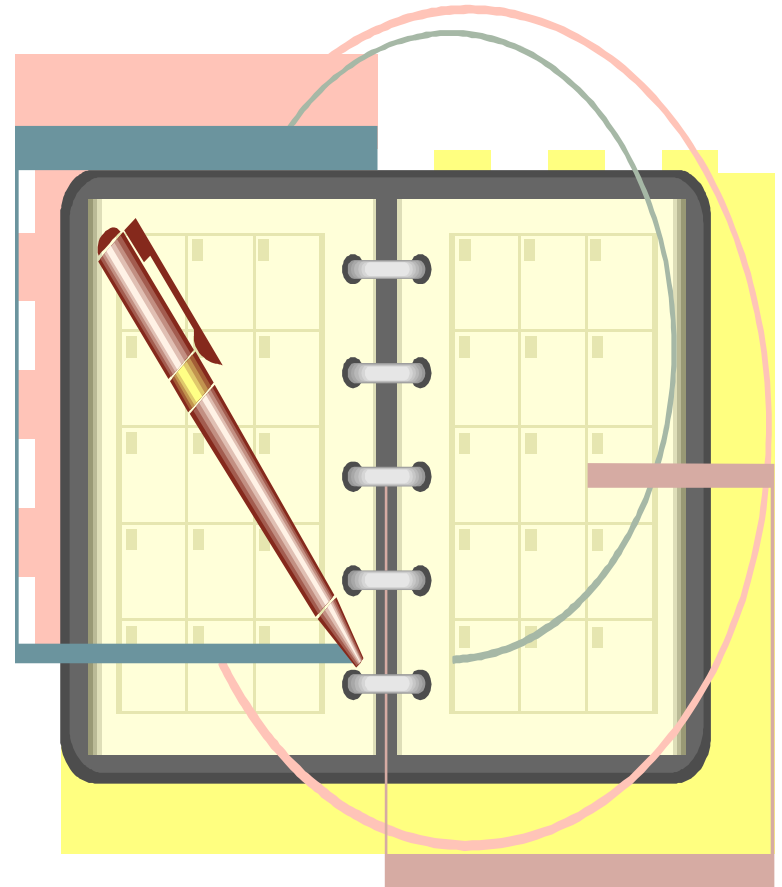


Metric Description	Std.	Metric Description	Std.
Facility Condition Index (FCI)	<0.05	Stockroom Turns / Year	2 - 3
Deferred Maintenance Backlog	Trend	Annual Training Hours	>40 hrs.
On-the-job Wrench Time	>60%	Maint. Cost / Replacement Cost	3 - 4%
PM / CM Ratio	70 / 30	Percent Return Work	<5%
Unscheduled Maintenance Downtime	<2%	Mean Time Between Failures	Trend
PM Schedule Compliance	>95%	% Failures Assessed: Root Cause	>75%
CM Schedule Compliance	>90%	Maintenance OT Percentage	5-15%
Unscheduled Man-Hours	<10%	% WO Covered by Estimates	>90%
WO Turn-Around Time	Trend	On-Site Supervisor Time	>65%
Emergency Response Time	<15 min. ²	Stockroom On-Time Delivery	>97%
Stockroom Service Level	>97%	Material / Part Performance	>98%



Agenda

- Performance Management
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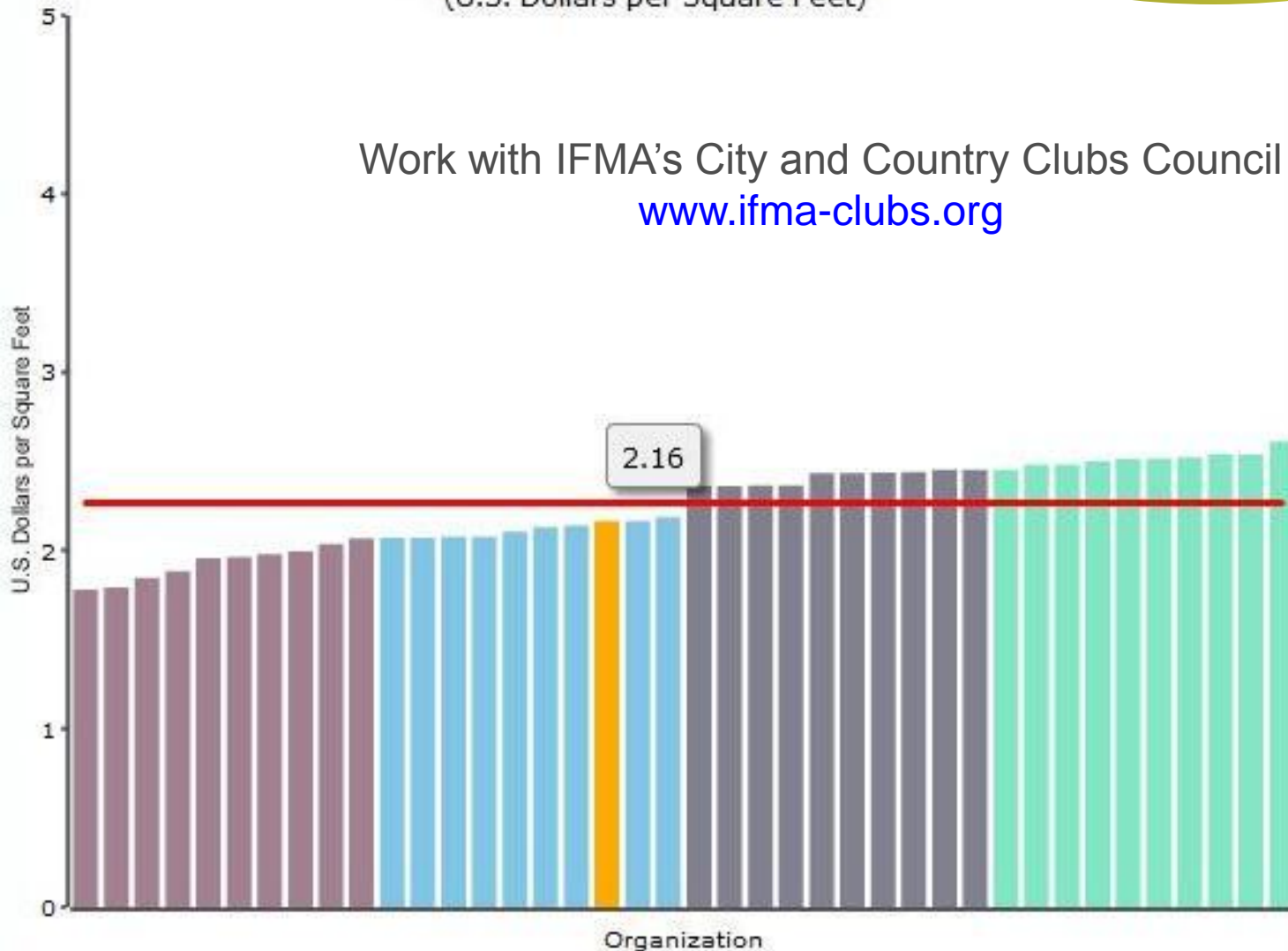


