


Third edition

# Facilities Management

## The Dynamics of Excellence

Peter Barrett and Edward Finch

WILEY Blackwell

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## *The Dynamics of Excellence*

Third Edition

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This edition first published 2014


*Registered Office*
John Wiley & Sons, Ltd, The Atrium, Southern Gate, Chichester, West Sussex, PO19 8SQ, United Kingdom.

*Editorial Offices*
9600 Garsington Road, Oxford, OX4 2DQ, United Kingdom.
The Atrium, Southern Gate, Chichester, West Sussex, PO19 8SQ, United Kingdom.

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*Library of Congress Cataloging-in-Publication Data*

Barrett, Peter (Peter Stephen), 1957–
Facilities management : the dynamics of excellence / Peter Barrett, Edward Finch. – Third edition.
pages cm
Includes bibliographical references and index.
ISBN 978-0-470-67397-3 (pbk.)
1. Real estate management. 2. Facility management. I. Finch, Edward. II. Title.
HD1394.B37 2013
658.2–dc23

2013019873

A catalogue record for this book is available from the British Library.

Wiley also publishes its books in a variety of electronic formats. Some content that appears in print may not be available in electronic books.

Cover design by Sandra Heath
Cover image courtesy of Shutterstock and the authors

Set in 10/12.5pt Minion by SPi Publisher Services, Pondicherry, India

1 2014

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# Preface

This book is about unlocking the full potential of facilities through excellent facilities management. The innate potential of built space can affect the way that we work, play, heal, learn and generally cope with the demands of modern life and modern business. The burgeoning profession of facilities management can be instrumental in realising this potential. However, poor management can lead to dysfunctional and short-lived built assets misaligned with changing user demands.

The two preceding editions of this book were instrumental in defining the landscape of facilities management (FM). As such, the book itself has become something of a standard reference for professionals and students alike. However, the landscape of FM has changed significantly in recent years, necessitating a further revision of the book (Third Edition). The concepts and ideas espoused in the earlier editions are just as relevant today as when they were first explored. Indeed, it is somewhat surprising just how robust the principles have been. What has necessitated a new edition is not a replacement of previous ideas, but rather a reconnection of established notions with the modern context, shaped as it is by unprecedented changes in the political, social and technological arenas.

The proliferation of good practice guides in facilities management suggests a world in which clarity exists between the right way of doing things and the wrong way. This singularity in thinking is sometimes at odds with the 'systems thinking' developed throughout this book. Indeed, the systems approach suggests that there are generally many ways of achieving the same goal. For many, this proposition is somewhat discomforting. For others, it is stimulating and invigorating. It provides the challenge to enable excellent facilities managers to shine.

Often we are tempted to think of physical facilities as purely economic commodities that we buy and sell in a property market according to our needs. Fundamental to the success of facilities management has been the recognition that facilities are more than this – they are 'factors of production'. As such, their importance is much greater than their capital value or even their resulting operational cost. The tendency to look only at the left-hand side of the balance sheet (cost) has distorted our view. Recent economic pressures and budget constraints have further amplified this preoccupation with cost saving. Whilst we have very sophisticated approaches to calculating this left-hand cost column, we have only rudimentary techniques for understanding or measuring those things that should appear on the right-hand side of the balance sheet – the benefits or value.

Indeed, we are only just beginning to understand how well-managed space can positively affect our ability to function as individuals and as groups. Whilst we like to legitimise our preoccupation with 'bottom line' costs, the reality is that a far greater opportunity cost is attendant on dysfunctional spaces – a cost that accrues to the organisation at large.

For most types of facilities, it is likely that the cost of getting it 'wrong' far outweighs any short-term savings in build or operational cost. Such oversights can be observed in production facilities (where buildings can inflict inefficiencies in manufacture); health facilities (where poor design can undermine staff and patient well-being); custodial facilities (where poor layout can increase the cost of security and surveillance); offices (where monotonous and inflexible surroundings can compromise creative thought); care homes (where a 'home from home' is replaced by a sterile institutional setting). The onus is on the facilities manager to identify those hidden yet vital attributes of space and services that may be overlooked in an attempt to reduce costs. This book provides a framework for making these seemingly transparent attributes more visible.

