



Unit - 1

Introduction to Successful Facility Management

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ What is facilities management?
- ✓ Skills, knowledge and character traits are necessary to succeed in facilities management?
- ✓ The purpose of an annual work plan?

Unit 1

Introduction to Successful Facility Management

What Is Facility Management?

According to the International Facility Management Association (IFMA), the field of facilities management concerns “a profession that encompasses multiple disciplines to ensure functionality of the built environment by integrating people, place, process and technology.” Moreover, facilities management is dedicated to improving an organization’s capacity to perform, through the careful coordination and optimisation of key operations.

To put the idea into some kind of context, consider the company you work in as a living organism. For the facility as a whole to stay alive, any number of core internal functions and contributory entities must come together in perfect harmony. Like the human body, it’s only when *all* of these functions are optimized and unified that the ‘health’ of the organization can be optimized. Along with conventional businesses, facilities management can be implemented to improve the performance of hospitals, schools and public sector enterprises in general.

Every organization is different, but nonetheless comprises its own contingency of human workers, interconnected departments, computer technology and software, general offices resources and so on. The objective of facilities management is to coordinate literally *everything* at every level, to drive the organization’s optimal and consistent performance. Due to the complexity of the task, the facility manager typically uses advanced facilities management software to identify issues, schedule tasks and make important decisions.

In this introductory unit, will be taking a closer look at the characteristics of a successful facility manager, along with some of the primary duties and responsibilities of those who work in facilities management.

Characteristics of a Successful Facility Manager

Some of the most important characteristics for successful facilities management include the following:

- Business acumen
- Resourcefulness
- Financial manager
- Spokesperson and advocate
- Agile purchaser, lessor, and contractor with a major regard for ethics
- Information manager
- Environmentalist
- Networker
- Mentor
- Innovator
- Risk taker
- Survivor

Facility managers with major organizations are no longer considered simple technicians. Instead, they are some of the most invaluable and sought-after human resources among employees and decision makers worldwide.

Every successful facility manager has their own unique experience, expertise and acumen, though all share the following key characteristics:

1. Business-oriented
2. Technically competent
3. Capable of good oral and written communication
4. Comfortable with reaction
5. Customer service oriented
6. Cost conscious
7. Outgoing, even politically savvy
8. Decisive
9. Slightly legalistic
10. Capable of concurrent problem solving
11. Comfortable with and capable of quantitative measurement
12. Action-oriented
13. Able to deal well with people
14. Experienced
15. Honest

The Development of a Facility Management Philosophy

Again, each organization will have its own unique facility management philosophy. Just as all facilities managers have their own individual take on what constitutes effective facility management. Nevertheless, you will almost always encounter the following components within an effective facility management policy:

- Facility management should be viewed as an important business function, which focuses on the impact of all organizational and financial actions.
- The primary concern of facility management is safety, followed by legal obligations, costs and customer satisfaction.
- Every physical asset and function at all levels throughout the company should fall under the supervision of an identifiable person.
- Facilities ownership incorporates a variety of costs – all of which must be understood by senior management and stakeholders.
- Everything the facility manager does should be carried out in a cost-conscious way and leave a trackable 'paper trail'.
- If it seems like a good idea, give it a go. If it doesn't work out as planned, modify it until it does.
- Common sense should always be favoured over wild estimates and guesswork, which could have potentially costly consequences.
- Facility managers should invest heavily in the cultivation of meaningful long-term relationships with staff, contractors, suppliers, consultants and third parties in general.
- A business can only succeed when its customers are both satisfied and loyal. The facility manager should therefore prioritize customer service at all times.
- Facilities management is only effective when the performance of the FM department is measured and assessed on a regular basis.
- At all times, the facilities manager must provide his or her services with the utmost regard for ethics and relentless commitment to an appropriate moral code.
- Transparency lies at the heart of successful facilities management – never make a secret of whatever it is you are doing at the time.

In addition to the above, there are 12 primary actions that should be taken by every facility manager, along with any other contributors within his or her department. This so-called 'Big Twelve' is outlined below.

