
Facilities management professional development: A New Zealand case study

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Abstract

This paper sets out to consider the stage of development of the Facilities Management (FM) sector in New Zealand and draw lessons from other countries which may be further down the road of professionalisation. A comprehensive literature review was conducted in order to learn from other regions. This was followed by a “world-café” discussion forum attended by 18 FM managers and academics in New Zealand held during an FM Masterclass. Delegates highlighted the issues of professional recognition, career pathways and academic qualifications, and these closely mirrored key themes from the literature and from professional FM associations in the USA, UK and continental Europe.

While many key organisations and individuals in the New Zealand FM industry were represented in this study, the field of FM is still young in New Zealand, and there are many individuals active in FM in New Zealand who may not recognise that term and who were therefore not consulted for this study. Further large-scale quantitative studies are being conducted to address this.

It would appear that New Zealand’s FM industry is in many ways some 15 years behind Europe, but also has the advantage of not having the

negative connotations that Europeans have because of the cost-cutting initiatives often associated with the implementation of FM.

Keywords: FM development; benchmarking; IFMA; BIFM; professionalism; New Zealand; adding value

Introduction

This paper sets out to show how FM has added value to organisations in other countries, and how it could also do so in New Zealand. Alexander (1992b) highlights the need for management development in FM, and even suggests that FM development depends on organisations using FM demanding more from their staff working in those roles. He argues that excellent technical skills are no longer sufficient for the new role FM must deliver. He claims that co-operation between professional bodies and educational establishments is essential in order to meet the needs of the constantly changing business environment and earn the same respect as other established professions (Alexander, 1992b). He argues that some organisations in the UK have grasped this opportunity to use FM as a source of competitive advantage (IBM, BBC, Allied Dunbar, Scottish Power and the National Health Service). He urges Facilities Managers to see their roles as being catalysts for change rather than merely delivery Service Level Agreements (SLAs). Alexander (2003) notes that Japanese organisations already recognise the contribution FM makes to the economy, and EU directives are starting to address the issue, as are some regional development agencies with large amounts of building stock (such as the Glasgow Development Agency in Scotland, UK). All of these are keen to preside over a work environment which is flexible to changing needs, satisfies those who use the space, can cope with developing technologies and reduces the impact on the environment. The workspace must also increasingly symbolise, reflect and sometimes even change the culture and values of the organisations which use them.

Alexander (1996) closes his editorial with the observation that in times of uncertainty, business restructuring and even natural disasters, it is to FM that business and government turn. He repeats this in a discussion about the need for a strategy for facilities management in times of considerable change in the business environment (Alexander, 2003). Nutt (2000) is very clear

about what he believes the strategic role of FM is and says that Facilities Managers need to be able to switch from “defence mode” to “attack mode” in situations of uncertainty and unpredictability saying that in the end, “the strategic objective of facility management is to provide better infrastructure and logistic support to business and public endeavours of all kinds and across all sectors” (Nutt, 2000, p. 124).

New Zealand had an experience of the need for strategic as well as emergency FM thinking in the aftermath of the February 2011 Christchurch earthquake in which 185 people died: FM staff were suddenly expected to set up temporary facilities for businesses and plan reconstruction.

The New Zealand context

It is perhaps helpful to briefly outline the New Zealand context in which these discussions took place. New Zealand is a relatively young country (the Treaty of Waitangi which most people regard as the country’s founding document was signed in 1840) several hours’ flying east of Australia. It has a total land mass similar to the UK but just over 4m people on a long, thin country divided over two islands, the North Island and South Island. There are three main conurbations: Auckland (the largest city and commercial hub), Wellington (the capital and seat of government), and Christchurch. This small population and isolation has led to a “can do” attitude which is often referred to as “she’ll be right” where people muddle through and make do (Rinne & Fairweather, 2011). Industry and commerce is dominated by small and medium-sized businesses, meaning that the opportunity for FM comes mainly from local and national government and hospitals.

This paper reviews the discussions surrounding the development of FM in the UK and continental Europe and considers what stage of development New Zealand’s (NZ) FM profession is at in 2015. After a literature review including the findings of a commissioned report for one of the authors of this paper into the backgrounds of NZ’s FMs, it uses a “world café” methodology involving members of the Facilities Management Association of New Zealand (FMANZ) to identify development needs from a professional and educational perspective. It concludes by making a number of recommendations for the development of the FM profession in NZ.

