Unit 2 - The Scope and Role of Facilities Management
Unit 2: The Scope & Role of FM

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Key Learning Objectives

1. What is FM Competencies
2. Planning and Project Management
3. Scope and Role of FM
4. Factors which determine FM effectiveness

Recurring Themes In Facilities Management Core Competency <Unit 2-4>

Traditional view of FM (Observed by Becker 1990)
- Embrace many discipline and expertise
- Facility oriented responsibilities (see illustration)
2.3 Key Themes

Multi-disciplinary function

Competencies

Operational

Non-Core

In-house FM

Strategic

Contracted-out

Real estate

Managerial

Maintenance

Core

Influence

Growth of business

Type of facility & Organisation
Becker’s list of facility-oriented responsibilities focuses mainly on operational aspects of FM:

- Real estate,
- Long range planning,
- Space management,
- Interior planning,
- Architecture & engineering services,
- Maintenance and operations, and
- Budgeting.
<table>
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<tr>
<th>Becker’s Traditional View From <em>The Total Workplace</em> (Becker, 1990)</th>
<th>Broader Perspective On FM Themes From <em>The Future For Facility Management</em></th>
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<tbody>
<tr>
<td><strong>Facility-Oriented FM</strong></td>
<td><strong>Management-Oriented FM</strong></td>
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</table>
| 1. Real estate  
2. Long range planning  
3. Space management  
4. Interior planning  
5. Architecture and engineering services  
6. Maintenance and operations  
7. Budgeting. | 1. Finance and cost of ownership  
2. Life cycle costing  
3. Integration of services  
4. Design for operations and maintenance  
5. Responsibility  
6. Cost-effectiveness  
7. Constant efficiency improvement  
8. In-house versus contracted-out  
9. Quality of life |
| FM function embraces many disciplines and types of experience | |

*Much of the content is *generic rather than distinctive* to FM, but more importantly the themes span across a combination of facets of FM*

The themes, span a number of facets:
Management processes, Output measures, Organisational issues, Performance targets
Defining Roles and Themes of FM Via Core Competencies

The 8 Competencies Area for FM Professional

1. Operations and maintenance
2. Real estate
3. Human and environmental factors
4. Planning and project management
5. Facility function
6. Finance
7. Quality assessment and innovation
8. Communication
IFMA then goes on to divide the **8 competency areas into 22 competencies**

<table>
<thead>
<tr>
<th>8 Competency Areas</th>
<th>22 Competencies</th>
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<tbody>
<tr>
<td>Operations and maintenance</td>
<td>Overseeing the acquisition, installation, operation, maintenance, and disposition of building systems, furniture and equipment, grounds and exterior elements, managing the maintenance of building structures and permanent interiors</td>
</tr>
<tr>
<td>Real estate</td>
<td>manage and implement the master planning process for the estate management functions, manage the real estate assets</td>
</tr>
<tr>
<td>Human and environmental factors</td>
<td>develop and implement practices that promote and protect health, safety, security, the quality of work life, the environment, and organisational effectiveness, develop and manage emergency preparedness procedures</td>
</tr>
<tr>
<td>Planning and project management</td>
<td>develop facility plans (new building projects). Plan and manage all phases of projects. Manage programming and design, construction, and relocation.</td>
</tr>
<tr>
<td>Facility function</td>
<td>plan, organise, and manage the facility function including managing the personnel assigned to the facility function and delivery of these services</td>
</tr>
<tr>
<td>Finance</td>
<td>Manage the finances of the facility function</td>
</tr>
<tr>
<td>Quality assessment and innovation</td>
<td>manage the process of assessing the quality of services and the facility’s effectiveness</td>
</tr>
<tr>
<td>Communication</td>
<td>Communicating effectively</td>
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Recurring Themes in FM Core Competency

UK Perspective
Barrett identified four key areas that typify FM:
• Facility planning core activities
• Building operations and management
• Real Estate and building construction
• General / office services

BIFM competencies for FM professionals are based on twenty three core competencies grouped into six main areas:
• Understanding business organisations
• Managing people
• Managing premises
• Managing services
• Managing the working environment
• Managing resources
The Changing FM Role

In UK

• FM role has evolved into more strategic role
• Priority of FM is co-ordination or integration of roles
• The competencies vary from organisation to organisation and from facilities manager to facilities manager.
• Premises-related operational management is outsourced
• The strategic aspect of property portfolio management is retained in-house.