Comparing Your Club

Process Management

MAINTENANCE COST PER AREA
(U.S. Dollars per Square Feet)

Work with IFMA's City and Country Clubs Council
www.ifma-clubs.org



City and Country Clubs Council of IFMA



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[About](#)

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[Member Directory](#)

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Welcome

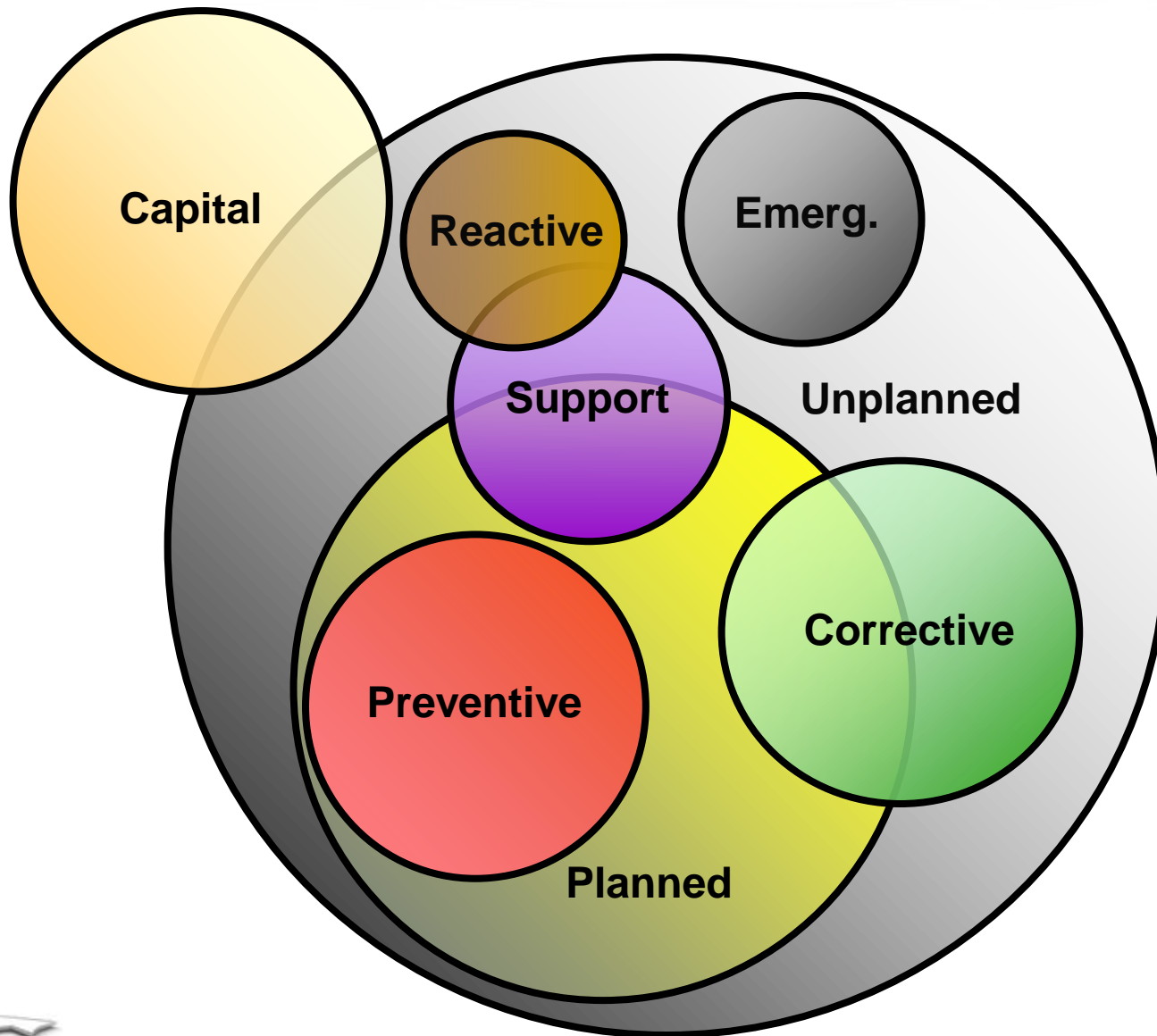
City & Country Club Council of IFMA

Welcome! Membership in the City & Country Clubs Council (CCCC) is open to anyone associated with maintaining the physical assets of City, Country and Yacht Clubs.