Fig: 1.2 Big Twelve

1. Carry out complete assessments of physical facilities and operations on a regular basis.
2. Measure, measure and measure some more.
3. Create a Facilities Master Plan in conjunction with senior management, which will then assist with all six-monthly and annual planning.
4. Get your organization right. Don't confuse staffing with organization.
5. In all but special cases, staffing will be a blend of staff, contractors, and consultants to minimize cost and maximize flexibility
6. Devise and implement a customer-focused quality program to encourage customer input and act on the data collected accordingly.
7. Where possible, develop automation processes to handle the information you need to manage, to the extent to which your budget allows.
8. Institute facility business planning that can feed into company business planning, even if you are initially rebuffed by company planners. Use the company's criteria and system for making financial decisions.
9. Always look at the facility management department as a separate business within a business. Don't expect people to respond positively to plans and positive outlooks – show them the results.
10. Get creative with your contracting requirements and ensure you're getting the best possible deal. Let your contractors and suppliers know that if they don't perform as you expect (financially or otherwise), you'll take your business elsewhere.
11. Don't overlook your public relations responsibilities as a facilities manager. Create an annual PR plan and ensure it targets the constituencies you've identified.
12. Ensure senior management personnel and stakeholders demonstrate consistent commitment to your facilities management program. You cannot be expected to run the entire show alone.

Irrespective of the size and nature of the organization, the above guidelines are of universal relevance and value.

Types of Organizations

Every organization is unique, with its own signature personality, objectives, points of appeal and so on. The facility management department is considered part and parcel of its personality. Priorities within the FM department differ from one organization to the next, but all facility managers possess a series of essential management characteristics.

The sheer diversity of organizational cultures worldwide makes it impossible to consider even a fraction of them in depth. Company policies, procedures, organizational structures – often completely different from one company to the next. This can make the field of facilities management particularly complex and demanding – particularly for FM specialists transitioning from one organization to the next.

Or for that matter, from one of the four primary types of organizations to a completely different organization. The four major organization types being as follows:

- Public Sector
- Educational Facilities
- Private Sector
- International Organizations

Non-Profit and Not for Profit Organizations

Organizational attitudes toward facilities standards fall into three groups; controlling organizations that have published standards; flexible organizations that neither have nor see a need for standards; and organizations in the middle that have standards that are unpublished.

Considerations for Organizing a Department

Organizing a facilities management department brings a variety of complex issues and criteria into question. Examples of which include the intended department size, whether the business operates multiple locations, available budget and/or resource restrictions and so on. It's worth remembering that you cannot and will not begin bringing any tangible benefits to the organization as a whole, before first ironing out the specifics of your facilities management department.

In accordance with the size and requirements of the organization, facilities management departments can be compact or enormous. FM responsibilities may be shouldered exclusively by one member of staff,

or distributed between hundreds of contributory staff members and contractors. Irrespective of size, the basic functions and objectives of the FM department remain the same.

Organizing the Department

One of the biggest changes to have affected facilities management over recent years is rapid growth in the availability and popularity of high-quality facility management outsourcing companies. These specialist agencies are able to quickly and comprehensively meet any need at any level for just about any organization in any sector. The result of which is a fast-growing dependence among facilities managers, who often turn to outsourcing as a more cost-effective alternative to hiring. Outsourcing also enhances flexibility of staffing, enabling the facility manager to access the manpower and expertise needed, only when and where it is needed.

A full-service facility department might, for example, have the following contracts:

Administrative Service

- Food service
- Security
- Information technology services
- Mail, messenger, and reprographics

Building Services

- Architecture, engineering, and interior design
- Operations and maintenance
- Moving and asset management
- Project management and estimating

Prior to reaching a final decision regarding outsourcing, facility management experts advise considering the following questions carefully:

1. Has the organization successfully outsourced requirements before now?
2. Has the organization been satisfied with the results of previous outsourcing activities?
3. Does the culture of the organization allow for the outsourcing business model?
4. Is there genuinely a need at this time to consider outsourcing to third parties?

Personality and Skills of Facility Personnel

1. The facilities manager must be comfortable with a certain amount of reactive management.
2. Contractors, consultants and staff must demonstrate total commitment to service.
3. A good facilities manager is happy for their performance and efforts to be quantitatively measured on a regular basis and their actions in general questioned. Whereas some resist scrutiny, the facility manager must embrace it.
4. Individuals who lack experience working in a corporate environment should be hired with caution. All of which represents a judgment call for the facilities manager.

