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Facilities Planners Unite!

Space Planner, Facilities Planner, Sr. Planner, Tactical Planner, Strategic Planner...these are just some of the titles used for individuals that assign, track, and manage the space portfolio for an organization.

Facilities planning is the process by which the needs of an organization are either translated from an idea or developed on anticipated requirements which are based on history or company projections, then translated into physical requirements and documented in a way that can then be executed and communicated in an organized and efficient manner.

For planning to be successful, it must be pro-active, flexible, adaptable, sustainable and integrative and most importantly, able to be clearly communicated. Planning is cyclical, and is therefore a continuous process that must be constantly reviewed and revised on an on-going basis. In the corporate world, there are many factors that influence the utilization of the company's space eg. growth, down-sizing, a new product taking off or failing suddenly, or even disaster recovery.

Therefore, any plan created must be mapped out and communicated very clearly to identify dependencies or impacts both upstream and downstream. It should have a strict change-control process in place, and should have multiple options outlined that anticipate change.

Facilities planners typically have a wide range of experience, from MAC (moves, adds, changes) activities, to interior design, to understanding furniture drawings and specifications, to move management, to project management to workplace management software to preparing and giving presentations. They need to be able to communicate with various levels of management, and be able to manage and coordinate vendors in multiple fields of expertise. Strengths include conflict resolution, customer service, the ability to gather and analyze data, understanding of customer/company's vision, organization and business plan, excellent communication, and organization.

Because of the diversity required for planning, tools and resources are not easy to find. There are many facilities-based user groups, but none that just focus on the planning aspects of facilities. FACILITIES FIRST is taking the initiative to generate interest in a user group for facilities planners. Topics of discussion could be IWMS (Integrated Workplace

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Management Software), Types of Planning (tactical/strategic/master), Facility Audits, Data Management, Benchmarking and Metrics, Industry Best Practices. If you are interested in participating in a Planning Users Group, please send an email to Tonya Thornburgh at tthornburgh@facilitiesfirst.com, or sign up on our website at www.facilitiesfirst.com and list any other topics that you would be interested in discussing or learning about.

Sustainability! Affordability! Stress Relief! It just makes sense!

Buying used or reconditioned equipment and selling your surplus equipment will bring you space relief, money, and professional recognition with other program managers as someone who appreciates operating on the “lean green” side. If it takes up space and no-one is using it – give it up! In today’s world equipment becomes obsolete very quickly so the more dust it gathers the more value it loses for your company. Likewise buying new equipment is often 2 or 3 times more costly than buying used or reconditioned especially if it has a component of installation or set up. Equipment footprint translates to real estate dollars and, especially in this economy with the added focus on green and sustainability practices, storing or shipping inactive equipment doesn’t make sense.

Many program areas outside of facilities have equipment that hasn’t been used in several months, sometimes years. Laboratory, manufacturing, testing, machine, facilities, food service, server systems and IT, telecom and back-up power equipment should be considered viable items for resale/reuse. You can help the departments in your company identify surplus items to make room for more useful equipment or newer equipment.

Selling equipment is best undertaken when equipment first becomes underutilized. However, that is most obvious when a company is expanding, consolidating, moving or just making changes and that IS NOT when it is necessarily the best time to liquidate. The most value for surplus items can be recovered when there is an abundance of time to market items to a large population through multiple channels. For this reason continual “maintenance” of equipment inventory saves money and effectively utilizes space and time, just as identifying surplus and selling it makes money. The longer the lead time to sell/dispose of surplus items, the better the marketing opportunities and consequently the higher the prices that are recoverable.

By carefully choosing a venue for selling items you can provide a smoother process with less risk and usually much better financial gain. If you allow a third party vendor to broker the items for you, you can utilize experience and expertise in equipment sales to maximize return while protecting department clients and your company from liabilities. Professionals know that the financial returns from an online listing with one amateurish picture won’t draw the interest or price that a carefully crafted listing with relevant/important pictures and information will. More importantly, many items do not market well online. More technical and expensive items require careful identification of prospective customers, extensive negotiation and comprehensive documentation of the transaction. Experience in dealing with brokers and dealers are important in finding the right venue to sell any larger items and reducing your liability related to the transaction and function of the equipment. Planning, removal and relocation can become a legal nightmare for the uninitiated, but enthusiastic amateur.

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How do you find a vendor/consultant to help you with this? This is the most important choice you can make. For very rapid disposition auctioneers and equipment liquidators perform the function. They charge a small percentage of sales prices and it is well known they bring clients the lowest return on original investment- use them as a later choice. Equipment brokers take a larger chunk- one you may not even be able to track. If they have a customer they will pay more of the value but otherwise they may act more as liquidators. Direct selling is a very effective value if you are very skilled, have multiple contacts and have the time to prospect and deliver.