The council is for Facility Managers and other club professionals of both private and public City, Country and Yacht Clubs, whose responsibilities are to sustain the functionality of a club's built environment. Our Council is dedicated to providing its members with networking opportunities, educational resources, industry-leading certification programs, annual conferences as well as the sharing of experiences and best practices that ensures professional growth to provide the finest quality facilities to the memberships served.

International Facility Management Association, (IFMA) was founded in 1980 and currently has over 19,000 members internationally. Its members are organized into local regional chapters and industry specific councils; IFMA certifies facility managers, conducts research, provides educational programs and recognizes facility management certificate programs.

Benchmarking Maintenance

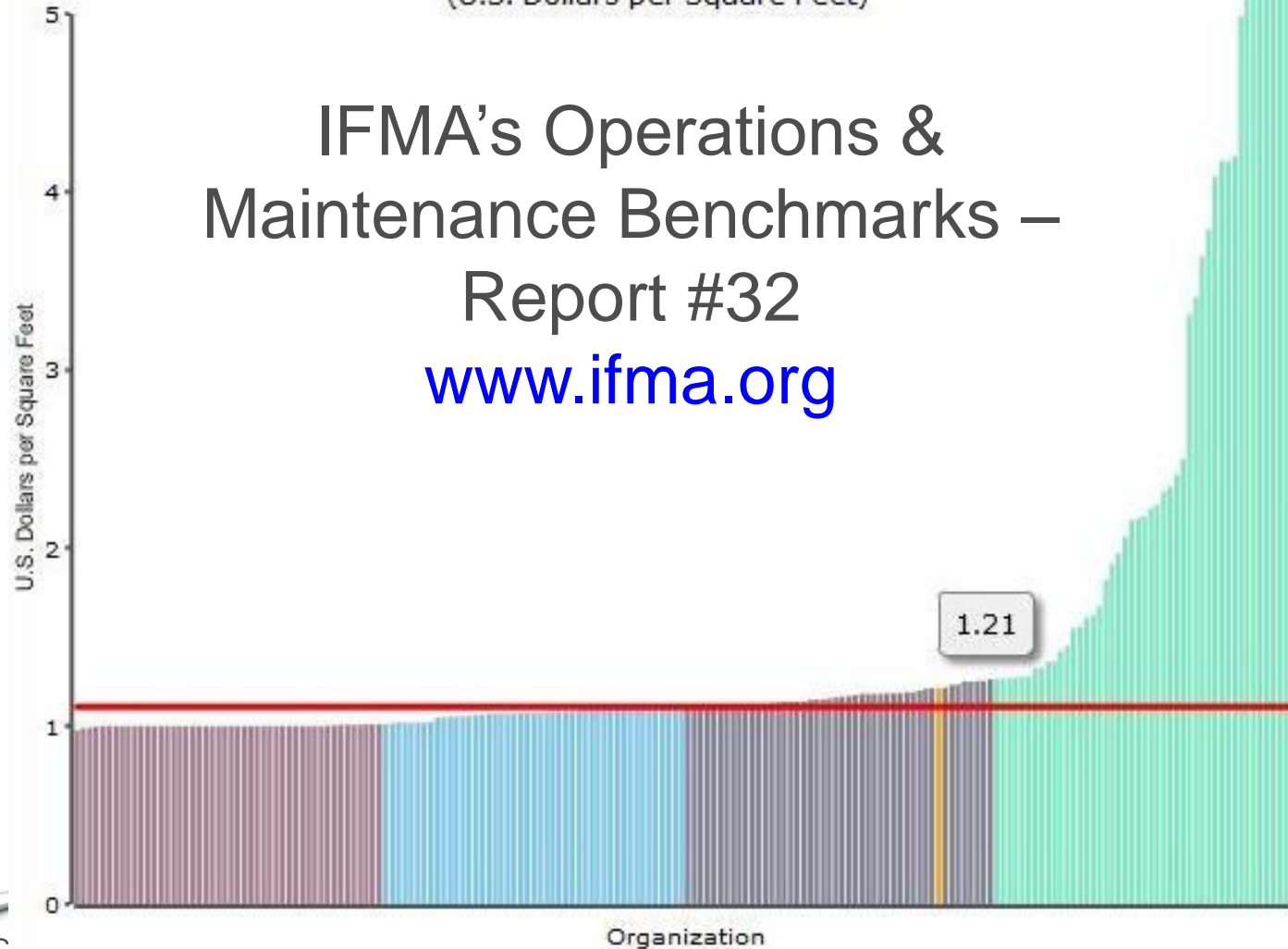


Comparing Your Club

Process Management

CUSTODIAL COST PER AREA CLEANED
(U.S. Dollars per Square Feet)

