



## A Mini Facility Management Assessment

This simplified checklist lets you to do a reasonably high-level assessment of your facility management practices and compare them to best practices.

For each management practice, read the expectation statement. If you fully meet those expectations, give yourself a check mark, even if it's in place via out-tasked or outsourced services. (adjust for any practices not applicable to your organization)

**Asset Management:** You regularly review property condition using formal process/checklists. You integrate the results from this and your maintenance management system into your capital and maintenance plans.

**Communications:** You use newsletters, emails, meetings, etc. in a planned and controlled way to communicate and receive communication from your customers (users) and staff.

**Customer Service:** You have policies and procedures in place to deal with customer / occupant communications and issues. You measure satisfaction results, develop corrective action plans and implement them. You have telephone and internet based coverage 24/7 for emergencies and requests.

**Emergency Management:** You have written plans for dealing with emergencies and issues, including disasters, accidents and business recovery.

**Energy Management:** You actively manage energy through formal plans and initiatives, including communications, projects, studies, project standards, etc.

**Environmental Management:** You have written plans that address all environmental issues such as CFC's, hazardous waste, spills, fluorescent tubes, etc. to reduce impacts.

**General Management:** You develop annual plans to address issues, set initiatives and targets, including facility plans, asset and capital plans, staff training, communications, etc.

**Maintenance Management:** You have a computerized system that tracks assets, plans preventive maintenance, tracks corrective maintenance and demand work orders and provides reporting for management, compliance and performance.

**Customer (Occupancy) Management:** You have systems to track, analyze and report usage to provide management and strategic information for cost containment and planning to drive behaviours and reduce total cost of ownership/occupancy.

**Performance Management:** You have quantifiable measurements of key deliverables and processes for suppliers and in-house staff. You have a formal process and measurement framework that drives improvements.

**Quality Assurance:** You have a formal quality assurance process in place that ensure consistent processes and procedures, results are monitored and compliance audits performed. Mechanisms are in place for continuous improvement.

**Staff Development:** You annually review, recommend and implement training for your team to stay current and develop your staff. You participate in associations and subscribe to related publications to stay current in the industry.

**Standards:** You have standards to minimize costs and ensure consistency for space layouts, furniture, fit-up and capital or base-building projects.

The practices identified here cover the range of management practices most organizations should have to effectively provide a safe, comfortable, cost effective environment for building occupants and users while maintaining the value of the asset.

*From Strategic Advisor 2008©*