1 Facilities Change Management in Context

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CHAPTER OVERVIEW

The number of books, training seminars and missives on the subject of change management continues to grow unabated. Yet few of these consider the importance of the *physical* change which inevitably accompanies the change of 'minds'. It is the physical change in the form of workplace redesigns, procurement of new buildings or perhaps the reengineering of a facilities service, which present the tangible evidence of change. People often discard the wise words which appear in the mission statement or the new process hardwired into the corporate intranet. If change is going to succeed, evidence suggests that a transformation in what we see, touch and experience is the only kind of change that people within an organisation are likely to understand and internalise.

How does the facilities manager achieve such transformations? A starting point in this journey is the process of 'sense making' or understanding the nature of change. This chapter describes the changing landscape in which facilities management teams operate. In so doing, it seeks to contextualise facilities management. This chapter explains how each of the elements of the change management process is addressed in each of the book's chapters. This is achieved by (1) an analysis of current thinking on change management; (2) an exposition of how facilities management needs to be redefined to accommodate contemporary approaches and (3) an explanation of a framework (described as the REACTT model) which identifies the key stages of facilities change management which in turn correspond with each of the chapters of this book.

Keywords: Change context; REACT model; Facilities management definition; Punctuated change; Transformation.

1.1 FORCES OF CHANGE AFFECTING THE BUILT ENVIRONMENT

A change can be described as any 'alteration in the state or quality of anything' (Shorter English Dictionary). Changes can involve people, technology, services or buildings. Indeed, most changes of any significance impact on a number of these facets. Thus, the facilities

Facilities Change Management. Edited by Edward Finch.

manager is never entirely concerned with buildings in isolation. One of the most popular quotes in the field of architecture is that of Winston Churchill:

> We shape our buildings; thereafter they shape us. (Winston Churchill, 1874—1965)

This prophetic observation is indispensable to our understanding of facilities in the context of organisations. It makes clear that the buildings which we find ourselves in are at the outset an expression of all the elements that go to make up an organisation. They represent an expression of its people, what they stand for, their mode of operation, as well as their actual and espoused values. The quote highlights that from the day a facility is occupied such buildings themselves become the agents of change (or inertia). A modern day counterpart to this quote given by Denison and Mishra (1995) contends that:

> Structures are both the medium and the outcome of interaction. They are the medium because structures provide the rules and resources individuals must draw upon to interact meaningfully. They are its outcome, because rules exist only through being applied and acknowledged in interaction — they have no reality independent of the social practices they constitute. (Denison and Mishra (1995), p. 206)

Ironically, the quote conceives of structures as organisational structures. However, it is most apt in describing the importance of 'physical structures' (buildings, floor layouts and supporting services) which provide the 'hardwired' rules that dictate organisational interaction and social practices.

1.2 INERTIA AND CHANGE

Early thinkers on the nature of change construed change as an incremental process. This view of the world is described as the 'gradualist' paradigm. Continuous improvement (*Kaizen*; Japanese for 'change for the better') was proposed as the key method for managing change in an environment which was perceived as largely predictable. Based on this concept, changes to individual subsystems such as people, missions or facilities provide the necessary intervention to allow small but continuous change that allows adaptation to the internal and external environment. In such a model it is possible to tinker with one part of the system without affecting the whole (Choi, 1995).

However, in parallel with modern day reinterpretations of biological evolution, it has been argued by Gersick (1991) that change in most organisations is not continuous, but is characterised by events involving rapid change. In just the same way as evolution in the natural world undergoes major transformative events, so it can be seen that organisations are also subject to such rapid and often unexpected change. Gersick (1991) studied change in individuals, groups and in organisations as well as the history of science. She found in all of these change categories a recurring pattern of relatively long periods of stability or equilibrium 'punctuated' by short bursts of metamorphosis. The paradigm known as 'punctuated equilibrium' was used to describe this pattern.

How can we explain this process of punctuated equilibrium and more importantly what are the ramifications for facilities management? The model is explained in terms of in-built organisational inertia which arises from persistent *deep structures* which allow only small incremental changes. It is these embedded structures which resist change and pull an organisation back to a condition of equilibrium. Such deep structures are highly stable. This stability arises from the establishment of a number of key choices in the organisation's

history that exclude many options which might be deemed inconsistent. These mutually interdependent choices reinforce and strengthen one another over time. Gersick (1991) suggests that three sources of inertia are at play in organisations.

- Sense making: the organisation's way of seeing things (cognitive framework). Organisations evolve shared mental models in the way that they interpret reality and learn. In reaction to change, the natural response is to look at ways of 'doing things better'. Notice that this contrasts with a more open approach which considers all options and also considers doing 'better things'. The focus is thus on efficiency and alignment rather than the exploration of new opportunities.
- Motivation: change brings with it a fear of loss as well as a realisation that such change may bring about a 'sunk cost'. For example, the change in choice of air-conditioning manufacturer may render the expertise of a plant engineer redundant, having gained years of experience in the maintenance and regulation of an existing system.
- Obligation: with any change comes disruption and the severing of interdependencies. Relationships with particular service providers may have to be terminated: short-term disruptions to customer services may ensue. In the short term, the attraction of change may be lacking and the turmoil and loss of goodwill may be the dominant concern.