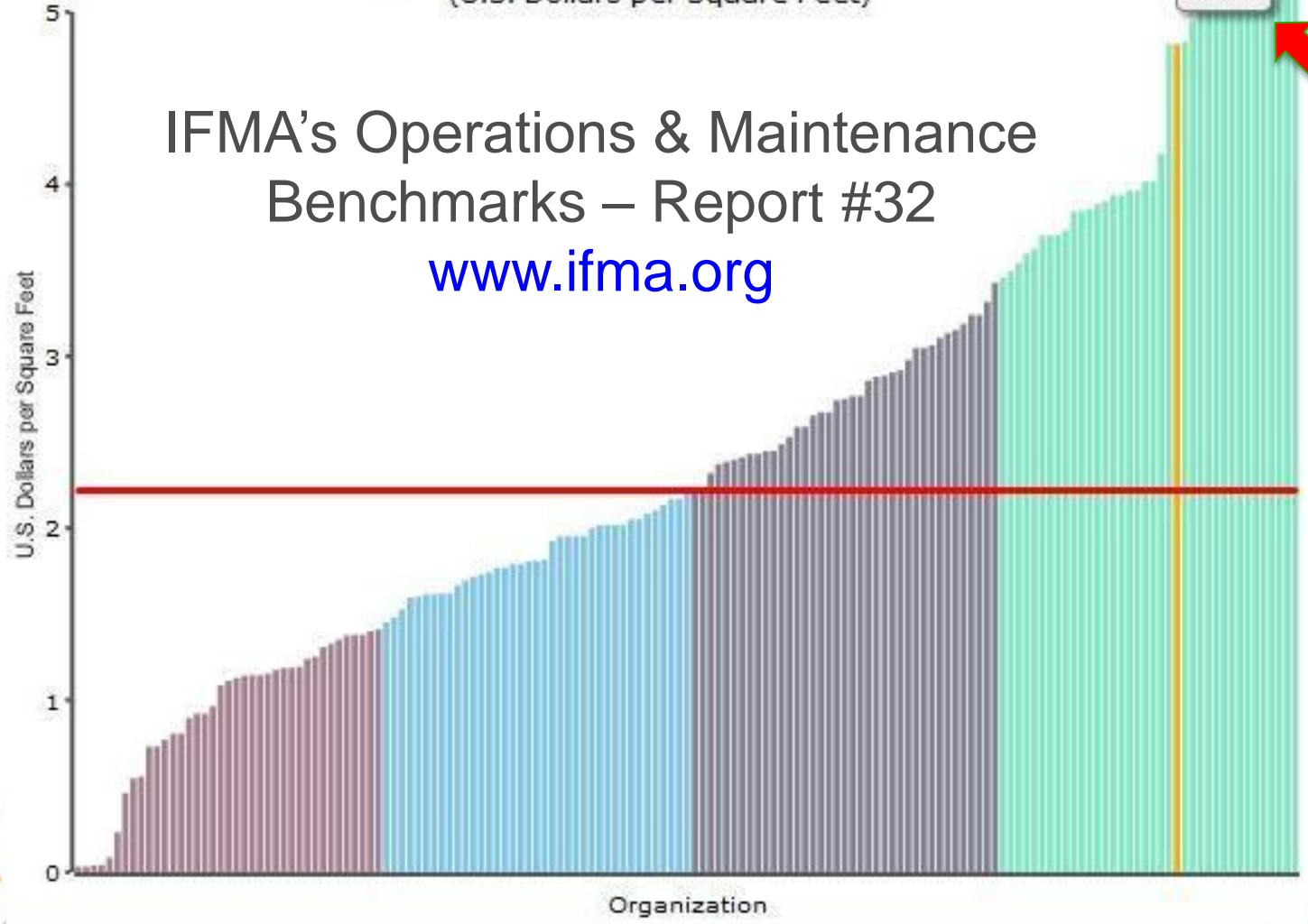
IFMA's Operations & Maintenance Benchmarks –
Report #32
www.ifma.org



Comparing Your Club

Process Management

ELECTRICAL COST PER AREA
Includes Consumption, Demand & Power Factor
(U.S. Dollars per Square Feet)



Don't be Here!!!

Process Management – The Detail

Process Management

	Organizational Goals	Sustainability Objectives	Initiatives	Measures	Targets	Current Status
Internal Processes	3. Operate Efficiently 4. Effectively allocate resources to maximize utilization	1. Become Carbon Neutral	1. Calculate Emissions Inventory 2. Purchase Energy Star Equipment 3. Purchase Offsets	Decrease in Carbon Emissions	15% Decrease	12%
		2. Decrease Water Consumption	1. Install waterless urinals 2. Install automatic flushers.	Decrease in Water Consumption	10% Decrease	0%
		3. Achieve Energy Star Certification	1. Lighting retrofit project. 2. Perform an energy audit. 3. Purchase energy star products.	Decrease in Energy Consumption	20% Decrease	22%
		4. Decrease Waste	1. Institute a double sided printing policy. 2. Provide recycling bins at every desk.	Decrease waste to landfill	10% Decrease	12%



