

1

Fundamentals

Key issues

The following issues are covered in this chapter.

- There are a number of definitions of facility management. One that is commonly used is an integrated approach to operating, maintaining, improving and adapting the buildings and infrastructure of an organization in order to create an environment that strongly supports the primary objectives of that organization.
- In any discussion of facility management, it is necessary to stress the importance of integrative, interdependent disciplines whose overall purpose is to support the organization in the pursuit of its business objectives.
- The correct application of facility management techniques enables the organization to provide the right environment for conducting its core business to deliver end-user satisfaction and best value.
- If a facility is not managed properly, it can impact upon the organization's performance. Conversely, a well-managed facility can enhance performance by contributing towards the provision of the optimal working environment.
- Facility management covers a range of functions, including real estate management, financial management, human resources management, health, safety, security and environment (HSSE), change management and contract management, in addition to maintenance, domestic services (such as cleaning and catering) and utility supplies.
- There is no universal approach to managing facilities. Each organization will have different needs. Understanding those needs is the key to effective facility management measured in terms of providing end-user satisfaction and best value.

- Quality of service or performance is a critical factor in any definition of value, and the relationship between quality (or performance) and cost (or price) has to be properly understood.
- Cost savings cannot be looked at in isolation from value. The organization must be able to demonstrate what it is getting for its money and should not assume that paying less today is proof of better value for money.
- The many risks involved in the search for best value should be recognized and allocated to those who are able to manage them effectively. This means that all options should be carefully examined and those that are most likely to achieve best value, whilst achieving and maintaining end-user satisfaction, should be considered.

Introduction

This opening chapter sets the scene, by discussing the importance of a facility to an organization (as the owner, operator or tenant acting as a client¹) and how approaches to facility management can differ between organizations even within the same sector. There is no single formulation of facility management that will fit all situations. Nonetheless, the concept of the informed client function is common to all situations and is described and discussed in this chapter – see Key concepts. It is a theme that stands behind this book and one that reflects an organization's perspective, its values, culture and needs. This chapter also discusses the necessity of securing best value in the delivery of services and examines some of the attendant risks – more are to be found in Appendix C. The context for facility management is first described and an overview follows in the form of a simple functional model. This is developed in the text to show the distinction between core and non-core business – something that is essential to understanding the focus for facility management.

Background

Origins of facility management

Facility management – the operational environment needed to support and enhance an organization's core business processes and activities – has evolved over the past 150 years or so. It originated at some time in the 1800s, when the American railroad companies thought it better to provide the utility of *facilities* and not merely buildings. This broader interpretation of *facility* is reflected in this book.

¹ An organization that procures facility services by means of a facility management agreement (EN 15221-1:2006).

It was not until the late 1950s that facility management became associated with the effective and efficient coordination of services applied holistically to enhance the performance of the organization. The collective practices that we recognize today have therefore evolved fairly slowly.

Forty years ago there was only brief mention of facility management. Buildings were maintained, serviced and cleaned: that was about it. Building maintenance management was arguably the term most commonly identified with these tasks, yet it explicitly excluded a role that embraced the *softer* side of an organization's support services and concern for the well-being of personnel.

A unified concept for facility management was far from attracting broad acceptance in the real estate (or property management) world. Few common procedures were in circulation and it was left to innovative organizations – many of them in the fast-growing financial services, ICT and media sectors – to devise ways of more effectively managing their facilities. Today, facility management is a service sector in its own right and has helped to establish a new professional discipline with its own principles, processes, standards, codes and technical vocabulary.

Definitions

Facility management has been regarded as a relative newcomer to the real estate and AEC (architecture, engineering and construction) sectors. This is because it has been seen in the traditional sense of cleaning, janitorial services, repairs and maintenance. Nowadays, it covers real estate management, financial management, human resources management, health, safety, security and environment (HSSE), change management and contract management, in addition to minor building works, building maintenance, building services engineering maintenance, domestic services and utility supplies. These last three areas are perhaps the most visible. The others are subtler, although of no less importance. For facility management to be effective, both the *hard* issues, such as building services engineering maintenance, and the *soft* issues, such as managing people and change, have to be considered.

The International Facility Management Association² has defined facility management as *a profession that encompasses multiple disciplines to ensure functionality of the built environment by integrating people, place, process and technology*. This definition clearly underscores the holistic nature of the discipline and the interdependence of multiple factors in its success. Elsewhere, it has been defined as *the integration of processes within the organization to maintain and develop the agreed services that support and improve the effectiveness of its primary activities*.