At some point in time, the forces of inertia, despite their attractive forces (e.g. efficiencies achieved through interdependency) become overwhelmed by external changes. The ensuing change is inevitably shattering to the status quo, resulting in 'punctuation in time'.

The punctuated equilibrium paradigm explains much about why facilities management change initiatives are so often challenging and problematic. Initiatives such as hot-desking or energy-awareness are often only able to impact on the outer superficial structures without penetrating more resilient deeper structures (culture and behaviour). This explains the legacy of failed attempts to introduce 'new ways of working' that directly challenge the deep structures of an organisation. Much of the literature on change in facilities is founded on the 'gradualist' paradigm of change, whereby, through a process of continuous adjustment, it is possible to respond to the changing environment.

As well as explaining why facilities managers encounter resistance when implementing change, the punctuated equilibrium model also highlights the significance of major facilities initiatives. The decision to relocate from a central business district to a suburban location may coincide with a change in business model, for example, a change from face-to-face to online customer service support. The relocation is thus a 'punctuation' or radical departure from the past way of doing things: the facilities change is simply a physical manifestation of a deep structural change. As such, every opportunity is taken in such a move to realign and transform systems: not as separate systems but as part of a holistic entity. The opportunity for transformative change which arises from a relocation or change in service provider is clear. However, it is incumbent on the facilities manager to realise this opportunity. As such, it involves working in concert with other systems within an organisation to overcome deep structural inertia.

1.3 UNDERSTANDING THE S-CURVE

Facilities management is driven by space forecasts and space budgets. Often such forecasts of change are based on simple extrapolations of what has gone before. A pattern of 5% growth in personnel over the last ten years is assumed to be repeated for the next five years.

However, such a forecasting approach is fraught with dangers based on business as usual. One of the most widely recognised predictor of change, the sigmoidal curve or S-curve, has consistently proven to be a reliable tool. Early work by Tushman and Romanellli (1985) showed how the S-curve (so described because of its characteristic S-shape) accurately describes the growth pattern of innovations and organisations. The curve illustrates the slow growth rate associated with start-up organisations whose initial growth is tempered by resource constraints and market acceptance. This is then succeeded by a period of rapid (exponential) growth during which time the organisation undergoes successive periods of growth. Finally, as the service or product offering is exhausted, the growth rate reaches maturity, with a tapering of growth.

The S-curve equally describes the characteristic growth patterns of individuals and indeed their lifestyles. This was illustrated in the seminal work of Becker (1990) in *The Total Workplace*. This describes how life changes impact on our choice of residential property. This begins with modest requirements to support a singles lifestyle, succeeded by shared living and the arrival of a family. Finally, in the maturing stage, married couples become 'empty nesters' and begin to downsize. At each stage there is punctuation in their existence associated with a change of accommodation. Houses and apartments are bought and sold to realign with their changing needs.

Figure 1.1 illustrates organisational growth in the form of an S-curve and the way this impacts on facilities and relocation decisions. During the early stages of growth, organisations typically occupy 'incubator' facilities, providing the flexibility for experimentation unencumbered by constraints and standards. The organisation at this stage is involved in inventing its 'deep structure'. As the organisation becomes too large for its original facility, the pressures for a transformative change overwhelm the forces of inertia. Thus a 'punctuation' in an organisation's timeline occurs. The organisation has established its deep structures, including its characteristic way of doing things, its mission and underlying

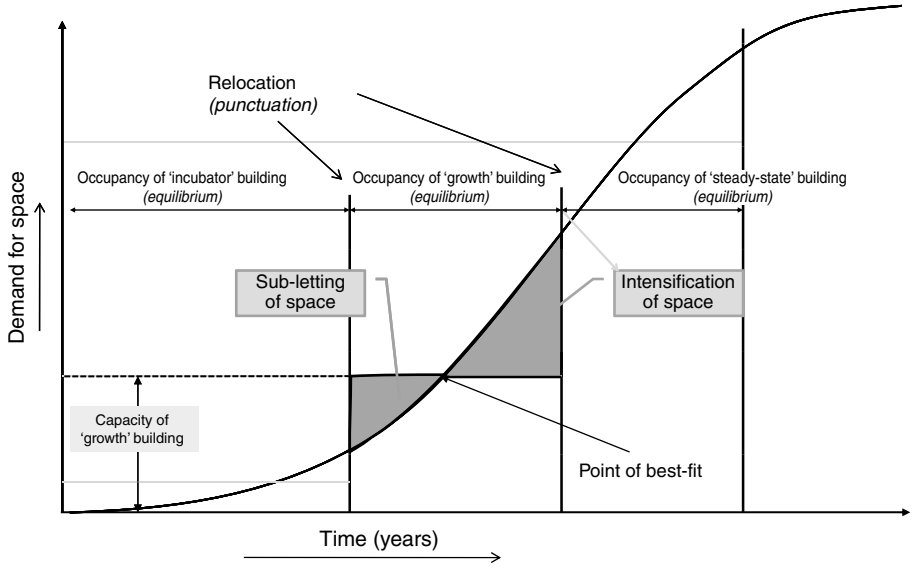

Figure 1.1 S-curve patterns of growth and space demand within an organisation. Reproduced by permission of John Wiley & Sons, Inc.