Key Performance Indicators

Balanced Scorecard Perspective and Strategic Objectives	Measurement	G	Y	R	Information Provided	Input / Data Required	Mainsaver	Priority	Type Metric	KPI Level
Customer Perspective										
1. Establish a proactive customer service program	Custodial QA Inspection Hits Emergency Response Times Percent of Rework (call backs)	<5 / Insp. <15 min. <3%	5-10 / Insp. 15-30 min. 3-5%	>10 / Insp. >30 min. >5%	Confirm quality of service, ID trends Measure of time to respond to emergencies Work quality, Repeat call on closed WO	Number QA inspections and WOs generated from QA insp. WO generation time and time to site (or repair) Fault code for return work request	✓ ✓ ✓	3 1 2	Outcome Process Outcome	2 2,3 2
2. Develop partnerships with customers for mutual success	On-Site Supervisor Time Annual Customer Expectations Calibration Proactive Manager Contacts w/ Customers	>65% APPA L1 >1/qtr	40-65% APPA L2 1/qtr	<40% APPA L3 None	Measure of supervisor interaction with customers Measurement of APPA level of service Proactive solicitation and PR to customers for feedback	Time sheet with code for field supervision time Refer to APPA LOS for maintenance and custodial services M.D. Anderson specific	✓ 3 2	1 3 2	Outcome Process Process	3 2,3 2
3. Implement effective customer service feedback and measurement system	Customer Satisfaction Percent WO with Customer Feedback Top Ten WO Trouble Codes	>95% >15% # & Type	90-95% 10-15% # & Type	<90% <10% # & Type	Survey results of completed CM WOs Measure of customer feedback on work orders Trade skill requirements	Customer satisfaction survey data No. customer feedback forms generated and returned No. WOs sorted by Fault code	? ✓ ✓	1 3 2	Outcome Process Process	1,2 2,3 2,3
Process Perspective										
4. Simplify and streamline processes	Workforce Productivity WOs Initiated by Staff vs. Customer Hours Spent on Unscheduled WOs Materials On-Time Delivery	>60% >75% <10% >97%	45-60% 50-75% 10-25% 90-97%	<45% <50% >25% <90%	Time spent on PM or CM (wrench turning) Measure of maint. program effectiveness Accuracy of schedules, ID problem areas Measure of inventory planning performance	Time records of WO labor for PM and CM (wrench turning) Requires indication of repairs from PM work Labor for CM work orders Maintenance WO awaiting parts status	✓ ✓ ✓ ✓	1 2 3 4	Outcome Process Process Process	1,2,3 2 2,3 3
5. Improve the delivery of service	PM Schedule Completion Rate Unscheduled Downtime Temperature/Relative Humidity Elevator Traps per Bldg per Month Open Work Orders (WO) by Type WO Completion Targets	>95% <2% w/in ± 2% <1/month # & type <30 days	85-95% 2-5% w/in 2-5% 1-2/month # & Type 30-59 days	<85% >5% >5% out >2/month # & type >60 days	Measure of PM program effectiveness System reliability of critical equipment Critical environments Vert. convey. condition & Ktr performance Areas of needed service/support Schedule compliance & aging by WO type (varies by priority)	PM shadowing schedule and completion times Requires use of Work Type field to identify breakdowns BAS temperature or humidity alarm WO numbers Fault code for elevator entrapments WO status, type, and date WO status, type, generation date, and current date (Aging)	✓ ✓ ✓ ✓ ✓ ✓	2 1 5 3 6 4	Process Process Process Process Process Process	1,2,3 1,2,3 2,3 2,3 2,3 2,3
6. Integrate technology to improve services	PT&I Completion Rates to Schedule Labor Costs Charged to Work Orders Material Costs Charged to Work Orders	>95% >95% >95%	85-95% 90-95% 90-95%	<85% <90% <90%	Measure of program implementation Measure of staff adherence to Mainsaver standards Measure of staff adherence to Mainsaver standards	PT&I shadowing schedule and completion times Time charges and accurate employee labor rates Material charges and accurate item costs on parts master records	✓ ✓ ✓	1 2 3	Process Process Process	2,3 2,3 2,3
7. Adopt best practices to improve services	PM to CM Ratio Materials/Stockroom Turns per Year PM Compliance for Critical Systems	>80% 2 - 3 100%	65-80% 1 or 4-5 90-99%	<85% 0 or >5 <90%	Measure of workforce distribution effort Measure of materials handling performance Measure of priority compliance using FMEA or FM triage analyses	WO type for PM and Demand Inventory levels and use data by stock number PM shadowing schedule and completion times for priority 1 equip.	✓ ✓ ✓	1 3 2	Process Process Process	2 2 2
Learning and Growth Perspective										
8. Provide appropriate training for our employees	Employee Satisfaction Rating Annual Staff Training Hours Facility Center Training Compliance	>90% >40 hours >95%	80-90% 24-40 hrs 85-95%	<80% <24 hrs <85%	Job satisfaction input Compliance & workforce development Compliance of Mainsaver training	Employee satisfaction survey data Staff training hours per period Training attendance records	✓ ✓ ?	1 3 2	Outcome Process Process	2 2,3 2
9. Formalize a program for career development	Staff Turnover Staffing Needs and Gap Analysis Number of CFM or EFP Certifications Number of Internal Promotions vs. Ext. Hires Number of Licenses or Trades Credentialing	<10% <10% >5/year >90% >10/year	10-15% 10-20% 3-5/year 75-90% 5-10/year	>15% >20% <3/year <75% <5/year	Job satisfaction & market conditions Measure of ability of division to achieve mission Measure of workforce and career development Measure of career development and opportunities provided Measure of workforce and career development	Number employees out of division / total number employees Requires staffing analysis vs. actual staff levels Number of new approved certifications New hires vs promotions to supervisor and higher positions Number of new trades licenses or credentials	? 2 ? ✓ ✓	1 2 4 3 5	Outcome Input Process Process Process	1,2 1,2 2 2 2
10. Prepare and encourage employees to implement new techniques	Root Cause Analyses (% Failures Assessed) Number of Preventable Breakdowns Staff Innovations	>75% <2% TBD	50-75% 2-5% TBD	<50% >5% TBD	Measures effectiveness of operation to resolve systemic problems Measures effectiveness of maintenance program Measure of staff creativity to resolve problems	Fault codes, failed equip. codes and No. evaluated Need to define standards Need to establish process	✓ ✓ ✓	2 1 3	Process Process Process	2,3 2,3 2
Financial Perspective										
11. Establish a high level of accountability	Lost Time Accidents Overtime Usage Sick Leave Unscheduled Leave Actual O&M Expenses to Budget % Planned WOs Covered by Estimate	<50/year <10% <5days/FTE <3days/FTE ±4% >90%	50-100/year 10-15% 5-10d/FTE 3-5d/FTE (5-7%) 80-90%	>100/year >15% >10d/FTE >5d/FTE (>7%) <90%	Workplace safety & possible training needs Staffing & unplanned work by trade Trends, workforce morale indicator Trends, workforce morale indicator Measures O&M cost variance and management of budget Measure of accountability of workforce efforts to estimated effort	Number of accidents resulting in lost time Total overtime hours by trade per period Time sheet sick leave code Time sheet unscheduled leave code O&M budget variance report (O&M costs from Mainsaver) WO time and WO estimate time	? ✓ ? ? ? ✓	2 3 5 6 1 4	Outcome Outcome Outcome Outcome Outcome Process	2 2 2 2 2,3 1,2
12. Align department priorities with institutional requirements	Mission Priority Project Completion Rate Reduced Carbon Footprint Increased Energy Savings Sustainable FM Score	TBD TBD >10% ded. Radar Graph	TBD TBD 5-10% red. Radar Graph	TBD TBD <5% red. Radar Graph	Need info from M. D. Anderson Need info from M. D. Anderson	Need info from M. D. Anderson				TBD TBD TBD TBD
13. Benchmark performance	Facility Condition Index (FCI) Maintenance Costs Benchmark Facility Operating Index (FOI) Total Cost of Ownership (TCO) Operations Funding Capital Reserve Funding Change in GSF Maintained	<0.05 \$2.25/sf <\$7.55/sf. \$18.50/sf. >\$7.55/sf. >2% of CRV <2%	0.05-0.15 \$2.25-\$3/sf \$7.5-\$8.0/sf \$18.5-\$20/sf \$7-\$7.55/sf 1-2% of CRV 2-7.5%	>0.15 >\$3.00/sf >\$8.00/sf >\$20.00/sf <\$7.00/sf >1% of CRV >7.5%	Deferred Maint./CRV, Bldg condition-trend Benchmark cost/sf for maintenance costs Annual cost of operations comparisons (Higher for health care) O&M plus capital projects per year (Ind. BM = \$18/sf) Operations funding available (Input Measure) Capital funding available (Input Measure) Measure of increased maintenance requirements	FCA information, deferred maintenance and CRV Maintenance costs (labor and materials) O&M costs per year (maintenance, custodial, utilities) Total facilities division costs per sf Operations budget (cost per sf) Capital budget (cost per sf) Gross square feet maintained	✓ ✓ ✓ 1 5 6 7	2 4 3 1 5 6 7	Input/Outcome Outcome Outcome Outcome Input Input Input	1,2 2 1,2 1 1 2 2
14. Maximize asset utilization	Cost of Breakdown Repairs Manhours Spent on Emergency Repairs Space Utilization Index System Lifecycle Performance	<3% <2% >92% >10%	3-5% 2-4% 85-92% EUL-10%	>5% >4% <85% <EUL	Measures impact of breakdown repairs Measures impact of emergency repairs on workloads/workforce Measure of effective use of space Measure of maintenance performance to extend equipment life	Requires standard Work Type field population Requires recording work order priority changes Vacant space area / total assignable area Replacement dates and EUL data for systems and equip.	✓ ✓ ✓ ✓	2 3 1 4	Process Process Outcome Outcome	2,3 2,3 1,2 2



