



Banking Institutions & Credit Unions Council of IFMA

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President's Message

By David M. Eisenreich

Happy New Year! Due to some scheduling glitches, we postponed issuing our December edition of our newsletter until this week. The board and I hope that your holidays were bright and that you are gearing up for yet another successful year in the world of Facility Management.

The Fall Council Meeting that was held in conjunction with World Workplace 2005 in Philadelphia, PA last October was very successful. The turn out was good and as always, participants engaged in very stimulating comments in the roundtable discussions. I want to acknowledge Jeff Cooper and Patti Childers for their outstanding efforts in coordinating this event. If you were not able to attend the meeting, please turn to page 2 where you will find a comprehensive review of the meeting.

While at World Workplace, I also had the honor of accepting the IFMA [Council Achievement Award](#) at the Awards of Excellence Banquet. This prestigious award (only one Council selected) acknowledged the huge strides the Banking Institutions and Credit Unions Council has made in its short existence. I want to recognize Sandy Oliver, our Past President, for the outstanding leadership during the period that was judged for the award and to Cheryl Waybright for her professional approach in documenting our achievements in the submission document. We should all be proud of this Council.

Call to Action: Having IFMA recognize our efforts and rewarding us for them only points out the need for us to excel even further. The few of us cannot do it alone. We need your ideas and [...Continued on Page 2](#)

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Council Achievement Award. . . And the Winner is . . . BICUC!

IFMA Press Release November 29, 2005



IFMA HONORS BANKING INSTITUTIONS AND CREDIT UNIONS COUNCIL WITH ACHIEVEMENT AWARD OF EXCELLENCE

The International Facility Management Association (IFMA) has honored the Banking Institutions and Credit Unions Council of IFMA with its 2005 Award of Excellence for Council Achievement. The council received the award at a gala dinner Oct. 25 at the Pennsylvania Convention Center in Philadelphia. The awards celebration culminated IFMA's World Workplace conference and expo.

The basis for the nomination of the Council Achievement Award recipient is "development of a good practices program" and its promotion of the professional development of council members. From May 2004 through April 2005, the Council grew by more than 87 percent. The Council made a commitment to strategic planning and has successfully utilized the IFMA strategic planning template. During the past year, the Council has increased the publication of its newsletters from four to six times per year; improved its Web site to serve as a centralized repository of useful information for financial facility practitioners; posted 14 discussion topics on its ListServ; and hosted three face-to-face educational and networking opportunities for its members.

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President's Message

By David M. Eisenreich

energy in taking the Council to new heights. We currently have openings on several committees and would like to increase the participation by our membership on these committees. You will help advance the BICUC to support our membership and also build on our accomplishments. Please do not hesitate to send me an e-mail expressing your particular interest and I will see that you are put in touch with that committee chair.

... [Signature]

World WorkPlace Meeting Re-Cap

By: Patti Childers

This year's fall meeting in Philadelphia was a great success. A group of approximately thirty facility professionals in the banking industry including several regular BICUC members, numerous first time attendees along with a few guests, met the first day of World Workplace for a robust discussion.

BICUC joins annually with other industry specific councils in hosting IFMA's Industry and Interest Day event at World Workplace.

The morning started with a continental breakfast forum discussing "Future Trends Impacting the Bank/Credit Union Facility" facilitated by President Dave Eisenreich. The discussion centered around five specific trends: Economic, Environmental, Legislative, Human Resources and Corporate Culture. The economic trends discussed were in the areas of



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World WorkPlace Meeting Re-Cap

increased cost of operating facilities due to rising utility expense, labor and material costs and deferred maintenance. In addition the discussion pointed out that most of us are managing aging structures and obsolete equipment that sooner or later will have to be replaced.

Environmental trends impacting the industry include increased demands to introduce sustainable design and construction as well ongoing management of indoor air quality issues.

In the area of legislative trends, we discussed the increased awareness of protection of customer sensitive information, security, worker safety and other code related issues.

Among the human resource trends, outsourcing lead the conversation. Additional discussions centered on staff development and training, changing demographics in the workforce (boomers on the way out, Gen Xers and Gen Yers coming up).

We discussed the various trends in the industry in the area of corporate culture. Certainly in the Banking Industry there continues to be consolidation of companies. Expansion and downsizing issues were also discussed.