An oft-cited definition is provided by Barrett & Baldry (2003), who see it as *an integrated approach to operating, maintaining, improving and adapting the buildings and infrastructure of an organization in order to create an environment that strongly supports the primary objectives of that organization*. They continue by reminding us that the scope of facility management is not constrained by the physical characteristics of buildings. The behaviour and efficiency of personnel and the effectiveness of ICT are important too. Whatever is adopted as a definition,

² www.ifma.org

either in this book or by personnel within the organization, it should stress the importance of integrative, interdependent disciplines whose overall purpose is to support the organization in the pursuit of its business objectives.

Rationale for facility management

Most facilities represent substantial investments for their organizations and usually have to accommodate and support a range of activities, taking into account competing needs. Within those activities is the organization's core business, for which an appropriate environment must be created in a facility that might not have been designed for the use to which it is now put. Yet, no matter how well focused an organization is on its core business, it cannot lose sight of the services needed to support it; that is, non-core business. The relationship between the two and the place of facility management is shown in Fig. 1.1.

The organization might have already considered the distinction between its core business and non-core business (e.g. security, waste management and cleaning) as part of the drive to achieve end-user satisfaction and best value. Since operational expenditure accounts for a significant part of annual expenditure, there is bound to be pressure to look for savings in non-core business areas. Cutting operating budgets can be financially expedient, but might not help the organization's long-term development. Since operations can involve complex, coordinated processes and activities, it is necessary to take an integrated view. A piecemeal approach to cutting costs is unlikely to produce the required savings and can impair the organization's ability to deliver high-quality services. For this and other reasons, we should be able to see why facility management is a more powerful concept than real estate management (or property management), because it takes a holistic view of the dynamics of the workplace – between people and processes and between people and their environment.

Facility management can thus be regarded as creating an environment that is conducive to the organization's primary processes and activities, taking an

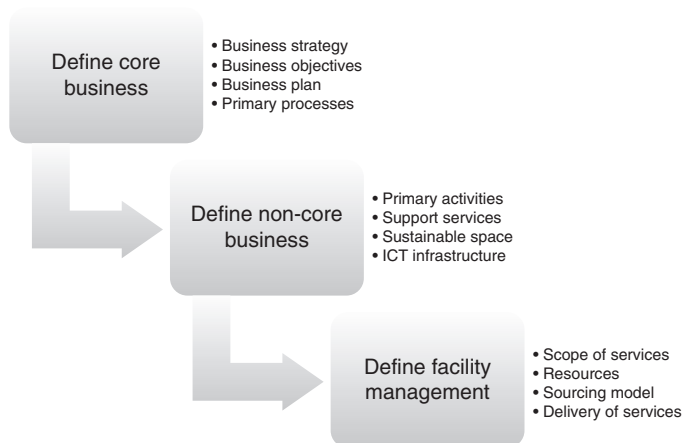


Fig. 1.1 The relationship between core business, non-core business and facility management.

integrated view of its services and support infrastructure, and using them to achieve end-user satisfaction and best value through support for, and enhancement of, the core business. We can develop this definition to describe facility management as something that has a number of distinct goals, and that will:

- Support people in their work and in other activities.
- Enhance individual well-being.
- Enable the organization to deliver effective and responsive services.
- Sweat the physical assets; that is, make them highly cost-effective.
- Allow for future change in the provision and use of space.
- Provide competitive advantage to the core business.
- Enhance the organization's culture and image.

The broad approach to facility management

There are common themes and approaches to facility management, regardless of the size and location of facilities, although these might not necessarily result in common solutions to problems. In some cases, services are contracted out – a form of outsourcing – and in others they are insourced, and for good reason in both cases. Many organizations operate what might be described as a *mixed economy* where some services, even the same services, are co-sourced. Whichever course of action has been taken, the primary concern is the basis of the decision. Where the decision has been arrived at for the right reasons, such as demonstrating better value for money from one approach as opposed to others, facility management can be regarded as working effectively. In order to reach this state, a basic plan for facility management (see Fig. 1.2) should be prepared to incorporate the following steps as a minimum:

1. Develop a strategy for facility management.
2. Determine the most appropriate model for sourcing services.
3. Procure the services, where outsourcing or co-sourcing applies.
4. Deliver the services, including mobilization and contract management.
5. Manage the performance of service providers and/or the in-house team.

