IFMA™ Southeast Wisconsin Chapter
International Facility Management Association

FM Roundtable Discussion – July 21, 2016

Succession Planning

- Cross Training
- Executive Communication
    - Documentation
    - Culture
    - Who?
- Business Continuity Plan –Tie Into
- Technical Library
- Continue to ID Critical People – Review Regularly
- Slow Transition Out
- Quarterly Training
- Annual Skills Assessment

Direct Reports

- Engagement
- Skills Assessment
    - Separate formal review
- Work order productivity/communication
- Work order standards
    - 1 Ticket-1 Door/UDoors
- Developmental Plans
- Self-Assessment vs. Reviews/Goals separate
- 360 Reviews
- Alignment with Corporate Goals
- Work orders-timeliness
    - Quality – via recalls
- Service Contract – 3 years

- Lease Responsibilities
    - Tenant vs. Landlord
- Parts ordering/vendors
- TMA-Info tracking vs. data entry efforts by technicians

Other Venue, Events, Etc.

- Service Agreements/Performance Contracts
    - Add Information from RFP L&L to Website
- FM File Mgmt.
- Security Mgmt.
- Boat Curse
- Historical Tour-Milwaukee

Action Items/Program Extraction:

- Future FM Roundtable Topics
    - Facilities Mgt. Systems/Asset Management/Data Tracking – Best Practices/Efforts
    - Also program and education committee related events planned
- Education committee events
    - Service Contracts – potential education meeting or Skype
    - HR/Talent Management – Reviews
    - Lease Coordination
- Programs Committee
    - Historic Boat Cruise Tour/Networking
- Next FM Roundtable

  All members welcome
  Date: October 25th
  Location: TBD
  Time: 330pm to 6pm
  Agenda: 2017 Strategic Planning

- Part 1 - 2016 accomplishments/Year in Review (presentation)

1. FM Roundtable - Detail Future Topics
2. Education Committee Summary
3. Membership Committee Summary
4. Program Committee Summary

5. Other Value Addsd

- <u>Part 2 - 2017 Plans/Goals</u>

1. FM Roundtable
2. Education Committee Goals
3. Membership Committee Goals
4. Program Committee Goals
5. Other