Left:
Mark Gebhard - Sterling Financial Corp., Dave Eisenreich - PNC Bank - Parade of IFMA Chapters & Councils

Right (Left to right):
Jesse Standing, Royal Bank of Canada
Edward Nickson, First Niagara Bank
Bruce Ellis - BLJC-RBC.



Left:
Melissa Van Hagan, Bank of the West
Buddy McMullin, Redstone FCU

Next up was the keynote presentation “We’ve Gone Green”, also presented by Dave Eisenreich. Guest speaker Gary J. Saulson of PNC Financial Services Group was unable to attend. Dave walked through PNC’s involvement in sustainable design, starting with the construction of the Firstside Center Operations facility in Pittsburgh, PA. Followed by several other major office facilities in the State of Delaware. He then proceeded to share with the group PNC’s latest efforts in developing a branch prototype that is designed for LEED Silver certification.

Following a short business meeting, a roundtable discussion “Energy Management and Resource Sustainability Green Innovations That Can Be Applied to a Financial Institution” was led by Jeff Cooper of Redstone Federal Credit Union and President Dave Eisenreich. In this discussion, participants were asked to share their experiences in the use of energy saving equipment as well as the use of sustainable design and products in the buildings they manage.

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Penny Grossenbacher
 Director,
 Facilities Management &
 Office Services
 US Central Federal Credit Union
 Lenexa, Kansas.




In her position, Penny Grossenbacher oversees all office and building-related activities for U.S. Central including office operations, maintenance, physical security, space planning, allocation and renovations, janitorial, long-range contingency planning and department budgeting. Her most memorable experience at U.S. Central was overseeing the construction of its new corporate headquarters in 2002.

Prior to US Central, Penny spent ten years with the Federal Reserve Bank of Kansas as a Senior Facilities Planner. 2006 marks her 20th anniversary in the FM profession. Penny attributes her AutoCAD training skills has

given her an edge in transitioning from the role of designer to facilities planner and later to FM Manager and Director. She is a member of DBIA and BOMA.

Penny enjoys designing and making purses, jewelry and scarves as a hobby. Each Christmas Eve, she anonymously donates a portion of the profit she makes to a local family with cancer.

As a member of BICUC, Penny values the networking and sharing of ideas with other professionals specifically in the financial institution industry. She commented, "It is productive and intriguing to find out what unique situations others have been in and how quickly BICUC members respond to questions and surveys." ... 

Membership Corner

By Jayne L. Burritt

The BICUC membership base continues to grow with 28 new members during the period between September 1 and November 30, 2005. BICUC now has 292 members. Further, Olumuyiwa O. Odufalu, CFM with Standard Chartered Bank Nigeria Ltd., is the latest BICUC member to obtain the CFM credential having received board approval for equivalency on September 28, 2005.

• Ahold Information Services	Larry K. Alberson, Manager, Information Technology Procurement & Administration
• Alliance Capital Management	Christopher C. Holman, Facilities Site Manager
• American General Finance	Christine M. Elpers, Facilities Project Administrator Clayton E. Powers, Director of General Services
• Bank of Castile	Scott S. Gillette, Facilities Manager
• Colorado State Bank & Trust	Shelley L. Bloom, Facility Management Officer
• Commercial Federal Bank	Phillip S. Bonifazi, Facilities Supervisor
• F&M Trust	Barry L. Shetter, Facility Manager
• Labarre Associates, Inc.	Tommy K. Jones, Facility Systems Manager
• MacDill Federal Credit Union	Joel A. Pecoraro, CFM, Director, Property Administration
• MBNA	Thomas A. Patrick, Facility Building Manager
• Republic Bank & Trust Co.	Carol A. James, Facility Manager
• SunTrust Bank	Terry L. Nosie, Group Vice President, Florida Facilities
• The World Bank	Jonathan B. Lyttle, Manager, Corporate Real Estate Lisa T. Brennan, Project Manager
• The World Bank Group	Mark W. Malloy, Senior Project Manager
• WSECU	John W. Goin, Facilities Supervisor
	David R. Smith, FMA, Retired

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8 PRINCIPLES TO KEEP IN MIND BEFORE SIGNING A CONTRACT AGREEMENT

By: [Bob Motter](#)

Each experience with a contract is unique and largely depends on the relationship between the parties and the terms of the contract. Here are 8 principles to keep in mind.

