Positioning facility management

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Abstract

This paper seeks to uncover major differences in current opinion concerning the purpose, scope and priorities of facility management (FM), and to indicate which key areas and factors of FM practice should be considered for inclusion in any theoretical framework for positioning FM. A literature review examines the available knowledge, theories and publications concerning linking FM to organisation and its environments from a range of published literatures. The paper identifies gaps in the existing knowledge base, and clarifies the issues for consideration and development framework for positioning FM. This paper is a part of research being undertaken for PhD study at the Bartlett School of Graduate Studies, University College London. It has produced a theoretical framework for positioning FM which will be further developed in the next stage of the study. The theoretical framework for positioning FM provides useful ground for developing decision method and tools for positioning FM practice. This paper offers a starting point in aligning FM practice to the particular organisation systematically.

Introduction

It is widely accepted that facility management (FM) covers a wide range of facility services and the management of which can contribute to the relative success or the partial failure of an organisation's business. FM is a key function in managing facility resources, support services and working environment to support the core business of the organisation in both the long- and short-term.

However, the nature and characteristic of organisations are likely to vary too. Some organisations may focus very much on business strategic issues. While other organisations may only emphasise on their operational process and short-term outputs. The organizational objectives normally vary by different business environment (Lee, 2002). Different organisations are differently reliant on their facilities and support services, and affected by environment and context. In turn, facilities as well as FM function are prioritised differently to the core businesses of different organisations. Consequently, the function, role, scope and priority of FM function need to design to fit with these contingent matters.

Fitting FM function to a particular nature and demand of the organisation, which is effected by surrounding environment, is crucial. Atkin and Brooks (2000) stress that, understanding the organizational needs is the key to effective FM, measured in terms of providing value for money. With the precise understanding, FM can link to the core business by providing services that fit and respond to the actual characteristics, needs and constraints of a particular organisation, and organisation's changes effectively. In opposition, the poor link may lead to incompatible FM practice that does not support the core business to the best of its capabilities (Barrett, 1995).

Although it is commonly agreed that FM practitioners could benefit from additional decision tools for identifying FM position, rather than using an intuitive, a systematic framework and method and tools for positioning FM has yet to be derived. The framework and tools are needed to improve the decision-making in positioning FM in accordance with the actual needs and contexts. This paper aims to:

- gain and understand the importance of position and positioning FM;
- identify the significant factors in FM practice and positioning; and
- propose a basic framework for positioning FM.

Generic and specific issues in FM practice

It is commonly agreed that the primary function of FM is to handle and manage support services to meet the needs of the organisation, its core operations and employee. FM is the support function coordinating physical resources and workplace, and support services to user and process of works to support the core business of the organisation. The central issues of FM practice consist of place or facility, people or user of the building, and process or activities in the facility. Nutt (2004) defines FM as the management of infrastructure resources and services to support and sustain the operational strategy of an organisation over time. The major purposes of FM can be distinguished in two aspects: to support and sustain the operations work and activities of organisations and their staff, and to manage work environment and support services.

FM involves the management of organisation's facility resources and support services in two levels: operational and strategic (Barrett, 1995; Nutt, 2002b). Operational FM involves short-term results on a day-to-day level. An effective operational FM provides a safe and efficient working environment which is essential to the performance of any business – whatever its size and scope of work. It can be said that the primary function of FM is operational function, the most visible part of FM. This operational function supports the basic routine, and regular needs of the organisation. On the other hand, FM can involve in several strategic issues such as property asset portfolio management, strategic property decision, and facility planning and development, which are related to policy and strategic plan of the organisation.

FM covers an extremely wide field of activities (Nutt, 1999), and is responsible for the provision of many varied services (Barrett, 1995). It has embraced broader range of services, more than building operations and maintenance (Aston, 1994; Best *et al.*, 2003). The domain of FM has been wider than the past. FM encompasses workplace, facility, support services, property, corporate real estate, and infrastructure. Today there are a variety of positions from where FM practice is conducted; those that give priority to property management, business support, customer and employee support, or to different combination of these (Nutt, 2002a). The function and role of FM are in turn wider.

