THE WORKPLACE MANAGEMENT FRAMEWORK

Version 2.0

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Document Control

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Draft version 2.0: revision of all sections to reflect hybrid and activity based working, the distributed workplace, data-led management, artificial intelligence, sustainability obligations and current standards. The ten management capabilities are retained unchanged.	November 2026

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1 PURPOSE

The purpose of this document is to define a Framework for the management of the workplace: 'The Workplace Management Framework' (WMF). The Framework provides a structure for the development, and subsequently the assessment, of best practice in the management of the workplace.

The Framework was first published in 2014. Since then the place of work has moved decisively beyond the office building, the functions responsible for the workplace have converged, and the means of measuring the workplace have changed from periodic observation to continuous data. This Version 2.0 retains the ten management capabilities defined in 2014, which have proved durable, and revises the content within them to reflect the world of 2026.

The purpose of the Framework is to:

- Define the management disciplines needed to deliver the effective workplace.
- Maximise the strategic and economic benefit of the workplace to organisations as a business tool.
- Establish the workplace as an instrument of organisational performance and of the attraction and retention of talent, and not only as a cost to be managed.
- Enable the development of best practice organisational and people capabilities for the management of the workplace.
- Communicate the management requirements needed to deliver the effective workplace to supply partners in a clear and unambiguous fashion.
- Measure the effectiveness of the organisation (internal and service partners) responsible for delivering the workplace.
- Communicate clearly the nature, purpose and structures associated with management of the workplace as a professional discipline to senior business leaders.
- Provide a common structure within which the Corporate Real Estate, Facilities Management, Human Resources, Information Technology and Workplace Strategy functions can unify their goals, their language and their measures.

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2 SCOPE

The WMF is designed to be applied to all types of workplace and embraces ‘high tech’ workplaces (including power stations, data centres and industrial premises) through to ‘high touch’ workplaces in which the support for the working activities of people is the primary purpose. In between these two extremes are workplaces such as hospitals, schools, universities and prisons, which are also embraced within the WMF.



In 2014 the ‘high touch’ end of the spectrum was described as offices, serviced offices, homes and people working on the move. In 2026 the home, the coworking or flexible-space centre, the client site and the places in between are no longer peripheral to the workplace: for most knowledge workers they constitute the majority of the places in which work is done. The scope of the WMF therefore embraces the whole distributed estate in which an organisation’s people work, whether or not the organisation owns, leases or directly operates it. The organisation’s duty of care, and its interest in the effectiveness of its people, extend to all of these places.

Traditionally the acquisition and management of the workplace has been predominantly the domain of the Real Estate and Facilities functions, being concerned primarily with the effective operation of buildings. As we move from ‘high tech’ workplaces to ‘high touch’ workplaces we see the role of ‘Workplace Management’ established as an integrator of contributions from across a number of disciplines (Real Estate, Facilities Management, IT, Human Resources, Risk, Security, Sustainability) to deliver an economic and effective ‘workplace experience’ to an organisation’s people wherever they work. The WMF is equally of value in achieving excellence in ‘high tech’ workplaces as it is in ‘high touch’ workplaces.

The Framework applies regardless of the operating model through which the workplace is provided. It applies where services are delivered in-house, where they are outsourced to single-service or integrated facilities management providers, and where part of the workplace is provided by a landlord, a flexible-space operator or a managed-office provider. In each case the management capabilities defined in this document are needed by the client organisation, whichever party performs the work.

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3 CRE, FM, IT, HR AND THE FRAMEWORK

The effective provision of the workplace requires close working between a number of functions including Corporate Real Estate, Facilities Management, Workplace Strategy, Security, Risk, Information Technology, Sustainability and Human Resources. Often these functions have their own drivers, languages and imperatives, but in order to provide the best value workplace for an organisation, these disciplines must find a unified set of goals linked tightly to the purpose and strategy of the businesses they serve. The WMF defines the capabilities needed to deliver effective workplaces regardless of the organisational units or supply partners that provide them.

Throughout this document we refer to ‘workplace leaders’ or ‘those with responsibility for the workplace’ often without referring to specific disciplines. This is deliberate: it is more important to define the management capability without linking it to a specific professional discipline. For completeness, however, we include the following definitions.

Corporate Real Estate

Corporate Real Estate functions are predominantly associated with the acquisition, management and disposal of the physical building asset and as such play an important part in acquiring and disposing of workplace ‘capacity’. Corporate Real Estate is the practice concerned with the planning, acquisition, management and administration of property on behalf of an organisation. Since 2014 the function has had to manage a portfolio whose demand is more variable and less predictable, and in which commitment to inflexible long-term assets carries a higher risk.

Facilities Management

Facilities Management organisations are largely focused on the delivery of environments and services at best cost, often through contracts, with a range of service providers each delivering a single service or a cluster of services. Facilities Management as it is defined today is mostly about providing services and managing and changing physical environments. ‘Facilities Management is the management of activities associated with the provision of services and environments to support the strategic purpose of the organisation.’ ISO 41001 defines the discipline as the organisational function that integrates people, place and process within the built environment with the purpose of improving the quality of life of people and the productivity of the core business.

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Workplace Strategy and Workplace Experience

Since 2014 a distinct function has become established in many organisations, variously named Workplace Strategy, Workplace Experience or Workplace. Its concern is the design of the workplace experience as a whole: the alignment of place, technology, services, policy and behaviour with the way the organisation's people work and the outcomes it requires of them. It draws on evidence from the organisation's own data and from the behavioural and cognitive sciences. In the terms of this Framework it is the function most directly associated with the Strategic Management and Client Relationship Management capabilities, and it is often the integrating function that the 2014 edition anticipated.

Human Resources and the Chief People Officer

The decisions that most shape the workplace in 2026, in particular the organisation's policy on where and when people work, are decisions about people before they are decisions about property. The Human Resources function, and the Chief People Officer where the role exists, is therefore a principal stakeholder in the management of the workplace and in many organisations holds the mandate for working policy. Workplace leaders who are not working closely with the people function will be managing supply without a clear view of the demand.

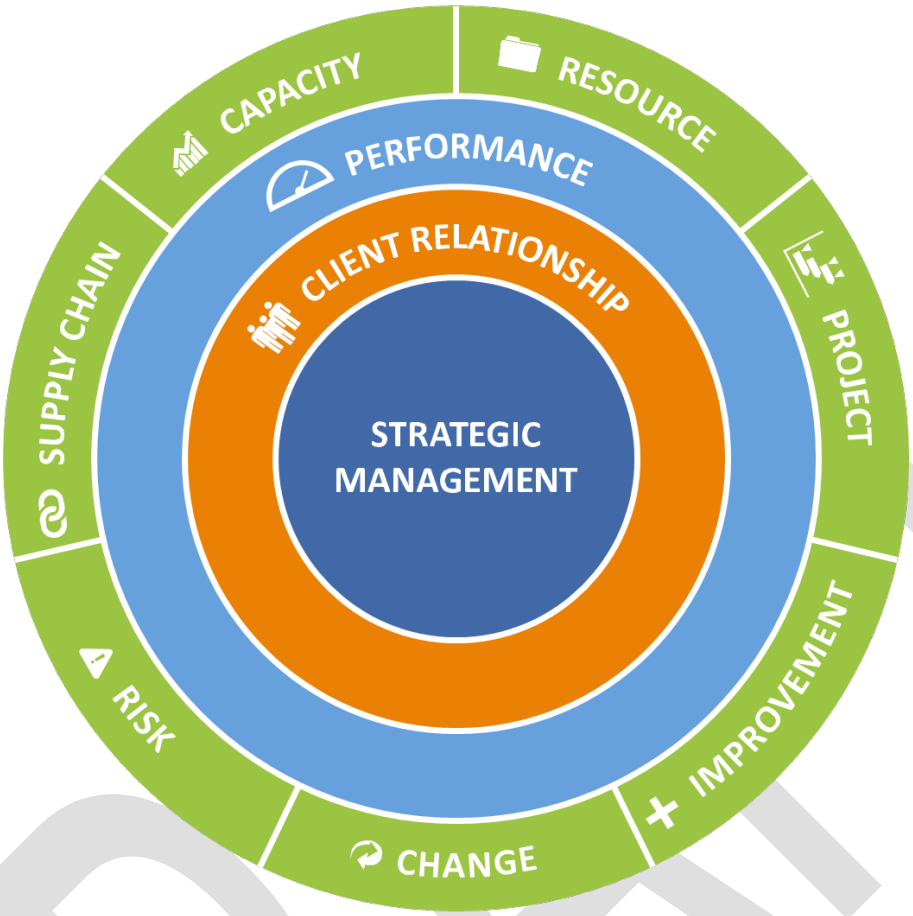
Landlords and flexible-space operators

A growing part of the workplace experience is delivered directly by parties outside the organisation: landlords offering managed amenities, building operating systems and shared facilities, and operators of coworking and flexible space. These parties are part of the supply of the workplace and must be governed as such (see Supply Chain Management).

