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The Collaborative Ecosystem

Resource Guide



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Bryant Mazzetti's Architect Perspective

An architect and a facility manager play crucial roles in the lifecycle of a building, and their collaboration is essential to ensure the successful design, construction, and ongoing operation of a facility. Architects are required to run through a series of steps that involve the input from other design team members including owners, users, developers, jurisdictional staff, and facilities managers.

Pre-Design Phase:

Needs Assessment: The architect begins by working closely with the facility manager to understand the facility's purpose, goals, and requirements. This involves discussions about space utilization, aesthetics, functionality, and any specific needs or preferences the owner/user may have.

Design Phase:

Concept Development: The architect develops design concepts and presents them to the owner/user for feedback. This stage involves brainstorming ideas, exploring different design options, and making adjustments based on the owner/user input.

Design Review: Throughout the design phase, regular meetings and design reviews are conducted to ensure that the architect's plans align with the owner/user vision and operational requirements. It is typical at this time the facility manager provides input on practicality, maintenance considerations, and long-term sustainability.

Construction Phase:

Project Oversight: The architect often continues to be involved during the construction phase, serving as a liaison between the owner/user and the construction team. They ensure that the design specifications are followed and that any necessary adjustments are made to accommodate changes or unforeseen issues.

Facility managers can positively affect the design process in several ways by leveraging their expertise and insights into building operations, maintenance, and occupant needs. Here are some ways in which facility managers can contribute to the design process:

- **Early Involvement:** Facility managers should be involved in the design process from the early stages. This allows them to provide valuable input that can influence the design to better meet operational and maintenance needs. Early involvement also helps in identifying potential challenges and addressing them proactively.
- **Needs Assessment:** Facility managers can conduct thorough needs assessments to determine the functional requirements of the facility. This includes understanding how spaces will be used, what equipment or systems are necessary, and any unique operational considerations. This information helps architects design spaces that are both functional and efficient.
- **Operational Efficiency:** Facility managers can provide insights into how the building can be designed for optimal operational efficiency. This includes considerations such as the layout of mechanical and electrical systems, energy-efficient designs, and ease of access for maintenance personnel.

- **Maintenance and Durability:** Facility managers have a deep understanding of maintenance requirements and can advise on materials and construction methods that are durable, easy to maintain, and cost-effective in the long term. They can help select materials that are resistant to wear and tear, corrosion, and other environmental factors.
- **Technology Integration:** Facility managers can suggest the integration of modern building management systems (BMS) and smart technologies to monitor and control various building functions. This includes HVAC systems, lighting, security, and more, which can improve efficiency and occupant comfort.
- **Budget and Lifecycle Costs:** Facility managers can provide input on the budgetary constraints and lifecycle costs associated with the facility. They can help prioritize investments that will provide the best return on investment (ROI) in terms of maintenance, energy savings, and overall building performance.
- **Sustainability:** Facility managers often have a strong focus on sustainability and can guide the design process toward eco-friendly solutions. They can suggest energy-efficient designs, renewable energy options, and strategies to reduce environmental impact.
- **User Experience:** Facility managers understand the needs and preferences of building occupants. Their input can lead to design decisions that enhance the overall user experience, such as comfortable indoor environments, accessible layouts, and amenities that improve occupant satisfaction.
- **Regulatory Compliance:** Facility managers are knowledgeable about building codes, regulations, and industry standards. They can help ensure that the design complies with all relevant codes and guidelines.
- **Regulatory Compliance:** Facility managers are knowledgeable about building codes, regulations, and industry standards. They can help ensure that the design complies with all relevant codes and guidelines.
- **Long-Term Vision:** Facility managers often have a long-term perspective on building performance. They can advocate for design decisions that contribute to the building's longevity and adaptability to future changes or expansions.

In summary, facility managers can positively affect the design process by providing valuable insights, contributing to the efficiency and sustainability of the facility, and ensuring that the design aligns with operational and maintenance needs. Collaboration between architects, facility managers, and other stakeholders throughout the design process is key to achieving a successful and functional building.

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Lynda Schroer's Designer Perspective

Facility Managers can provide significant contributions to the Architectural and Design (A&D) process from the initial stages of project development. Most importantly, by being involved early, FMs can ensure the design adequately supports operational and maintenance requirements, while aligning with budgets.

