

# Evolution of FM and A Review of Canadian FM Practitioners Skills

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## Abstract

This paper aims to examine the present facility management core skills in the Canadian context along with the evolution of facility management. There is a misconception of what facility management and what facility management practitioners do. The methodology used within this report is literature review and a survey analysis of Canadian International Facility Management Association Chapter facility management practitioners through a web-based survey.

This paper examines current roles in facility management that are practiced in Canada and trends leading into the future of facility management. The results show that Canadian IFMA facility management practitioners are using all the IFMA core competencies and are using them on a daily. The results also show that some of the competencies are used more often than others. The competencies that were used less often by practitioners are emergency preparedness and business continuity, real estate and property management, and technology. There is also a direct relation between how often practitioners use the core competencies and what aspects of the competencies they are developing, implementing, managing and/or overseeing. The paper also includes possible future trends for facility management such as; the developing of accredited college and university programs, promotion of facility management into high schools, and education to young facility management professionals to fill the gap when the facility management baby boomers retire. In conclusion, all IFMA core competencies are used by Canadian IFMA facility management practitioners, but some are used less often than others.

The framework of this paper will allow others in the facility management industry a way to evaluate performance and facility management criteria of facility management practitioners. It will also begin to examine where facility management came from, where it is today, and where it is going.

**Keywords:** Facility Management, International Facility Management Association (IFMA), Core Competencies, Canada

## Introduction

Facility management, according to the International Facility Management Association (IFMA), is defined as "... a profession that encompasses multiple disciplines to ensure functionality of the built environment by integrating people, place, process and technology" (2014, para. 1). This paper tries to analyze the history of facility management and how it has developed into what it is

today, the current roles of facility managers in Canada, and what lies ahead in the future of facility management.

## **Literature Review**

The purpose of this paper is to focus and analyze the supporting documentation and research information that is found on the topic of; Evolution and Practices of Facility Management as well as what IFMA core competencies are being used by Canadian facility practitioners? This paper will be used to answer questions by gaining knowledge from literature review and primary data through a web-based survey. Assumption in the development of this paper are that in the practice of facility management there are many skills needed in order to keep up with the full practice of facilities management. In order for that to happen, facility management practitioners will have to continue educating themselves in order to keep up with the fast paced profession. Another assumption is that organizations with facility management professionals will only see what their need is, therefore are not fully utilizing the facility management practitioner and their skills. This paper will include the definition of facility management, how facility management has evolved into what it is today, the current day profession of facility management within Canada; including what core competencies facility management practitioners are utilizing, and the future of facility management.

Knowing the key fundamentals before analyzing the facility management profession is critical to answering the initial research topics. Sullivan, Georgoulis, and Lines state “An extensive literature review of FM sources confirmed that very little data about the FM profession is currently available” (2010, p. 92). They also state “Even with the growth importance of FMs in the business world, little data currently exist to quantify the present state of the FM industry” (Sullivan, K, Georgoulis, S, Lines, B, 2010, p. 92). Breaking down literature and primary data suggests the lack of quantifiable information investigating the facility management profession. Therefore a survey will be used to identify what IFMA core competencies Canadian IFMA facility management practitioners are using, how often they are using them, and what aspects of each competency they use.

## **Method**

A variety of methods were utilized to develop this paper. A literature review was first conducted through the research from various books, journals, and websites. The literature review was selected because before primary research could take place it is important to gather information to better understand the topic of facility management. This focused on defining facility management, the history, current roles, and future of facility management.

A survey was created and distributed to IFMA chapter members located across Canada, as well as to a few past employers from co-op work terms. This survey assisted in further present research focusing on how facility management is being performed in the present in Canada. This survey was sent to facility management practitioners across Canada, majority of them belonging to an IFMA chapter of their varying locations. The survey was distributed by Canadian IFMA Chapters to their members. This was the easiest way that the survey could be distributed to each chapter's members. There were 29 survey questions, majority of them based on IFMA (2010) ‘Complete List of Competencies Covered on the IFMA CFM® Exam’ from the Certified Facility Manager (CFM) exam guidelines for the 11 core competencies of facility management. There were a total

of 60 respondents. Table 1 shows a list of the questions asked in the survey. The results from the survey can be seen in Appendix A.

