



Banking Institutions & Credit Unions Council of IFMA

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President's Message

By David M. Eisenreich

We have had a busy summer and are looking forward to a fantastic fall and upcoming year for the Banking Institutions and Credit Unions Council (BICUC). We are especially looking forward to an incredible BICUC fall meeting and IFMA World Workplace event later this month. As this is my first President's Message, I want to first thank you for giving me the opportunity to lead the Banking Institutions and BICUC for the coming year. I extend a special thanks to Sandy Oliver for outstanding leadership over the past year. It has been a delight to work with such an energetic and devoted individual in promoting and advancing the goals of the BICUC. [....Continued on Page 4](#)

Past - President's Message

By Sandra S. Oliver, CFM

Whew! It is hard to believe that my year as President of the BICUC came to an end just a few short months ago. The Council closed out our fiscal year on June 30 and a new set of officers and committee members have taken over the helm of BICUC. Preparations are well underway for the fall meeting in Philadelphia in conjunction with IFMA's World Workplace. Additionally, David Eisenreich, now President of BICUC, is leading your council forward with a strategic perspective to the future. Since this is my last "President's Message" I wanted to take the opportunity to thank the Board of Directors, Committee Chairs and members who joined our efforts to move the Council forward over the past year. [....Continued on Page 4](#)

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Demand and Supply– A New Twist on an Old Concept

By:

- [Francoise Szigeti, President, TEAG – The Environmental Analysis Group](#)
- [Gerald Davis, IFMA FELLOW, ASTM FELLOW, CFM, AIA, AIA, President, International Centre for Facilities, Inc.](#)
- [Jeff Villnow, Principal, TEC Infodex](#)
- [Rich Tremaglio, Information Management Practice Leader, TEC Infodex](#)
- [David Slater, TEC Infodex](#)
- [Robert Sauer, P.E., Facility Management Practice Leader, TEC Infodex](#)

You Need What?

Your company is evolving, working hard to keep up with the competition. You're the facility manager, and your job is to make sure that all the physical assets your business needs are available—at the right places and at the right times. Whether dealing with space utilization, carpet cleaning, installation of a new kiosk, completing a major roof repair, or even planning a new branch office, you are expected to translate business goals into accurate facility management budgets, and in a way that your CEO can understand.

The data you use to make informed decisions are all there—somewhere. What you need is a way to bridge the gaps between data groups—from planning to accounting, engineering, operations, and finance--so that your capital asset management program is fully integrated, documented, and strategically focused to support your corporate goals.

Demand and Supply in Facility Management Decisions

In the past, facility repair and alteration (R&A) decisions were all too often based on subjective considerations, particularly when dealing with large portfolios of properties. When R&A dollars were short, the squeaky wheel usually got the grease. More recently, facility condition assessments (FCA) have been used to bring structure and consistency to the problem of allocating limited R&A dollars among competing projects. However, FCAs are still of limited value to the facility manager—they generate long lists of candidate R&A projects, but provide little if any useful information about whether or not the project should really be funded. Should a new roof project be approved for a facility that is not functionally sound any longer, as happened to one organization? What is “excellent” versus “appropriate” condition, and how should this distinction influence budgeting decisions across your enterprise?

An innovative decision-making tool box, based on familiar demand and supply concepts, can help. The tool box employs standardized performance metrics that for the first time allow you to link your buildings' condition to the functional requirements of your organization and your customers. You can now plan, prioritize, and budget R&A projects using a multi-criteria, demand and

supply approach that is transparent, comprehensive and auditable, and in a way that is faster, easier and less costly than in the past.

With the tool box, you can now objectively determine the extent to which each of your assets “fits” the mission of your organization as well as the needs of the users. Essentially, you can compare your organization's (and customer's) functional requirements (demand) with your current or planned capability (supply), identify “gaps” between your demand and supply profiles, and then create, combine, or otherwise implement R&A projects in a way that closes the gap(s). The innovation is to set scalar levels of demand (requirements) and supply (capabilities) for each of several facility performance attributes, and then to link these numerical descriptors to candidate R&A projects, or even to demolition or new construction projects. Each scale provides a matched, numbered set of descriptions that profile your building requirements and capabilities in a standardized, quantified, and comparable way. Each building performance attribute is ranked from level 0 (unacceptable or not required) to level 9 (most desirable or required).