There is also a wide range of views on the list of support services within FM remit (Thomson, 1990; Avis, 1995; Jordan, 1994; Bernard Williams Associates, 1994; Kennedy, 1996; Kindcaid, 1996). In general, support services concerning FM range from building operational services (Avis, 1995), to construction management and real estate activities (Thomson, 1990). Amalgamating those available lists of support services can give us a generic scope of FM services as shown in Figure 1.

In practice, FM has been adopted differently in different organisations, and in different contexts. Scope and responsibility of FM in an organisation may be wider than the others. It would be rather rare that an organisation will require all support services shown in the Figure 1. FM tend to respond to the needs of organisations in many ways. The research of Schindler (1998) found that FM practices of each organisation, even in the same business could be different influenced by culture, business objective, and nature of that organisation. Although there are common themes and approaches to FM, regardless to the size and location of buildings, however, these may not necessarily result in common solutions to problems (Atkin and Brooks, 2000).

The arrangements of FM are related to a particular personality, needs, circumstance and environment of the organisation at the time. FM is recognised as an organisation-specific function that is based on a real business need (Owen, 1999). Its practice and arrangement are particularly pertinent to the characteristics and contexts of the organisation. Alexander (1994) suggests that the role FM should be defined by the relationship of facilities to the core business of an organisation in which success is measured by the degree and quality of support they provide to achieving key business objectives.
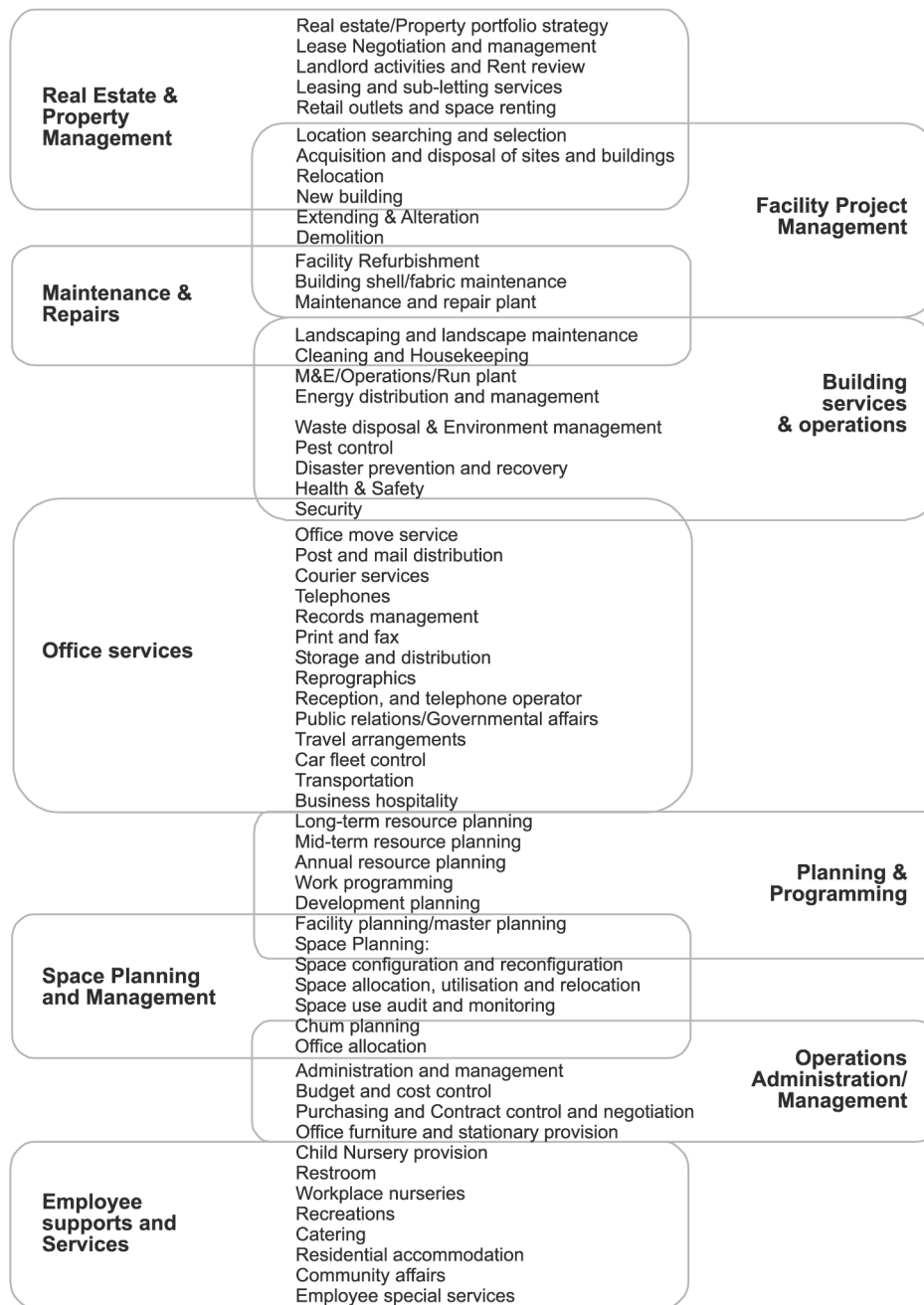
The function, role and responsibility of FM tend to differ in different organisations and circumstances. Selecting an appropriate role of FM for the given organisation and circumstance is crucial.