The 'dynamics of excellence' underscores the responsive role of modern facilities management. Various management principles have been put forward for managing the uncertainty that results from change. Examples include continuous improvement and more recently lean dynamics. These management approaches describe an ongoing effort to improve products, services or processes. Such approaches have been instrumental in confronting complacent attitudes regarding the achievement of excellence. Excellence instead involves continually moving forward. Whilst these techniques have proven useful in identifying 'lags' where disconnects occur between operations, decision making and information (incremental change), more searching approaches may be required in the face of the radical changes that continue to confront organisations. Issues of resilience and uncertainty (rather than variations) have emerged, involving ground-shifting change. The challenge is no longer simply to anticipate but rather to provide agility in the face of a changing landscape. The 'dynamics of excellence' embraces both the idea of ongoing improvement and adaptive resilience. As such, the argument developed within this book considers the pursuit of excellence through using all the levers available within an environment subject to radical change. Over the life of a building such changes will inevitably occur.

At a practical level the content of the book has been significantly developed to sharpen the focus on the dynamic aspects of facilities management. Chapters 2, 4, 5 and 7 are completely new and the remainder have been refashioned and augmented with new case study material. Although each chapter remains a standalone element as before, the book now does have a narrative arc: from a focus on the opportunities of being truly user-driven in Chapters 1 to 3; to management levers in Chapters 4 to 6; followed by possible tools in Chapters 7 and 8; to Chapter 9, with its concluding focus on sustaining the pursuit of excellence in facilities management.

Finally, we return to the idea of 'excellence'. It is instructive to consider the words of Aristotle:

> 'Excellence is never an accident. It is always the result of high intention, sincere effort, and intelligent execution; it represents the wise choice of many alternatives – choice, not chance, determines your destiny.'

Good facilities management never happens by chance. It is hoped that the ideas developed within this book will enable professionals to achieve a balanced consideration of all of the possibilities afforded by physical space. By so doing they will be able to make a more informed choice, cognisant of both intended and unintended consequences. As in the previous editions, the overall objective of this book is to complement and stimulate the facilities manager's own knowledge and expertise, whilst also contributing to the development of a shared knowledge base for the facilities management discipline.

**Peter Barrett**
**Eddy Finch**
June 2013

# Acknowledgements

The First Edition of this book, published in 1995, was the result of a collaborative effort between a team of people from both industry and academia. Half of the resource came from industry, but the other half was provided by the Engineering and Physical Sciences Research Council and the Department of the Environment through the LINK CMR programme and this support is gratefully acknowledged. A grant was also received from the Royal Institution of Chartered Surveyors which greatly facilitated the work.

The research that led to that edition was carried out in a wide range of areas and the following industrial partners all contributed in different ways, by providing, variously, material, information, access to situations, advice and ideas:

- Barclays Property Holdings Ltd
- Chesterton International plc
- Cyril Sweett & Partners
- Ernst & Young
- Nuffield Hospitals
- The Royal Institution of Chartered Surveyors

Many organisations were involved beyond the main partners, especially in the original providing the case study material in Chapter 1. Thanks are due to these organisations, despite their anonymity. Of particular note was Dr David Owen's input to Chapter 4 of the first editor on contracting-out, which is derived substantially from his doctoral work, which was associated with the project.

Martin Sexton and Catherine Stanley, who were the research assistants on the project, carried out the great majority of the fieldwork. Principal credit goes to Martin for Chapters 6 and 7 and to Catherine for Chapters 1 and 3 (of the First Edition). Several members of staff within Salford University made helpful contributions. In particular, John Hudson's advice in the areas of briefing and IT deserves mention.

Building on this sound foundation, working with David Baldry, the 2003 Second Edition updated, supplemented and filled out the material. Dr Dilanthi Amaratunga was very helpful in providing new case study material drawn from her PhD studies at Salford University.

This Third Edition is a more radical revision, driven by a new collaboration between Professors Peter Barrett and Eddy Finch. In doing this they have drawn

from a variety of relevant research projects and collaborations and would like to thank their network of colleagues for the stimulus provided.

As will be evident, many people have been involved over the years. We would like to thank them all for not only helping create this book, but also for making the process so enjoyable.