The key is that all scales are calibrated to give comparability and consistency in accordance with an [...Continued on Page 5](#)



Mark A. Gebhard


Facilities Manager
Sterling Financial Corporation
Lancaster, PA



Mark Gebhard is Facilities Manager for Sterling Financial Corporation based in Lancaster, PA. He is responsible

for all aspects of the management and maintenance of the properties owned or leased by Sterling Financial Corporation or any of its Affiliates.

Mark has 27 years experience in construction and facilities management. Prior to joining Sterling Financial in 2002, Mark was a team member of Wagman Construction and prior to that, with Charter One Corporation and Horst Property Management.

Mark obtained IFMA's CFM designation in 1995 and has been a member of IFMA for 12 years. When asked about the benefits of being networked with the BICUC, Mark noted that "being new to the financial industry, BICUC and IFMA have proven to be an invaluable resource to me in my career. Interacting and sharing with my peers in the BICUC council has been the highlight of my IFMA membership in recent years." 

Membership Corner

By Jayne L. Burritt

The BICUC continues its growth – 57 new members joined the council between April 1 and September 3, 2005. BICUC now has 283 members.

Please welcome:

- Alliance Capital Management
- Allied Irish Bank
- American General Finance
- Ameriserv Financial Bank
- Associated Bank
- BNY Asset Solutions
- Cargill Investor Services, Inc.
- Caribbean Development Bank
- CB Richard Ellis Management Services
- Citywide Banks of Colorado, Inc.
- Colonial Bank
- Comerica
- CommunityAmerica Credit Union
- Credit Suisse First Boston
- Dade County Federal Credit Union
- Discover Financial Services, Inc.
- Envision Financial
- Evangelical Christian Credit Union
- Fifth Third Bank
- First Commonwealth Bank
- First National Bank
- Fremont Investment & Loan
- GTE Federal Credit Union
- Hibernia National Bank
- Huntington Bank
- Janus
- Jones Lang LaSalle
- Howard Harris, Assistant Vice President
- Carmel Ann Birney, Assistant Vice President
- Clayton E. Powers, Director of General Services
- Christine M. Elpers, Facilities Project Administrator
- Philip H. Doell, III, Facilities Manager
- Michael F. Danelski, CFM, Facilities Manager
- Karen L. Sowders, Operations Manager
- Harriet Harrington, Office Manager
- Darrell F. Theobalds, Manager, Administrative Services
- Sunil K. Sharma, RIBA, Director, Facilities Management
- Beverly A. Freng, Vice President
- Jill F. Jaggars, Regional Project Manager, Vice President
- Virgil J. Moore, Vice President, Retail Facilities Manager
- Gay L. Tuttle, CFM, Facilities Manager
- Chris YT Tung, Vice President, Corporate Services
- Danny DM Lim, Vice President
- Wayne O. Anderson, Corporate Services Director
- Daniel Benvenuto, Operations Manager
- Kathy J. Merkle, New Albany Facility Manager
- Carol M. Daniels, Property Administration Officer
- Timothy P. Shook, Facilities Supervisor
- Mark A. Jaconette, Vice President of Facility Management
- James P. Murray, III, CFM, Vice President Facilities
- William S. Coleman, Building and Facilities Supervisor
- Jocelyn N. Hamada, Facilities Manager
- Scott Roach, Building & Facilities Manager
- Clarence A. Romage, Project Manager
- Mrs. Melissa C. Lewis, Facilities Manager
- Mr. Christopher W. Schneider, Vice President, Regional Facilities Manager
- Tricia A. Wright, Property Administrator
- Pui Shan Arnald Ng, CFM MSC, Associate Director
- Kwok Ching Lau, Assistant Facilities Manager
- Frank FK Lin, Facilities Officer
- Donnalee Upstrom, Facility Manager

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President's Message

By David M. Eisenreich

I want to also thank the rest of the Board Members for the commitment they made to this Council. Without their volunteer efforts we would not have been able to keep the Council moving towards our goals.