Regardless of the procurement approach, bundling arrangements and operating model, there are some fundamental management disciplines that are needed to manage an effective service organisation and to ensure the alignment of its services and goals with the strategic purpose of the organisation. These capabilities demand expert knowledge, skills, processes and information which, if they exist, will ensure the effective running of the service organisation to achieve best value in the context of the organisation's strategic business drivers. This document defines these capabilities within the WMF.

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The Workplace Management Framework



We expect that the WMF will be of greatest value to leaders who are seeking to develop their organisations to achieve best practice in the management of the workplace. These may include:

- Facilities Managers and Directors
- Corporate Real Estate Managers and Directors
- Workplace Managers, Workplace Strategists and Heads of Workplace Experience
- HR, People, Risk, Security, Sustainability and IT Directors
- Procurers of facilities services
- Suppliers of facilities services, flexible space and workplace technology
- CRE, FM and Workplace consultants
- FM and Workplace training organisations and professional bodies

It is envisaged that the Framework will be used in a number of ways:

- As a vehicle for presenting the industry to business leaders in an enhanced professional and ‘business relevant’ light.

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- As a model against which to develop the capabilities of an organisation's Real Estate, Facilities Management and Workplace functions.
- As a tool for communicating management requirements to suppliers of outsourced contracts.
- As part of the specification for outsourced workplace services, and as the yardstick against which the supplier's performance is reviewed and assessed at regular intervals through the life of the contract.
- As a yardstick against which to measure the organisational capabilities that deliver an organisation's workplace.
- As a framework within which to develop management competences.
- As a framework that enables the unification of goals and objectives of CRE, FM, HR, IT, Risk, Security and Sustainability functions.
- As a framework within which to develop supply organisations' capabilities.
- As a basis for the assessment and accreditation of workplace management organisations.

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4 THE BENEFITS OF AN INDUSTRY ACCEPTED FRAMEWORK

The following benefits will be provided by the adoption of an accepted Framework:

- The conscious and demonstrable alignment of the day to day delivery of workplace experiences to the core purpose of the organisation.
- The ability to clearly communicate management requirements needed to deliver effective outcomes on a robust and continuous basis.
- The ability to demonstrate the effectiveness of the organisation(s) responsible for managing the workplace against an accepted framework and, consequently, to improve the strength of management capabilities.
- The ability to develop organisational and personal competences against an accepted framework.
- The enhanced professional standing of the Real Estate, Facilities Management and Workplace organisation as seen by core business leaders.
- A defensible, evidence-based basis for portfolio commitments in conditions where demand for the workplace is variable and uncertain. Decisions on leases, fit-outs and disposals are among the largest and least reversible an organisation makes; a Framework that requires them to be grounded in measured demand and scenario analysis protects the organisation from committing on assumption.
- A shared language between people, property and technology leaders at board level, so that the workplace can be discussed as one system with one set of measures rather than as the separate concerns of separate functions.

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5 USING THE FRAMEWORK TO TRANSITION TO ‘WORKPLACE MANAGEMENT’

As well as assisting organisations in building their organisational capabilities to achieve best practice in the management of their workplace, the Framework can also be used to enable a transition to a ‘Workplace Management’ model for ‘high touch’ workplaces, in which supporting the organisation’s people to deliver their best contribution in an economical fashion becomes the primary focus.

Workplace Management

This is how we define Workplace Management:

‘Workplace Management is the management of all resources needed to design and maintain appropriate, effective and economical workplace experiences that align to strategic business objectives and support people in doing their best work every day, wherever they are.’

The definition is unchanged from 2014. What has changed is the setting in which it applies. In 2014 the transition from Facilities Management to Workplace Management was anticipated. By 2026 it has, in most knowledge-based organisations, taken place: the office is one of several places in which work is done, the organisation’s policy on where and when people work is a matter of executive concern, and the question of what the office is for is asked openly. The Framework is now less a vehicle for persuading organisations to make the transition and more a structure for managing the workplace once the transition has been made.

The purpose of the high-touch workplace is cognitive performance

Organisations are ultimately the aggregate energy of large numbers of people harnessed together within structures and processes to deliver a defined outcome. Maximising the contribution of people in this endeavour is an increasingly important challenge for senior leaders in public and private organisations.

In the knowledge economy that contribution is predominantly cognitive. The work that creates value is thinking: analysing, deciding, designing, writing, negotiating, learning and collaborating. The workplace, in all the places it exists, is the environment within

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which this thinking is done. Its purpose, for high-touch organisations, is therefore to support the cognitive performance of the organisation's people: their capacity to concentrate, to recover, to collaborate and to sustain effective work over time. The evidence from neuroscience and from organisational research on the conditions that support cognitive performance (sleep, physical activity, light, noise, social connection, autonomy, and the management of attention) is now sufficient to be a design input to the workplace rather than an aspiration.

It follows that the primary role of all those involved in the delivery of services, technology and environments is to enable people to deliver their best contribution to their organisations every day, inspired by their experience, supported in their work endeavours and unencumbered by failures in services or systems.

From disparate services to the workplace experience

Facilities Management as a discipline embraces the management of a disparate set of operational services that individually support an organisation's buildings. Often the people involved in the delivery of these services do not recognise the linkage between their endeavours and the emphasis of management is on procurement, cost and delivery against discrete Service Level Agreements.

As organisations place a higher premium on maximising the contribution of their people, and as the place of professional work is no longer exclusively the office, the approach to supporting people must become more sophisticated and integrated, delivering carefully thought-through workplace 'experiences' in which the contribution of many players is harmonised to deliver a greater outcome.

Consequently, to maximise the contribution an organisation's people deliver, those managing the workplace need to think about joined-up 'workplace experiences' as opposed to disparate services. By considering the brand values, functional needs, demographics and the cognitive demands of the work it is possible to determine the requirements the workplace experience must meet in best supporting the organisation's strategic purpose.

The 'design' of the experience is achieved through collaboration with Marketing, Sustainability, IT, HR, Risk Management, Security, Business Continuity and external service providers. The scope of Workplace Management embraces the 'workplace experience' that would be appropriate in all the places people work (inside and outside office buildings) and embraces not only the practical issues associated with effective work, but also the emotional and sensory aspects. Workplace Managers need to think like leaders from the entertainment industry and design workplace experiences in the same way they would design a theme park or theatrical experience.

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Once an ‘experience’ has been defined and designed, an ‘experience centric’ set of Service Level Agreements and measurements need to be developed to ensure the ‘experience’ is delivered robustly every day and effectively monitored.

The economics of the hybrid workplace

None of this can be achieved without considering the economics of delivering the ‘experience’, and so consideration of the cost and the utilisation of assets and services must be included. The hybrid workplace has altered these economics in three ways:

1. Average utilisation of the office has fallen while peak utilisation on the most popular days has not fallen in proportion. The organisation pays for peak capacity and uses it for part of the week.
2. Demand has become more variable day to day and week to week, and is set at team level by local working patterns rather than at organisation level by a headcount.
3. Part of the cost of the workplace has transferred to the home and to third places, where it is less visible and less managed.

Linked to economic delivery we must consider business volatility as a strategic consideration, ensuring that the workplace portfolio is capable of changing with the lowest cost and levels of disruption to respond to (even unlikely) business change. The confluence of these ideas we define as ‘Workplace Management’, and the Framework helps to bring these elements together.

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6 COMPONENTS OF THE FRAMEWORK

The Framework consists of ten management capabilities and provides a vehicle for determining how well the organisation achieves best practice in the management of its workplace. The ten capabilities are unchanged from the 2014 edition. Performance Management sits at the centre of the model, as the capability through which the effectiveness of all the others is measured.



Four themes run across all ten capabilities in this edition and are not given chapters of their own:

- **The distributed workplace.** The home, flexible space and third places are treated as workplace supply, subject to the same capacity, resource, risk and change disciplines as the office.
- **Data and evidence.** Occupancy sensing, booking and access data, building system data and survey data are now continuously available. Each capability is expected to make its decisions from measured demand and measured outcomes rather than from assumption or periodic observation.

- **Artificial intelligence and automation.** AI changes the demand for the workplace, by changing headcount, roles and the nature of work; it changes the delivery of workplace services, through automated service desks, analytics and building operation; and it introduces new risks. Its effects are addressed within each capability rather than as a separate discipline.
- **Cognitive performance.** The high-touch workplace exists to support the thinking work of the organisation's people. The design of the experience, and the measures by which it is judged, are expected to reflect this.

STRATEGIC MANAGEMENT

This capability is concerned with the innovative alignment of the workplace with the core purpose of the organisation and the creation of the mechanisms by which the workplace and services are effectively and economically designed and delivered on a day to day basis. Its key question is constantly 'how can we continually enable our organisation to achieve its strategic purpose in the most effective manner?'