Literature review

This section provides an overview of the challenges facing FM, key research developments and the origins of a number of national FM associations with a view to providing an overview of what is already known about FM. Maliene, Alexander and Lepkova (2008) provide a succinct overview of the historical development of FM as a concept, and also why it has been interpreted very differently in different countries, in particular within continental Europe. Three key aspects arising from the literature will be discussed. These are FM definitions and career paths, professional and academic recognition of FM, and the future development of FM. This literature review considers each of these in turn before using those same categories to evaluate the outcome of the world-café exercise conducted by Auckland University of Technology (AUT) and FMANZ.

FM definitions and career paths

An early definition of FM is offered by Alexander (1992a, p. 12) when he suggests it is “the process by which an organization achieves and sustains a quality environment and operational services to meet strategic needs at best cost”, a definition developed by Strathclyde University’s Centre for Facilities Management in the UK. He suggests that the BBC is far advanced in its thinking about the role that FM can contribute to organisational effectiveness, in particular a focus on the cost-effective delivery of asset management and user services to the satisfaction of end-users, whether those are external or internal to the organisation. Alexander (1992b, p. 16) quotes one source as saying that a facilities manager (also FM) in the UK is “typically male, second career, with no postgraduate skills, experienced in one functional speciality and often burdened with arbitrarily allocated responsibilities”. He also points out that facilities managers rarely hold positions on the board of directors and therefore lack the ability to influence strategy. One recent exception (in 1992) was in the National Health Service with the appointment of a “Facilities Director”. The problem in other organisations, he argues is that “a facilities manager often lacks the authority to be effective” (Alexander, 1992b, p. 16). Tay and Ooi (2001) collect a number of definitions from 1990 to 2000 in order to address what they call an “identity crisis” within FM, arguing that to many people, FM is synonymous with being (as used in the title of their article) a “jack of all trades”. The core of all these definitions is the “workplace” and they therefore propose the following definition: “the integrated management of

the workplace to enhance the performance of the organisation" (Tay & Ooi, 2001, p. 359). Compounding the lack of a commonly agreed definition is the fact that many FMs do not hold a specific FM qualification and management feel sending them on short courses is sufficient for them to undertake their role in the organisation. This, they argue, is inadequate in the new millennium because while an FM's staff may be involved in day-to-day operational matters, and may very well be borrowing management and engineering knowledge from other fields, the FM is far more likely to be focused on "strategic workplace planning and organising issues" (Tay & Ooi, 2001, p. 359). van der Weerd and Reitsma (2012) discussed this aspect in their conference presentation at the IFMA Facility Fusion conference in Chicago, USA.

Professional and academic recognition

In the *Foreword* and *Preface* to Alexander (1996) there is a discussion about the current (early 1990s) state of FM in the UK, USA and Europe. Ambitious claims are made for FM's potential role in an organisation. It will not only make things work more efficiently, provide a secure environment and ensure business facilities are aligned with the strategic goals of the organisation, but it will also deliver happy and motivated employees leading to the claim that FM done right underpins the competitive advantage of an organisation. The role of an FM is not just to meet service level agreements in a cost-effective manner (facilities are often one of the largest costs to an organisation) but, it is claimed, an FM should actually challenge current ways of doing things, looking constantly for better ways to deliver value. Alexander (1996) states that the increased competitive environment of the late 1980s and early 1990s forced businesses to reconsider the way in which they were doing business. The problem was that there were not enough qualified and experienced professionals to fill these roles. As Williams (1996, p. xv) explains "Of all the modern management disciplines facilities management (forced to grow too quickly out of an inadequately prepared base) is possibly the most plagued by this euphemism for bodging." The result, he claims, is a culture of "fire-fighting". The UK began to address this and FM moved from having a purely technical orientation to more of a management focus, with coverage of areas such as quality management, risk assessment and project management.