1. Do not believe that the contract being offered is fair or that all of your firm's interests are protected. While you may trust the contractor, service provider, supplier or seller you are dealing with, do not accept contracts that do not allow you to negotiate the terms.
2. Carefully read and understand the contract before signing it. What might have been discussed or understood by you in a meeting or on the golf course, may not be in writing. Make certain that what you are about to sign and accept contains the terms and obligations that ensure your company will receive all of what it has contracted for and what course of action it will take if it doesn't. If you have questions or do not understand the contract terms have it reviewed by an attorney.
3. Failure to perform is not an excuse that conveniently allows either party out of its contract

obligations for free. Almost every failure to perform by one party will cost the other party time and money.

4. Before entering into a contract know the other party's financial condition, as well as its performance history. Make certain your firm will be paid for what it provides or delivers.

This is important where the passage of title occurs upon delivery. If your company fails to receive payment, it becomes the other party's creditor and in most instances your company's claim is unsecured. Conversely, as the buyer, make sure the seller provides or delivers before making payment. Ask yourself what will happen if you prepay the seller for goods or services and prior to receiving them, the seller goes bankrupt or cannot deliver.

5. Do not allow any change in the terms of the contract unless it is in writing. Almost every contract provides that the only thing enforceable is what is in writing. What was said or promised over lunch or the telephone cannot be enforced unless it has been amended into the contract.


6. Know the length (term) of the contract. Production and performance contracting agreements have a start and end date meaning they are written for a specific term, 1, 2, or 3 year. Another type commonly referred to as an "evergreen"

type meaning it automatically renews. Evergreen type contracts should be avoided unless you clearly know and accept what the continuing price will be and that your company will need the goods or services in the future.

7. Fixed price, lump sum or surprise. Contracts that permit the seller to change the price at its discretion can place your firm in a disadvantaged economic position. Similarly, cost plus contracts written with a poor scope of work and specifications can easily become a financial drain on your company.

8. Keep these three things in mind when reviewing or signing any contract:

1. Contract writing is the art of predicting the future. Make certain your predictions about the future are as good as the person who wrote the contract.
2. A detailed scope of work and specifications always produces a better agreement.
3. And lastly, a contract is only as good as the people signing it.

Bob Motter is a facility management subcontracts manager for financial institutions with Viox Services, Inc., an EMCOR company, and serves as BICUC Secretary and Secretary and Webmaster of the IFMA Cincinnati Chapter... 

GET A LIFE! CREATING WORKPLACE WELLNESS

By: Yvonne Holland, CFM

Ever feel like your life is off the rails?

Ever feel like you are unable to balance the competing time pressures of work, commuting, community, family, volunteerism, managing your own health and caring for aging and perhaps ailing parents?

When working late how many times have you been told to **GET A LIFE?**

How we define the balance between our work and personal responsibilities will very likely be quite different from that of our friends, family or the colleague in the next office. We all live very different lives, complete with our own personal and professional aspirations.



The balance between work and the rest of our life responsibilities is therefore very personal. This was a favorite topic of two of my closest, and very busiest friends, with whom

I have dinner every 6 weeks or so...Recently, I lost one of my dear friends who had just turned 40 prior to a massive blood clot that killed her instantly, her funeral, attended by over 800 people was a testimony to her full, busy and fruitful life. She was however, like the rest of us, continually seeking harmony between the pressures of the workplace and personal responsibilities.

Ten to fifteen years or so ago, coping with a young or ageing family, addiction, financial stress, depression and your own health were seen as concerns to check at the front door when entering the workplace.

Today we understand that our workplace organizations have a significant stake in our overall well-being...we understand that we simply cannot park our personal challenges at the front door and be productive, whole, contributing human beings at our jobs.

To what extent then are our workplace organizations responsible for providing a supportive environment? As stewards of the workplace, the issue of balance for Facilities Managers is doubly complicated. More and more facilities managers are waking up to the need for workplace well-being. Not just because it makes people feel better and be more productive, but because it's simply the right thing to do.