culture. The new building (unlike the incubator building) attempts to formalise and express this emergent view of itself. At the same time, the organisation seeks out standards and efficiency measures. This is what is described by Becker (1990) as the transition from the 'loose fit' to the 'tight fit' organisation. This in turn is reflected in the facilities management operation, with the emergence of formal policies and standards (such as space standards) which attempt to rationalise the service provision. Becker also refers to the concept of 'elastic fit' as the form of building solution (and facilities management solution) which succeeds the 'tight fit' approach. The constraints imposed by operating standards, whilst allowing efficiencies, prevent the organisation from growing. Only by engineering a degree of flexibility can an organisation extend its life on the S-curve: it needs to reinvent itself. The 'elastic' model relinquishes formal 'standards' in favour of 'frameworks' and 'templates' tuned to the individual needs of each part of the organisation. During the growth and downsizing stages, further moves and relocations inevitably occur, ranging from the relocation of individuals or departments to whole organisations. Moves inevitably are associated with 'punctuation' — an opportunity for transformation. They present a chance to realign the space and service offering; an opportunity to bridge the emerging gap between what is required and what is available. Treating the relocation as simply a resizing operation is fundamentally flawed. Such a 'punctuation' needs to embrace all of the levels of change in an organisation; in other words, to enable a 'punctuation' which addresses some or all of the forces of inertia.

Figure 1.1 also illustrates the constant state of inexact fit which arises between the space demands of the organisation (the demand side) and the capacity of the building (the supply side). At almost no point is entire equilibrium between these two forces met. The shaded zones identify areas where the facilities manager is constantly having to compensate for the deficiencies in this mismatch. During the early period of occupancy (or during periods of downsizing) there may be a surfeit of space. Facilities managers, however, are rarely presented with this problem as departments undertake unsanctioned 'creep' into unoccupied areas. The problem then becomes one of preventing encroachment and of using excess space. Sub-letting is one such approach, as is the homogenising of capacity between more than one building. However, having too much space can be as challenging as having too little space. Beyond a specific 'tipping point' in the organisation's growth cycle, the challenge becomes one of limited space. Measures to intensify the use of space (in tandem with innovations such as hot-desking or desk-sharing) can significantly extend the capacity of the building. Indeed, more and more buildings are built on this premise from the outset. Even for large multinational organisations, this problem of fit in relation to a single building or campus remains. The option of distributing staff between geographical locations may not be an option where co-location or adjacency to market is an imperative. The S-curve becomes an essential weapon in the facilities manager's armoury in forestalling simplistic projections.

1.4 THE CONTEXT OF CHANGE

Most theory relating to change management lacks context. Many address only an isolated aspect of change (e.g. culture, workplace design, process design); whilst others put forward a single approach to change (e.g. 'organisation development', 'systems thinking' or 'strategic planning'). No wonder the facilities management profession is reluctant to spend time making sense of such a convoluted collection of 'recipes'. However, as we have seen in the

previous section, the central role of facilities in the 'punctuated equilibrium' paradigm makes an understanding of context essential. Without it, facilities managers cannot hope to use the serendipity of the move process to realign with 'deeper structures'.

Mintzberg and Westley (1992) are one of very few authors who acknowledge the central role played by facilities and supporting services in realising change. The authors attempted to confront the problem wherein 'by seeking to explain the part, we distort the whole'. In their key publication 'Cycles of Organizational Change' they describe a 'system of moving circles' (like a bulls-eye) to represent the various aspects of change at differing levels of abstraction.

Using their contextual model of the organisation, change is seen as taking place from the broadest conceptual level (i.e. in the minds of organisational thinkers) to the most concrete and tangible level (facilities and people). But, they argue, such change also occurs in one of two spheres; (1) the basic *state* and (2) the thrust or *direction* of the organisation. Put together, we end up with the total landscape of change which confronts an organisation.

1.4.1 State versus direction

The two facets of 'state' and 'direction' define the two spheres of activity facing the modern-day facilities manager, as shown in Table 1.1. The 'state' is about what you have got. We can reconfigure organisational services, delivery systems and people to satisfy the changing requirements of an organisation. Service level agreements can be modified, maintenance staff can be redeployed and space plans rearranged. Such changes often occur incrementally, over days, months or years, often in a piecemeal manner (what Mintzberg calls the 'deductive' change). Whilst these changes may be largely unplanned, over time they can have a profound effect on an organisation. Contrast this with the second facet, 'change in strategy' which involves planned change and determines the direction of an organisation. It is this second sphere which is increasingly the territory of the facilities manager, demanding a project management approach and longer term planning.