Amaratunga, Baldry and Sarshar (2000, p. 66) also offer a definition of FM: “the total management of all services that support the core business of the organisation”, although Chotipanich (2004, p. 365) says that “the primary function of FM is to handle and manage support services”, with the day-to-day focus being on providing a safe and efficient workplace. Alexander (1993, p. 10) defines the “total workplace” as including everything required to ensure that the physical, social and managerial environment is organised to “support the core activities of an organization”. However, Amaratunga et al. (2000) argue that much current thinking even within FM circles is on cost minimisation, whereas what businesses need is something that can justify the second-highest cost to the organisation (after payroll). They suggest that the traditional focus on recording unit costs and developing databases for comparison and benchmarking of quantitative data means that FM will never be seen as a key element or even a driver of organisational change and improved business performance in “core work processes” (Amaratunga et al., 2000, p. 68). This lack of strategic thinking is also referred to by Hou, Ho, Chung and Wong (2016) who point out that the area in which FM is often used, that of outsourcing, is plagued by a short-term focus on cost saving and budgeting resulting in a lack of integrated thinking. Amaratunga et al. (2000) suggest the Balanced Score Card’s (BSC) categories of financial, customer, internal business processes and learning and growth could, they claim, be used by FM to show how they can add value by creating a BSC for FM with clear deliverables contributing to the organisation’s strategic goals. This more strategic role of FM is also referred to by Chotipanich (2004, p. 365) who says it may include “property asset portfolio management, strategic property decision, and facility planning and development”. All of these, it is claimed, are related to the strategic plan and policy of the firm. Jack (1994) claimed twenty years ago that a better understanding of strategic FM and a more constructive working relationship between clients and suppliers could reduce the annual costs of running UK government buildings by over £100 million. However he warned that senior management involvement was essential for this to work and that they would need to communicate regularly with property managers, saying, “with property managers either at or advising the top of an organization’s tree, the organization will be able to focus even more clearly on its core business.” (Jack, 1994, p. 41)

The changing face of FM

An interesting study by Kaya and Alexander (2005) suggested that organisations see FM as belonging to one of five areas: a property issue, a people issue, an operational issue, a hard cost issue or core to overall business success. Which of these a particular organisation's FM department fits into influences where it reports: property to the property director, people to the HR director, operational focus to the Operations director, etc. Only if FM is seen as contributing to the whole business will it be represented at the main board of the organisation. They conclude by suggesting that rather than classifying FM by the type of industry their host organisation is in, FM should be classified by the role it takes within that business.

de Bruijn, van Wezel and Wood (2001) suggest that a parallel for the challenges facing FM in finding a definition and establishing a position in higher education can be seen with the field of "hospitality management", saying (p. 476) "for many academics in the field, the definition of 'facilities management' remains a vexatious issue."

Kennedy (1996, p. 136) warns that the exact make-up of FM support services in a particular location or organisation will vary, depending on the particular scenario or needs: "what they consist of and how they are provided is often based on an organisation's historical growth pattern". Reporting the factors that other studies have identified, Chotipanich (2004) then proposes four key factors which include organisational characteristics, facility features, business sector and cultural context.

The arrangements of FM are related to a particular personality, needs, circumstances and environment of the organisation at the time. FM is recognised as an organisation-specific function that is based on a real business need. (Chotipanich, 2004, p. 365)

Junghans and Olssen (2014) suggest that in order for FM to have credibility, it must also have a theoretical academic discipline underpinning, and industry and universities must collaborate to "establish a foundation of knowledge" (Junghans & Olssen, 2014, p. 68). A positive sign, they argue, is that management "movements" can be dismissed as fads or fashions if they last less than five years; FM has clearly outlived this period. They suggest academic "disciplines" need a presence in institutions. FM research centres

have existed since the 1980s (USA), 1990s (UK) and 2000s (Netherlands, Norway and Denmark, although Valen & Olsson (2012) claim FM was introduced in Norway in the early 1990s). They conclude that “FM has a large and growing institutional manifestation” (Junghans & Olssen, 2014, p. 75). Drion, Melissen and Wood (2012, p. 255) suggest that “an accurately reliable history of the development of facilities management has yet to be written”, but that the existence of what they call “hard” and “soft” FM persists. They suggest that the term FM has become tainted with poorly executed outsourcing attempts with a sole focus on cost-cutting. However, they also point out that the FM industry has not particularly helped itself as “companies engaged in outsourcing are required to offer such a range of disparate services that most fail to do anything well” (Drion, Melissen and Wood, 2012, p. 258), and sometimes even compound the problem by having to outsource themselves (leading to “fourth party outsourcing”). This perhaps explains why Mudrak, van Wagenberg and Wubben (2005, p. 103) propose that some managers see FM as “an outsourceable noncore function”.

de Bruijn et al. (2001) suggest that the US definitions of FM are more specific than those preferred in the Netherlands. While this European development does allow those practising FM to claim a broader organisational impact, there is a real danger of “defining that term (FM) in a manner so all-inclusive that it is nearly meaningless” (de Bruijn et al., 2001, p. 477). This is important because:

Clarity of definition and focus of a subject are normally essential to establishing credibility in the academic world and to gaining legitimacy among external, broadly “practitioner” audiences. (de Bruijn et al., 2001, p. 478)

Drion, Melissen and Wood (2012, p. 259) comment on this problem from an academic perspective, saying that such a pragmatic approach to what constitutes FM “removes any rationale whatsoever for FM education, for what cannot be properly defined, cannot be taught”.