Please join me in welcoming the newest members to the Board:

- Bob Motter, Secretary
- Donna Kelly, Treasurer
- Jeffrey Cooper, Programs Committee Chair.

Our priority for this council year is to continue the momentum that we have in:

- Providing educational and networking opportunities;
- Further developing our website (www.ifma-bicuc.org/) to be a depository of resources for members and for the Board;
- Developing and publishing benchmarking surveys that provide the data our members are asking for.
- Providing a newsletter filled with information that is valuable to us daily.

We will be rolling out the Council's first strategic plan in Philadelphia. This effort has allowed us to focus on the areas where the Council can benefit you. As the year unfolds, we will provide two opportunities for members to meet face-to-face to discuss issues facing today's

facility manager. The first opportunity is the Fall Meeting scheduled for the morning of Sunday, October 23rd at IFMA's World Workplace. The second will be our Spring Meeting, scheduled for March 2006 in San Antonio, TX. The Spring meeting will be held in conjunction with IFMA's Management Summit 2006.


We have and will continue to host Roundtable Teleconference Calls on important topics and we will continue to support the Listserv, our networking life-line for "instant" solutions.

We have an ambitious schedule outlined. To accomplish all this and still maintain our "day jobs" is my challenge to you.

I want you to ask yourselves: "How can I help? How can I give back to this Council? What do you need me to do? What is in it for me? Many have already asked those questions and have stepped up to the challenge.

To continue our success, we need more volunteers – take your pick, each BICUC committee has room for you. If you think volunteering is too much of a time commitment, let's talk one-on-one. We will place you in a position that adapts to the time you can afford to give us.

As my mother always said to my brothers and me as we argued over doing household chores "many hands make light work". So it is true with volunteering to the Council. The more "hands"

we have to share in the work, the lighter the load for everyone. We are all busy doing more with less. Let's see if you can do something for the Council that might result in an output that could lessen your load at work. Please call me to volunteer! 


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Past - President's Message

By Sandra S. Oliver, CFM

Our Spring Meeting was a hit thanks to our program team of David Eisenreich, Patti Childers and Cheryl Waybright. The BICUC membership body is growing due in part to the efforts of the Membership committee chaired by Jayne Burrirt. The Website is fantastic and a conduit for information for the Council thanks to David Eisenreich and his son Michael for all of their efforts. Our new look in the BICUC News is a big hit thanks to Cheryl Waybright for masterminding the transformation.

I have truly enjoyed my time as President of BICUC – and I hope that each of you will take the time now to step up and offer your assistance, I can assure you your input will be valued and you will reap rewards well past your expectations.

Congratulations to David Eisenreich as the next Council President. I wish him and the new board well!! 

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Demand and Supply . . .

American National Standard methodology from ASTM International. This makes it easy to deal simultaneously and quickly with many more variables than are normally considered, at a much lower cost, with much less time spent by decision-makers.

I'm from the Government and I'm Here to Help

The biggest property manager in the world—the U.S. Federal Government—provides an excellent test-bed for the integrated Demand/Supply facility management toolbox. Bureaucracy, stovepipes, funding uncertainty, politics, and other factors all combine to create an ever-growing list of R&A projects. The national infrastructure continues to deteriorate, and as a result U.S. federal government agencies are feeling very real pressure to somehow adapt their antiquated facility management procedures.