It is these two distinct facets which exemplify the two different worlds of 'facilities management' and 'real estate'. The two were often set apart, with facilities solutions allowed to *evolve* in response to changing demands. In contrast, real estate involved key strategic commitments with the impacts unfolding over many years, often as part of a masterplan. However, things have changed fundamentally. New innovations in workplace design, sustainable transport planning and energy initiatives, among others, have transplanted the activities of the facilities manager from evolutionary planning to project planning. The worlds of facilities management and real estate have begun to converge. Real estate has started to adopt the language of 'user-centred' behaviour (state), whilst facilities managers have embraced visionary language (strategy) previously confined to the real estate role.

Table 1.1 Elements of change (adapted from Mintzberg and Westley, 1992).

	Change in organization: State	**Change in strategy: Direction**
Thinking level (abstract)	culture organisational structure	vision positions
Doing level (concrete)	systems facilities services people	programs facilities assets

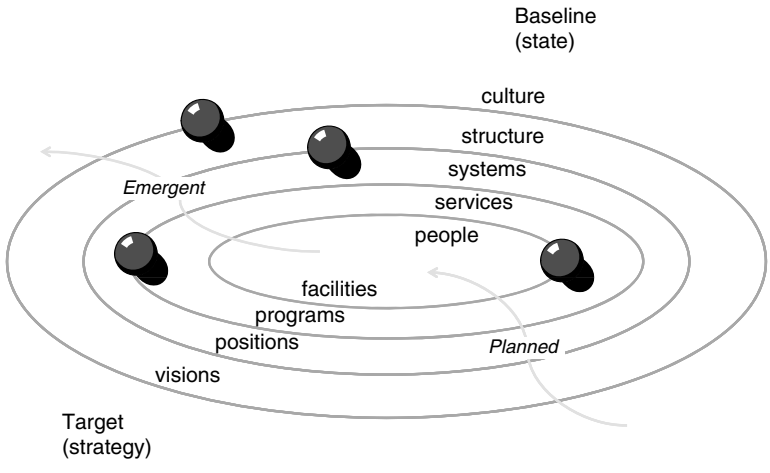

Figure 1.2 Orbital view of change (adapted from Mintzberg and Westley, 1992).

In Figure 1.2 we present the 'orbital model' of change management based on the *moving cycles* concept of Mintzberg and Westley (1992). Like the original model, it recognises that change can take the form of radial change (moving from the outer abstract level to the inner concrete level). However, unlike the spiralling view of Mintzberg and Westley, the orbital model proposes that a discrete quantum of 'energy' needs to be expended in order to move up through to outer levels. Without the necessary energy input, the change management initiative falls back to its original state. This energy might be referred to as the 'transition energy' (using the parlance of atomic theory). Change can also occur at a single orbital level (what Mintzberg and Westley calls 'circumferential' change) so that the impact of facilities changes may be confined to people and workplace, without a more abstract impact on structure or culture within the organisation. This gives rise to isolated pockets of change, either at a discrete point on the orbital path (isolated change) or within a single ring (silo change). Thus, the introduction of 'new ways of working' may be introduced at the 'people' or 'facilities' level; but the required transformation is unlikely to take place without the additional input of energy to affect the 'systems', 'structure' or 'culture' level. At the other extreme, an orbiting object (change initiative) may reach 'escape velocity', propelling the organisation into a new 'realm' of sequences and patterns of change.

So who needs another change management model? The value of Mintzberg and Westley's original model is that it places facilities management 'centre stage', unlike most change management models which make only passing reference to facilities as a vehicle of change. For those seeking to leverage support for facilities management initiatives, the ability to 'contextualise' the change is paramount. Is it an isolated approach, a piecemeal approach or perhaps a revolutionary approach? The orbital model highlights those areas of change where further investment of energy is required to transform an isolated or piecemeal approach into a more focused or revolutionary approach. The model demonstrates graphically the two realms of 'real estate management' and 'facilities management'. Whilst the former is typically driven by formal change, often in the form of a structured acquisition process or perhaps as part of a masterplan (the top-down approach), facilities management makes much more use of a bottom-up approach, in the form of informal, emergent change.

For corporate organisations seeking to roll-out change on a global arena, having a holistic view of change is an overriding concern. Such an approach allows innovation to be

fully exploited in various geographical regions and at different levels of abstraction within an organisation. The proposed 'roadmap' provides a useful tool that will allow more effective engagement between the 'concrete' world of the facilities management team and the 'conceptual' aspirations of organisational leaders.

1.5 FACILITIES MANAGEMENT AND THE BUSINESS OF CHANGE

So far in our discussion we have highlighted the emergence of the facilities manager as 'project manager'. But what do we understand by the term 'facilities management' and, more importantly, what is the reality in practice? The definition of 'facility management' provided by the European Committee for Standardisation (CEN) EN 15221-1 is given as:

> the *integration* of processes within an organisation to maintain and develop the agreed services which support and improve the effectiveness of its primary activities.