KPIs – Detailed Metrics

Balanced Scorecard Perspective and Strategic Objectives	Measurement		Target		Information Provided			
Customer Perspective		G	Y	R				
1. Establish a proactive customer service program	Custodial QA Inspection Hits	<5 / Insp.	5-10 / Insp.	>10 / Insp.	Confirm quality of service, ID trends			
	Emergency Response Times	<15 min.	15-30 min.	>30 min.	Measure of time to respond to emergencies			
	Percent of Rework (call backs)	<3%	3-5%	>5%	Work quality. Repeat call on closed WO			
2. Develop partnerships with customers for mutual success	On-Site Supervisor Time	>65%	40-65%	<40%	Measure of supervisor interaction with customers			
	Annual Customer Expectations Calibration	APPA L1	APPA L2	APPA L3	Measurement of APPA level of service			
	Proactive Manager Contacts w/ Customers	>1/qtr	1/qtr	None	Proactive solicitation and PR to customers for feedback			
3. Implement effective customer service feedback and measurement system	Customer Satisfaction	>95%	90-95%	<90%	Survey results of completed CM WOs			
	Percent WO with Customer Feedback	>15%	10-15%	<10%	Measure of customer feedback on work orders			
	Top Ten WO Trouble Codes	# & Type	# & Type	# & Type	Trade skill requirements			
Process Perspective	Balanced Scorecard Perspective and Strategic Objective				Measurement			
4. Simplify and streamline processes	Member Perspective							
	1. Establish a proactive member service program				Custodial QA Inspection Hits			
					Emergency Response Times			
					Percent of Rework (call backs)			
5. Improve the delivery of service	2. Develop partnerships with members & all departments for mutual success				On-Site Supervisor Time			
					Annual Customer Expectations Calibration			
					Proactive Manager Contacts w/ Customers			
6. Integrate technology to improve service	3. Implement effective member service and all departments feedback and measurement system				Members Satisfaction			
					Percent WO with Members/ Dept Feedback			
					Top Ten WO Trouble Codes			
Learning and Growth Perspective	Staffing Needs and Gap Analysis				<10%	10-20%	>20%	Measure of ability of division to achieve mission
8. Provide appropriate training for our employees	Number of CFM or EFP Certifications	>5/year	3-5/year	<3/year	Measure of workforce and career development			
	Number of Internal Promotions vs. Ext. Hires	>90%	75-90%	<75%	Measure of career development and opportunities provided			