# I Dynamic, Strategic Facilities Management

# 1 Diversity and Balance in Facilities Management

## 1.1 Introduction

### *1.1.1 Scope of the chapter*

The aim of this chapter is to help facilities managers take an objective view of their facilities management systems to gain a fuller appreciation of the various interactive elements. This is intended as a useful precursor to an assessment of whether the various aspects are in balance and to see if there is room for improvement. A general model and a discussion of the issues around the key dimensions are provided. This is followed by a number of case studies providing real life examples of existing facilities management organisations. The case studies do not necessarily demonstrate good practice; indeed in some cases they show how not to do it. They are intended to show the wide variety of approaches that can be employed. Any suggestions for good practice should not be followed to the letter; they are intended purely to stimulate the facilities manager into thinking about the different possibilities. No two facilities departments are likely to be identical as they will be designed to meet the needs of their parent organisations.

### *1.1.2 Summary of the different sections*

- Section 1.1. Introduction.
- Section 1.2. A generic model is presented that shows how the elements of an ideal facilities management department would interact.
- Section 1.3. This section draws together general conclusions from the case studies in Section 1.5, suggesting where the problem areas in facilities management may lie. The section goes on to consider suggestions for good practice within facilities management.
- Section 1.4. Different models are presented allowing facilities managers to identify their organisation with a particular model. Each model is accompanied by a pointer to a particular case study in the next section, which provides a real life example(s) of that model.

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- Section 1.5. Case studies are used to illustrate how different organisations operate within the different models.
- Section 1.6. Conclusions.

### 1.1.3 How to use this chapter

The material in this chapter can be used in a number of ways:

- It can be read sequentially.
- You may wish to go straight to the suggestions for good practice.
- You may be able to identify with a specific facilities management (FM) model and go straight to the appropriate case study.
- You may be particularly interested in a specific area, such as the structure of the facilities department and hence may wish to compare across the case studies (to make this easier each case study follows the same format).
- You may find a useful reference within the text and decide to go straight to another chapter.

## 1.2 Generic FM model

Facilities management is complex and involves many interactions. One of the main objectives of considering a diverse set of case studies (see later in this chapter) is to extract the key interactions at a general level. Therefore, although there are many different practices at large there are also certain regularly occurring functions that have to be addressed if facilities management is to be effective.

The generic model shown in Figure 1.1 is based on a combination of systems theory and information processing perspectives (Galbraith, 1973; Beer, 1985; Kast and Rosenzweig, 1985), linked to the practical material of the case studies. It illustrates the general range of continuing interactions that are involved in facilities management. The generic model shows how an 'ideal' facilities department would interact with the core business and the external environment. The model differentiates between strategic and operational facilities management, highlighting the need to consider the future situation, as well as the current one. In each of the following examples, the term facilities manager is referred to, but, as the case studies demonstrated, it is unlikely that any one person could be responsible for all of these areas and a facilities team is more likely, quite possibly with different people responsible for the strategic and operational areas.

The different interactions are as follows, with the numbers cross-referencing to Figure 1.1.

### 1.2.1 Operational facilities management

1. Interaction within the facilities department itself, between the facilities manager and the different functional units. The latter are the actual operational units of the facilities department and are likely to correspond

