As more clients recognize the benefits of integrating facility planning with corporate strategic planning, architecture firms that have the appropriate skills can vastly expand their facility management services.

Facility management services can be defined to include many related functions, ranging from strategic planning and asset management to planning and design, construction management, operations, maintenance, and general administrative services. As client needs change, the potential for facility management services expands, offering significant new market opportunities for architecture firms that have or wish to develop the appropriate abilities.

**CLIENT NEEDS**

Most companies that own their buildings have facility management (FM) or corporate real estate (CRE) departments. Companies that lease space but retain responsibility for physical plant maintenance and operations are also likely to have an FM or CRE group. Because facility management involves such a broad range of functions, many companies outsource skills and expertise they do not have in-house. The most typical FM clients manage office or multiuse facilities.

In the past, client organizations were relatively stable, manufacturing the same product or providing the same service for twenty years or more. In that environment the role of the design and construction industry was to respond to change as it related to space. Facility management consulting services most often addressed planning new space or reconfiguring existing space, as well as tactical assistance with building operations and maintenance and general office services. Most companies viewed their facilities and their FM/CRE departments as an expense.

In the past 10 to 15 years business cycles have shortened, the pace of business has rapidly accelerated, and real estate values have cycled up and down dramatically. More clients have come to understand the need to manage their facilities as an asset or a means to an end. In-house facility managers are challenged to respond instantly to continual company change, whether it stems from innovation, restructuring, or reorganization.

In the current business environment, client organizations must manage change effectively through strategic facility planning. There is a growing need for FM services to help develop facility strategies that can contribute to the achievement of corporate objectives. As an example, the facility objectives of many organizations now include maximizing productivity and flexibility and attracting and retaining personnel, as well as minimizing operations expenses. Flexibility is particularly important, as it permits organizations to respond more efficiently and economically to future demands.

Many clients today are moving away from hiring a number of different consultants for short-term projects. Instead, they are seeking to lower costs and increase efficiency through long-term relationships with consultants who can help them manage their space over time. In this climate, architects have the opportunity to reestablish themselves as integrators and trusted advisors—roles they played in many companies before the...
demise of the corporate architect and the emergence of predominantly leased business space in the 1980s.

The market for consultants providing strategic facility planning as part of FM services has enormous potential for growth because of the value it can add to client organizations. Architects and architecture firms that offer such planning services will be in a good position to provide clients with related FM services, as they will have an unusually thorough understanding of clients’ needs. Related information management services can provide a client with continually updated data that assist in ongoing management decision making.

At the same time this new version of facility management is developing, the more traditional market for facility management services is continuing to expand. Opportunities abound for architecture firms offering real estate, building design and construction, building operations, maintenance, and general office services to clients that may or may not have made the transition to strategic FM practices.

Due to high rates of churn (movement of people over time), clients continue to have a strong need for work space planning and design, a forte of architecture and interior design consultants. The FM field traces its origins to the increased need for interior space planning that came with office automation in the early 1980s. Now the trend toward team-based work processes, and the fact that teams tend to shift with each new project, is driving office planning in many organizations. As one facility manager explained, “Our job is to make it as easy as possible to form teams.” According to a 1996 International Facility Management Association survey, other issues of client concern include ergonomics, sustainability, recycling, emergency response, telecommunications, smart buildings, and sick building syndrome.

Services to help a client minimize operating expenses continue to be of great

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**Providing Information Technology Services**

American corporations find that facility management and real estate costs are their second largest expense after personnel. As more clients recognize the benefits of integrating facility planning with corporate strategic planning, there is more call for facility management services that provide information technology support. An architecture firm that has employees with the right skills may be able to provide such services.