Given the above reference to FM’s legitimacy in industry, it is useful to consider the development of FM as a profession across the USA, UK and

continental Europe before identifying the current status of FM in New Zealand.

Professional bodies

To the question “Is facilities management a profession?”, Leaman (1992, p. 18) wrote “No, not yet. But facilities management has all the necessary ingredients to become so.” He argued that at that time many buildings, rather than supporting those occupying them, “have become management obstacle courses”. One of the essential elements of professional recognition could be argued to be the existence of a forum for professionals in a particular industry to meet, debate and develop ideas and concepts. The USA, UK and continental Europe each have their own professional associations in the field of FM.

IFMA (International Facility Management Association) was founded in October 1980 by George Graves, Charles Hitch and David Armstrong as the National Facility Management Association and claims to have 24,000 members in 94 countries, although it is based out of Houston, Texas in the USA. It aims to certify professional FMs, provide conferences as a forum for networking, training and development, and is increasingly active on social media to share their message. The first Bachelors and Masters programmes in FM were introduced at Cornell University in 1983 by Professor Franklin Becker. The profile of their members is that they have an average age of 49 years, with 83% attending college (33% business; 16% engineering and 14% FM), and have an average of 28 years’ work experience with half of that in FM roles. IFMA also claim to have developed the “People, Process and Place” model (IFMA, 2014).

BIFM (British Institute of Facilities Management) was formed in 1993 and currently has 14,500 members, although some credit Sir Frank Duffy, a British architect, who helped establish the Association of Facilities Managers in 1985. BIFM has adopted the CEN/BSI definition of FM: “Facilities Management is the integration of processes within an organisation to maintain and develop the agreed services which support and improve the effectiveness of its primary activities” (BIFM Annual Review, 2013, p. 4). They point out that a key driver for the development of BIFM was the cost-cutting initiatives in the 1970s – 1980s where non-core activities (both “hard” and “soft”) were outsourced in a bid to reduce costs and improve quality.

However, as Alexander (1992b, p. 18) argued strongly, while the operation of FM may be outsourced, “facilities management decisions cannot be contracted out”, so BIFM’s goal was to demonstrate the importance of keeping FM in the boardroom and as part of their strategic plan, and “to become the authoritative voice for FM” (BIFM Annual Review, 2013, p. 4). Chotipanich (2004) also points out that industry sectors such as hospitality and leisure are much more reliant on facilities and FM could perhaps be expected to play a larger role in these sectors. Losekoot, van Wezel and Wood (2001) use the terms “hard” and “soft” to refer to the physical product of a hotel and the service delivered by staff within that servicescape (Bitner, 1990, 1992), arguing that unless the hard product is good, no amount of staff training will lead to customer satisfaction. Moreover, Rinkoo, Singh, Mishra, Vashishta, Chandra and Singh (2015) describe how the design of hospital operating theatres can also contribute towards staff satisfaction, recognising the importance of the internal customer in facilities management.

The UK and the Netherlands are regarded as being in the vanguard of FM development in Europe (de Bruijn et al., 2001; Jensen, 2010) so it is also worth reviewing the role of EuroFM, the European Facility Management Network. After an initial meeting of FM enthusiasts in 1987 hosted by Bart Bleker, EuroFM was registered in 1993, with partner organisations in The Netherlands (FMN), Denmark (DFM) and the UK (Professor Keith Alexander’s CFM at Strathclyde University and later at Salford University). This grouping agreed an official definition for FM as being about the “integration of processes within an organization to maintain and develop the agreed services which support and improve the effectiveness of its primary activities” (EuroFM, 2014, p. 2).