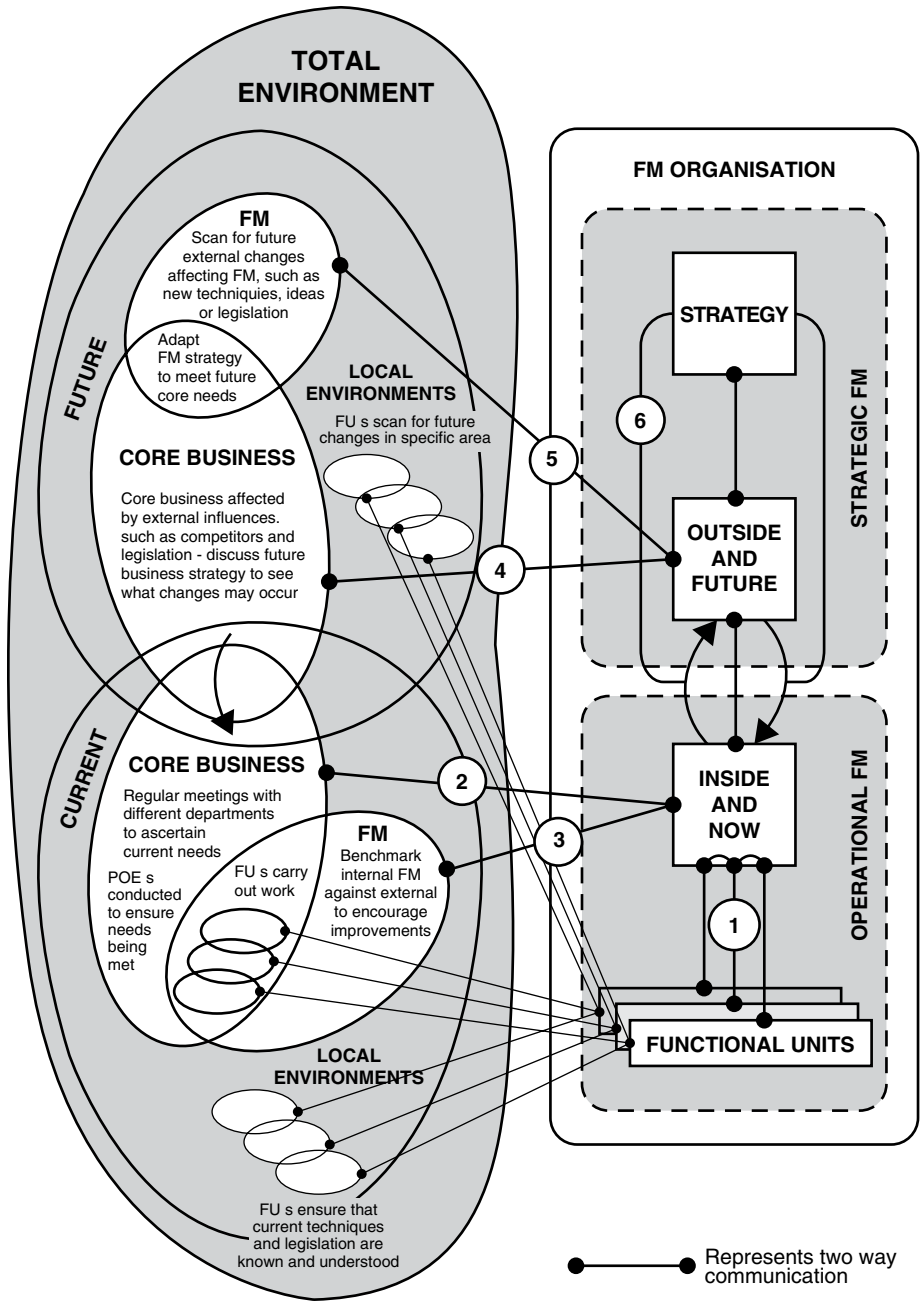


**Figure 1.1 Generic model for facilities management systems.**

to functions such as: maintenance, interior planning, architecture and engineering services, etc. It should be noted that the functional units can either be in-house or contracted out. With reference to this particular relationship, the facilities manager is acting in the role of coordinator, rather

than implementer. The functional units are expected to carry out their duties as directed, only referring major exceptions back to the facilities manager. In this way, the latter can concentrate on the other interactions. Each of the functional units should be fully aware of current techniques and legislation relevant to their specific area. They should also scan for possible future changes and inform the facilities manager as necessary.

2. The facilities manager interacts on a regular basis with the core business to identify current facilities requirements. This could be achieved on a formal or informal basis, depending on the organisation. Audits or post-occupancy evaluations should also be conducted to ensure that these needs are actually being met and to identify areas that could be improved.
3. The facilities manager benchmarks existing internal facilities services against other facilities management organisations, so that possible areas for improvement can again be identified.

### 1.2.2 Strategic facilities management

4. The facilities manager interacts with the core to ascertain what future changes may occur to the business, as a response to external influences, such as competitors' plans.
5. The facilities manager will also scan for possible developments within the facilities management arena.
6. Strategy is the policy framework, which provides the context for decision-making within the facilities department. Interaction occurs between strategic and operational facilities management, the aim being to synergistically balance current operations with the needs of the future.