Such a definition, whilst describing the scope of facilities management, does not attempt to provide an explanation regarding the skills or competencies required to undertake this task. There is no mention of innovation, leadership or skills development. Instead, the definition concerns itself with systems and system boundaries between contracting parties. What are primary activities? As noted by Barrett and Baldry (2003), facilities and their supporting services may themselves be the primary activity (e.g. hotels) or may secondarily become part of the primary activity (e.g. hospital cleaning as part of patient care).

More problematic with the CEN/definition are the three levels that are assumed to exist: (1) strategic; (2) tactical and (3) operational. The 'operational' level appears to underpin the facilities management activity. Quite at odds with this view, we see increasing evidence that facilities managers are not operational managers but are indeed project managers. They are involved in transformations, refurbishment projects, remodelling or relocations that have a discrete 'start' and a discrete 'end'. Such change management projects draw on skills which are not encompassed by the term 'integration' or indeed 'operations'. The focus is very much on the 'develop' rather than 'maintain' philosophy.

Section A.2 of the standard acknowledges the role of facilities management in the change process:

> An organisation relies on its primary processes in order to achieve its strategic objectives. Changing market forces and developments from legislation, technology and mergers constantly influence these processes. These changes shall be managed and structured in strategic, tactical and operational levels, in order to remain viable and compliant to changing demands. (EN 15221-1 (CEN/TC348, 2006))

However, what this statement does not recognise is the transformative potential of facilities and facilities management. The profession is concerned with much more than 'remaining viable' (efficiency) and being 'compliant'. Returning to our earlier observation, buildings and facilities themselves have the potential to shape and change the organisation. They are not simply an instrument of change — they *are* the change.

The European standard EN 15221-1:2000 describes a *systems* (process) perspective of facility management operating at the strategic, tactical and operational level. This assumes a set of interrelated components that transacts with the larger environment. Interestingly, the definition makes no reference to the role of the built environment. In the context of this book, the physical environment is identified as playing a central role — that processes alone do not define facilities management. Rather, it is the capacity of buildings and building systems to guide 'human behaviour'. As such, the challenge of facilities management in the context of change becomes much greater. Instead of being *equilibrium* seeking, based on a steady state strategy, facilities management recognises the importance of punctuated equilibrium in a non-steady state environment.

The nursing profession has an underlying set of principles that are equally applicable to the facilities management profession. The *International Council of Nurses* define the role of nursing as encompassing:

> ... autonomous and collaborative care of individuals of all ages, families, groups and communities, sick or well and in all settings. Nursing includes the promotion of health, prevention of illness, and the care of ill, disabled and dying people. Advocacy, promotion of a safe environment, research, participation in shaping health policy and in patient and health systems management, and education are also key nursing roles. (International Council of Nurses (2010))

By minor modifications, it is possible to identify an equally fitting definition of facilities management:

> Facility management encompasses in-house and collaborative provision of service settings for individuals, organisations and communities. Facility management enables the promotion of organisational effectiveness and individual wellbeing by leveraging the transformative potential of such service settings. Also key to the facilities management role are advocacy in shaping organisational policy, promotion of a healthy environment, research and professional development.

This definition serves a different purpose to that envisaged in the European standard. Whilst the European standard attempts to demarcate the industry boundaries, the definition above seeks to identify the professional role of the facilities manager. Such a definition is not predicated on a systems view of facilities management; rather, it acknowledges non-steady state change issues (shaping and research) and it is clearly tied to space and the built environment (service settings).

1.6 THE SCOPE OF FACILITIES CHANGE MANAGEMENT

What supporting services does the facilities manager need to integrate to achieve a suitable service setting? Figure 1.3 describes an organisational structure for the facilities team proposed by Williams (1996). This structure incorporates three key strands:

- premises
- support services
- information technology.

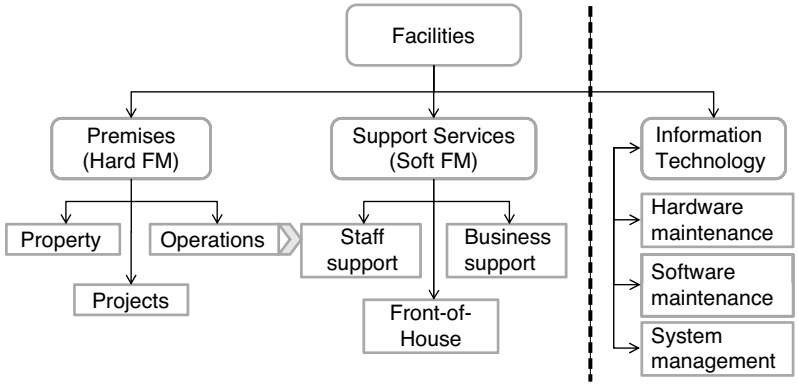

Figure 1.3 The scope of facilities management (adapted from Williams (1996)).

Williams (1996) goes on to suggest that 'the importance of involving the information technology (IT) function under the umbrella must never be underestimated.' He argues that information technology forms an integral part of any change issues related to workplace arrangements, location and facilities requirements.