The principal outcomes of this capability:

- The effective alignment between the organisation's core purpose, business strategy, drivers and external environment and the acquisition, design and day to day delivery of the workplace and services.
- The conscious development and articulation of 'workplace experiences' that are designed to align to the organisation's culture, strategic objectives and the cognitive demands of its work.
- The effective strategic management of supply and demand of the workplace to enable the business's purpose to be achieved in the most economical fashion.
- The determination of the strategic business demand for the workplace and services that support the business strategies, across the office, the home and third places.
- A hybrid and activity based working policy that is set at executive level, grounded in evidence, and consistent with the organisation's purpose.
- A sustainability and net zero strategy for the workplace portfolio and a workplace technology strategy, each integrated with the property strategy.
- Securing the required investment.
- The provision of resources (people, space, services, technologies and information) to enable the organisation to achieve its strategic purpose, along with plans to exit or transition.
- The creation of an atmosphere and supporting processes that foster continual improvement and innovation in all aspects of the workplace provision.
- The recognition of those responsible for the workplace as professional contributors to the strategic success of the organisation.
- The development of the function against the Framework.

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CLIENT RELATIONSHIP MANAGEMENT

This capability is concerned with the development and maintenance of effective relationships with internal clients and consumers to gain an intimate knowledge of future plans, demand for the workplace and the proactive evolution of the workplace experience to deliver greater value at an economic cost.

The principal outcomes of this capability:

- To foster trusting and effective relationships with internal clients and consumers.
- To gain an intimate understanding of business units and teams and their likely demand for the workplace, including their working patterns.
- To pre-empt business changes and plan for their consequences.
- To develop a knowledge base for each consumer group, built from relationship, survey and system data, to enable proactive proposals for changes in workplace options and arrangements to be made.
- To determine business requirements for services that are immediate or short term in nature.
- To measure and act upon the experience of the organisation's people wherever they work.

PERFORMANCE MANAGEMENT

This capability is concerned with defining and measuring the performance needed from all parts of the Framework to enable the delivery of effective workplaces at an economical cost. It is also associated with setting up processes and mechanisms to ensure improvements in service.

The objectives of this capability:

- The development and administration of performance measurements that are practical, meaningful and outcome based to manage all aspects of workplace effectiveness and, in 'high touch' environments, the 'workplace experience' and its contribution to the performance of people.
- The measurement of utilisation, occupancy, energy and carbon by defined and consistent methods.
- The ability to interpret these results, drawn from systems rather than compiled by hand, in order to take corrective actions in the short term and improvements in the medium term.
- To share knowledge across the organisation and supply chain through feedback of performance and practices that enable continuous improvement in services and strategically in the workplace design.

SUPPLY CHAIN MANAGEMENT

This capability relates to best practices in the selection of suppliers, the governance of supply chain relationships, the management of contracts and the performance

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management of supplied services. The supply chain now includes flexible-space operators, landlords providing services, and the suppliers of workplace technology and data.

The objectives are:

- The development of open and honest relationships with all suppliers of services, space and technology.
- The alignment of services with the requirements of the business, including its social value and carbon obligations.
- The encouragement of rapid responses to change and innovation in supply.
- The retention by the client organisation of ownership of, and access to, the data generated in the delivery of its workplace.

CAPACITY MANAGEMENT

This capability is concerned with the provision of appropriate levels of capacity and commitments to the physical workplace, services and technologies needed to achieve the organisation's strategic purpose in the most economical manner.

The aim of this capability is:

- To maintain a precise understanding of the true capacity of the workplace, services and technologies to support the business, along with the constraints and factors that influence that capacity.
- To continually measure the level of consumption of the capacity, distinguishing average from peak demand and understanding its variability by team and by day.
- Through the development of a process, to use knowledge of consumption of capacity to improve the effectiveness and resilience of services and the workplace.
- To maintain an appropriate balance of the workplace 'supply' in relation to short and long term business needs and the levels of volatility of the business, using the full range of flexibility instruments now available.
- To enable effective decisions about commitments to future workplace capacity to be informed by an understanding of existing potential capacity, taking into account activity based working, hybrid working patterns and the effect of artificial intelligence on headcount and roles.

RESOURCE MANAGEMENT

This capability is concerned with the day to day management of resources needed to deliver effective workplaces. Resource Management covers physical assets but also the human resources, technologies and utilities that are consumed, in the office and in the distributed estate.

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The aim of this capability:

- To ensure that the organisation responsible for managing the workplace has the right number of suitably trained and motivated people to deliver the workplace and services.
- To ensure that best in class management techniques are deployed to ensure that people within organisations responsible for the workplace are inspired to deliver excellence in customer service.
- To form decisions based on evidence of actual consumption of services, space, systems and other resources, measured continuously.
- To enable short term changes in demand to be balanced against available capacity in the most cost effective and productive manner.
- To operate the workplace in a manner that achieves the organisation's energy, carbon and wider sustainability requirements.

IMPROVEMENT MANAGEMENT

This capability is concerned with improving the provision of services and environments through a culture of innovation, informed by the knowledge of the effectiveness of day to day services. It involves processes to capture, monitor and fix day to day failures in service and experience, and proactively and systematically to engage all people responsible for delivery of the workplace in seeking ways to improve the value of the workplace.

The aim of this capability is:

- To ensure failures in workplace environments, services and the 'workplace experience' are dealt with swiftly and economically.
- To create processes that proactively and systematically engage all people involved in the delivery of services to capture, develop and implement innovations in the provision and delivery of the workplace.
- To make sure that lessons are learned and remedial actions taken to eliminate the root causes of failure, using the service desk and experience data as the primary evidence.
- To ensure that learnings are captured and used in subsequent design, specification, training or delivery of the workplace.

RISK MANAGEMENT

This capability is concerned with best practices in assessing and managing risk, business continuity planning, workplace security (physical and cyber-physical), workplace health, safety and wellbeing, environmental management and the privacy and ethics of workplace data.

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The aim of this capability:

- To assess the risk of operational failure in relation to the strategic success of the business and to agree the appetite for risk.
- To reduce the likelihood of security incidents and failures in projects, services and the workplace, in the office and in the distributed estate.
- To reduce the impact of any of these aspects upon the business, its reputation and its people.
- To ensure that the data gathered in managing the workplace is held and used lawfully and in a manner that retains the trust of the organisation's people.

CHANGE MANAGEMENT

This capability is concerned with best practices in promoting, managing and supporting changes in the way in which the workplaces are used and managed.

The aim of this capability:

- To formulate strategies and processes needed to make effective changes to locations, space, technologies, systems, processes, behaviours, working patterns or services to improve the effectiveness of the business.
- To manage technically, behaviourally and politically complex change programmes, including transitions to and adjustments of hybrid and activity based working and the adoption of artificial intelligence in work.
- To put in place arrangements that will ensure the changes implemented are maintained and evolve.

PROJECT MANAGEMENT

This capability covers best practices and development of skills and processes that deal with the management of projects from 'inception' to 'business as usual'. It includes justification, governance, financial management, change management, implementation, completion and post project review.

The aim of this capability:

- To ensure processes and tools are in place to ensure the effective capture of programme needs and requirements, including carbon and reuse requirements.
- To ensure the appropriate processes, data flows and resources are in place to enable effective delivery of projects, whether by stage-gate or by iterative methods.
- To ensure suitably skilled resources are maintained to ensure the effective management of projects.
- To ensure that the outcomes of projects are evaluated against measured data once in occupation.

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Each of the following chapters expands on the capabilities defined in this section along with what we believe represents the best practices known at this time.

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7 STRATEGIC MANAGEMENT



STRATEGIC MANAGEMENT

Definition for this Framework

Strategic Management is concerned with the innovative alignment of workplace assets and services with the core purpose of the organisation and the creation of the mechanisms by which the workplace and services are effectively and economically designed and delivered on a day to day basis.

Summary

The main goal of Strategic Management is to align the workplace assets and service management strategies with those of the main business. Its principal purpose is to put in place formal and informal processes to engage with the senior business executive to solicit their support and to ensure that the benefits of workplace innovations are exploited throughout the business. It is further responsible for growing the professionalism of those internally responsible for interpreting business requirements into service needs and ensuring those needs are met. In 2026 it carries three additional responsibilities: the organisation's policy on where and when people work; the sustainability and net zero strategy for the portfolio; and the strategy for the workplace technology stack.

Best Practice

- A documented and published Workplace Mission or Vision Statement that has been developed and agreed in conjunction with the Executive and made public to the organisation as a whole.
- A Workplace Strategy covering present and future needs and expectations from all stakeholders, including suppliers and internal customers, and covering the office, the home and third places.
- A Workplace Strategy based upon the 'experience' design along with headcount demand projections, measured utilisation, knowledge of supply, business outlook, the anticipated effect of artificial intelligence on roles and headcount, and future trends in working, produced and presented to Executive Management at regular intervals.
- A hybrid and activity based working policy, agreed at executive level with the people function, that states the organisation's intent and the evidence on which it rests.
- The Workplace Strategy is reviewed with other infrastructure support functions such as IT and HR on at least an annual basis for implications of new ways of working, workplace technology and the adoption of AI.
- A sustainability and net zero strategy for the workplace portfolio, with carbon and energy targets, reporting obligations and the retrofit versus relocation question addressed explicitly.
- Active continuous professional development programmes in place to ensure that staff understand how the world of the workplace is changing and to develop their knowledge base and experience across the broad dimensions of CRE, FM and Workplace, including data, behavioural science and AI literacy.
- Service and experience performance measurement that encapsulates users' total experience of their working surroundings.