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Events Calendar



2006

- **IFMA - Audio Seminar: Jan. 6, 2006**
The Emergency Operations Center: The Critical Tool for Incident Management
- **BICUC Roundtable Teleconference, January 10**
- **2006 IFMA Leaders Conference Jan. 27-28, 2006**
Houston, TX, USA
- **The Business of FM Feb. 20-23, 2006**
Houston, TX, USA
- **BIFM Scotland Conference Feb. 24, 2006**
- **The European Facility Management Conference 2006, March 7-8, 2006**
Messe Frankfurt, Frankfurt, Germany
- **BICUC's Spring Meeting, March 14-15,**
San Antonio, TX
- **IFMA's Management Summit, March 15 -17,**
San Antonio, TX
- **BICUC Roundtable Teleconference, May 9**
- **BICUC Roundtable Teleconference, July 11**
- **BICUC Roundtable Teleconference, Sept. 12**
- **IFMA's World Workplace 2006, Oct. 8-10,**
San Diego, CA
- **BICUC Roundtable Teleconference, Nov. 14**

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GET A LIFE!

As the Vice President for Facilities Management CBRE Management Services in Canada, it is my opinion that life "balance" deals with the ability of an organization, such as ours, to meet **its** goals while addressing **employees'** needs for life long learning opportunities and development, the need to be involved and connected to corporate outcomes, as well as the need to create a life outside of the professional environment. A balance of these elements can go along way to creating a very healthy work environment.

We all know that working harder and longer can be easily justified in short bursts. A weekend with the laptop here, an evening at the office there; it can seem like a small price to pay when a project deadline is staring your team in the face. In fact a team 'getting behind' a big project, a deadline or a deliverable can be a wonderful team building exercise....the adrenaline rushing, the laughter free flowing and creative process unfettered

The challenge, however, is that the exception can quickly become the rule in any organization. Once the balance between work and home shifts toward work, the price one pays can be significant - and perhaps even financially crippling.

When overwork becomes the new norm the symptoms are subtle and can be easily misdiagnosed because they hide behind other primary disorders: chronic absenteeism; nagging colds and flu symptoms; body aches; and sometimes more serious illnesses.



The signs of a loss of equilibrium between the working and personal lives of the people around us can be hard to link to the root problem but if left unchecked can undermine the effectiveness of the team and perhaps the entire organization.

Well-Being by the Numbers – DID YOU KNOW???

Next is a listing of some excerpts from Canadian School of Public Service:

Missed Weekends:

Canadian executives work, on average, almost 5 hours each weekend. More than a quarter of executives work 6 or more hours each weekend.

Brain Drain:

63% of retiring executives consider balancing work and

personal life a very important factor in their decision to leave.

Upward Immobility:

For 51% of executives, problems with work/life balance were a very important reason for not seeking a promotion. In the labor force as a whole, this number is 32%.

Cheer Up:

Almost 2 out of every 5 Disability Insurance Plan claims in 1997/98 were due to depression or anxiety.

Drowning In Work -

■ Heavy Load:

In 1999, almost half of all Canadian workers considered their workload not reasonable most of the time; 40% could not complete their assigned workload during regular working hours most of the time.

■ Shabby Job:

Half of all Canadian executives feel that their work suffers because they are asked to do more with fewer resources, while 29% feel that their work often or always suffers because of unreasonable deadlines.

Time You'll Never Get Back -

■ Commuter Blues:

Workers spent an average of 62 minutes per day traveling to and from work during the regular work week in 1998. That is more than 5 hours per week, or 10 full days a year. For those who take the bus or subway, the average travel time per day is 100 minutes.

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GET A LIFE!

Who's In Charge Here Problem With Authority:

Two thirds of Canadian organizations do not give their managers enough control to help employees balance work and personal responsibilities. Gatekeepers:

Life Isn't What It Used To Be

■ **Balancing Act:**

The percentage of workers reporting moderate to high levels of stress from balancing work and life responsibilities rose by almost 75%, from 27% in 1989 to 46% in 1999.

■ **Emotional Overload:**

Employees reporting high levels of depression more than doubled, from 15% in 1991 to 33% in 2001. In 1991, 1 in 5 workers reported high levels of job stress. By 2001, 1 in 3 workers were reporting high levels. High levels of role overload increased over the period, from 47% to 58%.