## **Evolution Of Facility Management**

### **History of facility management**

Facility management is a fairly new career in business and management. In the public sector, facility management has been utilized in engineering, public works, and plant administration (Cotts, D, et al., 2010, p. 4). Facility management was more commonly referred to jobs relating to janitorial services, mailrooms, and security (Facility Management, 2011. p. 550). It was not until the early 1950s that facility management was discussed as a needed practice in the United States (Katičić, L, & Šušnjar, I, 2011, p. 793). As Katičić and Šušnjar (2011) discuss, the development of facility management, "... was developed by the Schnelle brothers in order to enhance coordination and interaction between businesses so as to increase productivity" (p. 793). The development of facility management was a slow process in North America and Europe. It was not until the 1970s when it began to fully be developed in the United States and not until 10 years later in Europe (Mangano, G, & Marco, A, 2014, p. 242). With the increased use of personal computers and advancement of telecommunications, the 1970s were milestone in the evolution of facility management and increased requirements (Facility Management, 2011. p. 550). As facility management started building in the United States during the 1970s, IFMA states that the first "... formation of a more specialized organization occurred in December 1978 when Herman Miller Research Corp. hosted a conference, "Facility Influence on Productivity," in Ann Arbor, Mich., USA" (2014, para. 2). Shortly after this conference, in May of 1980, George Graves of Texas Eastern Transmission Corp., along with Charles Hitch of Manufacturer's Bank in Detroit, and David Armstrong of Michigan State University, the other two founding members had established the National Facility Management Association (NFMA). The first NFMA meeting involved 47 participants, 25 being direct members of the association (IFMA, 2014, ¶ 4-5). Soon after the second annual national conference, the Canadian facility managers became interested, and NFMA was transformed into the International Facility Management Association (IFMA) (Roper, K, & Payant, R, 2014, p. 10).



**Figure 1: George Graves at Podium**  
(<http://www.ifma.org/about/about-ifma/history>)

IFMA describes the progression within the past three decades as growing “... exponentially. With more than 24,000 members in 94 countries with 130 chapters and 17 councils, the association advances the global facility management profession by providing exceptional services, products, resources and opportunities” (2014, para. 6).

The roles of the past facility management practitioners and facility management departments were often associated with the following core responsibilities (Cotts, et al., 2010, p. 12):

- Caretakers
- Naysayers
- Advocates for employee welfare
- Controllers
- Employee efficiency multipliers
- Heavily reliant on the Purchasing Department
- Service providers
- Producers of voluminous policies and regulations
- Project handlers
- Major consumers of the administrative budget.

According to the respondents of the survey, many current day facility management practitioners began their careers as mechanical technicians, a cleaner, or maintenance worker/operator. There was no specialized training or education tailored to facility management, they worked their way up the ladder from trade programs to managing facilities. This shows the evolution from where facility management began to current day facility management. This shows that many of the older

generation of facility management practitioners began as hands on service workers to strategic and professional managers within the industry.

The growth of technology and personal use of computers in the 1970s was really the turning point in facility management. With the development of IFMA in 1980, facility management was better defined as a career in business and management. The responsibilities of facility management practitioners were further defined and they began to become a more prominent figure in the business setting, with a wide variety of roles.

### **Current roles of facility management – results and discussion**

Facility management has developed dramatically over the years as Steenhuizen, Flores-Colen, Reitsma, & Branco Ló discuss facts that offer "... efficiency, productivity, competitive advantage, and cost savings" (2014, p. 46). Enforcing the need of facility management in any organization creates tremendous benefits including cost efficiency, a high customer gratification, appropriate maintenance and operations, and safety (Steenhuizen, D, Flores-Colen, I, Reitsma, A, & Branco Ló, P, 2014, p. 49).

Current facility management practitioners have five reappearing challenges:

1. Financial skills
2. Dealing with physical demand of information technology and utilizing this technology to enhance facility management
3. Reducing costs to meet the organization's bottom line
4. Adjust to changing workspaces due to changing demographics
5. Providing emergency management and security to the organization

"By improving on these challenges, facility management in an organization can run more smoothly and provide monumental benefits" (Roper, K, et al., 2014, p. 530).

Today's facility management can be narrowed down into three pillars, as outlined by Steenhuizen, Flores-Colen, Reitsma, & Branco Ló (2014, p. 49) as "... the basics of FM:

1. Three principles of FM:
  - people;
  - place; and
  - process.
2. Facility management is of supportive nature.
3. There are multiple disciplines."