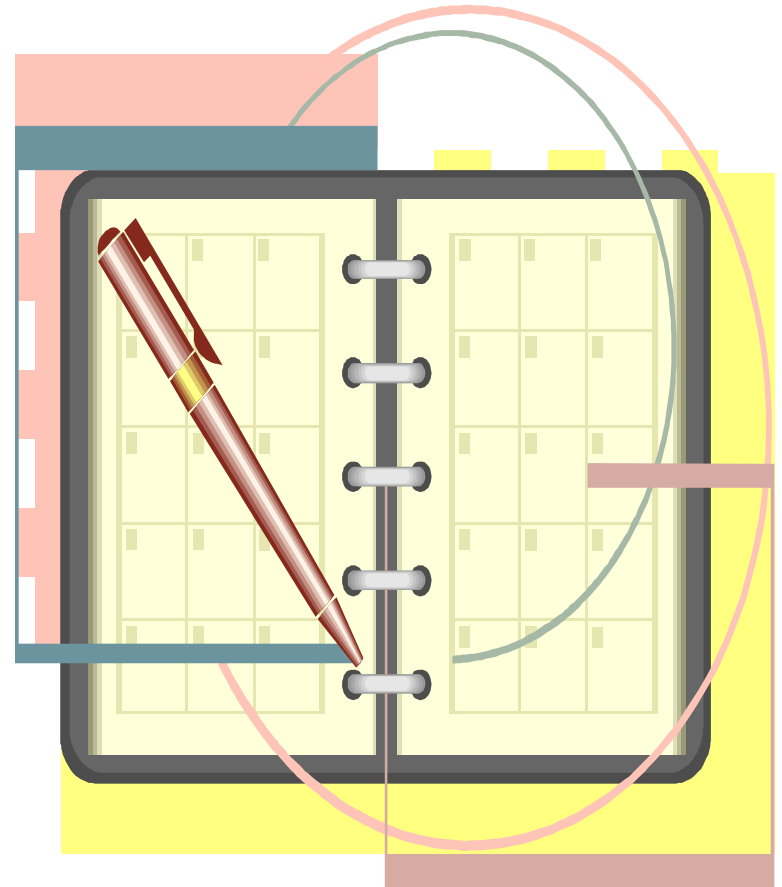
KPIs – Detailed Metrics

Balanced Scorecard Perspective and Strategic Objectives	Measurement	G	Y	R	Information Provided
Customer Perspective					
1. Establish a proactive customer service program	Custodial QA Inspection Hits Emergency Response Percent of Repeat Calls (Backs)	<5 / Insp. <15 min. <3%	5-10 / Insp. 15-30 min. 3-5%	>10 / Insp. >30 min. >5%	Confirm quality of service, ID trends Measure of time to respond to emergencies Work quality. Repeat call on closed WO
2. Develop partnerships with customers for mutual success	On-Site Supervisor Time Customer Expectations Calibration Proactive Manager Contacts w/ Customers	>65% APPA L1	40-65% APPA L2	<40% APPA L3	Measure of supervisor interaction with customers Measurement of APPA level of service
3. Implement effective customer service feedback and measurement system	Customer Satisfaction Percent WO with Customer Feedback Top Ten WO Trouble Codes	>95% >15% # & Type	90-95% 10-15% # & Type	<90% <10% # & type	Proactive solicitation and PR to customers for feedback Survey results of completed CM WOs Measure of customer feedback on work orders Trade skill requirements
Process Perspective					
4. Simplify and streamline processes	Workforce Productivity	>60%	45-60%	<45%	Time spent on PM or CM (wrench turning)
5. Improve the delivery of services	Target	Information Provided			
6. Integrate technology	G	Y	R		
7. Adopt best practices	<5 / Insp.	5-10 / Insp.	>10 / Insp.	Confirm quality of service, ID trends	
Learning and Growth					
8. Provide appropriate training	<15 min.	15-30 min.	>30 min.	Measure of time to respond to emergencies	
9. Formalize a program	<3%	3-5%	>5%	Work quality. Repeat call on closed WO	
10. Prepare and encourage	>65%	40-65%	<40%	Measure of supervisor interaction with members & management	
Financial Perspective					
11. Establish a high level of	APPA L1	APPA L2	APPA L3	Measurement of APPA level of service	
12. Align department priorities	>1/qtr	1/qtr	None	Proactive solicitation and PR to members & management for feedback	
13. Benchmark performance	>95%	90-95%	<90%	Survey results of completed CM WOs	
14. Maximize asset utilization	>15%	10-15%	<10%	Measure of customer feedback on work orders	
	# & Type	# & Type	# & type	Trade skill requirements	