Outputs

Strategic

- Well publicised Workplace vision statement.
- Workplace Strategy endorsed by senior business executives.
- Hybrid and activity based working policy endorsed by the Executive and the people function.
- Sustainability and net zero strategy for

Delivery

- Strategic plans supporting the Workplace Strategy are produced and acted upon.
- Service Level Agreements and Experience Level Agreements for all the services provided to business clients.
- Performance of workplaces and services meets the requirements of the business.
- Quality of service and experience shows

the portfolio. ▪ Workplace technology strategy. ▪ A quality improvement process in place. ▪ Processes in place that improve overall professionalism and encourage innovation.	positive trends. ▪ Professional development plans are agreed with internal staff and completed.
Other sources	
ISO 41001 Facility management	Management systems — Requirements with guidance for use
ISO 41014 Facility management	Development of a facility management strategy
ISO 41018 Facility management	Development of a facility management policy
IWFM Professional Standards	
RICS Strategic Facility Management professional standard	

7.1 Strategic alignment

In general, the greatest challenge that leaders with responsibility for the workplace face is gaining access to business leaders and encouraging them to share their thinking on the strategies for their areas of the organisation. The uncertainty of what the future holds, coupled with commercial sensitivity, means that useful information seldom emerges from the boardroom. That said, many business leaders would not recognise the strategic nature of those with responsibility for managing the workplace and could be forgiven for excluding them from the inner circle of trusted internal advisers.

The position has improved since 2014. The question of where and when people work is now a standing item of executive and board concern, and workplace leaders who can bring evidence to that question are being heard. The opportunity should not be wasted on anecdote.

So to be successful, leaders responsible for the workplace need to actively work to be, and be seen to be, credible, confident business contributors, knowledgeable about the organisation at large, the wider strategy for the business and the most up to date trends in people management, technology, engineering, service management and innovation. They must be able to make the links between all these factors to the benefit of the business, almost to the point of being able to pre-empt changes in the business and ensure that workplace capacity and commitments are flexible enough to cope with a variety of upside and downside changes.

Best practices include:

- Become knowledgeable as a business leader by undertaking secondments to parts of the business to learn what really happens, do regular background industry reading, read business journals and newspapers. Be a business leader first and a workplace leader second.

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- Working with Marketing, HR and business leaders to design and develop workplace ‘experiences’ that align to the organisation’s strategic objectives.
- Development of a Workplace Strategy which includes the acquisition and disposal of property that recognises a variety of business assumptions and scenarios and enables the organisation to inflate or deflate without cost or disruption.
- Bringing measured evidence (utilisation, experience, cost and carbon) to executive discussions of working policy, and declining to make commitments on the basis of assumption.
- Publish, communicate, promote and seek buy-in to the strategy and demonstrate how it contributes value to the business.
- Seek ways to get to know senior business leaders. These can be associated with business or extra-work activities. Being accepted as a business leader is predominantly not a knowledge or technical issue; it is an interpersonal issue.

7.2 Innovation

To continually increase the value of the organisation responsible for delivering the workplace to the wider enterprise, it is important (as with any function within any business) to create and maintain an environment in which innovation is fostered and delivered, along with processes for its proactive stimulation. Innovation is primarily about releasing every person within the functions responsible for the workplace to think creatively and come forward with new ways of delivering more value to the enterprise in relation to its business strategy and needs. This may, for instance, be in creating better experiences for people to assist in recruitment or retention, doing things more efficiently and cost effectively, finding better ways to use space, or applying new technology to service delivery.

In order to deliver innovation, leaders involved in delivering the workplace need, through their words, behaviours and actions, to:

- Inspire Curiosity: encourage employees to expand their understanding of both internal and external stakeholders: who they are, how they are interdependent, and the unique contexts in which each one operates.
- Challenge Current Perspectives: help employees view problems and opportunities differently and envision alternative possibilities.
- Create Freedom: empower experimentation, risk taking, learning from mistakes, and valuing effort over perfection.
- Drive Discipline: help employees identify execution implications early and often and align efforts to ensure successful implementation of innovative solutions.
- Create time and processes: develop processes to capture innovative ideas and give people time and techniques to think laterally about innovative improvements.
- Develop partnerships with suppliers that encourage innovation through removing contractual obstacles and developing supportive governance processes.

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- Pilot before committing: use measured pilots of new space types, services and technologies, with defined success criteria, so that innovation is adopted on evidence.

7.3 Hybrid Working and Activity Based Working

The 2014 edition of this Framework addressed 'Agile Working' as an emerging practice enabled by mobile technology. Since 2020 the practice has become general. Most knowledge-based organisations now operate some form of hybrid working, in which people divide their working time between the office, the home and other places. The design of this arrangement is among the most consequential decisions an organisation makes about its workplace, its culture and its cost base, and it belongs within Strategic Management.

Two related but distinct concepts are used in this Framework:

Hybrid Working describes the division of working time between locations: where people work, on which days, and under what policy. It is a matter of working policy, set with the people function, and it determines the demand for the office.

Activity Based Working describes the provision, within the office, of a range of work settings designed for different activities (concentrated individual work, collaboration, meetings, learning, social connection, recovery), with people choosing the setting that fits the task rather than being allocated a single desk. It is a matter of workplace design and operation, and it determines how the office supply is configured. Activity based working is the means by which mobile working within the office is made effective: it is the design response to the fact that people are not at one desk all day, and it is the design that allows a shared office to serve a hybrid population without either waste or shortage.

The two are complementary. A hybrid working policy without activity based working produces an office of empty allocated desks; activity based working without a clear hybrid policy produces an office whose demand cannot be planned. Both must be grounded in an understanding of the activities the organisation's people perform and the cognitive demands of those activities.

Best practices include:

- Setting hybrid working policy at executive level with the people function, stating the organisation's intent (for example, the purposes for which people are expected to be together) rather than only a number of days, and grounding the policy in the organisation's own evidence on productivity, engagement, collaboration and retention.
- Treating working patterns as a team-level matter within the organisation-level policy, since the demand for the office is created by teams deciding when to meet, and providing team leaders with guidance and tools for agreeing team charters.

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- Designing the office on activity based principles, with the mix of settings derived from analysis of the activities performed and the measured use of existing settings, and reviewed as patterns change.
- The conscious consideration of forthcoming lease events as opportunities to reconfigure accommodation on hybrid and activity based principles.
- A Workplace Steering Group involving all stakeholders associated with bringing about or adjusting a transition in workplace, technology, process and behaviour, with the people function as a principal member.
- Close working with HR to create policies that cover the requirements of hybrid working, remote workers, the home as a workplace, and an effective employee proposition.
- Developing with HR methodologies for assessing the suitability of roles, teams and tasks for remote and in-person working, based on the nature of the work rather than on seniority or precedent.
- Developing close relationships with IT to provide an infrastructure that supports effective individual and team working anywhere, with meeting rooms and collaboration technology designed for mixed in-person and remote participation.
- Measuring the effect of the working policy on utilisation, experience, collaboration and performance, and adjusting it on the evidence.

7.4 Scenario Planning

Because of the long term nature of financial commitments to the workplace, either through leaseholds or freeholds, and the inherently inflexible nature of buildings, it is important to recognise that whatever the business conditions and requirements are at the time of building acquisition, they will not remain the same for long. Whilst in many cases senior business leaders may not be comfortable with discussing upside and (particularly) downside business scenarios in planning the workplace portfolio, leaders responsible for the workplace need to consider a variety of potential scenarios.

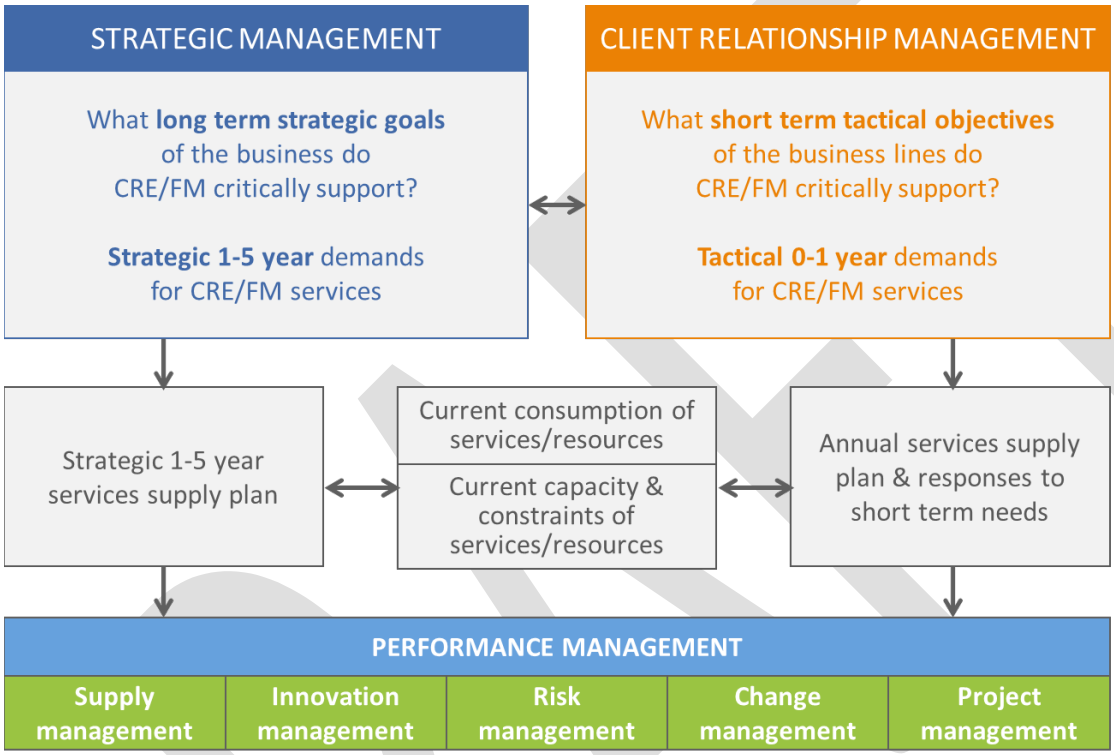
These scenarios may include increases or reductions in headcount, changes in organisational structure, and the withdrawal from certain locations. Two scenario variables have become prominent since 2014:

- **The effect of artificial intelligence on headcount and roles.** AI is changing the volume and nature of work in most knowledge-based functions. The direction and scale of its effect on headcount, on the mix of roles, and on the activities people perform in the office is uncertain and differs by function. Workplace scenarios should include a range of AI adoption outcomes and should not assume that headcount, and therefore demand, will follow historic trends.
- **Variability of demand under hybrid working.** Demand for the office is now a distribution rather than a number. Scenarios should model changes in working policy, in team patterns and in the balance between peak and average demand, and should test the portfolio against each.

Scenario planning is an important tool in planning the future workplace. Whilst it may not be possible to accurately forecast the future, it is definitely the case that from a

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workplace perspective as much as possible needs to be done to prepare for a variety of futures. The linkage of this aspect with the Capacity Management capability (described later) is vital, so that planning is based upon a true understanding of latent capacity in the existing estate and the available capacity and its capabilities. This will enable more sophisticated decisions to be made about the need for further commitments to inherently inflexible buildings and services.



7.5 Financial Management

Understanding budgets and managing departmental costs are skills that are shared with many management functions, but the use of financial tools in supporting change and underpinning strategy is particularly critical for leaders managing the workplace in order to effectively compete for corporate funding. Many difficulties exist in the way in which lines for cost are set in departmental accounts which make it complex to compare costs on a transaction basis. Benchmarking requires that the costs of each service can be separated by location and department. To analyse costs and to be able to create cost models at this level of detail needs skills of financial analysis over and above normal accounting practice.

Best practices include:

- Comparing costs of workplace services through benchmarking, internally and externally, to ensure a best in class cost and service level.
- Expressing cost per person and per attendance as well as per square metre, since under hybrid working the cost of the office per use has risen even where total cost has fallen.

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- Identifying the lifetime costs and the lifetime carbon of workplace assets to develop appropriate maintenance regimes which contribute to design trade-off decisions in the early stages of providing new facilities.
- Seeking to get agreement to a chargeback system to allocate costs fairly and motivate leaders to make best use of the organisation's workplace assets.
- Accounting for the costs that have transferred to the home and to third places, so that the full cost of the workplace is visible.
- Ensuring that Financial Management and analysis skills are a distinct part of the skills inventory for leaders managing the workplace.

7.6 Designing the Workplace Experience

Where the organisation is at the 'high touch' end of the workplace spectrum described earlier, in which the workplace's purpose is to proactively support the organisation's people in achieving their best contribution every day, careful consideration needs to be given to the design of the 'workplace experience' constructed from all the interlocking services that are provided.

'To design an experience you need to think through, second by second, the fusion of sounds, sights, information, web pages, smells, spaces, images, interactions, human behaviours and processes to create an experience that is both effective, energising



and which subtly reinforces brand values.' Ref: The Kinetic Organisation.

The 'Experience Tunnel'

(Mawson)

The idea of an 'Experience Tunnel' represents the individual's perceptions of their environment minute by minute through a working day in relation to all of their senses. Through this approach, we can define the feelings and experiences we would wish people to have throughout their working day and construct a 'workplace experience' which delivers these experiences. For example, on arrival at a building our sense of the organisation will be governed by the type of materials and colours used, the sounds, smells, behaviours and processes we experience. In 2026 the tunnel does not begin at the building: it begins with the decision to travel, the booking of a space, the journey, and continues into the digital environment through which most of the day's work is done.

Designing for cognitive performance

The experience should be designed from the evidence on what supports the cognitive performance of the people doing the work. The conditions are known: light, air quality, acoustics and thermal comfort within defined ranges; the availability of settings for undisturbed concentration and for recovery as well as for collaboration; the management of interruption and of the attention demands of digital tools; and the social connection on which collaboration and wellbeing depend. These conditions can be specified, measured and included in Experience Level Agreements. Where the organisation has adopted a measure of cognitive performance or wellbeing, the workplace experience should be designed to improve it.

These experiences can be reflected in Service Level (Experience Level) Agreements which cover the effectiveness of the integration of spaces, services, technologies, processes and behaviours, often delivered by different internal departments and external suppliers.

SLAs help each service provider to know what is expected and how the outcomes will be measured, to derive accurate prices. Incorporating ‘experience’ requirements into SLAs, and subsequently managing expectations, requires close working with internal clients and with suppliers to result in cost effective, achievable and satisfactory expected service outcomes.

Hybrid and activity based working open up changes in the type and nature of services that prior experience may not necessarily provide. It is therefore essential that the process of determining new SLAs is done collaboratively, involving internal core clients, user groups and suppliers, and that they are reviewed regularly to capture points of learning that emerge. Often SLAs contain penalties and incentives which can result in a lack of attention to managing service performance. In times of change, however, active management and collaboration on services is a necessity. The SLA should be what the acronym says: an ‘Agreement’, not an unyielding statement.

7.7 Design for change and serviceability

The workplace and services represent some of an organisation’s longest term commitments. Whilst the design of a facility or a service may take several months, the operation of the facility is likely to take place over many years. Whilst the initial investment in design and delivery of the workplace is significant, the lifetime running costs of a facility usually dwarf the up-front costs. So it is important that the serviceability of the facility is at the forefront of the design team’s thinking during the design process.

Further, during the life of a facility, many facets of the organisation and the way it works will change, driven by economic need. Changes in its market, changes in technology,

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processes and new cultural norms need to be recognised. The period since 2014 has demonstrated that the use of a building can change fundamentally within its first lease term. It is vital that in the process of designing a facility and supporting services these factors are considered within the design.

Consequently, the workplace, services and technologies must be designed for effective operation, servicing and change. To this end all processes and activities associated with the design of new services, technologies and the workplace should involve life cycle costing, life cycle carbon assessment, and an active contribution from workplace leaders with knowledge of and responsibility for the day to day operation of the workplace. Design for change includes designing for reconfiguration without major works, for reuse of components, and for the measured monitoring of the building once in use.

7.8 Developing new skills

It is clear that the role of leaders responsible for the workplace has changed significantly since 2014 and will continue to do so. New skills are required for those who act as the link between supply delivery and internal clients. Change requires skills of consultancy and the ability to design experiences and help users transition their workplace behaviour. The ongoing development of people and organisational competences is critical to the continual enhancement of value from the organisation responsible for the workplace.

The skills inventory for workplace leaders now includes, in addition to the technical and service management competences described in the professional standards:

- **Data literacy**: the ability to specify, obtain, interpret and present utilisation, experience, cost and carbon data, and to distinguish a real change from random variation.
- **Behavioural science**: an understanding of how people respond to environment, policy and change, sufficient to design interventions and to evaluate them.
- **Change leadership**: the capacity to lead politically and behaviourally complex programmes across functions.
- **AI literacy**: an understanding of what artificial intelligence can and cannot do in work and in workplace services, sufficient to specify its use, to govern it, and to anticipate its effect on demand.
- **Sustainability**: a working knowledge of carbon accounting, energy performance and the reporting obligations that bear on the portfolio.

Best practices include:

- The development of effective leadership skills needed to manage a service organisation covering items within this Framework.

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- The creation of a competency framework for staff involved in managing the workplace that links the strategic purpose of the organisation to the skills and capabilities needed to deliver the workplace and services needed by the organisation.
- The creation of succession plans for the key members of leaders and teams managing the workplace.
- The creation of continuous professional development programmes to ensure people understand how the world of the workplace is changing and to develop their knowledge base and experience across the broad dimension of workplace management.
- The creation of a Recognition Scheme which recognises personal staff contributions to quality and service.
- The encouragement of professional development of staff and those of suppliers by becoming accredited with professional bodies associated with the management of the workplace.