From a space plan/layout perspective, FMs can quickly identify items that may have been overlooked or not sized appropriately eg storage, janitorial support space, mail collection/ distribution, etc... They also tend to know 'where the skeletons are hidden', meaning there may some requirements that could be overlooked by other stakeholders because they simply aren't aware they exist. In addition FMs often understand the workflow of certain specialty areas and support the needs – they can provide detailed information regarding set-up / tear-down eg conference / events space; shareholder meetings; audit space requirements, etc..

The Designer typically takes the lead on specifying decorative lighting, furniture and finishes. FM's should be interested in what is being proposed early on, not only aesthetically but from a durability and maintenance perspective. Regarding furniture, it is imperative that FMs understand the selection and specification process, has actively participated and provided constructive input to ensure support of the product choices once installed and minimize post-occupancy issues or concerns. Decorative lighting has become more prominent in common areas in office space – understanding the lighting specifications operation and maintenance in advance of order and installation can eliminate unforeseen issues and associated costs down the road.

While Building Systems are the focus of the Engineering team, this area should be of significant interest to FMs as they are responsible for ensuring operational excellence for the long-term. Building systems are continually changing and new technologies are emerging all the time. Proactively inquiring about 'better' systems, engaging with the engineering team and wanting to learn more about what is currently available that could be considered for the project is important – the FM

FMs typically look at the project through the lens of operational occupancy and performance – as such, their input throughout the process is invaluable. FM's should ask and appropriately insist on having a seat at the table. If needed, having a career sponsor eg a senior colleague or leader to support this request can be invaluable – but you must make the desire known and follow-through.

Once seated, have an open-mind and prepared to articulate requirements, concerns and potential solutions for consideration throughout the process.

How to Ask Your Boss to Be Your Career Sponsor

Having a sponsor—a senior colleague who's invested in your growth and career progression—can help you get ahead in your career. And while finding a sponsor may feel overwhelming, you don't have to overthink it. Start with a senior leader who knows your work and track record better than anyone: your manager. Here's how to turn your boss into your sponsor. First, build credibility and trust. You can do this in three ways: performing your tasks with excellence, taking initiative to learn new skills and take on new responsibilities, and actively seeking feedback to improve. Over time, the credibility you build will earn you the right to make the ask. When you do ask them to be your sponsor, simply be honest about what you want. During a one-on-one meeting, ask them whether they'd be willing to be your sponsor and help you grow within the organization. You may also want to include a specific action item that you think would be helpful to your career progression. And if they agree, stay proactive by updating them on your progress, accomplishments, and goals. Remember: Your achievements are also a reflection of your manager's leadership. Don't forget to show them gratitude for their investment in you.

This tip is adapted from "[Turn Your Boss into a Sponsor](#)," by Jovina Ang

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Christian Pellecchia's General Contractor Perspective

As a General Contractor, I have always insisted on FM's having a seat at the table with the design and construction teams for the entire duration of construction projects. Over the years, I have learned that the FM's can lower costs for design and construction because of their intimate knowledge of the buildings that are constructed and their intended use. Furthermore, FMs could also lower costs for the maintenance activities for the entire lifecycle of structures in two general ways. First, they could provide their expertise on where to place certain equipment to create easier access for the maintenance team; thereby generating more efficiency. Second, they could make recommendations for certain products to be used in construction that are less costly to maintain.

However, there are a few aspects of the design and construction process that FMs should become more familiar with to be more effective at these meetings. In turn, I will make the argument that FMs should become more proficient in the following three areas:

1. Architectural and mechanical drawings
2. Fundamentals of MEP and F
3. Permitting processes of their local jurisdictions

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We teach Facility Managers of all levels the basics of all other workplace functions, so that when they come to the table, they are both prepared and empowered to lead the decisions on their company's workplace experience.

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Leni Rivera's Workplace Strategist Perspective

An effective and cohesive workplace experience is best created when it includes the input, involvement, and decisions of all workplace functions – from Corporate Real Estate, Interior Design, Facility Management, to Workplace technology. However, because many companies have these teams working separately, effectively creating and driving a workplace experience strategy that incorporates all workplace perspectives is increasingly difficult.