This plan for facility management is something of a simplification to highlight key considerations. These and other relevant matters are elaborated in subsequent chapters.

Risks and opportunities

There are innumerable factors and events that can impact an organization's business objectives, planning and operations. Downside risks have the potential to hinder, even negate, attempts at achieving best value. Table 1.1 identifies some downside risks that the organization can face in its facility management. The chapters in which the underlying issues are considered are indicated in Table 1.1. Some of these risks might be easier to address than others. In certain cases, the organization will have to acquire new skills or insights into how problems can be solved.

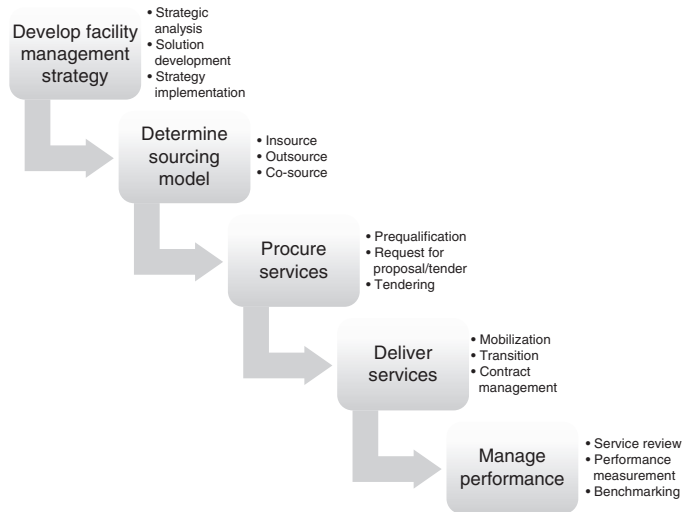


Fig. 1.2 A basic plan for facility management.

In pursuing more efficient and effective facility management, the organization should also be aware of opportunities (upside risks). Some upside risks do, in fact, mirror the downside risks to counter their influence (see Table 1.2).

Key concepts

The informed client function

The organization needs to act as an informed client if it is to be sure of achieving end-user satisfaction and best value. The informed client function is a requisite irrespective of how services are procured – see also the later section in this chapter on Key roles, responsibilities and accountabilities.

The following outlines the scope of the informed client function:

- Understanding the organization, its culture, end-users and their needs.
- Understanding and specifying service requirements and targets.
- Brokering services with, and amongst, stakeholders.
- Managing the implementation of outsourcing.
- Minimizing uncertainty and risks through proactive risk and opportunity management.
- Agreeing standards for control purposes.
- Managing service providers and monitoring their performance.
- Benchmarking the performance of services.
- Surveying end-users for satisfaction with service delivery.
- Providing management reports.
- Reviewing the scope of services and service levels against end-user requirements.
- Developing, with service providers, delivery strategies for services.
- Agreeing, with service providers, changes to service requirements.

Table 1.1 Risks (downside) faced in facility management.

- Inadequately resourced or inexperienced client function (Chapters 4, 7, 8 and 9).
- Inadequate planning of implementation – limited preparation and/or allocation of responsibilities (Chapters 7, 8, 9, 14 and 15).
- Misapplication of transfer of employment of personnel (Chapters 4, 8 and 14).
- Poor relationship between service provider and facility/contract manager (especially if the latter was once involved with preparing an in-house tender) (Chapter 9).
- Conflicts of interest when dealing with in-house tenders, arising from inadequate split between purchaser and provider personnel (Chapter 4).
- Unclear or imprecise roles, responsibilities and targets for effective teamworking (Chapters 7, 8, 9, 14 and 15).
- Possible loss of control over the facility management function and ownership of, and access to, documents and knowledge (Chapters 8, 9, 10 and 14).
- Lack of standard forms of facility management contracts or inadequate conditions of contract (Chapter 8 and Appendix D).
- Inappropriate allocation of risks and rewards between the organization and service providers (Chapter 7).
- Inadequate definition of the scope and content of services (Chapters 7, 8, 9 and 14).
- Lack of consideration of all stakeholders in the facility management sphere (Chapters 2, 3, 7, 8 and 14).
- Specifications that are overly prescriptive and/or concentrate on procedures, not outputs (Chapter 8).
- Stakeholders' *gold plating* of requirements (Chapter 8).
- Poorly controlled changes to end-user requirements (Chapters 8, 9, 10, 11 and 14).
- Excessive monitoring of service provider performance (Chapters 9 and 11).
- Absence of, or a poor system for providing, incentives to raise performance (Chapters 8, 9 and 11).
- Inflexible contracts unable to accommodate changes in end-user requirements during the contract and work outside scope/specification (Chapter 11).
- Failure to take account of relevant health and safety legislation at the correct time, leading to penalties and later excess cost (Chapters 6, 7, 9, 12 and 14).
- Redundancy in the supply chain where cost is added without necessarily adding value (Chapters 7, 8 and 9).
- Poor bundling/grouping of services to be outsourced (Chapters 7, 9 and 10).
- Absence of shared ownership of outcomes (Chapter 10).
- Poor cash-flow position for the organization and/or service providers (Chapters 8 and 9).
- Financial failure of chosen service provider during the contract period (Chapters 8, 9, 10 and 14).
- Absence of benchmarks against which to measure performance and improvement (Chapters 2, 4, 8 and 11).
- Lack of education and training in facility management (Chapters 3, 4, 6, 9, 11 and 14).
- Fraud or irregularity in the award and management of contracts (Appendix B).