The best solution is the managed marketing approach. Facilities First specializes in this approach. We have the documentation to get the “big bucks” and protect your assets. We work with the client and the customer and the services to get the whole job done the way you would want if you had the skills, contacts and time to do it yourself. Call us at 650-691-7944 or email us sales@facilitiesfirst.com.

The Importance of Knowing What You Have

How does your organization collect, maintain and use your facilities data? What information are you currently tracking on each facility and your equipment and why? Who is responsible for maintaining the integrity of your data, and do you have defined processes in place? Are multiple entities tracking the same data, and if so, whose is the most accurate? If you don't know the answers to any one of these questions, you need to read on.

Having reliable data on your facilities and equipment is not only useful, but a critical component of responsible facilities management. This data will not only help you with your day-to-day struggles in a facility, but will also provide you with historical data that can be used to:

- Assess the condition of the facility
- Establish baselines for measuring and forecasting change
- Help make decisions on repairs, improvements, renovations as well as acquiring or abandoning space to support business objectives
- Report to state and federal agencies (e.g. County inventory tax, Sarbanes-Oxley reporting)
- Pro-actively identify potential problems (Risk Management)
- Provide essential data for warranties and insurance claims
- Provide opportunities to release/replace surplus equipment
- Provide baseline equipment inventories for moves and construction capacity planning
- Ensure that your facility is working as designed and that you are achieving optimal efficiencies, whether that be around space utilization, energy consumption, environmental performance, employee productivity or systems operability
- Effectively plan short-term and long-term strategies
- Minimize impact of disaster recovery efforts
- Integrate with other organizational data
- Report metrics, set benchmarks and identify trends
- Effectively plan your budget and get funding for new projects

Having reliable data at your fingertips will allow you to make better, financially sound, fact based decisions, in a timely manner, and will also add credibility to your organization. Using your facilities data to pro-actively manage your facility can reduce the amount of re-active activities

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typically performed by a facilities department. It can also help you establish benchmark reporting so that obtaining funding for future needs is easier.

We recommend setting up a team to activate this data and finding a database system that is easy to use and multifunctional. Set up a process for recovery/maintenance of your data and inventorying of your equipment. Determine: how often to collect, who will collect the initial data, who will keep the data maintained and up to date, how you will compare with other systems data, where will you store the data, how you will want to sort the data, what level of data is needed and how accurate does it need to be, what kind of data do you need for you space and what kind for your company-wide equipment manufacturing, testing, operating and facilities equipment and the building systems that supply it. If you would like our help, we are very experienced in helping companies put these databases together.

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Data Collection...who, what, when, how and where?

So, now you know why you need to collect data on your facility, and you have an idea of the general "buckets" of information you need to gather....now what?

Step 1: Identify **who** will be collecting the data, and whose perspective will guide the data being collected. The individual(s) selected must have a thorough understanding of the information that needs to be collected, as well as any processes associated with the data. They must also be methodical, detail-oriented, not afraid to ask questions, and be given an adequate amount of time to properly perform the task.

Step 2: Identify **what** information needs to be gathered, and to what level of detail you want to capture. Keep in mind that whatever data is collected needs to be maintained, so be sure to scrutinize the importance of the information you are collecting. If you understand the data that you need to provide to others in the organization, this will help you prioritize the data that you collect.

Step 3: Determine **when** data should be collected. Ideally, you want to start tracking data from the

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beginning of a project, the moment something is installed, or when major changes are taking place, but you do not always have that luxury. Remember, we do not live in a static environment, and therefore, need to perform regular audits of the data collected to ensure its accuracy, and that the initial investment of time collecting the data is not wasted.

Step 4: Collecting data can be a very involved, complex process that extends over a period of time, or it can be quick and simple, depending on your individual needs. The key is to develop a systematic approach to **how** you are going to collect your data. There are several methods that can be used to collect data:

- Interviews – these can be one on one or group oriented
- Observations - notes, journals, checklists, tape/video recordings
- Surveys – questionnaires, audits, inventories
- Existing Information/Documentation

Step 5: Determine **where** the data will reside. Data can be kept on a spreadsheet or document, in a database, in a file cabinet, or in someone's head (although, this one is not recommended). When determining where to store the data, consider the following:

- How many individuals need to access this information?
- What is the frequency in which this information is accessed?
- Is this information used by multiple organizations?
- How often does this information change and need to be updated?
- How do you provide this information to others in the organization?
- Does this information stand alone, or need to be combined with other information?
- Is there a visual component tied to the information?
- Is this information being captured electronically somewhere else?

Answers to these questions will help you determine the proper method for storing your data.

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