EuroFM acknowledge that FM development was driven by particular interest groups in different countries and at various speeds (also Wauters, 2005); some focused on real estate and maintenance, others on the services often grouped under the FM banner. Steenhuizen, Flores-Cohen, Reitsma and Ló (2014), discussing Portugal’s stage of FM development, suggest that it is still at the stage of being technical and engineering-focused, compared to the rest of Europe where service orientation and management is the goal. They suggest that “soft” equates to a “managerial” and “hard” to a “technical” focus. They also found that in Portugal the staff operating in FM come from engineering and architecture professions compared to other

European FM managers who held FM qualifications. However, EuroFM worked together to provide agreed definitions on such terms as “real estate, support process, tenant, cost of capital, depreciation, business support, cleaning, hospitality, ICT, floor and workplace” (EuroFM, 2014, p. 3). In its mission statement, EuroFM specifically identifies the three elements which underpin its role: practice, education and research.

In a helpful summary of the current state of FM education in Europe, Steenhuizen et al. (2014) explain that there are 15 countries within Europe that offer a total of 49 study programmes including an identifiable FM component, spread across 42 institutions. The largest number of programmes (13) are taught in the Netherlands, with Germany having 7, Norway 6, Austria 5 and the UK and Finland 3 each. They conclude their analysis with a number of recommendations, including that in any educational establishment “the programme should also include the field of hospitality, the importance of innovation, and an emphasis on the future development of FM” (Steenhuizen et al., 2014, p. 54). However it is hoped that these institutions have taken on board the warning from Leaman (1992, p. 20) who wrote:

At present, the agenda of facilities courses sometimes appears as uncoordinated or illogically-formed lists, with no one quite knowing what to put in or what to leave out and with items sometimes included on the basis of staff availability or enthusiasm rather than on a clear idea of the overall course structure. (Leaman, 1992, p. 20)

This paper sets out to identify the current state of FM in NZ, so having reviewed the historical development of FM in the USA, UK and Europe, there now follows an analysis of what is known about FM in NZ.

FMANZ (Facilities Management Association of New Zealand) recognises that there are multiple disciplines involved in “ensuring functionality of the built environment by integrating people, place, process and technology” (FMANZ, 2014, p. 2). It uses the definition of an FM recorded in the Australian and New Zealand Standard Classification of Occupations:

A Facilities Manager organises, controls and coordinates the strategic and operational management of buildings and facilities in public and private

organisations to ensure the proper and efficient operation of all physical aspects of a facility, to create and sustain safe and productive environments for occupants. (FMANZ, 2014, p. 2)

FMANZ prides itself on being the leading body for FM in NZ, with in excess of 500 members. Established in 2008, an inaugural conference was held in 2012. In a study commissioned by one of the authors of this study for FMANZ, AUT and Hanze UAS, Schutte (2014) set out to identify how these three partners could contribute to the professional and educational development of FM in NZ. She identified that there is currently little FM education available in NZ. After a literature review of secondary data on FM in NZ, a mixed methodology was used. Empirical evidence in the form of 30 interviews with FM professionals and academics was followed by a survey to gather supporting quantitative data for the qualitative data. A total of 400 survey links using SurveyMonkey were sent out, with 117 responses (29%), of which 90 were usable (77% of responses). She found only two courses in NZ – one at Massey University as part of the Bachelor of Construction, and one at Unitec Institute of Technology in Property Management and Operations Management courses – and concluded, “there is no educational programme specifically focused on FM in NZ” (Schutte, 2014, p. 24). Investigating the professional backgrounds of those identifying themselves as FMs in NZ, she found that while 65% of respondents did have an FM background, 36% came from project management, 32% had a trade background, 31% came from property management and 26% from operations management. The most common qualification among respondents was a Certificate level qualification (36%), followed by a Bachelors degree (34%) and a Trade diploma (30%). 19% had a Master’s degree. However, only three respondents claimed to have a specialised FM academic qualification.

In questions about the “maturity” of FM in NZ, respondents felt there was an increased awareness of FM, but much decision-making was still short-term and reactive, with few FMs being able to influence company strategy. This also affected the perceived career paths for FM professionals. In her conclusion, Schutte (2014, p. 35) noted that “a large number of FM professionals come from the ‘hard-FM’ side, meaning that there is a strong focus on the ‘place’”, rather than on service and customer orientation.

Having reviewed the existing literature on FM and the current state of FM in NZ, this paper will now describe an innovative methodology for developing an understanding of the thoughts of key decision-makers within the NZ FM community: members of FMANZ who attended a series of FM Master Classes at AUT.