Strategic facility planning requires the ability to predict future space needs and costs and to relate projected facility costs to their impact on future profitability. Unfortunately, the information necessary to make such predictions is not readily available in most organizations, and when it is available, it is almost never integrated into a single, easily accessible database. In most organizations facility operations data are maintained separately from design and construction data, which in turn are separate from overall business finance information. Even if all the data are computerized and up-to-date, typically the databases are stored in different software formats and maintained by separate departments within the organization.

Advances such as open database connectivity (ODBC) and object linking and embedding (OLE) technologies make it possible to retrieve data in a relational environment, which greatly assists the integration of information previously stored in separate, vertically organized formats. For example, it is now possible to create a database in which the user can call up the floor plan for an office space and click on a piece of office equipment to retrieve information on the cost of the equipment, its age, and its depreciation rate.

Opportunities for consultants include provision of the initial service of integrating client data into an easily usable facility information system and provision of an ongoing data management service. In some instances the consultant’s services may include continuing data analysis support as well. However, in many organizations significant institutional barriers must be overcome and a certain level of trust achieved before consultants will be allowed to maintain proprietary information. Adequate security systems are essential.

Computer-aided facility management is evolving rapidly, and good decision-making software is currently on the market. Information storage and retrieval is the most significant challenge in the field at present, and the market will reward consultants who help their clients meet this challenge.
Benchmarking is a service provided by many FM consultants, including both business management and design consultants. Benchmarking evaluates people, processes, systems, and information flow and makes comparisons to industry benchmarks or to goals set by a particular client. For example, one firm moved its accounting department out of the headquarters complex when it found the cost of headquarters space was more than twice the industry benchmark for an accounting function. Many A/E firms provide building engineering services to help facility managers minimize maintenance and operations expenses. Because FM services are a high-value market, fees are often as high or higher than fees for traditional design services. Of course, this higher fee level attracts other service providers to the FM field, including accounting firms, real estate development firms, and others.

**SKILLS**

As is the case with many markets that offer new opportunities to use the skills of an architect, it is important to develop sound capability before offering a service for the first time. Be sure you can deliver a strong product. Team with more experienced providers if necessary.

In analyzing your own organization’s ability to provide FM services, consider the skills and background of available staff in relation to the specific tasks involved in the potential work. As the range of services broadens, there is a greater need for generalists who can develop facility planning strategies and manage the implementation process. This involves the ability to evaluate organizational and management situations, define constraints, and develop options for achieving stated objectives. Architects often develop the necessary organizational development and management skills through their experience in project or contract management or in interior or architectural design. In addition to architectural or other professional design training, a background in business administration, property management, and/or behavioral science is helpful.

Space planning expertise is always in demand for FM projects. Both architects and interior designers have a good background for the work. For the space programming tasks, consider use of junior-level generalists with good communications skills teamed with design professionals for interviewing tasks.

Benchmarking is a financial accounting or business management function and can be performed by any generalist. Indeed, design firms face competition from business man-
agement consulting firms in this area. Design firms can gain a competitive edge in this area by offering benchmarking data with more context and analysis.

Information technology services—including data capture, retrieval, analysis, and maintenance—are an emerging component of the FM field. Software programmers who can help integrate data into an information system the client can use for ongoing decision making are an enormous asset to the project team. Information technology skills are in high demand in today’s market, and this can be a challenging resource to develop and maintain.

Larger A/E firms may provide a range of building operations and maintenance or general office services to support the FM operations of their clients. In addition to architects and engineers, these services may require personnel skilled in strategic planning, market analysis, building assessment, site evaluation, asset (FF&E) evaluation, construction, office management, property management, and institution/hotel management.

**PROCESS**

The process involved in providing facility management services naturally depends on the specific service or group of services being provided. Much also depends on a client’s specific needs, organizational style, and competitive environment.

An approach to preparing a facility management plan would include the following: identification of goals and constraints, strategy development, management recommendations, and data capture.