### 1.2.3 Discussion

It should be noted that the generic model should be used as a framework of the aspects a facilities manager aims to keep in mind. In reality, how the issues are handled will vary for each organisation, as will the emphasis given to particular activities. What matters is that the facilities management organisation handles each of the six interactions *appropriately* in the context of their particular circumstances. Many facilities organisations are firing on two or three cylinders, not all of the six given above. This means less power, with the dormant interactions not contributing, or in fact acting as a drag on the active interactions. For the facilities function to achieve its full potential all six interactions must be dealt with appropriately. For most organisations this will mean some scope for improvement.

Much of this book is focused on the dynamics of facilities management and, in particular, Chapters 2 and 5 focus on excellence in FM and enhancing FM performance respectively. The generic FM model stresses how facilities managers need to be responsive to the core business, but also to developments in facilities

management practice and society more generally, whilst all the time having to manage the practicalities of service delivery. The remainder of this chapter turns to practical illustrations of the richness of these elements of practice across the various aspects of the model.

## 1.3 Illustrations of facilities management systems

### *1.3.1 Overview*

Within the context of the above generic FM model, this section begins by summarising the findings of the case studies and first highlights the potential problem areas within facilities management systems in Section 1.3.2. The section goes on to consider suggestions for good practice within facilities management. Whilst conducting the interviews for the case studies, a standard checklist was utilised so that comparisons could readily be made across the organisations. This checklist was derived from the generic FM model set out in Section 1.2. The checklist expanded upon the following basic themes:

- facilities management structure;
- management of facilities management services;
- meeting current core business needs;
- facilities management and external influences;
- strategic facilities management.

This provides the structure for Sections 1.3.3 to 1.3.7 where suggestions for good practice are given.

### *1.3.2 Potential problem areas in FM*

The case studies presented later in Section 1.5 provide an indication of the varied nature of facilities management. Even though eight organisations are considered, facilities management is viewed very differently by each one. In some of the organisations, for example, facilities management is expressed primarily as a maintenance function, whereas in others the scope is very much wider, including services such as catering or security. Another area where the organisations differ is whether services are provided in-house or contracted out.

Such differences are not surprising and are to be expected, as facilities departments are necessarily tailored to meet the individual needs of their particular organisation. In addition, it is still a relatively new discipline and as such is still trying to find an agreed identity. The case studies, however, do draw attention to a major issue, which is neglected by many organisations, namely the strategic relevance of facilities management. In several of the organisations, facilities management is considered to be a purely operational function. Hence, the facilities departments exist to provide a day-to-day service, not to

consider how facilities could benefit the core business in the long term. In these organisations, senior management fail to comprehend that their facilities personnel possess valuable knowledge that could be utilised when making major corporate decisions.

In two of the cases, for example, the organisations had relocated. In each case the facilities department was not involved in the decision-making process and was only brought in to advise after sites had been purchased and new buildings designed. Hence, certain important factors, such as churn, were not taken into consideration and problems have occurred as a result.

The organisations that do not consider facilities management to have a strategic role are therefore neglecting a source of information that is just waiting to be utilised. However, it is not only at the strategic level that opportunities for improvement are being wasted, but also at the operational level. Communication actually within facilities departments was normally effective and the different functional units generally worked together to provide an integrated service. On the other hand, communication outside of the department, i.e. with the rest of the organization, was often ineffective, as the facilities department waited to receive instructions rather than actively asking their users what they required.

The preceding analysis indicates that there is often room for improvement within the facilities management field and so the following sections make suggestions on how these could be achieved. Even though the case studies highlight problems, they also provide many examples of well-designed facilities management systems and so the proposals can be regarded as a synthesis of good practice, as demonstrated by the case study organisations. It should be remembered, however, that all organisations are different and not all of the proposals will be applicable to every organisation.

### *1.3.3 Facilities management structure*

The facility management models and the case studies show that there are various ways to organise the facilities department; basically there is no one method that will guarantee success. Bearing that in mind, the following points should be taken into consideration when organising a facilities department. The size of the organisation is the starting point for deciding how any facilities department is to be structured. Different sized organisations will require different staffing levels. If an organisation is quite small and located in just one building, for example, there is probably no need for a full-time facilities manager, as the amount of facilities work undertaken will be minimal. At the other end of the scale, a large organisation may need a correspondingly large facilities department.