7.9 Sustainability and Net Zero Strategy

The workplace portfolio is, for most organisations, the largest source of their operational carbon and a material element of their reported environmental performance. Reporting obligations (in the United Kingdom through streamlined energy and carbon reporting and the TCFD-aligned disclosures required of larger companies; in the European Union through the Corporate Sustainability Reporting Directive; and internationally through the ISSB standards) have made the energy and carbon performance of buildings a matter of board accountability. Occupiers also face regulatory minimum standards for the energy performance of the buildings they lease, and investors and employees increasingly judge the organisation on its performance.

Sustainability is therefore a strategic driver of the portfolio and not an operational matter alone. Decisions on whether to retrofit or relocate, on the length of commitment to a building, on the specification of fit-outs and on the operation of the building day to day all carry carbon consequences that must be weighed with cost and experience.

Best practices include:

- A sustainability and net zero strategy for the workplace portfolio, with targets, dates and a published pathway, aligned to the organisation's corporate commitments.
- The inclusion of operational and embodied carbon as criteria in all acquisition, disposal, retrofit and fit-out decisions, alongside cost and experience.
- The measurement of energy and carbon intensity per square metre and per person, reported through the Performance Management capability.
- The operation of buildings according to measured demand, so that energy is not consumed in serving space that is not in use.
- The inclusion of supplier carbon (Scope 3) and social value in supply chain governance.

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- The use of recognised building performance ratings and certifications (such as NABERS UK, BREEAM In-Use, LEED and WELL) where they support the strategy, without treating certification as a substitute for measured performance.

7.10 Workplace Technology Strategy

The workplace is now operated through a technology stack: space and desk booking, occupancy sensing, access control, visitor management, building management and energy systems, integrated workplace management systems, collaboration and meeting technology, the service desk, and the analytics that draw on all of these. This stack determines what the organisation can know about its workplace and how its people experience it. It is a strategic asset and must be planned with the same care as the property.

Best practices include:

- A workplace technology strategy, agreed with IT, that sets out the systems required, their integration, the data they will produce and who owns it.
- Data ownership, interoperability and open interfaces as requirements of all technology procurement, so that the organisation is not dependent on a single supplier for access to its own data.
- The integration of workplace data (booking, sensing, access, service desk, survey) into a single analytical view that serves Capacity, Resource, Performance and Client Relationship Management.
- The governance of workplace data for privacy and ethics (see Risk Management).
- The use of artificial intelligence within the stack, for analytics, forecasting, service desk triage and building operation, under defined governance and with human accountability for decisions.
- Pilots and staged adoption of new technology, with measured outcomes, before portfolio-wide deployment.

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8 CLIENT RELATIONSHIP MANAGEMENT



CLIENT RELATIONSHIP MANAGEMENT

Definition for this Framework

Develops and maintains effective relationships with internal clients and consumers to gain an intimate knowledge of future plans and demand for the workplace assets and services. Provides proactive advice for the evolution of the workplace experience to deliver greater value at an economic cost.

Summary

The main objective of Client Relationship Management is to act as a communication bridge between internal businesses and consumer groups and the suppliers of the workplace assets and services. The role requires excellent communication skills and processes as well as wide experience of the technicalities of the services provided. The focus is shorter term than Strategic Management, more concerned with meeting existing requirements and supporting changes within the 0–1 year period. It includes a degree of change management consultancy supporting newer ways of working where appropriate. Under hybrid working the demand for the workplace is set at team level, and Client Relationship Management must therefore reach the team leaders whose decisions create that demand.

Best Practice

- Regular formal reviews with client user department management are used as input to strategic plans, to modify existing plans and identify new projects and requirements.
- Service Level Agreements for individual user departments take into account differing requirements wherever possible.
- Regular surveys carried out on all services used by occupants of the workplaces in order to gauge perceptions and satisfaction, supplemented by continuous experience measurement.
- Engagement with team leaders on their teams' working patterns and the settings their work requires.
- A communication plan for promulgating plans, successes and initiatives to the wider organisation's workforce.
- Performance of services and quality improvement plans are reviewed regularly with client groups.
- Post occupancy reviews are held at the end of major move or change projects, using measured data.

Outputs

Strategic

- A regularly updated forecast of business units' or consumer groups' likely demand for workplace assets and services in the immediate or short term, including their expected attendance patterns.
- A knowledge base for each consumer group, combining relationship intelligence, survey results and system data, to enable proactive proposals for changes in workplace options and arrangements to be made.
- Detailed knowledge of the requirements of consuming groups is taken into account in drawing up overall strategic plans.

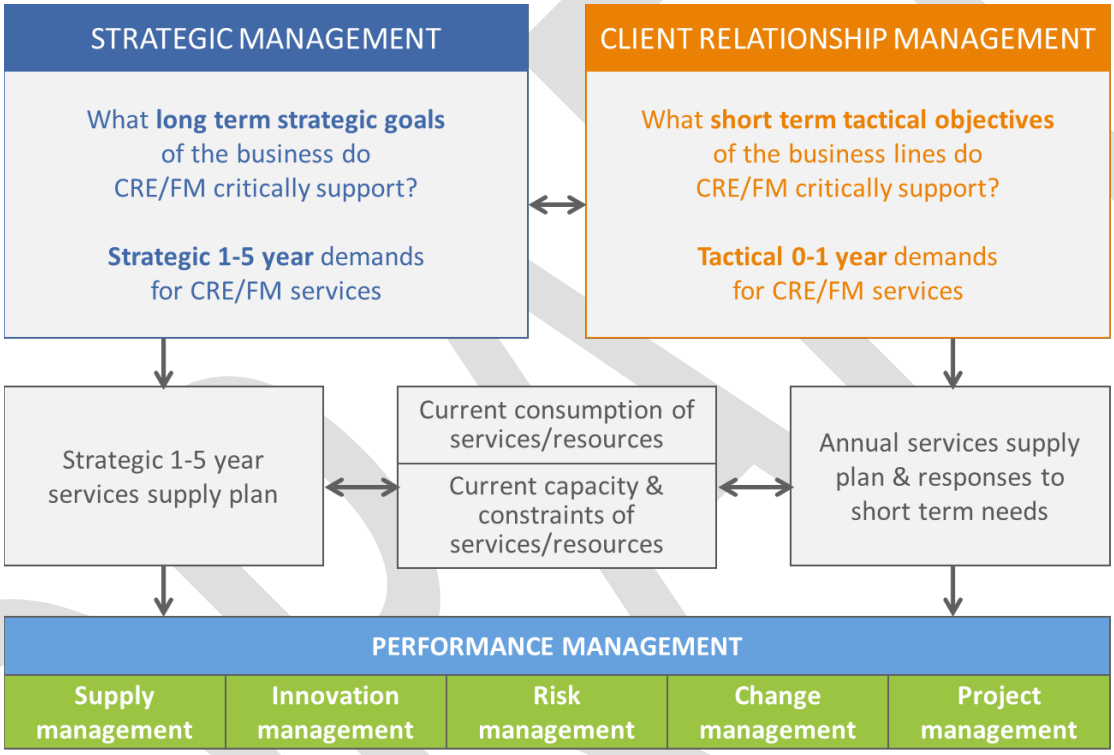
Delivery

- Services provided conform to the workplace strategies and policies.
- Performance of all workplace services used by each business unit or consumer group.
- SLAs and Experience Level Agreements reflect accurately the requirements of the consumers of services and the strategic requirements of the organisation.
- Quality improvement plans deal with the issues raised by the consumers of the services.
- Projects and changes involving consumers are dealt with efficiently and effectively and with the collaboration of other infrastructure

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	suppliers such as IT.
Other sources	
IWFM Professional Standards	
ISO 41001 Facility management	Management systems

Client Relationship Management recognises two parties and must interface with both effectively to achieve success. The first are the 'clients', the senior leaders whose businesses pay for services and space (directly or indirectly). The second party are the 'consumers', the people who use the services, environments and experiences each day. Under hybrid working a third level has become important: the team leaders who, within the organisation's policy, determine when their teams come together and therefore when and how the workplace is used.



Leaders responsible for the workplace hold a key role in bridging the needs of the business units and the service providers. In times of change this role consists of building close working relationships, interpreting needs, challenging wants, designing solutions and planning implementations. It requires knowledge of the business units' objectives, their people and their working practices. It goes well beyond the communication of change involved in responding to requirements for internal desk moves and problem resolution. These are, of course, important but the role should encompass more of a consultancy approach, acting as advisor to the business on design and services which can improve business performance. This will require the Client Relationship Manager to have a good understanding of the nature of the work being done and the skill and experience to see how workplace changes can impact people's productivity.

The interpretation of business needs and development of immediate and short term demands for workplaces and services represent an important role for the Client Relationship Manager. The role encompasses day to day interaction with internal business clients and with those responsible for delivery of services. Often this role is viewed by the service providers as the 'intelligent client'.

Best practices include:

- The appointment of Client Relationship Managers that have the necessary authority and skills to build excellent relationships and who can make decisions on the basis of their understanding of their clients' needs.
- The active development of Client Relationship Plans for all major departments and geographies which take into account the special needs of those units.
- Client Relationship Managers becoming 'agenda setters' who proactively engage their clients with new ideas, points of view and value-added suggestions.
- The development of practices that encourage leaders responsible for the workplace to engage with the business through assignments, secondments and career development.
- The implementation of active processes designed to collect data on the satisfaction of 'workplace experiences' which are used to drive changes.
- The training of workplace leaders in the latest standards of Client Relationship practices.