Today, a greater number of facility management practitioners are educated in facility management and are entering the field with degrees and credentials. In facility management, the areas of study include civil and mechanical engineering, architecture, and facility management. Many others are also seeking professional designations (Cotts, D, et al., 2010, p. 20). From the survey, only 19 percent of the respondents have a Facility Management Professional (FMP) designation and 18 percent with a Certified Facility Manager (CFM) credential. Through the various educational backgrounds, facility management practitioners are better prepared to organize a setting in an organization that is dynamic and effective, safe, meets authorization, and is attractive to clients (Facility Management, 2011. p. 549).

What facility management practitioners have in common, according to Katičić & Šušnjar (2011) “... is the prevailing attitude that facility management is a multidisciplinary and trans-disciplinary profession with theory and practice encompassing engineering, architecture, design, accounting, finance, management and behaviourism in management” (p. 797).

As discussed, IFMA’s core competencies were used to create the survey which was distributed to the Canadian IFMA Chapters members. These 11 core competencies relate to current facility management skills, and they include;

1. Communication
2. Emergency Preparedness & Business Continuity
3. Environmental Stewardship & Sustainability
4. Finance and Business
5. Human Factors
6. Leadership and Strategy
7. Operations & Maintenance
8. Project Management
9. Quality
10. Real Estate & Property Management
11. Technology

From the survey, the competencies that are being used 80 percent or above are Communication, Sustainability and Environmental Stewardship, Finance and Business, Human Factors, Leadership and Strategy, Operations and Maintenance, Project Management, and Quality. Three competencies that are not always or usually used by the majority of respondents are Emergency Preparedness and Business Continuity, Real Estate and Property Management, and Technology. Although three of the competencies are not used always or usually, all 11 competencies have approximately 50 percent of respondents using them sometimes. There were some deeper aspects of each of the core competencies in the survey that support the usage that respondents have.

Communication has 100 percent of practitioners using communication skills daily. This indicated by a 96 percent response that practitioners promote facility management information and recommendation to both internal and external stakeholders. The data supported by the results of the survey show who respondents are communicating with through the facility management profession. The people respondents communicated with are facility staff, senior management, and other departments which are highest percentage of people they are communicating with. Approximately half of the respondents manage and/or oversee both emergency preparedness and business continuity. Another quarter of respondents do not manage and/or oversee emergency preparedness and business continuity activities. 70 percent of respondents manage and oversee sustainability. The sustainability core competency statistic of respondents managing and/or overlooking the competency, there was direct co-relation between managing and overlooking sustainability. The correlation of how often and what aspects of finance and business is covered by 70 percent of the Canadian IFMA facility management practitioners.

The next four competencies, human factors, leadership and strategy, operations and maintenance, and project management, are all supported by additional analysis of aspects in each competency.

The Human factors core competency is supported by services provided and aspects of human factors. The majority of human factor aspects are covered by more than 50 percent of respondents. The human factor aspects respondents manage most are equipment replacements and repair, indoor air quality (IAQ), lighting, temperature control, and acoustics. The lowest percentage of managing of human factor are; ergonomics and way-finding. There are five occupancy service aspects that the majority of respondents manage.

The five occupancy services aspects that the majority of respondents manage the most are janitorial services, which approximately 80 percent of respondents manage, are facility helpdesk, security, safety, and parking. The two aspects of occupancy services that are managed the least by respondents are food services and concierge service. Both aspects of human factors and occupancy services reflect on the percentage of how often human factors are managed by practitioners.

Respondents also manage, develop, and implement leadership and strategy aspects. The strategy aspects are the performance and goals aspects. The aspects of performance and goals that the over 70 percent of respondents develop and implement are security, personal and professional growth and development, and performance appraisal system. These aspects in large part contribute to how often respondents manage leadership and strategy. Another aspect of leadership and strategy is promoting, encouraging, and adhering to a code of conduct, develop, managing, and/or oversee relationships, and ensuring compliance with the organization's social responsibility policies. All of these issues of leadership and strategy are aspects which approximately 80 percent of respondents provide.

The regularity of managing maintenance and operations of respondents is well supported. The majority of respondents are managing building systems, structures, interiors, exteriors, and grounds of facility aspects. The operations side, however, expressed that operations of grounds of facility were not managed by the majority of respondents. The majority of the aspects that support the facility management practitioner regularity of using operations and maintenance are the results shown in Appendix A.