- Maintaining the ability to re-tender as and when required.
- Understanding the facility management market and how it is developing.
- Undertaking strategic planning.
- Safeguarding public funds, where applicable.
- Developing in-house skills through education, training and continuing professional development/education (CPD/CPE).

A distinction does need to be drawn between types of organization. Differentiation between them can be based on various criteria and terms; for instance, the *not-for-profit* and *for-profit* sectors. For our purpose, the distinction is based upon the applicability and extent of regulatory control over decision-making and accountability. In most countries, the public sector is therefore clearly defined and, by the presence of far fewer regulatory controls, so too is the private sector to a large extent.

Private-sector organizations

Whilst organizations in the private sector appear to be able to set their own agenda for their affairs, the requirements of corporate governance, including compliance with various legislation and standards (especially financial), mean that greater

Table 1.2 Opportunities (upside risks) arising in facility management.

- Enhancing organizational capability and quality of service delivery, and proper assessment of requirements in the scope of services (Chapters 7, 8, 9 and 14).
- Identification and allocation of risks on a rational basis to help clarify relationships between service providers and the organization (Chapter 7).
- Proper separation of duties between purchasers and service providers (Chapters 8 and 9).
- Clear roles, responsibilities and targets for effective teamworking (Chapters 7, 8, 9, 14 and 15).
- Proper contract documentation with appropriate conditions of contract for insourced as well as outsourced services (Chapter 8 and Appendix D).
- Proper allocation of risks and rewards (Chapter 7).
- Improved response to end-user requirements (Chapters 8, 9, 10, 11 and 14).
- Improved performance with proper incentivization (Chapters 8, 9 and 11).
- Health and safety legislation incorporated into facility management policies and procedures at the appropriate time (Chapters 6, 7, 9, 12 and 14).
- Shared ownership of outcomes (Chapter 10).
- Proper monitoring of contract performance (Chapters 9, 11 and 14).
- Improved cash-flow forecasting and budgeting (Chapters 2, 3, 8, 9, 11 and 14).
- Opportunity to build up benchmarks against which to measure performance and improvement (Chapters 2, 4, 8 and 11).
- Properly focused education and training for in-house personnel in facility management (Chapters 3, 4, 6, 9, 11 and 14).
- Proper assessment of services to be grouped/bundled for outsourcing (Chapters 7, 9 and 10).

transparency is now expected in commercial dealings. Growing recognition of the importance of being a *good* organization extends to facility management, where it is likely to be judged on how well it satisfies or not the end-users of services. Corporate social responsibility – see Chapters 8 and 13 – is now a feature of corporate life and with it come particular responsibilities for facility managers. The direction of travel for the private sector is, consequently, likely to be towards increasing standardization of processes, procedures and practices for its non-core business. In this regard, there is much the private sector can learn from the public sector, where accountability is a given and openness and transparency are the norm.

Public-sector organizations

The imperative of openness and transparency in commercial dealings has been a long-standing preoccupation of the public sector. Often derided for its unimaginative approach to new ideas and novel practices, most public-sector organizations nowadays have both the competence and confidence to devise more effective, cost-efficient and value-adding methods of working. Fixed capital investment in the public sector brings with it responsibility to extract best value for taxpayers. The public sector has, in many countries, become adept at understanding the inherent risks in delivering facilities and the impact their operation would have if they fall short on requirements. For these reasons, we are witnessing something of a renaissance in the role of the public-sector organization and one that can be as informed as the best in the private sector.