8.1 Employee experience measurement

The periodic satisfaction survey remains useful but is no longer sufficient. Organisations now have access to continuous measures of experience: short pulse surveys, experience indices administered at regular intervals, feedback captured at the point of use (on leaving a meeting room, on closing a service request), and the text of service desk requests and survey comments, which can be analysed at scale. These measures should be treated as a formal input to Client Relationship Management alongside the structured reviews with client management.

Best practices include:

- An experience measurement programme covering the office, the home and third places, with a stable core of questions so that trends can be read over time.
- Measurement at the point of use where it is practical, so that the experience of a specific setting or service can be linked to the setting itself.
- Analysis of free text from surveys and service desk records, using AI tools where appropriate, to identify recurring themes.
- Reporting of experience results to client groups alongside service performance, and the inclusion of experience measures in Experience Level Agreements.
- Comparison of experience results with external benchmarks where they exist.

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8.2 Team-level engagement

Hybrid working has moved the determination of demand from the organisation to the team. The organisation sets policy; the team decides when it will be together and what it will do when it is. The Client Relationship Manager must therefore work with team leaders as well as with business unit heads.

Best practices include:

- Providing team leaders with guidance and simple tools for agreeing team working patterns ('team charters') within the organisation's policy, covering when the team meets, for what purposes, and what it expects of its members.
- Gathering team patterns, by survey or from booking data, so that demand can be forecast at the level at which it is created.
- Advising teams on the settings and technology their activities require, and ensuring that the office provides them.
- Identifying teams whose patterns conflict with the available supply (for example several large teams choosing the same day) and negotiating adjustments before shortage occurs.

8.3 Pre-empting demand with analytics

The knowledge base for each consumer group, described in 2014 as a product of relationship, can now be built in part from systems. Booking, access and sensing data show how each group uses the workplace; the people system shows its headcount, growth and role mix; survey data shows its experience. Combined, these allow the Client Relationship Manager to anticipate changes in demand before they are raised.

Best practices include:

- A consolidated view, for each business unit and major team, of headcount, attendance pattern, space use, service use and experience results.
- Routine review of this view with the client, so that the conversation starts from shared evidence.
- The use of forecasting models, including AI-assisted models where the data supports them, to project each group's demand under its expected growth and working pattern.
- Clear governance over the use of individual-level data in this analysis (see Risk Management).

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9 PERFORMANCE MANAGEMENT



PERFORMANCE MANAGEMENT

Definition for this Framework

Performance Management enables the measurement of the effectiveness of operational delivery and the implementation of quality improvement plans.

Summary

The most important part of Performance Management is the use of the results data to enable the engagement of all parties to achieve the desired outcomes and to drive improvement. However, performance measures are often misinterpreted and the wrong things are measured against poorly defined objectives and outcomes, leading to wasted time and effort. The availability of continuous data has increased the volume of measurement but has not reduced this risk; the discipline of choosing the right measures is more important, not less.

Best Practice

- Clear Service Level Agreements and Experience Level Agreements against which KPIs are set.
- SLAs and KPIs are aligned as closely as possible to the business's strategic goals.
- KPIs chosen on the basis of measuring desired outcomes as opposed to ease of accessing data.
- A balance of service, experience, financial, quality, health and safety, utilisation and carbon measures.
- Utilisation and occupancy measured by defined, consistent and documented methods.
- Use of Quality Improvement Plans to address failures and/or focus on specific service areas.
- The ability to analyse performance data and interpret trend data, using statistical methods to distinguish real change from variation.
- Benchmarking of specific data which assists in informing strategy, focused on the important issues.
- Customer satisfaction, experience and customer needs analysis used to drive performance improvement.

Outputs

Strategic

- Overarching KPIs linked to business objectives, vision and values.
- Process to adjust the balance of 'importance' for elements of the performance management system to focus on certain areas.
- Each measurement has an owner and a documented definition.
- Outcome based SLAs and Experience Level Agreements.
- Benchmarking.
- Trend analysis.
- Customer satisfaction, experience and customer needs analysis.

Delivery

- Suite of KPIs which are measurable and meaningful with clear targets and thresholds.
- Clear reporting, fed from systems, which is easily interrogated and tailored to the customer.
- Dashboard alert systems.
- Quality improvement process.
- Use of simple statistics to identify true changes from random variations.
- Suppliers and clients engaged in performance reviews.
- Everyone values measures as useful feedback to help them do their jobs better and contribute to the organisation's vision.

Other sources

Show Me the Numbers, Stephen Few	Information Dashboard Design, Stephen Few
Balanced Scorecard	Kaplan and Norton
ISO 41001	ISO 41012 Facility management — Guidance on strategic sourcing and the development of

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Performance Management is the lynchpin of all the management capabilities and as such enables the measurement of the effectiveness of all other management capabilities and their operational outcomes. However, it is not as simple a discipline as it may first appear. Poor alignment of measures to the goals of the business can result in the focus being skewed to the wrong things, leading to damaging decisions and wasted effort. The use of poorly defined measures that are open to misinterpretation is common and often leads to dispute.

The most important part of Performance Management is the use of data to enable the engagement of all parties (the business, suppliers, staff, occupants and customers) in innovating to achieve desired outcomes. This includes the communication of performance measures and their results, which become a major tool in aligning all stakeholders' interests.

9.1 KPIs

In many cases measures of performance are already in existence within FM. Service Level Agreements, KPIs and performance indices are all used to monitor service delivery, compliance with contract conditions and business policies.

Best practices include:

- KPIs are aligned as closely as possible to the business's strategic goals.
- Measurements that are predictive of future performance are included in addition to those backward-looking ones focused on past performance.
- The provision of performance measures chosen on the basis of measuring desired outcomes as opposed to being chosen on the basis of ease of accessing data.
- The balance of service and 'experience' performance with financial performance.
- Measurements that are carefully defined and where ownership is clearly assigned.
- The development of Quality Improvement Plans created from careful analysis of data within which leaders seek to correct failures to meet desired performance levels.
- The development of analytical skills to interpret statistically significant performance results and link them to causal factors.

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9.2 Experience and outcome measures

Service KPIs measure whether the service was delivered. They do not measure whether the workplace is doing its job. The performance management system should include measures of experience and of outcome:

- **Experience Level Agreements**: the agreed standard of experience for defined settings or journeys (arrival, finding a place to work, running a hybrid meeting), measured by survey, point-of-use feedback and environmental data.
- **Attendance against intended pattern**: whether the office is used as the working policy and team charters intend, which is the first indication that policy and provision are misaligned.
- **Collaboration and connection**: measures of whether people are able to find and work with the people they need to, drawn from survey and, with appropriate governance, from meeting and booking data.
- **Productivity and cognitive performance proxies**: self-reported productivity, measures of focus and recovery, and, where the organisation has adopted one, a structured index of cognitive performance or wellbeing. These are the measures that connect the workplace to the purpose described in Section 5.
- **Environmental quality**: air quality, temperature, acoustics and light measured against the ranges that the evidence shows support cognitive work.

9.3 Utilisation and occupancy

Utilisation and occupancy are now standard measures and are the basis of most capacity decisions. They are also the measures most often misreported, because the methods differ and the definitions are rarely stated.

Best practices include:

- A documented definition of each measure: occupancy (people present), utilisation (settings in use), and their peak, average and distribution by hour, day and week.
- A stated method and source for each: access control, sensors, booking, network, or observation, with the known biases of each recorded.
- Reporting of peak and distribution as well as average, since under hybrid working the average conceals the condition the organisation is paying for.
- Reporting by team and by setting type as well as by building, so that the measure serves Client Relationship and Capacity Management.
- Reconciliation between sources at intervals, so that a change in the measure is known to be a change in use and not a change in the method.

9.4 Energy and carbon

Energy and carbon intensity are performance measures of the workplace and should be reported with service, experience and cost, not in a separate sustainability report alone.

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Best practices include:

- Energy and carbon per square metre and per person, by building, with targets derived from the net zero strategy.
- Measurement of the relationship between occupancy and energy, so that the building is operated to demand.
- Inclusion of these measures in supplier performance reviews where the supplier operates the building.

9.5 Analytics

The performance report compiled by hand at month end has been replaced, in organisations that have invested in their technology stack, by dashboards fed directly from systems. This improves timeliness and reduces error but places a greater demand on the definition and governance of the measures.