In the context of business, the BIFM focused on:

• organisation strategy
• organisation behaviour structure
• managing FM processes
• quality management

Emphasis is placed on management, not facilities
The Changing Facilities Management Role

- FM in UK evolved into more strategic recently
- Co-ordination or integration roles
- Emphasis of core competencies varies
- In-house retains strategic portfolio mgt (priority)
Outsource operational nature FM

BIFM Redefine 6 Main Areas of 23 Core Competencies in 1998

1. Understanding business organisations
2. Managing people
3. Managing premises
4. Managing services
5. Managing the working environment
6. Managing resources
Core Competencies in Context of Business By BIFM:-

1. organisation strategy
2. organisation behaviour structure
3. managing FM processes
4. quality management.
FM could be characterized (and defended) by any or all of the following six statements stating:

- A technical function concerned with maintaining the practical utility of the physical infrastructure to ensure it supports the core activity of an organization.
- An economic function concerned with ensuring the efficient use of physical resources by controlling cost (financial control)
- A strategic function concerned with the forward planning of physical infrastructure resources to support organizational development and reduce risk (change management)
- A social function concerned with ensuring that the physical infrastructure work meets the legitimate needs of users within their organizational role (user interfacing)
- A service function concerned with the provision of non-core support services (support service)
- A professional function with social responsibility for people in the workplace.
Management and customer Perception
Need to change physical assets from
Overhead to resources
Prestige

Employer’s Needs & Expectations
Working conditions
Morals
Sick building syndrome

Government Policies
Repetitive attain injury
Public private partnership
Negligence claim
Best value
Security
Health & safety

Need for flexibility
Out sourcing
Communications
Need for fast responses
Heavier use of facilities
Space management
Volatile market conditions
planned maintenance

Cost Reduction
competition
depressed trading condition
Higher energy costs
Need for operational
Downsizing
Need to focus on core services

Facilities

Change or business
Re-engineering factors
intelligent buildings

IT Development

Best value service
Innovative services
Flexibility
IT – based
Added value
Environmental issues

Corporate governance
Stake holder’s influence
Integrated resources management
Customers driven strategies
Relationship management
Market intelligence
Planning & Project Management is one of the competency areas of IFMA. Consider the following strategically:

- the development of facility plan (new building projects)
- the planning and managing of all phases of projects
- the management of programming, designing, construction and relocation

The Construction Process

View of construction industry process and its improvement relates to:

- operational activities of construction
- design and construction consistency in technological product and its assembly eg. prefabrication and the standardisation of building components
Planning & Project Management

Facilitating change to a process of design and construction

Challenge:

The change towards having a defined process, the capability to manage such a process and the leadership to implement the change towards a process-led approach and repeatable & manageable process

Requirement for a repeatable and manageable process:

• Product flexibility (through explicit management and a corresponding change management role) which enables:
• Early involvement of all parties
• Ability for phased review throughout the project life cycle
• Systematic feedback (through the facilities manager to integrate the design and construction process with client’s long term built asset requirements)
• Discipline and consistency
The real key to achieving a changed and improved process lies in identifying and ability to achieve:

- the management of such a process
- the management of change to a process-oriented approach
The Construction Process

*Characteristics of Construction Process*

- Mainly in operational activities of construction, BUT not processes
- Example, growth in prefabrication and standardisation
- Absence of a defined or repeatable process
- Short-term products oriented activity
- Lack of a repeatable and managed design and construction process
- Impacts on the client’s core and business-support processes.
Change In Performance Indicators

Conventional – Product Related Performance Indicator
- Time, cost, quality of delivered product

Increasing Concerns
- Consistency, predictability and maturity
- Minimal disruption due to revise in product to suit changing business priorities
- Other extended qualitative performance parameters
New Option

Clients undertake design and construction of their building projects (e.g. BAA and BT)

**Why?** – Essential to support strategic business needs

**How?** – Another process orientated design and construction function managed by FM Dept

**What needed?**

- A discipline plan for the design and construction process
- **Management of that process**, and
- **Manage the change** to a **more process-oriented** set of management procedures.