Location is also important. If a facility department is dealing with multiple sites it will undoubtedly require a different approach to one operating on a single site. With a multiple site organisation, the facilities manager will have to decide whether services are to be provided on a centralised or decentralised basis. It is likely that a certain amount of autonomy must be granted to each site to make

**Table 1.1 Typical facilities management activities.**

| Facility planning | Building operations and maintenance |
|---|---|
| • Strategic space planning<br>• Set corporate planning standards and guidelines<br>• Identify user needs<br>• Furniture layouts<br>• Monitor space use<br>• Select and control use of furniture<br>• Define performance measures<br>• Computer-aided facility management (CAFM) | • Run and maintain plant<br>• Maintain building fabric<br>• Manage and undertake adaptation<br>• Energy management<br>• Security<br>• Voice and data communication<br>• Control operating budget<br>• Monitor performance<br>• Supervise cleaning and decoration<br>• Waste management and recycling |
| **Real estate and building construction** | **General/office services** |
| • New building design and construction management<br>• Acquisition and disposal of sites and buildings<br>• Negotiation and management of leases<br>• Advice on property investment<br>• Control of capital budgets | • Provide and manage support services<br>• Office purchasing (stationery and equipment)<br>• Non-building contract services (catering, travel, etc.)<br>• Reprographic services<br>• Housekeeping standards<br>• Relocation<br>• Health and Safety |

everyday facility decisions or else services could grind to a halt. For example, in the case of the professional group (Case Study 4), an assistant facilities manager is located at each site to deal with day-to-day operations, leaving the head facilities manager free to address major problems.

Another major consideration for the facilities manager is what services should be provided by the facilities department. Again there is not a definitive guide as to what should be included. The case study organisations, for example, vary considerably in their choice of functions; some concentrate primarily on maintenance, whilst others include general office services. As a rough guide, any facilities department is likely to perform some of the activities listed in Table 1.1 (Thomson, 1990). However, facilities managers should not just select items from the list at random, but provide only those services that are needed by their particular organisation. Once established, facilities departments do not have to limit themselves to their original activities and so the list can be extended as necessary. It is notable that in its survey of Facilities Managers' Responsibilities 1999 the British Institute of Facilities Management (BIFM) (1999) identified 29 distinct functions that a significant number of its membership carried out.

A trend in many organisations seems to be that the *conception* of what should come within the ambit of facilities management is changing. Therefore, although, for example, an organisation may have traditionally used an architect

to do major refurbishments as something separate from a maintenance orientated role for the facilities department, it may decide to put all of these activities under the facilities banner. The architect may well still do the major refurbishments, but his point of contact will be the facilities manager and the building related issues of the organisation will be more closely integrated.

A further decision to be made relating to the choice of services is whether they are to be provided in-house or contracted out. The latter has gained in popularity, but as the case studies demonstrate there are no hard and fast rules concerning what should be kept in-house and what should be contracted out. Some organisations favour a totally in-house option, while others literally contract every service possible, and then there are those that will use a combination of both. Due to the number of possibilities and issues involved, contracting out is contextualised and discussed further in Chapter 4.

The background of personnel may be another influential factor when deciding how to staff a facilities department. As facilities management is still a relatively new profession, there are a limited number of people as yet who possess qualifications in this specific field. Most facility managers, therefore, will have previously trained or worked in other areas – sometimes in related professions like surveying, but often in totally different areas like human resources. A lack of technical skills is not necessarily a problem, as the facility manager's role is to coordinate work, not implement it. Indeed, several of the case study organisations had chosen to appoint existing staff as facilities managers. The reasons put forward to support these decisions included: they had proven track records as managers and they were already familiar with the operations and culture of the organisation. These organisations complemented these existing skills by sending their facilities managers on courses to acquire the necessary basic technical knowledge. Another approach used by some of the organisations, where there were assistant or regional facilities managers, was to employ people from different disciplines who could support each other.

### 1.3.4 Management of facilities management services

A facilities manager can be responsible for the provision of many varied services, as Table 1.1 shows. A common mistake made by many facilities managers is to think that they have to be involved at every stage of the delivery process and know every last detail about what is happening, but it should be remembered that it is a facilities manager's role to coordinate or, as the name implies, manage these services. Only when facilities managers learn to manage effectively and efficiently will they be able to turn their attention towards strategic issues, which is where facilities management may really be of use to its core business. So how can facilities managers make time to consider strategic considerations?

