FM Ally Program Charter

Role Description

**FM Ally Partnership:** As a supplement to existing FM communications and services, the FM Ally will be a point of contact with the Client's Associate Dean, Assistant Vice President, or equivalent position, fostering FM-Client relationships with the goal of providing excellent communication and a more consistent FM service delivery.

- Provide a point of contact for the Client's Associate Dean, Assistant Vice President, or equivalent position
- Be an available FM resource to the Client if things are not going well or if they are unsure who to contact to assist in resolving issues as they arise
- Develop and foster the relationship between FM and the Client.
- Develop relationships with Client key personnel
- Review project and jobs scheduled to determine interactive impact. Communicate with customer to determine next steps
- Anticipate issues and present solutions

**Client Profile:** The FM Ally has the responsibility for collecting, creating and maintaining critical Client information, special needs, and general work restrictions. This living document will provide FM with a centralized source of knowledge for each Client that can be used for continuity of service if Ally is on leave or the Client's Ally changes.

- Interview Client in order to document their specific needs
- Maintain Client Profile by updating as necessary.
- Become FM's resource on the Client Profile information and make the Client Profile available to FM

**FM Ally Client Communication:** The FM Ally takes responsibility to regularly and proactively communicate with the Client regarding FM and Client activities.

- Participate in quarterly FM/Client Update Meetings with FM Directors and Deans
- Schedule meetings with Client: Associate Dean, Assistant Vice Presidents, or equivalent, as necessary to exchange information
- Address Client communication concerns as issues arise.
- Ensure that FM Directors are kept updated on key issues

**Additional FM Ally Responsibilities:** The FM Ally will also act as an additional resource for planning, problem solving, and other facility-related needs of the Client to assist with existing FM services.

- Problem-solve on-going and recurring issues where FM is not meeting the Client's expectation
- Participate when appropriate in capital project planning and R&R project planning
- Visit Client facilities & site regularly and review pertinent conditions
- Occasionally attend Client related events to gain knowledge of Client's operational needs
- Participate in quarterly Ally round-table discussions to share ideas and experiences
Ally Positions

1. **Weinberg College of Arts and Sciences (Science programs)**
   - **Ally:** Quentin Bruhn
     - **Client Contact:** Joel Trammel, Associate Dean of Facilities & Planning

2. **Weinberg College of Arts and Sciences (Arts & Humanities/Houses)**
   - **Ally:** Charles Davidson (primary)
   - **Ally:** Jessica Abrams (supplemental)
     - **Client Contact:** Joel Trammel, Associate Dean of Facilities & Planning

3. **Feinberg School of Medicine**
   - **Ally:** Jay Baehr (primary)
   - **Ally:** Michelle Beall (supplemental)
     - **Client Contact:** Eric Boberg, Executive Director for Research

4. **McCormick School of Engineering and Applied Science**
   - **Ally:** Rolf Ziemann
     - **Client Contact:** Alice Kelly, Associate Dean, Administration, Finance and Planning
     - **Client Contact:** Deirdre Nora Dennett, Assistant Director, McC Facilities, Space & Safety

5. **Kellogg School of Management**
   - **Ally:** Tom Arey
     - **Client Contact:** Dennis Hareza, Chief Finance and Administrative Officer
     - **Client Contact:** Daniel McCrudden, Director of Facilities Administration

6. **School of Communication**
   - **Ally:** Noel Davis
     - **Client Contact:** Rick Morris, Associate Dean of Finance & Administration

7. **University Libraries**
   - **Ally:** David Grosskopf
     - **Client Contact:** Elizabeth Hitchcock, Associate University Librarian for Planning and Facilities

8. **Athletics and Recreation**
   - **Ally:** Kory Burton
     - **Client Contact:** Chris Reynolds, Deputy Director of Athletics (Operations & Administration)

9. **Student Affairs**
   - **Ally:** Carrie West
     - **Client Contact:** Julie Payne-Kirchmeier, Associate VP for Student Auxiliary Services
10. Vice President of Research
   • Ally: Steve Sowa
     o Client Contact: Jay Walsh, Vice President of Research
     o Client Contact: Margaret Ann McDonald, Senior Executive Director of Office for Research
     o Client Contact: Lisa Forman, Executive Director of Center for Comparative Medicine

11. Bienen School of Music
   • Ally: Deborah Burkhart
     o Client Contact: René Machado, Associate Dean for Administration and Finance

12. School of Professional Studies
   • Ally: Toni Maugeri
     o Client Contact: Ken Woo, Director for Information and Technology

13. School of Education and Social Policy
   • Ally: Jessica Abrams
     o Client Contact: Coleen Coleman, Associate Dean

14. School of Law
   • Ally: Eric Kersey
     o Client Contact: George Langford, Director of Facilities

15. Medill School of Journalism, Media, Integrated Marketing Communications and Central Administration (includes Office of Alumni Relations & Development, University Police, Business & Finance, University Relations, General Counsel, Administration & Planning, Global Marketing)
   • Ally: Vincent Geraci
     o Client Contact: Douglas Troutman, Administration and Information Technology (Medill)
     o Client Contact: ... (Central Admin units)

16. Real Estate
   • Ally: Ranee Berliant
     o Client Contact: ...
FM Policies

The following policies will be in effect upon implementation of the Ally Program. All FM staff members—those who are Allies and those who are not—will be expected to be familiar with these policies and abide by them as they relate to their work. Communication is key to the success of the Ally program and therefore communication is the primary consideration in each of these policies.

1. **FM Response to Ally Requests**: The FM Ally role is intended to provide excellent communication with senior-level administrators among our customer groups. In order to provide this quality of communication, it is essential that all FM units and employees place a high level of priority on requests from Allies for information or assistance.
   - All requests should be acknowledged immediately or as soon as possible—even if only to indicate that the request has been received and is being investigated.
   - Any requests designated as an “Emergency” should receive an immediate formal response, providing all assistance or information required.
   - For other requests, after prompt acknowledgment, a period of no more than 24 hours for urgent/important issues, or up to 72 hours for general inquiries will be expected.

   If issues with either responsiveness or unreasonable requests arise, they will be addressed by Senior Staff.

2. **Proactive Sharing of Information**: Many meetings and other opportunities for communication occur between FM and its customers. Although it is neither possible nor advisable for FM Allies to be present at all meetings and copied on all communications, it is essential that they be kept abreast of general activities as they develop between FM and the customer group they serve. Throughout the course of their work, FM directors, project managers, planners and other staff should exercise good judgment and copy a customer group’s Ally on communication when they think it will be of benefit.
   - Do share informative, pertinent communication.
   - Do copy Allies on important emails.
   - Do not add them to email lists, unless requested.
   - Do not include them on long email threads that do not communicate substantive information.

   A complete list of FM Allies with their contact information and the customer groups that they serve will be made available to all FM staff for reference and use in implementing this policy.

3. **FM Ally Responsibility during Absences**: As FM representatives, the Allies are expected to provide a single point of contact for the senior-level administrators in the various customer groups. As such, it is appropriate that Allies provide advance notice to their customer contact when they will be out of the office for vacations or other reasons. During these absences Allies should supply appropriate and complete contact information for their designated backup. This backup may be the Ally’s director or another approved individual who will be able to respond with sufficient capability on their behalf. In instances when they are away from the office but responding to email, it may be that an Ally need not provide this notification or backup. The Ally’s good judgment should be used so that the line of communication with their point of contact in the customer group is never broken.

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