Requirement for contingency approach

FM practice is likely to be case-specific by nature. Practically, it deals with the diversities of facility, organisation, business sector, surrounding environment and context, and circumstance. Nutt (2002a) suggests that fitting FM function and role to the environment of practice is important. Arguably, it might not be sensible to apply standard solutions and practices to the diverse contexts.

Despite, the generic concepts of FM provide broad framework for practice and understanding the key factors in general, Hinks (2002) argues that the role of FM should be defined in respect to the contingent needs of organisation on facility issues. Barrett (1995) suggests that facility managers should not just select service items from the generic list at random, but provide only those

Figure 1 Cluster of support services

Real Estate & Property Management	Real estate/Property portfolio strategy Lease Negotiation and management Landlord activities and Rent review Leasing and sub-letting services Retail outlets and space renting
	Location searching and selection Acquisition and disposal of sites and buildings Relocation New building Extending & Alteration Demolition
Maintenance & Repairs	Facility Refurbishment Building shell/fabric maintenance Maintenance and repair plant
	Landscaping and landscape maintenance Cleaning and Housekeeping M&E/Operations/Run plant Energy distribution and management
	Waste disposal & Environment management Pest control Disaster prevention and recovery Health & Safety Security
Office services	Office move service Post and mail distribution Courier services Telephones Records management Print and fax Storage and distribution Reprographics Reception, and telephone operator Public relations/Governmental affairs Travel arrangements Car fleet control Transportation Business hospitality
	Long-term resource planning Mid-term resource planning Annual resource planning Work programming Development planning
Space Planning and Management	Facility planning/master planning Space Planning: Space configuration and reconfiguration Space allocation, utilisation and relocation Space use audit and monitoring Chum planning Office allocation
	Administration and management Budget and cost control Purchasing and Contract control and negotiation Office furniture and stationary provision
Employee supports and Services	Child Nursery provision Restroom Workplace nurseries Recreations Catering Residential accommodation Community affairs Employee special services

services that are needed by their particular organisation. FM practice is seen as adapting to its contexts. These authors agree that FM practice needs to be tailored to specific factors of given organisation.

Since the organizational natures and environment affect the use and management of the facilities, there may be no universal approach to managing facilities (Atkin and Brooks, 2000; Nutt, 2002a). In this regard, adopting a contingency approach is sensible. The choice of FM practice and arrangement should be decided based on the

characteristics of the organisation and its contexts and circumstance. Establishing the FM profile based on case specific-basis should potentially lead to appropriate FM practice and arrangement.