The U.S. Coast Guard (USCG) is using the toolbox to improve how its Logistics Support functions meet the requirements of its missions, its strategic goals and its operational units. It applies a fact-based, objective, transparent approach to the budgeting and prioritization process for R&A projects. It integrates information captured using the toolbox's scales, which

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Membership Corner

- JP Morgan Chase Real Estate Todd R. Grubb, Facility Manager
Nanette R. Anderson, Facility Manager
- MBNA America Bank, NA Michael Cochran, Executive Vice President
Edward C. Jackson, Corporate Energy Manager
Paul T. Knoll, Facility Engineering Manager
Thomas A. Bradshaw, Jr., Site Manager/SPBO
Nicholas Cox, Regional Engineering Operations Manager
- Morgan Stanley Susan T. Clancy, Corporate Services, Director
- Navy Federal Credit Union Judy A. Harrison, Senior Field Facility Project Manager
- PCR Facility Services Jim L. Evatt, Owner
- PNC Bank Charles H. Hutson, III, Project Officer
- Provident Bank Russell E. Gaull, Construction Manager
- Redstone Federal Credit Union Buddy McMullin, Vice President
- Southeast Corporate Federal Credit Union Ginnie S. Pennington, Facility Administrator
- State Department Federal Credit Union Willie N. Poindexter, Facilities & Telecommunications Manager
- The South Financial Group Roy E. Neeley, Vice President of Real Estate Services
- Tower Federal Credit Union Kathryn B. Weldon, Supervisor
- Visa Gordon B. Byers, Vice President Real Estate
- Washington Mutual Bank Michael S. Li, AIA, Vice President, Development Manager
- Washington State Employees Credit Union Michael W. Sanders, SPHR, Vice President Facilities Services
- Wauwatosa Savings Bank Bryan J. Olen, Director of Facility Operations
- Wescorp Charles J. Geiger, Facility Manager
- William Blair & Company Dana McMullen, Facilities Manager



What You Missed . . . Roundtable Conferences

July 26th

Council Benchmarking & Planning Session: This call was a planning session regarding the direction of BICUC Benchmarking efforts.

September 13th

Organizational Structure – Best Practices For Managing Multiple Facilities. This call focused on best Practices pertaining to:

- Organizational structure of the financial institution facilities organization
- Multi-State Branching – O&M Models,
- Challenges of the financial institution facilities organization



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Demand and Supply . . .

are based on the “ASTM Whole Building Functionality and Serviceability Standards” (Suitability Index), with the data provided by other performance indexes such as the Mission Dependency Index, Facility Condition Index, System Criticality Index, and the Space Utilization Index. A weighting factor is provided by considering the relative importance of certain criteria to the mission of the operational group using the facility to be repaired.

The key scalar data are efficiently captured over the intranet of the organization, using web-based software. Thousands of candidate R&A projects worth many tens of millions of dollars are then ranked taking into account all the indexes that are currently available as part of an integrated process—and all the key decision-makers are involved in every step of the process.

So, how can the USCG experience help you?

Consider:

In the past, functionality assessments were not normally conducted because there were no tools to give consistent, objective levels of requirement to match explicit levels of supply capability. Nor was it possible to prioritize R&A projects while


taking functional assessments into account. The USCG project demonstrates how this can now be done. R&A projects can be objectively linked to your organization’s business goals, quickly and efficiently.

The underlying “gap” methodology has now been successfully tested with a number of different types of constructed assets and other logistics support requirements, and in a very complex, politically driven decision-making environment.. Are your building requirements or decision processes any more complex?

Traditional building inspections and condition surveys were normally done by recording observed deficiencies at periodic intervals. They are often times subjective and results are seldom calibrated. The tool box provides data that are captured in a standard manner and calibrated so that you can compare data between and across your facilities, whether collected by you or your vendors.

Accordingly, your data and your decisions are replicable, and in this case replicability equals credibility.

In every business, the target is to capture only the data needed to the level of detail needed for the decision to be made. Detailed programming and inspection data are not needed for budgeting purposes. In fact, such data are usually obsolete by the time a project is underway. The

tool box supports “just in time” data collection whether you are involved in portfolio-level strategic planning, building-level maintenance planning, or day-to-day project execution. Finally, everyone can sing to the same sheet of music. 