The premises responsibility is further subdivided into three activities: property, projects and operations. As shown in Figure 1.3, 'property' would typically involve all activities involved in procurement and disposal of property assets and leases, to produce a property portfolio that meets the emerging needs of an organisation. The 'projects' function is clearly aligned with change management agendas, involving strategic decision making and financial investment. This activity also presents challenges in terms of the teams engaged, with the number and constitution of project teams changing over the course of the project. It is through the support of such projects that it is possible to extend the useful life of assets, through adaptation and upgrading. Projects may include simple churn issues related to the movement of staff or departments. They may extend to the design and construction of new buildings or even masterplans. The 'operating' role is in essence concerned with 'day-to-day' steady state activities including the important functions of cleaning, security and maintenance. However, even these seemingly operational activities take on a 'projects' characteristic in many situations. Thus, infrequent external cleaning of facades may have few operational characteristics, requiring a risk assessment and innovative access strategies to clean inaccessible areas such as atria. Similarly, security may not fit the 'operational' tag in all situations. The attendance of VIPs or an unexpected security situation may prompt a change management approach that is far from being operationalised.

Adaptations to the original diagram of Williams (1996) relate to the interface between 'operations' and 'staff support'. The emergence of participative facilities management and the increased engagement of employees in the facilities agenda makes this interface a particularly important one. Figure 1.3 also highlights the increasing importance of 'front-of-house' services in addition to staff and business support. Service settings in this context are used to accommodate visitor needs and to communicate the corporate brand to such visitors. Reception and concierge services represent an important part of the facilities management role in this respect.

1.7 REPLACING LIKE WITH UNLIKE

Rarely do designers now replace like with like, particularly in fast advancing technological areas such as mechanical and electrical services. Such systems inevitably exhibit declining performance as they age. The replacement of these items may occur every 5 years (e.g. diffusers) or every 20 years (e.g. plant and boilers) and in the intervening period regular maintenance can extend their life. In an unlikely world of unchanging needs (legislation, technology and organisational change) it is sufficient to replace like with like to bring the buildings condition up to an 'as new' state of repair. However, such a strategy is unlikely to meet the changing demands that produce an advancing utility gap. In Chapter 3, further consideration is given to the inevitable process of declining performance through age. At the same time, needs change along with changes in legislation and technology. The inevitable decline in performance of plant, services and fabric over time eventually prompt a replacement decision. The facilities manager is thus called upon to do more than 'maintenance' (i.e. merely retaining the 'status quo'). Technologies change such that new performance standards are possible. Legislation and standards also change, so that in the case of boiler and refrigeration plant, new energy and environmental standards dictate a change in product and a change in the way it is operated. Thus we see that 'change management' is integral to the modern facilities manager's role.

1.8 THE INTELLIGENT CLIENT

In order to harness the benefits of change, the typical role of the facilities manager as 'fire fighter' is not sufficient. Many modern organisations are pursuing the objective of being a 'thin client' in relation to facilities management, retaining only a minimal in-house management capability. Pressed with organisational demands and the need to focus on core business, for many organisations, outsourcing presents an attractive proposition. Using the outsourcing approach, management expertise, technical expertise and labour are procured from the external market by means of a contract. Is it possible for an organisation to relinquish all responsibilities using this approach? Williams (1996) suggests that there is a core capability that needs to be retained in-house. This facilities management capability can be described as the 'intelligent client'. Essentially, this provides a senior management capability which is able to represent the interests of the organisation. In order to do this, three facets need to be addressed:

1 sponsorship (policy and strategy), involving:
   a creation (support from within and outside of the organisation)
   b strategy formulation
   c changing
   d directing
2 intelligence (understanding and monitoring)
   a customer objectives
   b customer needs
   c technology
   d service delivery

3 service management (contract management)
   a agency
   b task management
   c contract management

Williams (1996) goes on to argue that 'the proper allocation of resources to each of these facets is absolutely critical to the achievement of cost effective facilities management.' He suggests that many organisations often possess only one or two of these three essential facets (sponsorship, intelligence and service management). Organisations invariably focus on the procurement process (service management role) as an opportunity to 'squeeze out' savings. However, the opportunities for budgetary control (enabled through the forward-looking sponsorship role) and the opportunities for value engineering (enabled through the intelligence role and an understanding of need) are two equally important areas. Both of these facets do not need to come at the expense of the outsourced service provider's profit margin. A mature partnering relationship with an outsourced provider should explore the possibilities for budgetary control and value engineering.

1.9 THE CHANGE MANAGEMENT CYCLE

So far we have identified two characteristics of change that represents the greatest challenge and greatest opportunity in facilities management: (1) the punctuated nature of change, whereby changes to facilities impact on many other dimensions of an organisation, and (2) the focus on human engagement which is central to the eventual success of any change management challenge. To this end, we have noted that facilities managers are not just integrators, they need to be leaders of change. Invariably, such change requires active intervention through the various phases of change. The temptation is to concentrate on the 'doing' part of a change management process (the move, the signing of a service contract or the installation of a new technology), since this is often the most conspicuous activity which often attracts the attention of managers, stakeholders and the press. However, success is largely dependent on careful analysis before the event and further refinement after the event.