Factors in positioning FM

To adopt the contingency approach into FM practice arrangement, it is necessary to identify key factors concerning FM practice. The factors of

FM practice have been discussed by many authors. Lee (2002) indicates three important factors influencing FM practice including organisation's objectives, core business needs, and source of value. Nutt (2002a) identifies key factors related to FM practice including facility type/facility sector, stakeholder, market context, cultural and contextual issues. Schindler (1998) notes that there are a few factors that affect the approach of organisation concerning FM provision, which are culture and objectives of organisation, physical size of the organisation, characteristics and activities, of FM functions within management hierarchy.

Cotts (1999) notifies four factors, which are size of organisation, size and location of facilities, ownership right over the facilities, and control issues, that affect the structure of FM practice of an organisation and position of facility manager. He also argues that either small or large organisation facility managers must perform the same basic functions to their companies. The facilities department must reflect the needs of the parent organisation.

Bennett (2000) identifies six critical factors in positioning support services for an organisation. The factors include operation process, logistical relationship with primary operation, support service products, resourcing of the operations, control, and coordination with organisation structure. Hinks (2002) underlies many important factors in aligning FM with organisation's core business including external factors such as business climate, business needs and priorities, organizational situation/circumstance: upsize or downsize, diversify, restructure, and scope and limitations of your facilities.

Krumm et al. (1996, 1998) identifies several factors that can influence the position of real estate and FM functions such as business processes, structure of organisation, size of physical asset, validity of the physical asset to the organisation, and organisation plan. They also notify that the changes within the business processes, and in the structure of corporations, have consequences for the position and role of the support staff and for the alignment of corporate physical assets.

Barrett (1995) highlights key factors influencing facilities department organising. They include the size of the organisation, the location of site, scope of support services, the conception of organisation, the choice of service provision, background of facilities personnel, and external influences such as legislation, techniques, knowledge, and external contacts with contractors.

Based on the above views, the key factors in FM practice can be categorised into two groups:

(1) internal factors including organizational characteristics, facility features, and business sector; and
(2) external factors including economic, social, environment, legislation and regulation, FM market context, and local culture and context.

Influences of contextual factors on FM practice

In order to establish an appropriate arrangement of FM, it is essential to understand how the factors affect FM practice. Four key factors are analysed in this section.

Organizational characteristics

Characteristic of an organisation has the major influence on the needs on facilities and support services of each organisation. Atkin and Brooks (2000) and Stephens (1994) notify that even within the same business sector, each organisation is likely to have different needs in facilities and FM function. The characteristics or natures of the organisation reflect its business objectives, operation process, and the organizational culture. They influence the organisation's needs and management method of its facilities. Kennedy (1996) suggests that the extent of scope of support services under FM depends on how the organisation has evolved in its allocation of managerial responsibilities, as well as its particular needs and requirements of the organisation. The support services can be given priority according to the role they play in support of key business activities.

The goal, priority and role of FM are likely to vary by the particular characteristic of the organisation due to many factors such as organisation's goals, characteristics, constraints, operation process and so on. It is essential to FM practitioners to recognise and address the characteristic of organisation specifically. In addition, the characteristic of an organisation should be addressed from time to time because the organizational objectives and characteristics can be shifted or changed by business cycle and external environment (Lee, 2002).

Nutt notices that it should be expected that FM will serve the organisation differently at different stages in its life-cycle. In the stable periods, the FM function is to secure the routine operations. So operational management and maintenance are likely to be the dominant function during stable periods. But in unstable periods, i.e. organisation expansion, restructuring, or attempting to enter new markets, or expanding the business, FM can be a key strategic function in reducing risks and gaining advantages for the organisation on facility

resources issues (Nutt, 2002a). Planning, strategic decisions and contingency arrangements are required in these unstable periods. In this case, FM should be able to contribute to developing the competitive advantage of the firm (de Valence, 2004).

FM can be required differently in relation to business conditions. Hinks (2002) argues that FM function can differ for the same organisation when it operates in different business scenarios. He finds that organisations in stable business, which refers to a business operating in a broadly unchanging state, may require stable business support services. FM function may provide best value for the business by being stable. Differently, organisations in dynamic business may require an agile support service to allow it to adapt quickly. FM function in this situation needs to be more responsive and proactive than the one in the former situation is. The strategic tasks of FM function seem to occur and vary from time to time.