Stakeholder engagement

Effective management of those individuals and groups with an interest in a facility is a key factor in the success of facility management. These individuals and groups are referred to as stakeholders and collectively will determine the nature of facility management, including its processes and activities and the extent to which they are able to satisfy their (i.e. stakeholder) interests (see Chapters 2 and 7).

End-user experience

Both inside and outside the organization, the individuals or groups that will experience the impact of facility management are appropriately termed end-users. As the ultimate customers of facility management, their needs and expectations must be properly counselled and managed. They exist for both private- and public-sector organizations. Examples include:

- hospitals;
- financial services companies;
- airport authorities;
- manufacturing companies;
- colleges and universities; and
- entertainment complexes.

As the above examples might suggest, the structure, management and space requirements of organizations can vary widely, but the most important point is to realize that the implementation of best practice facility management is relevant to all. Undoubtedly, some aspects and requirements will be more significant than others, depending on the type of organization and its business objectives and drivers.

The following are examples of individuals or groups as end-users of facility management:

- A *procurer of services* – the general definition of a customer and also the recipient of services.
- An *internal department* – an organizational unit served by the facility management function (perhaps operating as a separate unit) with financial exchange between the two and *internal end-users* as the recipients of services.
- The *external end-users* of the organization's facility and services, as would be found in the customer service sector.

Best value

Value for money is a term long used to express the relationship between the cost of a good or service and its quality or performance. The term *best value* extends the concept of value for money to imply the need to strive continually for something superior at the lowest practicable cost. The organization might not be aware of the extent to which value for money in facility management can be improved; that is, through the search for best value. This would suggest that it is not the outcome that needs to be scrutinized, but the decision-making that leads to it and the assumptions upon which it is based.

The best value decision is generally cited as the determinant of whether to outsource a service or not. Whilst value is about the relationship between cost and quality, it is often equated with achieving a reduction in cost. The organization might believe it is achieving best value if it is paying less for a given service this year compared with the previous year. Whereas cost is easier to measure, best value is concerned with the quality of a service and the efficiency and effectiveness with which it is delivered. The organization should therefore set itself cost and quality objectives for the management of its facility, with the cost objective taking priority only where financial necessity dictates.

When choosing options for service delivery and service providers, there needs to be an assessment not only of cost implications but also of quality (see Chapter 8 on Tender evaluation). The organization should choose the approach and service delivery that offers best value, not simply lowest cost, and measure performance against both cost and quality. Benchmarking can help in checking performance (see Chapter 11).

Normally, the achievement of best value is demonstrated by acceptance of the lowest tender price in a competition where all other criteria (quality, performance, terms and conditions) are equal. Best value can also be achieved through collaborative arrangements with suppliers and service providers. Economy of scale offered by bulk purchasing of utility supplies – see Chapter 8 – is an obvious example. An additional benefit from collaboration is that risks are also shared.

Operability

The success of a new or refurbished facility depends to a certain extent on ensuring that design takes proper account of operational requirements through a thorough process of briefing. Like all *good* decisions, those in design have to be based on the correct information and data, and the impact of a design on operations has to be understood before it is committed to construction and/or installation. Once the facility is operational, it is too late to take issue with the *fitness for purpose* of the design. The principle of constructability is widely applied by designers and design teams; however, the principle of design for operability is not necessarily recognized to the same extent. Designing a new or refurbished facility without understanding the requirements of operability is likely to have negative consequences for both its operational efficiency and energy performance (see Chapter 2 on Design and facility management briefing).

Other concepts

Facility planning

Changes in the use of a facility, whether at the level of routine minor adjustments or as part of a major restructuring of the organization, have to be planned. As a stage within the life cycle of a facility, facility planning serves to determine if the organization has the most appropriate facility to support its core business into the future, providing a formal basis for initiating a process of managed change where found necessary (see Chapter 14).

Sustainability

The organization might have, as an objective for its facility, the requirement to optimize operational cost over the life cycle. The facility might have to sustain operations over many decades in an environment in which pressure to reduce energy consumption and, by implication, carbon emissions is likely to increase significantly. A long-term view of the operability of any facility should be taken so that the organization is aware of its obligations and liabilities into the future. Important in this regard is an understanding of a facility's carbon footprint (see Chapter 13).

