

# Mini FM Assessment Checklist

## About the Mini FM Assessment

This Mini Assessment lets you to do a high-level assessment of your own FM practices and compare them to best practices. As a mini assessment, it covers only higher level practices. The full FM Assessment has sub-items for a more detailed assessment, gap analysis and recommendations based on priorities and your specific needs.

Practice	Expectation	Yes
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 occupants	
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.	
Lease Management	You have formal processes and resources to scrutinize lease charges from landlords and property tax.	
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.	
Occupancy Management	You have systems to track, analyze and report usage to provide management and strategic information for cost containment and planning to drive behaviors 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.	

Column Total	Max = 14	
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Your Rating	Score = "Yes" total / 14 * 100 %	<input type="text"/>
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## Using the Mini Assessment

For each Practice, read the Expectation column. If you fully meet those expectations, check the "Yes" column, even if it's in place through out-tasked or out-sourced services.

To arrive at your % rating, add up all the checkmarks under the "Yes" Column, divide by 14 and multiply by 100%

## Best Practices

Best practices are considered to be the most effective at delivering the desired outcome. The practices identified here cover the range of management practices most Corporate FM and Property Management organizations should have in place to effectively provide a safe, comfortable, cost effective environment for building occupants while maintaining the value of the asset.

The actual methods, technology, practices and controls behind each of these best practices are not dealt with in this checklist, however they are important to ensure the best practices are actually delivering results.

## Assessing the Results

This score provides you with an idea of where your organization fits relative to ideal FM best practices. It is a mini version of the full scale FM Assessment. You are unlikely to achieve 100%. Even the best organizations don't necessarily meet all the best practice expectations.

## On-Line

Please visit [www.fminsight.com](http://www.fminsight.com) and go to the **SurveyFM** section. Fill in the assessment on-line to anonymously contribute benchmarking data and compare your score to other participants.