Facility features

Facility is normally designed or selected based on the needs of the operation processes of the organisation. The features of facility normally reflect the specific needs of occupying organisation and occupants. Facility can differ by many aspects such as building type, architectural design, and building engineering systems, scale of the facility, location, and ownership on the facility. The physical features of facility cause differences in approach and methods to FM and should be a primary concern of facility manager. It should be reviewed, selected and operated in an efficient manner which addresses the needs of the businesses (McGregor, 2000).

Business sector

Business sector has also been regarded as a critical issue in FM practice (Price, 2004; McLennan, 2004; Nutt, 2004; Loosemore, 2004). It is a major factor in selecting facility and support services needed. Type of business affects operation processes of organisation, in turn influences on the need of facility. According to operations management literature, different operation processes require different transformation situations and facilities (Harrison, 1993; Slack *et al.*, 1998; Adam and Ebert, 1992).

Grimm (1994) notes that in some industries the support functions attract little attention. In other industrial sectors, the support services might signify a crucial operational element in the success of that company. Role and function of facility and support services, therefore, vary by fundamental of the business environment that organisation is located. Some business sectors, such as hotel,

commercial mixed-use, and leisure, are much more facility-based than others.

Price notices that facility services will be found important, where customer impact of the facility is high (Price, 2004). In turn, business sector has considerable influence on prioritising FM purpose, function, and roles and responsibilities. For instance, maintenance function seems to be crucial to facilities and organisations that have high operational risk of failure, e.g. acute hospital and nuclear plant. In other businesses, the conditions of facility resource can be important to university. Whilst quality of facility services is important to businesses, where the customer impact is immediate, such as retail sites and hospital. McLennan (2004) notes that business sector is a key factor determining the criticality of facility to core operations. He also suggests that FM practice should also be tailored to meet the particular needs of the business sector.

Culture and context

While FM has recently become a normal practice around the world, cultural issues and contextual factors have come to the notice of FM practitioners especially those who work or implement the practice outside USA and UK. Wong (2000) indicates that the culture influence on FM practice in Asia in terms of standard, perception, and quality. He pointed that the differences in conditions and specifications of facilities, standards, costs, and culture can affect FM practice, and also emphasised that FM practitioners need to be sensitive on cultural issues. For instance, Southeast Asian countries seem to have lower standards compared to those of the UK and USA, due to their economic capacity and cultural tolerance as well as local preference.

Different capacities and conditions of FM markets in different countries can be found. The capacity of FM market in terms of services availability, supplier capability, and available technology can affect the decision-making and choice of service delivery method.

These cultural, legal, environmental, economic and social contexts would also give rise to different sets of national and regional priorities concerning FM practice and arrangement (Nutt, 2002a). They are important issues of the FM practice. FM practices in different countries should be adopted and adjusted differently in respect to preference, belief, value, local contexts and paradigm, standard and local practice.

Organizational needs on facility and FM reflect the influences of the internal and external factors. These factors effect the decision-making, choice, priority, and constraints of organisation concerning FM practice. They are interrelated, and can influence each other. Figure 2 shows the

Figure 2 Environment of FM practice
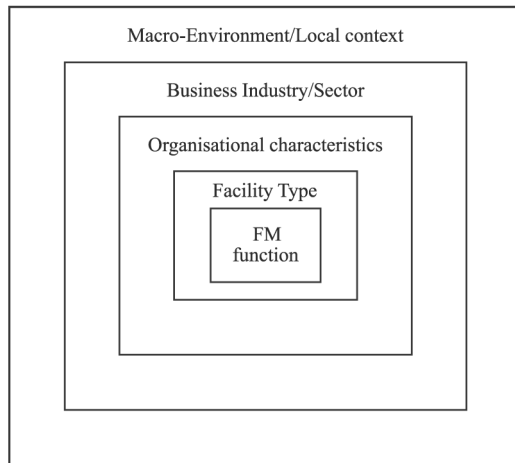
hypothetical relationships and influences of the internal and external factors to FM practice.

