

Contents

<i>Preface to the Fourth Edition</i>	x
<i>Abbreviations</i>	xii
Introduction	1
The organization	1
The customer as end-user	1
Principles, process and procedures	2
1 Fundamentals	3
Key issues	3
Introduction	4
Background	4
Key concepts	8
Other concepts	13
Key roles, responsibilities and accountabilities	15
Core competence in facility management	16
Conclusions	17
Checklist	18
2 Facility planning	19
Key issues	19
Introduction	20
Real estate management	21
The own, lease or rent decision	21
The totally serviced workplace	22
Space management	23
Space utilization and efficiency	24
Design and facility management briefing	26
The feasibility study	34
Design development	35
Stakeholders	36
Risks and opportunities	39
Conclusions	39
Checklist	40

3 Facility management strategy	42
Key issues	42
Introduction	43
The business context	44
Business drivers and constraints	45
Organizational management levels	46
Cross-cultural management	47
Strategy formulation	48
Strategic analysis	50
Solution development	53
Strategy implementation	55
Conclusions	57
Checklist	57
4 Human resources management	59
Key issues	59
Introduction	60
Personnel management	60
Conclusions	66
Checklist	66
5 Workplace productivity	68
Key issues	68
Introduction	69
Measuring productivity	69
Sick building syndrome	76
Design issues	77
Unconventional working arrangements	78
Conclusions	83
Checklist	83
6 Health, safety and security	85
Key issues	85
Introduction	86
Health, safety and security policy	87
Zero accidents	88
Occupational health and safety	88
Compliance	89
Hazard and risk assessment	92
Security and well-being	93
Conclusions	95
Checklist	95
7 The outsourcing decision	97
Key issues	97
Introduction	98
Establishing the baseline	99
Attributes of service provision	105

Options for service delivery	109
Evaluating options	116
Conclusions	118
Checklist	118
8 Procurement	120
Key issues	120
Introduction	121
The procurement process	122
Centralized versus decentralized procurement	123
Procurement policy and procedures	124
Roles, responsibilities and accountabilities	126
Prequalification of service providers	126
Request for proposals or tender	131
Tendering	140
Financial close	142
Conclusions	145
Checklist	145
9 Service delivery	147
Key issues	147
Introduction	148
The internal customer as end-user	149
Insourcing	150
The in-house team	150
External service providers	151
Mobilization	152
Contract management	155
Conclusions	162
Checklist	162
10 Specialist services and partnership	164
Key issues	164
Introduction	165
ICT services	166
Health-care services	169
Security and protection services	170
Custodial services	170
Professional services	171
Performance and SLAs	172
Risk, insurance and indemnities	172
Supplier management	173
Collaborative relationships	174
Public-private partnerships (PPPs)	179
Facility management and private-sector participation	187
Conclusions	189
Checklist	190

11	Performance management	192
	Key issues	192
	Introduction	193
	Quality or performance	194
	The post-implementation review	194
	Post-occupancy evaluation (POE)	195
	The service review	196
	Updating service specifications and SLAs	199
	Performance measurement	199
	Benchmarking	208
	Beyond benchmarking	214
	The quality system	215
	Conclusions	216
	Checklist	216
12	Maintenance management	219
	Key issues	219
	Introduction	220
	The maintenance strategy	221
	The maintenance policy	221
	Maintenance planning	222
	Maintenance methods	227
	Building logbooks	231
	Permits and approvals	232
	Inspections	232
	Building services engineering installations	233
	Manuals, registers and inventories	236
	Maintenance management system	238
	Conclusions	239
	Checklist	240
13	Sustainable facilities	242
	Key issues	242
	Introduction	243
	Sustainable development	244
	Environmental management	245
	Corporate social responsibility (CSR)	247
	Zero carbon	248
	Whole-life carbon	248
	Environmental performance and energy efficiency	250
	The building energy management system	251
	Managing water resources	251
	Managing waste	252
	Management and end-user responsibilities	253
	Technology-enhanced facilities	253
	Innovative workplaces and housing	260
	Conclusions	270
	Checklist	271

14 Change management	273
Key issues	273
Introduction	274
Transition	275
Managing change	292
Organizational change	292
Innovation, research and development	296
Conclusions	298
Checklist	299
15 Information management	301
Key issues	301
Introduction	302
Managing information	303
The facility handbook	310
The facility user guide	311
Information and data	311
Information handover	323
Building information models (BIMs)	324
Systems and interfaces	327
Conclusions	329
Checklist	330
Appendices	332
A Glossary	332
B Prevention of fraud and irregularity	355
C Risks involved in outsourcing	361
D Contract provisions	363
E Typical sections of an SLA	366
<i>Bibliography</i>	367
<i>References</i>	369
<i>Index</i>	372