This book directly tackles the issues confronted by facilities managers in an environment of change. The sequence in which the chapters appear reflect the cycle of interventions required by the facilities management team. The same sequence applies to both 'physical assets' and 'procured services'. Whilst it is often tempting to assume that the building alone is the subject of change, in reality there are many other smaller change cycles that cumulatively impact on building performance. New technologies, new working practices, reorganisations, new service solutions — all have their own adoption cycle. With this in mind, the phases through which change occurs are not described solely in terms of the whole building's lifecycle. Despite this, we can see parallels with models such as the RIBA (1999) Plan of Works which encompasses (1) Appraisal; (2) Strategic Brief; (3) Outline Proposal; (4) Detailed Proposal; (5) Final Proposal; (6) Production Information; (7) Tender Documents; (8) Tender Action; (9) Mobilisation; (10) Construction to Practical Completion; (11) After Practical Completion. Such a model, however, is designed for the purposes of managing a process rather than challenging assumptions and identifying the need for change.

The chapter sequence used in this book reflects a change management cycle as shown in Figure 1.4. It is based on a modification of the REACT model of Macrimmon and

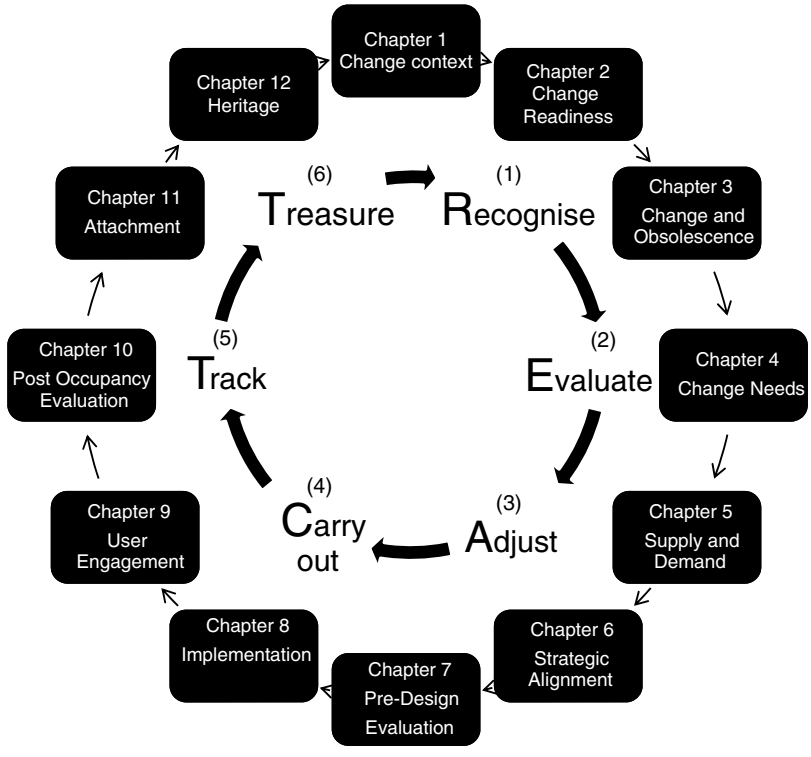

Figure 1.4 REACT model – the framework for 'facilities change management'.

Wehrung (1988), a risk management model that lends itself to an understanding of transformations. In the original model the key stages are (1) recognise; (2) evaluate; (3) assess; (4) choose; (5) track. The modified model (which describes fully the organisation of this book) aligns with the following stages of what is described as the REACTT model:

- Recognise
- Evaluate
- Assess
- Carry out
- Track
- Treasure

The relationship between the book chapters and each of these stages is illustrated in Figure 1.4 and explained further in the following sections.

1.9.1 Recognise

How do we avoid working on the wrong problem? This is what the well-known psychoanalyst Freud called the 'presenting problem'. He observed that when patients were asked what their problems were, their true concerns did not become apparent without further probing. This framing problem is often the most challenging aspect of facilities change management:

recognising that you have a problem in the first place. It is one aspect of the decision-making process which defies attempts to automate a change management process, requiring a uniquely human understanding.

Chapter 1 (Finch) has provided an overview of the change management challenge for the facilities management profession. Putting the problem in context is central to any facilities management undertaking. Invariably, what appears to be a simple mobilisation activity soon emerges as a problem which touches on the soft underbelly of an organisation (deep structures).

Chapter 2 (Finch) addresses the challenge of change readiness. This describes the ability to configure systems and assets such that they can meet the requirements of various possible futures. Again, not only do we have the 'presenting problem' of current day concerns, we also need to identify concerns of tomorrow.

Chapter 3 (Pinder) considers the concept of obsolescence. Obsolescence is an inevitable consequence of the passage of time. The challenge therefore is to anticipate this process and take the necessary steps to prolong the useful life of assets. The chapter identifies two interrelated approaches for coping with changing user demands: designing buildings for adaptability and adaptive re-use. Both approaches rely on the initial recognition of a facility's inherent potential.