Aligning/linking FM to the organisation

The idea of linking FM to the core business of the organisation is common and has been emphasised by many authors (Alexander, 1994; Krumm *et. al.*, 1996; Barrett, 1995; Then, 1999, 2003; Thomson, 1990). Stephens (1994) emphasises that positioning facilities and facilities organisation to fit with the organisation context is crucial to FM practice and to its contributions to the core operations. FM function needs to find an appropriate position that fits to the particular organisation, local culture and contexts to support and serve the core process of the organisation effectively. Stephens points out that under-positioning FM function seems to limit its potential to support and provide positive responses to the organisation's key values and success. On the other hand, over-positioned FM function may result in redundancy of work process and inefficient resource utilisation. The proper position of the FM function will enable the FM function with appropriate delegation and authority to provide the right environment for the organisation's core business, which results in effective resource management and provision either in long- or short-term.

It is clear from the literature review that many authors believe that aligning FM function to the core business of an organisation is a crucial concern. Bennett (2000) emphasises the need of developing and further study on strategic framework for positioning support services. Then (2003) stresses the need for framework to integrate business resource management with the provision and management of the corporate operational assets, and associated facilities support services, in their business settings.

Many have suggested framework for linking FM to the core operations. Barrett (1995, 2000) has developed a generic model of FM practice that describes the linkage between the facility department and the core business and the external environment. The model suggests that FM function should interact with the core business at the operational level by meeting the current needs of every department on a regular basis, and in the strategic level by scanning for possible development within FM arena as a response to the external environment and future business change. He suggests that the key in linking FM to the core business is a two-way communication between the organisation and FM practice group.

Lee (2002) suggests that FM practice can be linked to the core business through a value tree model, in the model, the linkage to the core business is through key business issues such as customer satisfaction, business continuity, operating efficiency, and the organisation's key objectives such as income maximisation, minimising risk with optimum costs. FM needs to understand the core business needs, the source of competitive advantage or value, and to identify what is critical to the business, its customer and stakeholder value. FM must be aware of the business objectives, the nature of products and/or services, the processes to achieve them and plans for future growth and development. There is a need of clarity in the requirements for FM and support service. To be of strategic relevance FM must align itself close to the core business needs and close the gap between the business demands and the delivery of facility solutions (Loosemore, 2004).

Atkin and Brooks (2000) have developed a model that identifies the basic relationship between core and non-core business with linkage to the core business based on business strategy, innovation strategy, capital, customers, markets, and the organisation's management structure.

Then (1999, 2003) proposes a conceptual framework for integrating FM service with strategic business planning and operational asset management, the so-called integrated resource management framework. His integrating framework for FM is built on the creation of a continuous dialogue between the strategic management of core business development and the operational management of business resources. It aims to put an appropriate physical resource structure in place that matches demand with appropriate support strategies. Then also stresses the crucial relationship between strategic decision relating to facilities provision driven by core business drivers, and tactical-operational decisions relating to support services provision and their

management within the real estate portfolio. The model also takes account of external real estate market dynamics in relation to resource allocation of the organisation.

Although a number of general conceptual frameworks for linking FM functions to the organisation have been identified, however, there are still gaps that need to be filled. First, those general frameworks have still uncovered operational linkage with the routine requirements of organisation on facility. The existing frameworks must focus on linking FM function to the core business in strategic level. Arguably, FM is a support function that should be capable of supporting both core business operations and other support units. Second, the available approaches and frameworks tend to focus and prioritise on the internal factors. Most of them there, have undervalued the importance of the external issues such as economic, social and culture, climate and conditions, legal context, and FM market which affect FM practice both directly and indirectly as identified earlier. Third, the literature review found that most frameworks offer only general conceptual models without structural method and procedures, and lack decision criteria which can be used for positioning in different circumstances.

Theoretical framework for positioning FM

The main idea of this paper is that the position of FM should not simply be decided by the generic building technical service assumption, intuitive or common practices from other buildings. Rather, selecting the position of FM requires a systematic framework and decision tool which address the multiple factors in holistic approach. Positioning FM refers to the process of identifying FM roles,

function and scope of FM in relations to the organisation's fundamentals, i.e. core process, support activities, nature and contexts, and external environment including local culture, law and regulations, economy, and market.