Agenda

- Performance Management
- Process management and best practices in a club environment
- **Summary and Exercise**



Performance Management



Process Management

Process Management

- Using technology as an enabler (IWMS/CMMS)
- The BSC as a performance management tool
- Benchmarking against other clubs
- Sustainable operations
- Networking for improvement (CCCC)



Benefits of High-performance Management

- Reduce costs
- Maximize return-on-investment (ROI)
- Minimize total cost of ownership (TCO)
- Maximize asset value and life cycle

Financial Perspective

How do we look to our financial stakeholders?

Member Perspective

How do our members see us?

- Improves member satisfaction
- Fully supports strategic business initiatives
- Inspires confidence in stewardship
- Enhances and reinforces reputation

- Enhance operational efficiencies and effectiveness
- Optimize process performance
- Continuously monitor improved performance excellence

Process Perspective

What must we excel at?

Learning and Growth Perspective

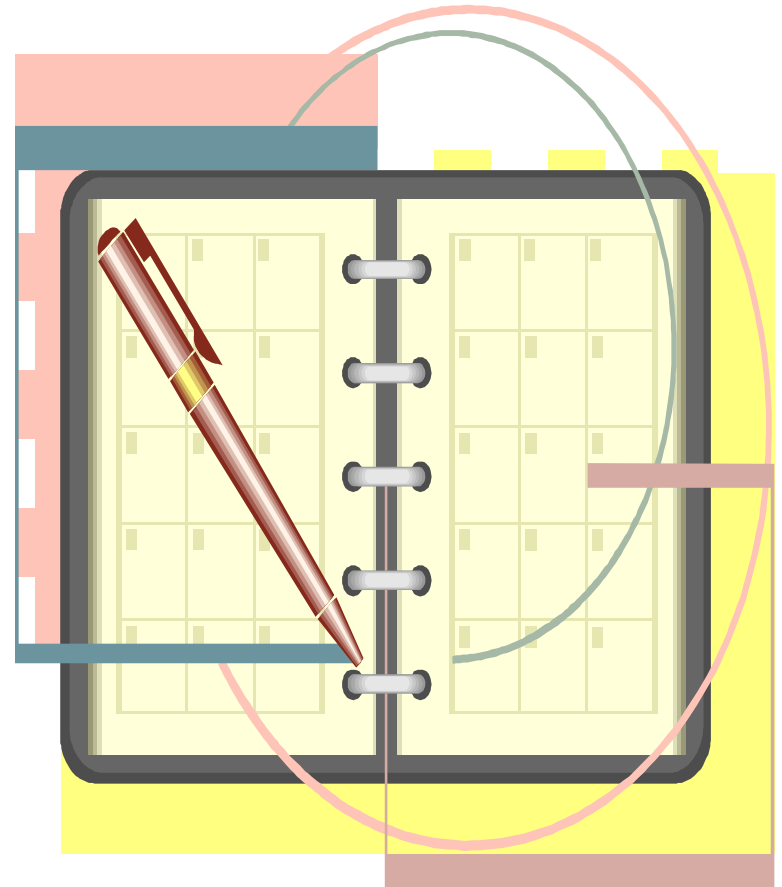
Can our FM team continue to improve and create value?

- Build pride - and attract and retain the best employees
- Commits to continual improvement
- Values education and career progression



Agenda

- Performance Management
- Process management and best practices in a club environment
- **Summary and Exercise**



Group Exercise

- “Practice makes perfect”
- Club excellence “scorecard”
- Start with some examples
- FM excellence at your own club
- Share best practices
- Next steps



Creating The “FM Scorecard”

- Individual exercise for creating your performance FM score card
- Sample “score cards” are being handed out by members of the CCCC
- We will start with some sample FM initiatives and then work as a team to create metrics and measures for each
- You can fill in these examples on your card and/or you can also fill in any specific initiatives for your own club that come to mind during this exercise.
- When you get back to your club, you can use this work as a template to start the discovery and planning process for improving your operational excellence



Sample FM Initiatives (??)

- Energy/water savings
- Condition assessment
 - Major MEP systems
 - Roof
 - Exterior
- O&M excellence (Metrics)
- Maintenance process “rigor” – CMMS, WO systems, etc.
- Service levels – e.g. SLA for key FM suppliers?



Score Card – Front/Back Layout

Key Projects/Programs

- Identify
- Evaluate
- Prioritize
- Implement
- Measure Effectiveness



City & Country Club Council of IFMA

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Note: format for a folded (1/2) letter size sheet, printed on card stock

Score Card - Inside Layout

Objective	Measurement	Target	Information Provided	Completion or Tracking Date



Where do You Go From Here??

- Begin with 50,000 ft. view of facilities
- Maintain good asset inventories and priorities
- Drill down to specific detail for levels of service analyses
- Enhance planned maintenance activities
- Manage resources more effectively
- Enhance accountability of managers
- Benchmark with other Clubs



City & Country Clubs Council

- Position, Name, club, e-mail, phone info



Thank You!

The Best Practices in Facility Management:

Creating an Environment of Operational Excellence

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