Decisions in design have of necessity to take account of the carbon embodied in the manufacture of components and materials and in the construction or refurbishment of a facility (see Chapter 2 on Design and facility management briefing). Account must also be taken of carbon produced during the operation of the facility. Patterns of use over the life of a facility will affect the overall carbon load and will be influenced by the actions of all stakeholders, not just occupants and other end-users. A refurbished facility can be designed for zero carbon, but decision-making might inadvertently ignore the longer-term sustainability of the facility; for instance, occupants and other end-users, together with suppliers of various goods and commodities, will contribute to the facility's carbon footprint throughout its operational life. The result could be a significant underestimation of the carbon impact of the refurbished facility. A whole-life perspective has to

be taken, which involves understanding the stakeholders who will be influential in this regard; in particular, their interest in, and impact upon, the facility (see Chapter 13).

Outsourcing

The process by which services are delivered to an organization by an external provider is known as outsourcing and is based upon a sourcing decision. Outsourcing is the alternative to obtaining services from within the organization (i.e. insourcing) and can involve highly prescribed procedures, especially within the public sector. Co-sourcing is where outsourcing and insourcing are combined. Chapter 7 considers the outsourcing decision.

Procurement

Procurement concerns the acquisition of goods and services from an external source and so is the practical manifestation of outsourcing. It is, however, necessary to regard procurement as more than the activity of obtaining quotations from service providers and placing orders. A range of issues has to be taken into account and that normally requires technical knowledge of the services in question. Chapter 8 considers the procurement of services.

Performance management

Services are provided according to agreed performance levels. Measuring actual performance and comparing with stipulated performance levels will show if the service is being provided as agreed or if some action needs to be taken to correct performance (see Chapter 11).

Management of change

Facility management is concerned with routine, minor change arising in the course of day-to-day operations and should be capable of minimizing disruption as well as safeguarding business continuity. Larger and more complex change is better handled outside the normal routine and constituted as a defined project with clear objectives and supporting plans (see Chapter 14).

Human resources management

Managing the delivery of services involves, to a large extent, managing personnel: these might be internal or external to the organization. It means ensuring that services are delivered safely, efficiently and cost-effectively by those involved. Facility management embodies human resources management to an extent that procedures should both reflect and be sensitive to the broader issues and requirements facing the organization. A close working relationship between the human resources manager and the facility manager is desirable to ensure that matters affecting personnel are adequately addressed and that there are no ambiguities.

There is considerable legislation in this area. One fast-moving aspect is equality, which covers issues around the subjects of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation. Regular updating on the part of the organization will be necessary. Chapter 4 considers human resources management.

Maintenance management

The origins of facility management included, amongst other functions, building maintenance management. In its modern context, facility management covers the maintenance of the structure, fabric, building engineering services installations, fittings and furnishings that collectively form the facility (see Chapter 12). Maintenance is an integral part of facility management and requires clear definition of arrangements to prevent and deal with failure or breakdown of parts, components, systems and other elements. Business continuity is likely to be a key concern and plans for dealing with any impact on operations should be prepared and kept up to date (see Chapters 9 and 14).

Information management

Proper management of information and data is necessary to comply with statutory obligations and duties, as well as enabling the organization to derive optimal use and benefit from its facility. The breadth and depth of information to be managed can be substantial and requires a structured approach for its collection, analysis, exchange, storage, updating and control. Despite the growth in ICT, much information and data are likely to be paper-based and of variable quantity and reliability (see Chapter 15).

Key roles, responsibilities and accountabilities

There will be changes of personnel and other aspects of an organization's management over time. Arrangements and agreements, with respect to facility management, might well outlast the employment of key personnel. It is important, therefore, that there is recognition of the need for:

- The organization to be an informed client and to develop this function into the future.
- A procurer–provider relationship to develop between those procuring services within the organization and service providers (internal and external).

In coming to terms with these needs, the organization might benefit from a better understanding of the new tasks this role as an informed client represents. This function will demand a significant degree of operational knowledge and experience, not only of the organization's own business, but also of the services being provided. Since little remains the same for long, change is an ever-present condition that has to be managed as part of any facility management remit.

In particular, the success of a change initiative in the delivery of services will depend on two main parties:

- The organization's representative (typically the facility manager, but sometimes the estates manager or other senior manager).
- Service providers, whether internal or external.