The frequency of daily management by respondents is evident by the phases of the projects they manage. Overall, the majority of respondents manage all phases of projects. The two phases respondents manage the most are the planning and monitoring stages. 70 percent of respondents manage these two phases. There is a direct relation from how often respondents use project management skills and the phases of the project they manage.

Some quality aspects of the IFMA Certified Facility Manager Guidelines states are the monitoring of codes, regulations, policies, and standards as well as the measuring performance. The majority of performance measures, such as key performance indicators (KPIs), performance metrics, specifications, and best value practices are aspects of quality in which the majority of respondents develop, manage and/or oversee. Another aspect of the quality competency is monitoring codes, regulations, policies and standards, in which over 90 percent of respondents manage.

From real estate requirements, acquiring and disposal of real estate, managing a real estate portfolio and prepare, administering, and allocating service charges, support the fact that real estate and property management is one of the three core competencies that is being managed less by

respondents. Another aspect of real estate and property management that support the lack of managing the competency is the over 60 percent of respondent do not develop or implement real estate master plans. All the aspects of real estate suggests that the real estate and property management competency is not being used as much as some of the other core competencies.

There is a direct relationship between both management and operational technology aspects. The aspects of the technology competency are very similar to real estate and property management as it supports the lack of managing of technology. The majority of respondents do not plan, direct, manage and/or oversee technology. The only technology that the majority of respondents use is maintenance, repair and operation technology.

### **Future of facility management**

The future for facility management is promising and bright. In order to evolve the field of facility management, there needs to be improved education and attainment of credentials in the facility management field. There is also a need for facility management to be better defined in an organization. There has been a substantial increase in the number of colleges and universities offering facility management (Roper, K, et al., 2014, p. 534-535). “The accreditation of associate, baccalaureate, graduate, and Ph.D. programs by the IFMA Foundation has given authority and more importance to education in FM. The profession itself also benefits as more workers enter facility management with knowledge and understanding of basic facility issues and their solutions” (Roper, et al., 2014, p. 535). The next step will be looking into high schools to get the word out regarding the rewarding career in facility management. Respondents to the survey also indicated that there is a need for an increase in facility management programs in colleges and universities. As facility management support grows and becomes a higher needed resource area in organizations, it is important that facility management practitioners to market their services. The following are ways Roper & Payant (2014, p. 502) suggest approaching facility management marketing:

1. Increase the awareness of facility services.
2. Decrease the resistance to a particular service or set of policies and procedures.
3. Improve the image of the facility organization as a service provider.
4. Enhance customers’ knowledge about facility services.
5. Disclose specific qualification about facility services.

By marketing and developing public relations with the entire organizations employees, Roper & Payant state that facility management can have an “... increase service awareness, knowledge, and qualifications while decreasing resistance to the facility department’s policies and procedures” (2014, p. 502).

The emerging trends evident in the future of facility management include:

- Security and emergency preparedness
- The changing development of facility management in business operations and productivity, including the changing office workplace
- More focus on sustainability and sustainable responsibility
- New and emerging technologies used for both building data and operations



(Facility Management, 2011. p. 551, Roper, K, et al., 2014, p.533, and Steenhuizen, D, et al., 2014, p. 53).

A major change that will be occurring in facility management is the baby boom generation entering retirement. With the number of baby boomers in senior management and supervisor positions, this will have a huge effect on the facility management field. Survey respondents indicated that within the next five to ten years, there will be a need of younger, qualified graduates that will need to fill the vacancy gap from the baby retirement. However, with the emerging new young professionals entering facility management, this will create a new feel for facility management. New workspaces and their functions will have the largest effect. Will offices become a thing of the past, and will we develop home offices and new work arrangements (Roper, K, et al., 2014, p. 534)? There may even be some organizations that will require 24/7 access and operations, and this would lead to around the clock facility management. Modifications in the way facility management is currently being performed will have to be changed to meet the demands of the organization (Roper, K, et al., 2014, p. 538).

With the future, facility management practitioners must remember, according to Cotts, Roper & Payant, that they are "... the stewards of one of the most valued assets of the organization" and "It is important that (they) keep reminding current management of the fact that (they) are as important to mission accomplishment as human resources and information technology" (2010, p. 543).

It is important to understand facility management is becoming a people-based service, as oppose to the traditional property-based service it once was. "Changing roles, combined with changing technology, drives the environment of the future" (Facility Management, 2011, p. 552).