**Goal identification.** A firm providing facility management services works with the client’s management team to develop overall goals for the strategic facility plan. The client’s mission and vision statements are connected with facility outcomes. For example, are the client’s physical facilities an important part of the corporate image program? Is exceptional employee health and comfort part of the organization’s human resources strategy? Is minimizing the operations budget a management priority?

**Constraints identification.** Goals analysis is translated into more quantified parameters, such as building and operations budgets, building performance limits, and so on. This often results in a document called a “needs analysis,” which carefully outlines the needed outcome and becomes the backbone of the scope document.

**Strategy development.** The consulting team develops specific facility strategies to achieve the goals within the constraints. For example, to develop strategies for managing interior office space, the team would perform interior space programming and planning.

The first step would be to determine the specific amounts and types of space needed in the client organization and the client’s space use patterns (such as rate of churn). The consultants would analyze potential trade-off options, for example, strategies for reducing the operations budget or increasing the efficiency of the work process.

Another step would be to identify the work style of the organization so that the space could be planned to facilitate the work process. For example, a current trend in many organizations is to develop interdisciplinary teams to carry out specific work requirements. To accommodate this arrangement, work space must be flexible so that team members can work in close proximity for the duration of a project and then perhaps reconfigure the space for another project. A team-based organization also needs comfortable meeting rooms, since many employees spend most of their working hours in group situations. Organizations with a more linear or hierarchical functional style may not require such levels of flexibility but rather may need more commodious individual workspaces. The design professional’s ability to generate creative options that meet the specific needs of an organization’s work style adds value to this phase of the work.

To develop more specific strategies for planning work space, in-depth interviews are conducted with division managers to determine precise space requirements. What is currently working well in the space? What doesn’t work? This information is translated into both qualitative and quantitative terms. For example, a division manager may report that workers are too crowded; an effort would be made to determine exactly how many additional workspaces are needed and what their size should be. The work style of the organization is taken into account as specific interior planning recommendations are developed.

**Management recommendations.** A facility management plan prepared for presentation to a client assembles and analyzes all of the information that has been gathered.
about space use in the organization and the options that would meet organizational needs. The plan also recommends facility strategies that can achieve corporate objectives at the same time they minimize cost and maximize flexibility. For example, a plan might recommend that the accounting function, which can be accomplished in a space that costs $8 to $10 per square foot, be relocated away from the headquarters office, where it currently occupies a space costing $21 a square foot. Another example might be an organization that is evolving from a linear work style toward a more team-based functional organization. In this case the plan might recommend a gradual transition toward office spaces with larger, more comfortable meeting rooms and movable partitions.

**Data capture.** One of the greatest values an FM consultant can offer to a client is the ability to capture and maintain a facility database that can continue to be used to evaluate strategic facility options. Analyses that in the past took months to perform can now be accomplished within a few minutes with FM software. To use this decision-making software (which involves what-if gaming strategy), a client must have an up-to-date database of its current space requirements.

An architecture firm offering facility management services can produce a database and obtain software for a client on a fee basis or offer to maintain the database and provide an analysis service for a monthly retainer. Not only does this arrangement provide a valuable service for the client, but it also establishes an ongoing working relationship between the client and the firm providing the service.
The AIA provides a contract document designed especially for these types of architectural services. The AIA suggests a two-part agreement:

**B102-2007, Standard Form of Agreement Between Owner and Architect without a Predefined Scope of Architect’s Services** provides terms and conditions only.

**B210-2007, Standard Form of Architect’s Services: Facility Support** provides the architect’s scope of services only.

Together they equal a complete owner-architect agreement.

AIA Document B210™–2007 focuses attention on providing the owner with means and measures to ensure the proper function and maintenance of the building and site after final completion. This scope provides a menu of choices of services, including initial existing condition surveys of the building and its systems, evaluation of operating costs, and code compliance reviews. B210–2007 is a scope of services document only and may not be used as a stand-alone owner/architect agreement. NOTE: B210–2007 replaces AIA Document B210™–2004 (expired May 31, 2009).

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