Therefore, Facility Management professionals should know that they are an integral part of the strategy development and are welcome at the table. But to add value to the conversation, they should come prepared. Here's how:

1. Know the other workplace functions that are involved in the process; know what they do, how they deliver their goals, and the role that each of them play within the overall strategy.
2. Lead the conversation with the ways in which the role of FM supports their success and contributes to delivering a common goal.
3. Leverage FM's specific KPIs (Key Performance Indicators) to drive home its value.

This way, the FM function will fit seamlessly into a long-term strategy that drives a cohesive and sustainable workplace experience.

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Linda Besetzny's Facility Manager Perspective

The Facility Manager plays an integral role in any build out process and needs to have a seat at the table from the start of the planning process.

The Facility Manager can also be the Co/Project Manager in leading the project. Your collaborative input with the entire build-out process team is invaluable.

I have found success by letting my boss know my skillset, leadership and experience that I can help to lead the project. Of course, we lean heavily on other subject matter experts as well.

How to communicate more effectively and be an active participant:

- Once you are aware of an upcoming project whether it is retrofit or relocate, offer to set a meeting with your boss asking for input from the appropriate stakeholders including decision makers and IT. Understand the scope, budget, timeline and overall final big picture. Find out who will "run" the project. Will it be you as the Facility Manager or an outside Project Manager? Offer to set the weekly meetings and find out who needs to be invited. Have the PM send out minutes to each participant. Prepare before each meeting by reviewing last week's minutes. Have the GC send out updated weekly timelines. Keep track of the budget and provide timely updates to your boss. Compile the project team list of contacts and circulate to the entire team.

The Design-Build project delivery (one entity, the Design Build Team), works under a single contract with the project owner to provide design and construction services. It will be one entity, one contract, one unified flow of work from the initial concept through completion, including a Project Manager (if desired) to work in tandem with the Facility Manager. I've always found this way works best, whereas you both act as "Co" Project Managers (you representing your firm). The Project Manager helps find the GC, architect and any other specialists needed, usually interviewing at least 3 vendors.

- Keep the stakeholders updated throughout the project. Once the project is complete, close out the project by letting your boss know that you stayed on schedule and within budget.
- Be invited to a seat at the table. Your input is valuable. Let your boss know your skillset and leadership skills. Express how you can help to keep the budget on track, save money and implement sustainable practices.
- When approaching your boss regarding a problem, always bring a solution to a problem rather than going to your boss to solve the problem.
- Let your boss know that you have an entire IFMA network of contacts for project management referrals and vendors at your disposal. Ask your fellow Facility Managers what vendors and contractors they use or products that they recommend. Be thorough – ask for referrals on projects previously completed by general contractors and architects. Don't recreate the wheel – share the knowledge.
- Get the input from key stakeholders for a complete understanding of the scope, including doing a survey to end users for input. Keep stakeholders informed throughout the project.
- Track the budget and value engineer items out if needed in order to stay within/under your budget. Track the timeline carefully to avoid holdover rent expenses.
- Close out the project by letting the stakeholders know the project met the criteria set for timeline and budget.

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Maureen Roskoski's Sustainability Director Perspective

Sustainable Facility Management

Enabling sustainable facility management requires thoughtful decision making at the design and construction phase of a new building or a renovation. Key items to consider during design and construction include:

- What data is needed to track company sustainability metrics? AND What data is helpful for us to reach our sustainability goals?
- How will we collect that data? For example, to track energy and water consumption, meters are needed and location of meters should be based on data needs.
- What are our HVAC needs? Beyond basic heating and cooling needs, what configuration of mechanical systems and zones are beneficial to meeting our goals.
- How do we balance sustainability design with facility operational requirements?

Throughout the design process, an FM, or an SFP, can demonstrate their value by reinforcing company sustainability values and goals. We won't win all the arguments or get everything we suggest, but we can remind everyone of the bigger picture and why certain things may be prioritized based on company sustainability goals.

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All CEU participants are required to complete the session evaluation, five question assessment and **CEU session code** for each session attended. After passing the test, your electronic CEU certificate can be downloaded from the Attendee Service Center.

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- Click “Start CEU Process” on the left-hand side.
- Click “Start” next to the session you attended.
- Complete the session evaluation.
- Complete the five-question assessment and CEU session code
- After passing the test, your attendance will be verified, and a certificate can be downloaded from the Attendee Service Center.

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