### **Conclusion**

The purpose of this paper was to determine if IFMA's core competencies were being used by Canadian IFMA facility management practitioners and the evolution of facility management. There is a misconception around what facility management is; therefore the problems that were investigated are; the history of facility management, if facility management skills were actually being used by Canadian IFMA facility management practitioners today, and the future of facility management. The paper also identified how often Canadian IFMA facility management practitioners used the core competencies in their daily job.

The history of facility management looks into how facility management has formed. Facility management became an independent profession in the 1950s, with management of jobs such as janitorial services, mailrooms, and security. When the use of personal computers in the office and advancements in telecommunications came about the 1970s, there was a need for more supervision and management was required. The International Facility Managers Association was later created in 1980. This was a milestone in the development of facility management. Since then, facility management has grown to be a recognized global profession that is practiced around the world.

Current roles of facility managers identifies what current facility managers are implementing, managing, and developing today and how often they are using the core competencies. Today, all core competencies are used by Canadian IFMA facility management practitioners but some are used more than others. Real estate and property management, technology, and business continuity

and emergency preparedness are the core competencies not being used as much compared to the other IFMA core competencies. Both the majority and minority of IFMA's core competencies are supported by aspects in each one of the core competencies and back up the percentage of Canadian IFMA facility management practitioners' usage of the core competencies. All IFMA core competencies are covered by Canadian IFMA facility management practitioners but some are used more than others with support of each competency aspect.

The future of facility management looks into developing trends in facility management industry and major changes that facility management will encounter. These major changes include an increase of colleges and universities offering facility management programs, as well as more accreditations and professional designations. The other major change that facility management will encounter is the large number of people in the baby boom generation that will be retiring leaving a gap in skilled practitioners.

An important observation discovered through the research was the diversity of one facility management practitioner to another. No two facility management practitioners are alike. Although this thesis focusses on facility management practitioners in Canada, current roles vary drastically from different provinces and municipalities. This shows how demanding the facility management field is, with a wide range of roles and responsibilities.

This paper will be relevant for the future International Facility Management Association, each Canadian Chapter, along with individuals wanting to know more about facility management. There is no impact on anyone in this case, but this paper acknowledges that there is a past, present, and future for facility management, as well as what core competencies today's Canadian facility management practitioners are using daily.

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## Appendix

### Appendix A: Survey Results

Table 1 - Survey Questions

Question #	Question	Number of Respondents
1	Which IFMA Chapter are you a member of?	60
2	What is your job title?	57
3	How many facilities do you manage?	60
4	What is the total square footage you manage?	56
5	What is your highest level of education?	60
6	If you do have a diploma or degree, what is it in?	40
7	What are your other credentials (Ex. CFM, FMP, SFP, etc.)?	59
8	What was your career path to your current position?	52
9	What is Facility Management to you?	34
10	How often do you use the following knowledge areas in your current job?	57
11	Do you promote facility management information and recommendations to internal and external stakeholders (facility staff, public, senior management, customers, boards or directors, and so forth)?	56
12	Which members of your organization do you share facility management recommendations to? Please check all that apply.	57
13	You plan, manage/oversee, and support the organization's program for _____.	56
14	You are able to manage/oversee the organization's commitment to the sustainability of the built and natural environment.	55
15	What aspects of finance and business, as an individual practicing facility management, do you analyze/manage/oversee for your respective organization? Please check all that apply.	51
16	Do you develop and implement _____ that support the performance and goals of your organization? Please check all that apply.	51
17	Do you provide leadership to your organization by: _____? Please check all that apply.	51
18	What aspects of building systems, structures, interiors, exteriors, and grounds of a facility do you manage/oversee? Please check all that apply.	51
19	What aspects of occupant services do you manage/oversee? Please check all that apply.	51

20	What aspects do you develop, recommend, and manage/oversee for the facility's operational planning requirements? Please check all that apply.	51
21	Do you _____ capital construction projects? Please check all that apply.	51
22	You are able to develop and manage/oversee the creation and application of _____ for the facility organization. Please check all ta	51
23	Do you monitor compliance with codes, regulations, policies, and standards?	51
24	Do you develop and implement a real estate master plan?	50
25	Which aspects of real estate assets do you manage/oversee? Please check all that apply.	50
26	Do you plan, direct, and manage/oversee business and operational technologies? Please check all that apply.	46
27	How do you think technology will impact the future of facility management?	35
28	How do you think sustainability will impact the future of facility management?	32
29	Where do you see facility management in the next _____?	28



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