This paper proposes a theoretical framework for positioning FM. The framework aims to provide facility managers with a structural framework for identifying profile of FM practice that fits to the context of organisation, and to assist the organisation in making decisions concerning FM arrangement. The theoretical framework for positioning FM shown in the Figure 3 is based on the concept that FM function and position should link to the core business through the facility demand-supply model.

The framework adopts a stepped approach. The features of facilities and organisation's operation process are identified in the first stage of the framework to identify the scope of support services required for the organisation. To identify the criticality of the facility, the relative significance of facility to the core operations is analysed. FM policy and strategy including service delivery method should be formed and selected based on the levels of criticality and tolerance. Both internal and external factors are the key inputs and criteria for the decision-making throughout the process.

Once these fundamental issues are identified, the profile of FM including function, role scope, organizational structure, level of authority, performance measurement policy, can be projected or selected. To cope with the dynamic, the implementation of periodic reviews is included at the end of the process. As a part of PhD research, the framework will be verified for its validity and practical applicability in the further stage. In order to prove the applications of the framework, a serial case studies research has been conducted.

Figure 3 Theoretical framework for positioning FM
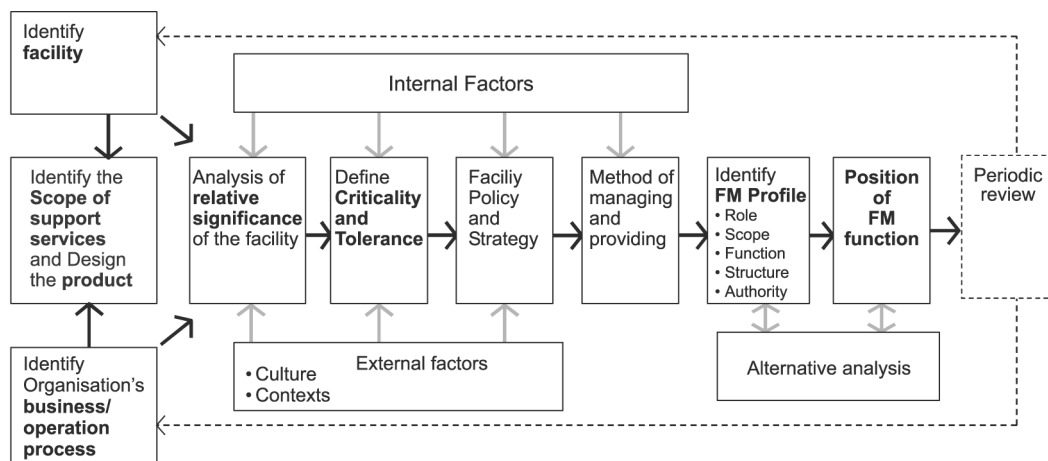
The decision method and tools for positioning FM will be developed based on the refined framework.

Conclusions

This paper pointed out the importance of fitting FM practice with particular characteristics and environments of the organisation. It explained the significance of organizational factors and local contexts in FM practice and arrangement.
The case-specific nature of FM practice has been emphasised here. It makes a case that the selection of FM practice and arrangement should be based on these key factors, rather than adopting standard or "best practice" FM. Blending the generic FM principles and concepts to the specific contexts is crucial. FM practitioners should pay attention to the balance of the generic framework and the specific issues by taking contingency approach.

The review of a number of literatures found several key factors related to FM practice, including organisation's characteristics, facility features, business sector, and environmental factors. These factors construct the constraints to and the criteria for FM practice and decision-making. Hence, establishing FM practice should be concerned with both internal and external factors. Since the factors are interrelated, positioning FM should take a holistic approach. This paper reviewed the available FM positioning frameworks. It identified the major gaps remaining to be filled.

Finally, this paper proposes a theoretical framework for positioning FM. The systematic framework adopts a holistic view and a stepped approach to assist the organisation and facility in selecting an appropriate FM arrangement based on its internal and external factors.

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