Francoise Szigeti, Gerald Davis, Jeff Villnow, Rich Tremaglio, David Slater, and Robert Sauer are part of the team working with the US Coast Guard Maintenance & Logistics Command Pacific, under the leadership of CAPT Mike Valerio, Chief of Civil Engineering, to create and implement this new approach to budget allocation and prioritization. They have all been working in the FM-CRE field more than 20 and up to 45 years. They are focused on making facilities work better for the occupants, stakeholders and other users. Collectively, they have tackled facilities from A to Z, Airports to Zoos, at all phases of the Life Cycle Management. Francoise Szigeti and Gerald Davis can be contacted at 613-727-1788. Jeff Villnow, Rich Tremaglio, David Slater, and Robert Sauer can be contacted at 425 453-4040. You can also visit www.icf-cebe.com and www.TECinc.com.


Events Calendar



2005

- BICUC’s Fall Meeting and Industry and Interest Day, October 23 at World Workplace
- IFMA’s World Workplace 2005, Oct. 23-25, Philadelphia, PA

2006

- BICUC’s Spring Meeting, March 14-15, San Antonio, TX
- IFMA’s Management Summit, March 15 -17, San Antonio, TX
- IFMA’s World Workplace 2006, Oct. 8-10, San Diego, CA 

What's Up with the BICUC ListServe?

The Banking Institutions & Credit Union Council ListServe has been active as a resource to obtain insight from your peers.

This information exchange is a feature of your membership in the council. It allows council members to solicit advice and recommendations from their counterparts throughout via an e-mail network providing instant access to the entire council membership. Visit the Resource Center on the BICUC website at <http://ifma-bicuc.org> for detailed instructions.

From April 1st to September 30th, information was exchanged on the following topics:

- Branch Budgets
- Building Standards
- Costs to Build a Branch
- Digital Video Recorders
- Facilities Branch Support
- Head Office Site Selection
- Internal Moves
- Job Descriptions
- Recycling Program
- Relocation Costs
- Saturday Hours
- Theft Problem
- Vendor Diversity
- Weekend Pay – Shift Differential
- Window Films

You can control how you receive the listserv information. There is a list of COMMAND

INSTRUCTIONS that allow you to choose how you receive the information.



COMMAND INSTRUCTIONS: Send Command to: `LISTSERV@LISTSERVER.IFMA.ORG` leave the subject line blank, in the body of the e-mail include nothing but the COMMAND itself. (Never send a message to members of the listserv to this address.)

--For a digest form (a weekly e-mail containing all messages grouped by subject). Issue a SET IFMABICUC command.

--More information on listserv commands can be found in the listserv reference card, which you can retrieve by sending an INFO REFCARD command.

The Board intends for the listserv to be a valuable tool to exchange information between our members. For additional COMMANDS or to review the Rules and Regulations of the service please visit www.ifma-bicuc.org and click on "Resource Center" link on the Home page.

So, got a problem? Post an inquiry for a solution on the BICUC ListServe and watch for the creative solutions to arrive on your screen!

About the BICUC

The Banking Institutions & Credit Unions Council (BICUC) is a council within IFMA that is focused on issues facility managers of financial institutions face on a daily basis, to include: security, money handling, banking equipment and regulations, customer liability, drive-up lanes, information privacy, disaster recovery, occupancy expense management, real estate transactions and leasing, project management and benchmarking.

Membership is open to IFMA members who have responsibility for managing Banking and Credit Union facilities.

The BICUC News, an electronic publication of the Banking Institutions & Credit Unions Council (BICUC) of the International Facility Management Association (IFMA), is scheduled to circulate bimonthly (February, April, June, August, October, and December). One electronic copy of each issue is supplied to BICUC members and is made available on the BICUC website (www.ifma-bicuc.org) two weeks after the distribution to the BICUC membership. *The BICUC News* reserves the right to edit any articles received or solicited for publication. This right includes the discretion to select titles, artwork and layout. The views expressed in *The BICUC News* are those of the authors and do not necessarily reflect official positions of BICUC or IFMA. Some of the information used in the preparation of this publication was obtained from publicly available sources that are considered reliable. However, the use of this information does not constitute an endorsement of its accuracy by BICUC or IFMA.

The BICUC News

Don't Forget!
Register for the
BICUC Fall 2005
Meeting -
October 23, 2005
in Philadelphia.