Methodology

The “world-café” method (Brown & Isaacs, 2005; Schiele & Krummaker, 2011) used in this research is becoming increasingly popular (The World Cafe, 2016). It takes the form of a sequence of discussion groups. It is different from traditional focus groups as the discussion topics become refined and more focused each round, and a large amount of knowledge from a considerable number of experts can be accessed in a very short period of time. Essentially there are a number of topics (one per table). Each table discusses that topic for ten minutes, and a moderator then summarises the discussion. Delegates (often referred to as “co-researchers” because of their involvement in the development of the discussion) then move to a different table for another (usually related) topic. Before the next group discuss the topic, the moderator summarises the previous group’s discussion on the topic. The result is that each group does not start from the beginning; they are building on or refining what has already been discussed. The third (and sometimes fourth) group then does the same. At each change-over, the moderator summarises the current state of the discussion. These discussions may also be recorded on whiteboards or on flipcharts. After all the delegates have discussed each topic, they move around the room and with stickers indicate their top three points from each topic.

Benefits of this approach are claimed to include the ability to generate, refine, debate and even validate issues all in one forum. Participants become co-researchers rather than passive subjects. The ability at the end to rank or vote for the most important issues also provides a very targeted list of top priorities which the entire room can see at a glance and validate or debate. A paper co-authored by one of the creators of the world-café concept describes the experience of using it in Singapore. They explain that “café dialogues enable large groups, often hundreds of people, to think creatively as part of a single, connected conversation” (Tan & Brown, 2005, p. 83). Underpinning the technique is the assumption that the solution to the

problem being discussed is already in the room. Unearthing the solution is possible by following seven principles:

1. setting the context
2. creating a hospitable space
3. exploring questions that matter
4. encouraging everyone's contributions
5. cross-pollinating and connecting diverse perspectives
6. listening together for patterns, insights and deeper questions
7. harvesting and sharing collective discoveries

The strength of the approach is that small groups of people have simple conversations around a table and then record the main points for the next group. The emphasis is on genuine listening and hearing each other. As Tan & Brown (2005, p. 88) conclude, the world-café concept works because “café conversations are able to reduce the distance between the powerful and the less powerful in a constructive and practical way.” The other example of a world-café exercise is, by coincidence, set in Auckland, NZ. Fouché and Light (2010) report on a study between the University of Auckland and Auckland District Health Board. The collaborative nature of the concept was a good fit for an organisation which is focused on the needs and values of its clients. As they explained, “the permeating aroma of coffee, soothing music and café-styled table settings are not ordinarily associated with research or, for that matter, with social work practice” (Fouché & Light, 2010, p. 34).

Their goal, they claimed, was to achieve “multi-directional knowledge exchange” (Fouché & Light, 2010, p. 39) instead of the one-way transfer of information that often occurs at large gatherings. It is about tacit rather than explicit knowledge. They explained that in their world-café experiment the initial groups had been very tentative about discussing the issues, but by the last rotation it took several attempts to call the room to order! Again, they reported that initial “brainstorming” ideas gradually became connected into themes and patterns. All the information captured on sheets of paper, Post-It notes and whiteboards becomes “data” which can then be interpreted. Having explained the origins and workings of the world-café approach, this paper now briefly outlines the experience of the authors in running a world-café on facilities management development in NZ.

A group of 15 FMs and academics from across NZ were brought together at AUT in Auckland for a week of Masterclasses facilitated by FMANZ. Bringing practitioners and academics together is a valuable way of conducting collaborative research and closing what has been called the “rigor-relevance gap” (Chen, Wu, & Wu, 2013, p. 567). This issue is also considered by Schiele and Krummacker (2011) who propose a “consortium benchmarking” approach to develop robust research with engaged industry co-researchers rather than passive subjects. At the end of the week participants were invited to take part in a world-café around three topic areas:

- How did you find yourselves in the role of FM in your organisation?
- Why should someone (like a young graduate) consider a career in FM?
- What will be the critical issues facing FM in NZ in 2020/2025?