To date, the construction industry appears to be wanting in terms of the:

(a) defined management process
(b) capability to manage such a process
(c) clarity and authority of leadership within the industry to implement the change widely.
Facilitating Change To A Process Of Design And Construction  <Unit 2-15>

Requirements Of A Change to Process-Oriented Design Construction

- A defined process
- Capability to manage such a process
- Leadership to implement the change

*Process-oriented protocol for design and construction process is developed but remains a research tool and yet to be tested.*
Facilities Manager fits the requirements because:

- the process management role replicates the concept of the FM role
- design and construction is non-core business process and can be outsourced
- natural client contact for the outsourced service.
- the FM principles could also be applied to managing the design and construction process.
- function of project mgt is already devolved to the facilities manager.
- compatible with the operation of FM
Conventional Entry Points To The Design And Construction Process

Entry of parties usually occurs incrementally

Problems With This Arrangement

- Late in identifying and satisfying the need for a building
- Important decision points are made without input from user
- Potential conflict between design and ‘buildability’.
- In traditional construction industry, entry at the briefing stage.

The least disruptive and least costly solution adopted by many clients is to seeking pre-tender construction advice from Facilities Manager.

- to provide FM feedback on the relationship between existing built assets and their strategic business needs.
Conventional Exit From The Design And Construction Process

Upon completion of project, all parties of design and construction process exit except the Facilities Manager.

- Advantages of his presence includes
- Extension of project knowledge
- Value of continuous involvement
- Aid to incorporate process and product knowledge to Mgt
- Creates and apply post project feedback mechanisms
- Incorporate intelligence on previous products to new projects
- Provide appropriate business specific feedback at early stage to new projects
- Complete the circle of plan, act, review and re-plan

*The systematic growth of process and product competence is now possible with FM as the agent of change*
The Qualification Of The Client Facilities Manager To Manage The Process Of Design And Construction <Unit 2-22>

Case for Involvement of FM
- Overlap in core competencies between who build and the one who manages
- Good for Client Facility Manager to act as process manager

Design and Construction Function As Another FM Because:
- the contemporary client environment
- the associated emphasis on process management
- the client perspective on the design and construction service
- the design and construction service’s expanded performance parameters
The Facilities Management Core Competency Areas <Unit 2-23>

Scope of Contemporary FM

- Expertise in finance and the cost of building ownership
- Life cycle costing and the life cycle management of buildings
- Integration of services
- Design of buildings for effective operations and maintenance
- Cost-effective management of completed buildings in accordance with the needs of the core business process.
Case for Facilities Managers to Assume Role of Process Manager
Definition of Core Competencies of Contemporary FM

- Mere extension of involvement, since FM already hold project mgt responsibility
- Harmonise the construction process with other support service processes

- Inline with core expertise in relation to operations and maintenance, which include:
  - real estate
  - human and environmental factors
  - planning and project management
  - the facility function
  - finance
  - quality assessment and innovation
  - communication

- Current fluidity of definition and interpretation of the FM role, a stronger position to accommodate change than the existing professions.
Strategic Facilities Management And Core Business/ Non-Core Business Co-Ordination <Unit 2-24>

- Specific Benefits of Involving Facility Manager in Construction Process
- Co-ordination function are similar in both cases
- Strategic involvement achieve harmony with clients needs and performance expectations
- Accommodate construction process mgt and interface with the existing core and non-core processes can reduce overall disruption
- Assist in the transition to a process-oriented, client driven approach construction process
- Client wants a changes and willing to develop process protocol
- A single authority is required to co-ordinate
The Case For The Facilities Manager Leading The Design And Construction Process

✔ The **FM** experience of company core process operations
✔ Scope for the **FM** to be vested with direct authority of the client company
✔ The procurement of buildings is a natural non-core function within the **FM** remit
✔ **FM** has privileged access to client’s strategic priorities
✔ Privileged **FM** information on use and needs of built assets
✔ Scope for direct reporting to eliminate communication gaps
Potential Process Input By Facilities Management

- Scope for the **FM** to introduce learning from previous process and product experiences
- Scope for the **FM** to improve pre-briefing requirements capture input
- Continued **FM** involvement in building management beyond physical completion
- Scope to re-use **FM** experience of process and product for adaptation and future projects, and to limit disclosure of client strategy to that required by design and construction team whilst maintaining a client-oriented perspective on implications for the built asset.
Process Management And Facilities Management

» Scope for the FM to co-ordinate the remainder of the team

» Scope for the FM to directly re-select and manage the team for future works

» FM knowledge/ overview to inform decision making within process

» Benefits of prior experience of FM as change manager and in communications

» FM experience in outsourcing contract operations which will support the definition of roles and performance requirements of the design and construction service

» FM experience of managing and combining hitherto-diverse activities and organisations into a co-ordinated manageable process with consistent goals and performance indicators

» FM used to operating phased reviews and audit/benchmarking practices as part of continuous improvement philosophy