■ **No Satisfaction:**

The share of workers with high levels of job satisfaction declined from 61% to 43% between 1991 and 2001. During the same period, the share with high organizational commitment declined from 76% to 43%. The share with high levels of life satisfaction declined from 54% to 41%.

Gender Trouble

■ **This or That:** Three quarters of female workers feel that commitment to family hindered career advancement. Two thirds feel that advancement depends on putting their career ahead of their personal life.

■ **On Hold:** 41% of women report postponing having a child, or not having one at all.

Six essential factors for a healthy work environment:

I think we can all learn from our Public Service (APEX) which cited six essential factors for a healthy work environment:

1. A values-based work environment and management regime;
2. Open communications and dialogue;
3. Collegiality and sharing within a team;
4. Clarity and unity of purpose;
5. Significant flexibility and discretion, and support for reasonable risk taking;
6. Balance between work and personal life

As Facilities Executives, responsible, in whole/part for workplace wellness/resource attraction/retention and productivity, we should take the lead in forming Workplace Wellness groups within in our own organizations. The Workplace Wellness groups could target best practices,

supportive management practices, and advice on a variety of well-being related topics – such as stress management and prevention such as healthy eating and exercise.

Focus groups could be brought together to identify 'fixable problems' with respect to workload. Lunch N Learn sessions could be set up on topics such as mental health, breast health, and bio-feedback.

An annual Workplace Wellness Award and Employee Appreciation Day could become vehicles to recognize the contributions made by employees.

The next time I am told to 'GET A LIFE' I will remember my friend, now lost to us all forever, and remember to balance my workplace and personal responsibilities going forward. If you have any questions regarding this article or any IFMA related issue please do not hesitate to contact me directly

Yvonne Holland is Vice President of Facilities Management in CBRE's Canadian Management Services group. She is past president of the Toronto chapter of IFMA and is currently a member of the IFMA International Certification Committee. She can be reached at yvonne.holland@cbre.com

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What's Up with the BICUC ListServ?

The Banking Institutions & Credit Union Council ListServ continues to be an active resource to BICUC members.

A feature your BICUC membership, the ListServ allows you to solicit advice and recommendations from your colleagues for which you will receive instant access to the entire council membership. Visit the Resource Center on the BICUC website at <http://ifma-bicuc.org> for detailed instructions.



From October 1st to November 30th, information was exchanged on the following topics:

- National Facility management Company
- Facilities Integration
- ATM & Night Drop in Kiosk
- Branch acquisition -- a facilities checklist?
- Branch acquisition -- a facilities checklist?
- Operating Costs.

Randy Archer, Facilities Manager at First National Bank of Colorado recently used this tool to request information on digital video recorders. He received 14 responses to his inquiry and has this to say:

“I have found the BICUC ListServ to be very helpful in gathering information on materials, best practices, sample policies and sample documents. I have received good responses on all my inquiries and I appreciate the time other FM’s take to send their comments and experiences.

These responses are not the sole inputs for my business decisions, but they are often an important step in the research part of the process. Particularly when big dollars are involved, it benefits all of us to be highly informed when we make our FM decisions. I also try to respond to others when if I have a pertinent comment about an online inquiry. The ListServ is an important peer group tool and it is probably the feature of BICUC I use most in my work.”

Larry Judkins with First Horizon recently requested information on two topics:

“The responses from our members were great. The information I received helped me develop my RFP much faster than if I had started researching for companies without such input. Having a

network of peers will share information in a short time have proven to be one of the best perks I have received from being a member of IFMA. The process of having this request sent out to the other members was quick and easy.” . . .

Roundtable Tele-Conferences

By Jeff Cooper

The program committee is off and running and has 5 round table teleconference sessions scheduled specific to the BICUC. All calls are at 1:30 Eastern time.

- Jan 10th - Facilities Standards
- Dial - : 1-866-248-6630
- Participant Code: 7542367102#
- May 9th - Emergency Preparedness & Disaster Recovery
- July 11th - Energy Conservation | Energy Management
- Sept. 12th - Outsourcing Service Contracts
- Nov. 14th - Risk Assessment. . .

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The BICUC News

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