As described above, the participants were all put into groups on one of three tables, provided with whiteboard, pens, Post-It notes and flipchart paper. At each table, one person was asked to be the moderator/facilitator and therefore stay with that particular table and topic. These moderators were not given any additional training; however they were enthusiastic participants in the Masterclasses so it was felt they brought a personal commitment and in-depth understanding of the issues being debated. Their lack of experience in the moderator role might be considered to be a limitation of this approach, but while each moderator approached their role in their own way, the authors of this paper did not feel there was any significant difference in the achieved outcomes from each group. Their knowledge of the subject and their rapport with fellow FM professionals gave them a considerable advantage over non-specialist trained moderators, in the opinion of the researchers. Initially discussions were tentative, and delegates were happy to move on to the next table when the time came. However, with the next two changeovers, groups were asking for more time and the discussions became more animated. The moderators seemed to really enjoy their role of facilitating, guiding and focusing discussion and were very happy to give feedback to the whole group on how they felt the topic had developed, even though this was a new role for most of them. The next section summarises the discussions with the help of photographs of the mindmaps and spidercharts that seemed to develop on the whiteboards.

Findings and discussion

This section summarises the findings from the world-café and discusses the implications for the future development of FM in NZ.

How did you find yourselves in the role of FM in your organisation?

Participants reported they felt it was unrealistic to expect to have an FM career lasting from school leaver to retirement. However they felt that FM skills would be useful in other careers and skills learned in other careers would be useful in FM. There were examples of architects who had come to FM via project management; Navy engineers who became hospital engineers before becoming FMs; Valuation/Property managers who did project management before becoming FMs/Asset managers; skilled tradesmen who had completed postgraduate study before becoming FM/Asset managers. They saw “property managers” as being responsible for buy/sell/lease decisions and “bricks and mortar” whereas FMs were people who operated facilities and dealt with “bricks + people”. The perception of FM for some was still that of the building caretaker, as opposed to the “business optimisation enabler” that they saw themselves as. They felt the FM role required certain core competencies which could be divided into strategy (forecasting, planning and business analysis), hard (pipes + wires, building fabric and fitouts) and soft (cleaning, catering and transport). These core competencies (from leaky taps to strategic business enablers) would need to come from a variety of “structured learning paths” from school, polytechnics and university. A final comment from this group was that “all training needs a mix of real world experience and theory”.

Why should someone (like a young graduate) consider a career in FM?

This group immediately identified that FM needed new blood to survive. These new people could come with diplomas, degrees or postgraduate qualifications but also from the trades with knowledge, experience and skills. These might include overseas qualifications, architecture certification, project management skills, a business background, building sciences knowledge, military experience, project management, property valuation and eventually even an NZ FM qualification. This group also identified the importance of core competencies, and suggested FM should have an “elevator pitch” in which they could sell an FM career to graduates considering their options. Some of the strengths of a career in FM included being part of an emerging profession, playing an important role in large

projects (e.g. the rebuild of Christchurch after the earthquake), satisfaction from making a workplace a good place to be, a need to develop and use both hard and soft skills, opportunities in management and leadership, cross-organisational roles and influence, opportunities for innovative IT developments. They also acknowledged some of the challenges the industry faces in attracting high-calibre graduates, including the lack of an FM identity and confusion between building management and FM, and the lack of FM representation in the boardroom.

What will be the critical issues facing FM in NZ in 2020/2025?

This was considered by some to be the hardest topic, perhaps reflecting the day-to-day rather than long-term strategic focus of many FMs. This was acknowledged in a comment that FMs are often seen to be reactive not proactive. There is a need to learn from mistakes. Credibility was seen to be important to this discussion group, and formal qualifications were thought to be part of the solution to that. Other aspects were the ability to report direct to the CFO or COO. Some felt NZ was about 20 years behind other countries in the development of FM, and that legislation was also changing fast, leading to an urgent need for FMs to upskill and stay current. They also made the comment that the FM is no longer the janitor. Essential to the development of FM by 2025 is the ability to demonstrate to organisations how FM has and will continue to add value to the organisation; the FM must be able to anticipate and predict trends and prepare their organisation for those.

Discussion

Back in 2003, Alexander (2003, p. 269) warned that “the challenge to secure the future of facilities management as a credible discipline, vocation and business service is enormous.” He explains that the traditional business disciplines and professions will be unhappy to see their “traditional” positions of authority challenged by a newcomer and that FMs should be prepared for considerable conservatism, scepticism and even prejudice as they challenge for a seat at the top table. The feedback from the delegates is that there is an urgent need for specific FM education in NZ. However, where those modules would be located within the educational system is likely to be a source of considerable debate.