Information overload is a major problem for many facilities managers, who find that they spend all their time attending to basic operational problems. Hence, the facilities manager should empower other members of the team to

make decisions, encouraging problems to be addressed at lower levels in the hierarchy. Depending on the nature of the problem, this could mean either the functional units or assistant facilities managers. For example, in the case of the school (Case Study 2), the different functional units worked together initially to sort out problems and only approached the facilities manager (bursar) with major difficulties. In organisations with various sites, such decentralised decision making will be essential if operations are to be maintained.

A further way to ease information overload is to ensure that all of the facilities team, both in-house and contractors, know exactly what is expected of them. Thus it is often worth establishing procedures to address this issue. In larger organisations this will probably mean making use of formal work programmes, service level agreements, maintenance schedules, etc., as briefing tools. Regular meetings to discuss workloads and performance may also be useful. It should be remembered, though, that informal methods can be utilised as well and may be just as effective, particularly in small firms. In the school (Case Study 2), for example, the bursar held formal weekly meetings to discuss workloads, but he also checked on progress while he walked around the school attending to other duties. Consequently problems could be sorted out on the spot, rather than waiting for the next meeting.

Investment in information technology may be another way to make information processing easier. This is becoming a popular option and there is an ever increasing number of specialist facilities management software packages appearing on the market. These packages offer a variety of different features and so the facilities manager should evaluate possible systems to ensure that they meet an organisation's particular needs. In some cases, the facilities manager may find that IT solutions are just not appropriate, as in the case of the corporate headquarters (Case Study 3), when the facilities manager found that all of the systems he reviewed were far too complex for his requirements. In order to help the facilities manager make appropriate decisions regarding this subject, the issues involved are covered in more detail in Chapter 8.

Even though facilities managers have easy access to a variety of information sources, opportunities to utilise or manipulate information are frequently wasted. Facilities managers are often responsible for a number of buildings and therefore they should perhaps consider making comparisons across buildings to identify where improvements or savings could be made. Such internal benchmarking can be used in a variety of ways. Many facilities managers, for example, will have data relating to energy consumption of their buildings. These figures could be compared to see if certain buildings were performing better, reasons for this could be established and perhaps applied elsewhere. In a similar vein, the hospital (Case Study 5) used internal benchmarking to see if it was more cost-effective to employ in-house staff or contractors to perform a specific function.

### 1.3.5 Meeting current core business needs

Even though facilities management exists to support the core business, it is often this relationship that runs into difficulties. As it is a support service, many

facilities managers have taken on a reactive role, waiting for instructions before they perform any action. This often means that dialogue will only occur when problems arise. The result is that the facilities manager has to remedy the situation quickly, rather than assessing what would be the best long-term solution. It would be far better in some cases if the facilities manager had time to discuss the various implications. Such a lack of consultation is likely to result in a facilities management service that does not necessarily support the core business to the best of its capabilities. A typical example of this lack of communication would be an office move. Ideally in this situation the facilities team would consult with the users to find out how each person worked and who they needed to be located next to. However, facilities groups are rarely given enough time to do this and so the users are often moved into an impersonal office space that does not support their particular working patterns. Consequently the whole department is likely to be demoralised and productivity may be reduced.

One of the ways to improve facilities services therefore is to become more proactive, i.e. actively seek out problems and requirements before they become critical. In several of the case study organisations, this meant arranging regular meetings to discuss the services provided by the facilities management group. In Case Study 3, for example, formal meetings are held every two months, which are attended by the facilities team and representatives from each department, who will have been briefed prior to the meeting. Furthermore, proactive behaviour could include addressing emerging areas of significant activity, such as environmental management and business continuity planning.

In some organisations, staff are not the only people who will be on the receiving end of facilities services. In the private healthcare group (Case Study 5), for example, facilities management efforts are directed towards making a patient's stay as pleasant as possible. In a situation where the users are not part of the organisation, it is not always possible or sensible to try to ascertain what they think of facilities management services. Therefore, facilities managers should try to target people that will provide them with useful information. In the case of the hospitals, it can be argued that it makes more sense to discuss the provision of services with people who are there full time and who can speak on behalf of the patients, namely the nurses and consultants. Even though meetings are a useful way of gauging satisfaction with facilities services, there is generally not time to discuss things in great detail and only certain people's views will be represented. Facilities managers should therefore consider developing an audit system that seeks to improve services through feedback.

