



**The Carlyle Consulting Group**  
[www.carlyleconsultants.com](http://www.carlyleconsultants.com)  
**(866) 227-5953**

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## **Practical Strategies For Facility Management** *(A Two-Day Workshop)*

1. Facility Management Defined
2. The FM Triangle
  - a. Managing the Building
  - b. Managing the Assets
  - c. Managing the People
    - i. Managing Perceptions
    - ii. Customer Service
  - d. Customer Satisfaction Survey
3. Inspections – Understanding What You Have
  - a. Building Interior
  - b. Building Exterior and Grounds
  - c. Safety Audits
4. Maintenance Is The Key!
  - a. Preventative Maintenance
  - b. Predictive Maintenance
  - c. Cost of Maintenance
  - d. Computer Software Versus 12 Clip Board Method
  - e. Work Priority System
  - f. Proactive Versus Reactive Mentality
    - i. Lighting Schedule
    - ii. Resource Conservation Recovery Act
5. Five Year Planning
  - a. Asset List
  - b. Retiring Old Equipment
  - c. Benchmarking
    - i. 358 Cleaning Times
    - ii. RS Means
    - iii. EER – BOMA
6. Team Discussion: Quality / Customer Service Improvement

7. Budgets And Why They Are Necessary
  - a. Capital
  - b. O&M
  - c. Project
  - d. Variance Reports
  - e. Historical
  - f. Zero Based
  
8. OSHA
  - a. Five Key Administrative OSHA Requirements
    - i. Safety Plan
    - ii. Audits
    - iii. Training
    - iv. Recordkeeping
    - v. Safety Poster
  - b. What Records Does OSHA Require
    - i. 300 Log - Log of Work Related Injuries and Illnesses
    - ii. 300A Log - Summary of Work Related Injuries and Illnesses
    - iii. 301 Log - Injury and Illness Incident Report
    - iv. Recording versus Reporting
  - c. Fines and Citations
    - i. Willful
    - ii. Repeat
    - iii. Serious
    - iv. Other than Serious
  
9. ADA
  - a. Who is Covered?
  - b. Who is Exempt?
    - i. Reasonable Accommodation
    - ii. Undue Burden
    - iii. Cost Cap on Renovations
  - c. Barrier Removal
  - d. Hiring Considerations
  - e. Tax Credits and Deductions
  - f. Elevator Exemption
  
10. Legal & Safety Issues
  - a. Accident Investigation Reports
    - i. Slip Trip and Falls
    - ii. Attractive Nuisance
    - iii. Trespassers
  - b. Employees Right to Know Issues
  - c. Bomb Threats & Evacuations

11. Team Discussion: Indoor Air Quality
12. IAQ - Three Essential Issues
  - a. Temperature
    - i. Humidity
    - ii. Air Flow
    - iii. Sick Building Syndrome
  - b. Incident Log & Reports
  - c. Air Duct Cleaning
13. Low Bidder Defense
  - a. Weighted Vendor Table
    - i. Lowest Evaluated Bidder
    - ii. Low Bid Causes
  - b. Pre-Bid Walkthrough
14. Effective Service Agreements
  - a. Specifications
  - b. Contracts
  - c. Clauses to Protect
    - i. Contractor Relationship
    - ii. Hold Harmless
    - iii. Incorporated By Reference
    - iv. Cancellation – With or Without Cause
    - v. Evergreen Contracts
    - vi. OSHA Safety Clause
15. Insurance Issues
  - a. Named Insured
  - b. Notice of Cancellation
16. Team Discussion: Cost Reduction Ideas
17. Project Oriented Contracts
  - a. Notice To Owner
  - b. Payment Draws
  - c. Subcontractor Rights / Owner Obligations
  - d. Bonding
  - e. Release of Liens
  - f. Retainage
  - g. Punchlist
  - h. Change Orders
  - i. Value Engineering
  - j. Close Out Package