Both parties should share the common goal of delivering best value. To be successful in achieving this goal, any divergent interests between the two parties also have to be recognized. A cooperative approach, which recognizes individuals' interests and aligns efforts with business objectives, has the potential to deliver the greatest benefit. A cooperative approach – for example, partnering – is also one of the recommended arrangements for managing external service providers (see Chapters 4 and 10).

Owner

The organization that holds legal title to the facility and that is the ultimate authority in decisions affecting its acquisition, use, alteration, abandonment and disposal is the owner for our purpose in this book.

Operator

The organization that is responsible for the day-to-day operation of the facility and that has legal and financial responsibility for ensuring the safe, efficient and cost-effective operation of the facility is the operator for our purpose in this book.

Core competence in facility management

Successful facility managers are likely to be those who are able to combine knowledge and skill in facility-related matters with an understanding of organizations, people and processes. An accomplished designer does not necessarily make a competent facility manager. Understanding how to design a facility is not the same as ensuring that it is safe and secure in operation. Knowing how people within an organization make use of a facility – moreover, how they can work safely, comfortably and efficiently – goes a long way to becoming a successful facility manager.

Setting aside the historical background to the development of the discipline and, therefore, the particular competences that have been assimilated over the years, we can see that facility management draws on a body of knowledge that spans science, engineering and social science. Even so, facility managers need to be able to take a physiological view of facilities rather than a purely anatomical view. This implies greater familiarity with *softer* issues than those of a purely technical or engineering nature. In practice, this means that facility managers have to understand how facilities behave and function as environments to support people in their work (and

in other contexts). A fundamental characteristic of the environment is change and so one of the main competences that facility managers should have is an ability to manage change.

Other competences include organizational management, financial management and end-user service. It is the interaction of these that establishes facility management as a unique discipline. Traditionally, it might have been considered that a sound education and training in an established discipline such as architecture, engineering or surveying was enough; however, aspiring facility managers might lack sufficient understanding of organizational behaviour and human resources management, and how innovation and change can be managed effectively. Core competence in facility management can therefore be said to cover the following, amongst others:

- *Real estate management* – building performance, building services engineering and workplace design.
- *Financial management* – accounting, finance, purchasing and supply, and legal aspects.
- *Organizational management* – organizational structure, behaviour, processes and systems.
- *Innovation and change management* – processes, technology, ICT and information management.
- *Human resources management* – motivation, leadership, employment law, health, safety and security.

Conclusions

Facility management is about providing support to the organization's core business in the form of services. To benefit most, the organization has to understand that it needs to be an informed client in managing any facility. This requires a focus on service delivery that provides end-user satisfaction and best value in an environment where risks abound – there are so many threats to organizational and human well-being. Effective facility management comes from being able to devise and implement practices that reduce or eliminate the risks and that add value to the core business. This current understanding is a far cry from its origins. Indeed, facility management has emerged from an indistinct past to become a key discipline. It owes its success to the increasing awareness amongst facility owners, their personnel and other end-users of the value that a well-managed facility can bring to the core business. At the same time, the discipline of facility management has evolved to embrace *softer* issues, but without ignoring the science and engineering base that remains a cornerstone of the discipline. In an ever-changing world, facility management is likely to evolve in line with changes in corporate real estate management, legislation affecting employment and the workplace, especially health, safety, security and environment, and change management. Whatever happens, distinct core competences must be present for those managing a facility. Where they are not, retraining or recruitment of appropriate human resources will be necessary.

Checklist

This checklist is intended to assist with review and action planning.

	Yes	No	Action required
1. Does facility management have a sufficiently high profile, i.e. is it connected to the organization's business objectives?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Have senior managers articulated a workable definition of facility management?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Has a formal risk assessment of facility management been undertaken?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Could the organization be considered an informed client?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Is the role of stakeholders in facility management fully recognized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Have end-users of services been recognized as a distinct group of stakeholders?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Is the organization able to determine whether or not it is achieving best value from its facility management, however it is provided?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Is the concept of design for operability explicit in all design work?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Is facility planning a recognized concept and one that is practised?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Is there a practical interpretation of sustainability and is it reflected in the approach to facility management?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Is the role of facility management in dealing with routine change recognized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Is the organization aware of the competences that must be instilled in its facility management personnel?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Are there arrangements in place for continuing professional development/ education (CPD/CPE)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Is the organization aware of the likely <i>direction of travel</i> for facility management?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>