1.9.2 Evaluate

Having recognised future challenges, it is then necessary to understand the baseline position. How do the assets that we have inherited and the aspirations of the organisations align with the future challenges 'presented' in the recognition phase?

Chapter 4 (Dettwiler) highlights the requirements for capturing client 'needs' — not based on wishes or desires but on sound evidence. This process is illustrated in relation to start-up organisations whose critical facilities decisions at the growth stage can have a profound effect on the future development of an organisation. By choosing the wrong facilities options, the start-up becomes entangled in inflexible solutions that hinder growth and expose them to significant property risks.

Chapter 5 (Shiem-shin Then) continues along the same lines of evaluation, with a considered approach to space planning. Space expressed as square metres is the unit of measure: the challenge becomes one of balancing supply and demands — both today and in the future.

1.9.3 Adjust

Once the change requirements and the extent of the task has been identified, the essence of a 'project' starts to materialise. This is captured in Chapter 6 (Love and Smith), which considers the *strategic* or early design stages in the life of a project which determine the fundamental characteristics of quality, cost and time of projects. The inception stage provides an opportunity for *breakthrough*, innovative or creative ideas or just better approaches to facilities provision. The authors of this chapter advocate the creative engagement of a diverse, broad or mixed environment of stakeholders at this vital stage.

Pre-design evaluation is a concept addressed in Chapter 7 (Ornstein and Andrade). The name might suggest that it belongs in the 'evaluation' stage, but it is also instrumental in the fine-tuning of design solutions — often providing vital insights that need to be captured in the early design (inception) stage.

1.9.4 Carry out

The terms 'mobilisation' or 'implementation' aptly describe this 'doing' stage. The physical move or the mobilisation of new service providers are what traditionally we have associated with facilities management. The 'doing' stage is fraught with dangers associated with commissioning, testing and training. Things invariably go wrong, despite the best laid plans.

Chapter 8 (Bull) isolates 'communication' as the single most important determinant of success at this stage. Employees involved in a move are likely to be significantly more forgiving of mistakes if they understand the challenges involved and their role in the process (as co-producers). Timely communication provides the vital mechanism for allaying fears, tackling frustrations and resolving outstanding issues.

The theme of user-involvement is further explored in Chapter 9 (Vischer). Participative involvement of users is a phenomenon which looks set to transform the facilities management profession. The principles espoused in this chapter inform all of the stages of the REACTT model, from recognition to tracking and beyond. However, user involvement is of vital importance at the 'carry out' or implementation stage. The chapter highlights the possibility of transforming end users negative energy (associated with a resistance to change) to a powerful positive energy.

1.9.5 Track

Change management is a continuous process. Once the project is complete, many lessons remain to be learned. Often it is only by occupying the new space or experiencing the new service are shortcomings in the original design apparent. Added to this is the fact that even from day one of handover, requirements may have changed. Only by undertaking a 'post occupancy evaluation' some months after project completion can we identify shortcomings and embrace successes.

Chapter 10 (van der Voordt *et al.*) looks in detail at the concept of post occupancy evaluation, providing an overview of the principles involved. Only by continuing to track the results of a change management initiative can we provide the learning experience essential to the facilities manager.

1.9.6 Treasure

The REACTT model is a continuous cycle that occurs at many levels and across many timeframes in facilities management. The inevitability of 'obsolescence' is not assumed in this model. Indeed, buildings can perform well beyond their intended design life and often acquire a value that transcends any functional analysis. The concept of 'treasuring' what we possess runs through the final two chapters of the book.

In Chapter 11 (Inalhan and Finch) we examine how building users learn to value the familiar. Sometimes this is based on sound reasoning related to familiarity with processes, investment of effort in the development of expertise and asset specificity (having a unique knowledge of the peculiarities of a given system). However, we also need to consider the emotional process of 'place attachment'. Facilities managers ignore the strength of this phenomenon at their peril. The chapter examines the dimensions of place attachment that have to date been poorly understood in facilities management, despite the extensive research that abounds in other areas such as tourism, home-making and urban planning.

Chapter 12 (Pereira Roders and Hudson) is the final chapter of the book, lifting the lid on the concept of 'cultural heritage'. What is conveyed in the chapter is that in order to successfully manage change we also need to include assessment processes that recognise the existence of cultural heritage. Cultural heritage in this context includes the range of characteristics that are deemed to be of cultural significance. These can include tangible heritage such as buildings, engineering structures, archaeological sites and historic areas. They can also include intangible heritage assets such as customs, events and associations. In a world in which sustainability forms such a prevalent part, it is undoubtedly true that facilities managers need increasingly to understand how these assets are valued and treasured.

1.10 SUMMARY

This chapter has attempted to position facilities management in the larger context of organisational change. Today facilities management *is* change management. As such, the profession needs to be empowered with tools and techniques that enable them to engage with the new reality. Fundamental to this new reality is the empowerment of building users, engagement in complex service provider relationships, alignment with organisational strategy and empathy for assets that underpin the fabric of modern society.

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