A variety of techniques have been developed to allow facilities managers to do this and can be grouped together under the title of post-occupancy evaluation (POE). At its most basic level, POE is a formal assessment of a building by its occupants after it has been completed or occupied, to identify areas that do not meet users' requirements. However, despite its title, POE is also useful when planning new facilities or altering existing ones, as data generated during an evaluation can be used in the briefing process for a new project. Due to its flexibility, POE is a tool that will be useful at various times for many facilities managers and hence is covered in detail in Chapter 3.

### 1.3.6 Facilities management and external influences

Facilities management is a very wide field and consequently a continually changing one. New legislation and new techniques are appearing all the time and it would be virtually impossible for one person to keep track of all the different changes. Therefore, the facilities manager needs to employ certain methods to make this information processing task easier.

Firstly, the facilities manager should utilise the expertise that already exists within the department. The facilities manager's role is that of coordinator; therefore, each of the functional units should ideally ensure that it is fully aware of developments within its own area of expertise and report any significant changes to the facilities manager. This should apply to both in-house personnel and contractors. The facilities manager will often have to take positive action to enable the functional units to acquire this knowledge. For example, one of the case study organisations sends its maintenance technicians on regular courses to guarantee that they are fully aware of the latest techniques and legislation.

Secondly, another way for the facilities manager to keep abreast of changes is to make use of existing external contacts. Facilities managers have to deal constantly with many different specialists as part of their work, such as insurance firms, fire officers, building control, etc. Therefore, it makes sense to maintain good communications with these people so that they can advise on new developments in their areas. In the case of the school (Case Study 2), for example, the facilities manager has established a strong working relationship with the local fire service, which carries out frequent fire inspections to check that current standards are met and also advises on potential changes. In this way the school can plan refurbishment work with the new changes in mind.

Thirdly, facilities managers may also find it helpful to make contact with other local businesses and exchange ideas. One of the case study organisations (Case Study 3), for example, is located in a business park and so the facilities manager attends residents' meetings to discuss mutual concerns. As a result of these meetings, the facilities managers have established a local benchmarking group, whereby they visit each other's buildings to study at first hand how different organisations operate. With benchmarking the number of possibilities for gaining information is almost limitless and depends purely on the nature of the relationship between the participants. Benchmarking could be used to compare processes, services, performance of plant, etc.

Finally, the facilities manager can take advantage of the growing number of specialist information sources dedicated to facilities management. These include:

- professional associations, such as BIFM (British Institute of Facilities Management);
- books;
- periodicals;
- conferences;

- short courses;
- postgraduate degree courses;
- collaborative research projects (joint academic and industry).

### 1.3.7 Strategic facilities management

Some of the organisations had come to realise that facilities had an important role to play in strategic planning. The private healthcare group (Case Study 5), for example, had recognised that they were not only judged on their medical care but also on the physical state of their hospitals and ancillary services, such as catering, both of which fell under the facilities umbrella. Therefore, in order to remain competitive, an appropriate facilities strategy was essential. Indeed, facilities issues have become such a major concern in this organisation that the facilities manager has been appointed to the board, so that he is involved fully in strategic decision making.

It should not be assumed, however, that only larger organisations can benefit from strategic facilities management. It can also play an important role in smaller organisations, as was demonstrated by the independent school (Case Study 2). When one of their buildings suddenly became vacant, the facilities manager took the opportunity to devise a comprehensive facilities strategy. This in turn led to an improved layout for the whole school, incorporating a number of new well-equipped facilities. Hence, the school has gained a certain amount of competitive advantage as it can now offer additional subject areas.

## 1.4 Facilities management models

### 1.4.1 Context

Experience has demonstrated that facilities management departments vary considerably from one organisation to another. This is due to the fact that they have developed in response to the particular needs of their organisation. Despite these differences most facilities departments generally fall into one of five categories (Cotts, 1990):

- office manager;
- single site;
- localised site;
- multiple site;
- international.

These models focus primarily on location, and therefore indirectly size, but this is only one method of classifying facilities departments.

Facilities managers may want to try to identify their organisation with a particular type and then go on to read the associated case studies to see if there are any similarities. It should be noted that the models are not core business