

Total Facilities Management

Third Edition

Brian Atkin PhD, MPhil, BSc, FRICS, FCIOB

Adrian Brooks BSc (Hons), MBA, MRICS

 **WILEY-BLACKWELL**

A John Wiley & Sons, Ltd., Publication

Contents

<i>Preface to the Third Edition</i>	xii
<i>Preface to the Second Edition</i>	xii
<i>Introduction</i>	xiv
<i>Abbreviations</i>	xvi
1 Background to facilities management	1
Key issues	1
Origin	2
Rationale for facilities management	2
Defining facilities management	4
Approaches to facilities management	5
Informed client function	5
Concept of best value	7
Supplier relationships	7
Matters of risk	9
Conclusions	11
2 Developing a strategy for facilities management	12
Key issues	12
Introduction	13
Developing a facilities management strategy	14
Strategic analysis of facilities requirements	15
Developing solutions	19
Strategy implementation	20
Relationships between client organisations and service providers	23
Case study – Developing a strategy	24
Conclusions	28
3 Facilities planning	30
Key issues	30
Introduction	31
Real estate management	31
Space management	32
Design briefing	34
Facilities management brief	35

Post-occupancy evaluations	38
Real estate options	39
Totally serviced workplaces	40
Conclusions	41
4 Retaining services in-house vs outsourcing	43
Key issues	43
Introduction	43
Attributes of service	44
Customer service	44
Uniqueness of service	45
Priority, flexibility and speed of response	46
Management implications and indirect cost	47
Direct cost	48
Control	48
Overview of options and implications	50
Market testing	51
Other implications of outsourcing	51
Conclusions	52
5 Change management	54
Key issues	54
Introduction	54
Change in an organisational setting	55
Managing change in practice	56
Change as a process	56
Communicating change	59
Responsibilities of those managing change	60
Resolving cultural conflict	61
Case study – EastPoint	61
Conclusions	64
6 Human resources management	66
Key issues	66
Introduction	66
Dealing with shifting demands for resources	67
Appropriate management structure	67
Case study – Practical human resources issues	68
Employment obligations	72
Case study – Sun Life	73
Functions, job descriptions and skills	76
Performance appraisal	77
Conclusions	79
7 Policy and procedures for outsourcing	81
Key issues	81
Introduction	81

Essential approach	82
Strategy	84
Tender documents	87
Tendering process	89
Ongoing relationships	93
Conclusions	94
8 Policy and procedures for in-house provision	96
Key issues	96
Introduction	96
Definition of services	97
Identifying stakeholders	97
In-house capabilities and skills	98
Departments as customers	98
In-house team approach	98
Service provision reviewed and improved	99
Conclusions	100
9 Service specifications, service level agreements and performance	101
Key issues	101
Introduction	102
Stakeholders' interests	102
Rationale for service specifications and SLAs	103
What is a service specification?	103
Example of a service specification – cleaning of open-plan offices	105
What is a service level agreement (SLA)?	107
Example of a service level agreement (SLA)	109
Critical success factors and key performance indicators	110
Performance monitoring	113
Updating service specification and SLAs	116
Quality system	117
Conclusions	118
10 Health, safety and environment	119
Key issues	119
Introduction	119
Sustainability and environmental issues	120
Relevant legislation	121
General policy	121
Corporate social responsibility	122
Organisation and administration	123
Workers' rights	124
Disability discrimination	124
Safety rules and practice	125
Stress, employees and the organisation	128
Conclusions	130

11	Workplace productivity	132
	Key issues	132
	Introduction	132
	Measuring productivity	133
	Work itself	134
	The organisation	136
	Communication	137
	Work environment	138
	Environmental factors having an impact on productivity	139
	Design implications	141
	Unconventional working arrangements	142
	Conclusions	143
12	Building intelligence and smart systems	145
	Key issues	145
	Introduction	146
	Building engineering services	146
	Intelligent buildings – Smart buildings	147
	Smart tagging, sensing and control	149
	Applications of smart systems technology	152
	Conclusions	156
13	Facilities management service providers	158
	Key issues	158
	Introduction	158
	Preliminary approach	159
	Types of service provision	160
	Managing agent	161
	Case study – Facilities management in the public sector	162
	Managing contractor	167
	Managed budget	168
	Total facilities management	168
	Evolution in the nature of service providers	169
	Determining the best approach	171
	Conclusions	172
14	Managing service provider and supplier relationships	174
	Key issues	174
	Introduction	174
	Service providers and suppliers	175
	Types of relationship	175
	What kind of relationship is needed?	177
	Contractual arrangements and partnering	178
	Gain-sharing	180
	Continual improvement	180
	Conclusions	180
15	Managing specialist services	182
	Key issues	182

Introduction	183
ICT services	183
Health care services	187
Security and protection services	188
Custodial services	189
Professional services	189
Performance and service level agreements	190
Risks, insurance and indemnities	191
Conclusions	192
16 Information systems management	194
Key issues	194
Introduction	194
Information management	195
Planned preventive maintenance	200
Case study – ICEconsult	200
Computer-aided facilities management (CAFM)	202
Building information modelling	203
BIM applied to existing buildings	204
Conclusions	205
17 Contract management and financial control	207
Key issues	207
Introduction	207
Contract conditions and terms	208
Payments	208
Cost monitoring	209
Performance monitoring	211
Change control	212
Contract administration	212
Contract review	213
Conclusions	213
18 Benchmarking best practice	215
Key issues	215
Introduction	215
Pursuing continual improvement	216
Benchmarking practices	217
Measuring performance	218
Benchmarking facilities management	220
Other kinds of benchmarking	222
Case study – Diageo	224
Conclusions	226
19 Public-private partnerships	228
Key issues	228
Introduction	229
Public-private partnerships (PPPs)	229

Procurement and contractual approach	231
Generic PPP project set-up	231
Main types of service provided	236
Payment mechanisms	236
Facilities management and private sector participation	237
Output specifications	238
Relevance and benefit of private investment and partnership	238
Risk and private investment	239
Problems with private investment and partnership	240
Conclusions	240
20 Education, training and professional development	242
Key issues	242
Introduction	242
Backgrounds of facilities managers	243
Growth of a professional discipline	244
Core competence in facilities management	244
Studying facilities management	245
Facilities management training and personal development	246
Continuing professional development (CPD)	247
The future for facilities managers	248
Conclusions	248
21 Innovation, research and development	251
Key issues	251
Introduction	251
Change and innovation	252
Innovation and research and development	252
Research and development themes	254
Flexible corporate real estate	254
Healthy buildings promoting future living	257
Sustainable communities	261
Tele-care in the home	264
Conclusions	267
Appendices	269
A Glossary	269
B Prevention of fraud and irregularity in the award and management of contracts	283
C Risks involved in outsourcing	289
D Contractual approach and terms	291
E Sections for a service level agreement (SLA)	295
<i>References and Bibliography</i>	296
<i>Index</i>	298