The other topic that was recognised by many delegates (despite their overwhelmingly technical backgrounds) is the importance of “soft” skills for FMs. Alexander (2003, p. 274) warns that:

We may find that organizations which have experimented with new policies to reduce space dependency will have to contend with increased staff disorientation. Intelligent buildings, with their ever-increasing complexity, will be shown to be much less manageable. (Alexander, 2003, p. 274)

This quote highlights that much of FM is to do with the impact of the physical environment on the users of facilities. Another way in which delegates were in agreement with Alexander (2003, p. 274) is where he warns that “contracting out will be seen to have reduced options and sacrificed long-term objectives for short-term gain”. One thing that delegates continually raised was the issue of recognition and a seat in the boardroom. This was seen as essential to avoid an attitude of short-termism. This issue of recognition is noted in the literature under the term “legitimacy”, and Leaman (1992, p. 20) argued:

Facilities management will ultimately gain its legitimacy from putting together within practical working situations obstinately dissimilar areas – management and design – and they too will be required to act in the public interest. This is the heart of professionalism – the socially-responsible implementation of practical areas of knowledge which are stubbornly hard to resolve. (Leaman, 1992, p. 20)

This complexity is referred to by Kok, Mobach, and Omta (2015, p. 154) when they say, “No matter where FM is situated within the organisation, it is embedded in a complex web of relationships.” FM, they argue should be a result of co-creation, and they even warn against a rush to sit at the top table. Instead, they suggest that, rather than being seen to be aligned with top management, FMs should aim to act as a communication channel between senior management and the users of the facility.

This research is clearly exploratory, and consisted of a group of highly-motivated and focused delegates with an in-depth operational knowledge of the FM industry in NZ. As a result, a wider survey might well produce

different results. However the world-café delegates who participated in this study in NZ seem to have raised many of the issues discussed in the FM literature in Europe over the past 20 years. This is helpful for educational establishments such as AUT and AIS who can therefore develop an offering which addresses the gaps between current practice and the professional competency framework FMANZ is building.

Recommendations for practice and further research

Practical changes recommended as a result of this study could include the importance to benchmark FM practices against those of markets where it is further developed. Some European organisations could provide the evidence of more effective workplaces, improved efficiencies and more satisfied internal and external customers, as well as sustainability developments and cost savings. Having this evidence available to NZ organisations considering an expansion of their FM operations could be very important in strategic decision-making. Successful FM career stories could encourage new recruits to the industry.

The creation of a suite of courses leading to certificates, diplomas, degrees or postgraduate qualifications is clearly felt to be important – what they should include and who should accredit or fund those will require further investigation. More exploration of the educational framework that FMANZ and AUT are developing is crucial for FM to add value to the NZ economy.

Given that this paper has suggested that the USA, Europe and NZ are at different stages of FM development, more work could also be done on exactly what those stages are and how NZ can move up that developmental ladder. There are many changes to FM and its educational needs across the world and researchers across the globe are investigating the relevance of FM in their own particular context. Adetoro, Oluwaseun and Ajayi (2016) investigated the attitudes of Nigerian FMs to the issue of benchmarking which is still struggling to gain acceptance there. Their reference to formal and informal benchmarking is insightful as it could be considered that that was exactly what was happening at the world café exercise which this study reported on, as is their observation about the lack of strategic vision in FM organisations.

An example of where FM can be shown to have taken such a strategic perspective is the study on reducing the carbon footprint of building by considering the lifetime energy use of a building from its design and construction, through its operation and even including its demolition (Dixit, Culp, Fernandez-Solis & Lavy, 2016). This study also included PhD research from NZ, so this is a very positive development for FM in this region.

Conclusions

Alexander (1992b) explains that academic qualifications and professional qualifications are both valuable, but they are different – one focuses on a body of knowledge, the other is evidence that the holder can apply this knowledge in the field. Alexander (1996, p. xvii) explains that, in setting up the Centre for Facilities Management at Strathclyde University in the UK, they wanted to offer a Masters programme in FM which was “industrially relevant and reflects the cutting edge practice in the field”. Alexander, (2003, p. 273) warns that “the facilities manager is, by definition, a hybrid manager.” What AUT is developing in association with FMANZ must do both of these. If this can be done in NZ and thereby create the capacity for education and research into FM and a sharing of best practice then, he argues:

The facilities management movement can be summarised as a belief in potential to improve processes by which workplaces can be managed to inspire people to give of their best, to support their effectiveness and ultimately to make a positive contribution to economic growth and organizational success. (Alexander, 2003, p. 270)

While NZ may not yet be where the USA and Europe are in terms of FM adding value to the organisation, it is suggested that with the collaboration of AUT and FMANZ it is getting there.

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