Facility Management Leadership

There is no single correct or universally effective type of leadership. Nevertheless, there are certain important leadership principles that apply at all levels in all organizations. Irrespective of their formal title, the successful facilities manager:

1. Serves at least two constituencies; the external, which is business-oriented and normally political; and the internal, with a results-oriented, technical orientation. He or she must bridge these needs and demands.
2. Is an activist if facilities are to be recognized as important, and if they are truly to be managed correctly.
 - Resources will never (or will never be perceived to) be adequate to accomplish all facility programs.
 - The facilities, unlike personnel, cannot speak. They need an advocate.
 - Facility management is not widely known as a profession. It needs to be explained and promoted.
3. combines technical functions with a capable team of workers to ensure the mission is accomplished.
4. hires strategically, implements the loose-rein technique, evaluates through agreed-upon metrics, and manages by walking around.
5. sets the tone for quality service.
6. simultaneously reacts to the needs of the day and plans for the future. There will always be a significant reactive component to the leader's job.

For a facility manager to succeed, they must have a deep and detailed knowledge of the organization they work for, along with the functions and objectives of the business they run *within* the wider business. The importance of running a facility management department like any other business cannot be overstated. In accordance with the requirements of the organization, the facility manager may also require extensive technical knowledge and specialist expertise accordingly.

As a uniquely diverse field, it is unrealistic to expect any facility manager to demonstrate advanced acumen in *all* aspects of facilities management. This is where the development and maintenance of a network of experts demonstrates its value – the facility manager ultimately deciding how the knowledge and skills of these experts will be used. One common mistake in facilities management is to base all hiring decisions on the requirement to hire the lowest bidder. An approach which almost always constitutes false economy and rarely delivers true value for money.

Strategic and Annual Planning

As with most endeavours in business, a facility management plan will only ever be as effective as those producing it want it to be. The more thorough and accurate the planning process, the higher the likelihood of its success. At the opposite end of the scale, the consequences of substandard planning can be catastrophic. Good planning improves response times, simplifies major expense coordination and helps coordinates short-term activities with long-term objectives.

Facility planning can be divided into two basic categories – short/mid-term planning and strategic/long-term planning.

Consideration	Short Term	Long Term
Timeline	Less than three years	More than three years
Clarity of future	Reasonably clear	Not clear
Purpose of planning	To provide facilities	To provide infrastructure; to permit future short-range plans to be made more easily
Planning pressures	Lost business, laws and regulations, suddenly recognized need	Doubts and uncertainties, long-term savings, locating of highly fixed assets
Basis of projecting needs	Specific input information	Probable likelihoods
Techniques of planning	Space layout	Top down—bottom up
Nature of plans	Definite and specific	General and conceptual

Capital investment and budgets Budget, cash-flow analysis Investment analysis

Source: Richard S. Tryce, unpublished manuscript, June 14, 1988.

All planning within the field of facilities management should be approached in the context of the organization's wider business plan. This is due to the fact that facility management plays a direct role in helping the company achieve the goals and objectives set out in its business plan – financial and performance-based objectives alike.

In addition, short-range and long-range facility planning will always be linked to the department's budget. Budgets typically being decided and allocated on an annual basis, though a growing number of organizations are showing preference to multiyear budgeting. Every facility manager will encounter at least three budget phases in any one fiscal year; budget closeout, execution of the current budget, and development of the follow-up budget.

The Annual Work Plan

The annual work plan should flow from the mid-range plan. It should:

1. Present a clear message. Facility managers and all employees within the department should have a clear understanding of the work plan's objectives, goals and priorities.
2. Be clearly structured. All information should be presented in a manner that is consistent and easy to understand, with no unnecessary complexities.

Note. The work plan will usually need to be updated at the mid-point of the year.

At its heart, planning facility management projects involves the identification of a problem and the allocation of the resources required to address it. Upon identifying an issue, the subsequent plan for its resolution must take into account available resources, consequences of inaction, corporate culture and so on.

Planning involves determining the general design-and-build solutions and general sequence of the design-build cycle so that the following is possible:

1. It can be determined that the project is feasible.
2. A schedule can be developed.
3. A not-to-exceed budget can be developed.

The planning process can be intensive and time-consuming, but nonetheless has the potential to reduce the costs of the subsequent design, purchasing and construction processes. Hence, the importance of investing as much time and effort as necessary in the initial planning phase.

Further Reading:

- ✓ ASTD. 10 Steps to Successful Facilitation. ASTD, 2008.
- ✓ Bens, Ingrid. Facilitating to Lead! Jossey-Bass, 2006.
- ✓ —. Facilitating with Ease! Jossey-Bass, 2005.