Best practices include:

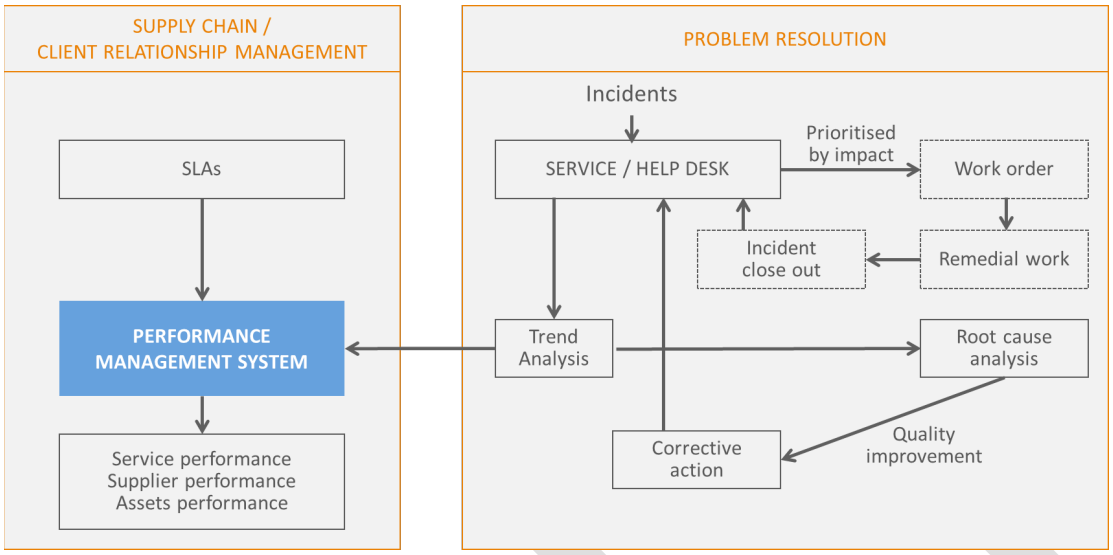
- Dashboards fed from source systems, with the definitions and sources of each measure accessible to the reader.
- Alerting on thresholds, so that failures and shortages are known when they occur.
- The use of AI tools to analyse service desk and survey text, to detect anomalies and to forecast demand, with the analysis reviewed by people who understand the data.
- Analytical capability within the workplace team, or available to it, so that the organisation can interrogate its own data rather than depend on a supplier's reporting.

9.6 Quality Improvement

It is a key responsibility of workplace leaders to improve the quality of the services for which they are responsible. Quality, in this context, is meeting the requirements of the business and not some form of star rating. It is a learning process which relies upon management commitment and support. In that sense, it encourages openness in acknowledging problems and failures, analysing root causes and working to eliminate those causes.

The following diagram illustrates the inter-relationship of Quality Improvement to the resolution of problems and performance management of service suppliers.

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Best practices include:

- The use of processes which engage the internal team responsible for delivering the workplace and its key suppliers in Quality Improvement initiatives, starting with the strategic goals of the organisation and mapping them to KPIs.
- The development of a programme of initiatives that remove ambiguity, identify measurable results and link and cascade strategy through the supply chain and organisation.
- The active use of performance measurement to formulate improvement plans.
- The engagement of staff and suppliers in identifying root causes of problems and resolving them.
- The development of measures to demonstrate improvement from actions taken.

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10 SUPPLY CHAIN MANAGEMENT



SUPPLY CHAIN MANAGEMENT

Definition for this Framework

The supply of services and provision of workplace assets are governed by a strategic process that ensures that they are provided in a manner that supports the strategic needs of the business.

Summary

Supply Chain Management covers the entire supply chain life cycle from strategic policies and plans, selection of suppliers of all the workplace assets and services, the negotiation of contracts, the mobilisation of supply, monitoring of performance and, where appropriate, the termination of contract. The supply chain now includes the operators of flexible space, landlords who provide services and amenities, and the suppliers of workplace technology and data, and the discipline extends to them.

Best Practice

- There is a supply chain strategy that covers all the workplace services, assets, space and technology.
- The strategies and policies are agreed between CRE, FM, Workplace, IT and Procurement.
- The selection process of suppliers involves all stakeholders.
- A partnership style of client and supplier relationship is reinforced through a management governance structure.
- The governance seeks to build a commercial basis of mutuality that provides long term benefits.
- Innovation, flexibility to business change, social value and carbon, as well as cost, are seen as key requirements.
- The client organisation owns the data generated in the delivery of its workplace and contracts provide for its access and transfer.
- Review of contract performance and benchmarking are carried out by independent audits.

Outputs

Strategic

- Supply chain strategy.
- Procurement standards and policies, including social value, modern slavery, living wage and carbon requirements.
- Collaborative contracts that have exit plans and data provisions.
- Sharing of knowledge and business information across the supply chain.
- Relationships across the supply chain are overseen by a governing management group of principal stakeholders.

Delivery

- Contracts reviewed annually with respect to their continued alignment with business needs.
- The benefits from innovation are shared.
- Open book accounting for costs of services.
- Balanced scorecard performance reviews carried out monthly.
- Trends in performance are reviewed and Quality Improvement Plans jointly owned.
- Communication across the supply chain is actively encouraged and supported by appropriate activities that support social cohesion.

Other sources

ISO 41012 Facility management

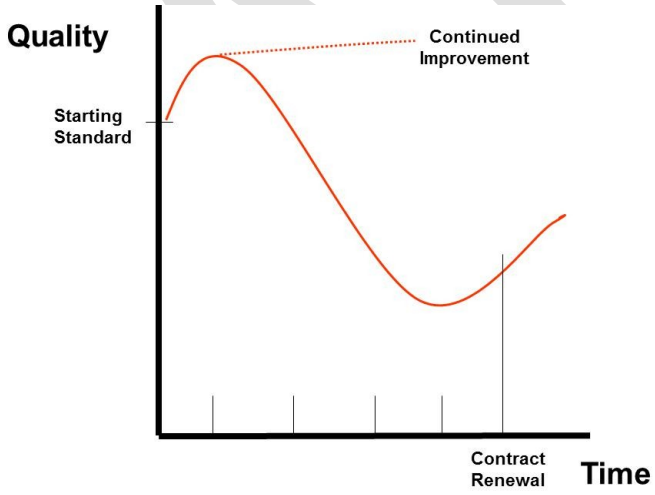
Guidance on strategic sourcing and the development of agreements

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ISO 44001 Collaborative business relationship management systems	
IWFM Professional Standards	
UK Modern Slavery Act 2015	Procurement Act 2023 (public sector); Social Value Act 2012

The aim is to create arrangements which align supplier activities within the supply chain to the organisation's objectives and (in high touch environments) 'workplace experiences', recognising the volatility of the organisation's business situation and the probability of the need for change in volume or nature of services. This requires the development of open, mature and honest relationships with all suppliers of services to achieve that alignment, facilitate innovation and ensure the avoidance of a 'silo' mentality.

The rapidly changing business environment requires that suppliers are positively responsive to change, and best practices should encourage agility to change and innovation in supply. Supply Chain Management seeks to eliminate the adverse trends that often characterise adversarial supply relationships, as illustrated in the figure below.



Best practices include:

- Establishing a governing Supply Chain Council whose purpose is to give direction and help align supply chain strategy with the organisation's overall strategy. The workplace leaders should be a major influence on this Council.
- Developing appropriate styles of relationship with suppliers dependent upon the nature of the service and its criticality to the organisation, in some cases developing collaborative relationships through strategic partnering arrangements.
- Selecting IT systems that enable effective management of the supply chain through careful determination of needs and an effective selection process.
- Engaging in collaborative strategic sourcing; this is the cornerstone of successful supply chain management.
- Measures and a culture that focus on total cost of ownership (TCO), not price.

10.1 Cost management

One of the most common reasons for outsourcing a service is to achieve cost savings and it is important therefore that cost management is well developed.

Best practices include:

- True transparency of supplier accounts and accurate identification of the management and corporate overheads that are being charged.
- Ensuring supplier discounts are passed through to the client organisation.
- Requiring that supplier accounts are open to independent audit from time to time.
- Requiring that costs are reported not only in relation to budget but also in relation to transaction or work carried out.
- Ensuring that payment systems are well integrated with work order and contract systems.
- Ensuring that suppliers are paid on time and are rewarded for innovation.

10.2 Contract form

The process of renewing or renegotiating an outsourcing contract can be a great lesson in what can go wrong in an outsourcing relationship. A common theme is the informality that can grow in long-standing sourcing contracts. This should not be confused with partnership. Contracts that have been in place seven to ten years often lapse into an informal relationship that has the provider acting more like an internal Facilities Management department than an outsourced provider in a buyer/seller partnership relationship.

Since 2014 outcome-based contracting models have matured, in which the supplier is rewarded against the outcomes the organisation requires (experience, availability, carbon) rather than against inputs or activities, and in which the commercial model is designed to align the interests of both parties over the term. These models are demanding to set up and govern, but where the relationship is strategic they are the current best practice.

In a world in which many workplace services are outsourced, the Framework itself has a place in the contract. The ten capabilities give the client organisation a structure in which to specify what it requires of a supplier: which capabilities the supplier is to provide, which remain with the client, and the practice and outputs expected of each. The same structure then serves as the yardstick for regular review. The supplier's performance against the capabilities is assessed at agreed intervals, using the Maturity Assessment or an equivalent, and the results are recorded alongside the service performance data so that the development of the supplier's capability over the term is visible to both parties.

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Best practices include:

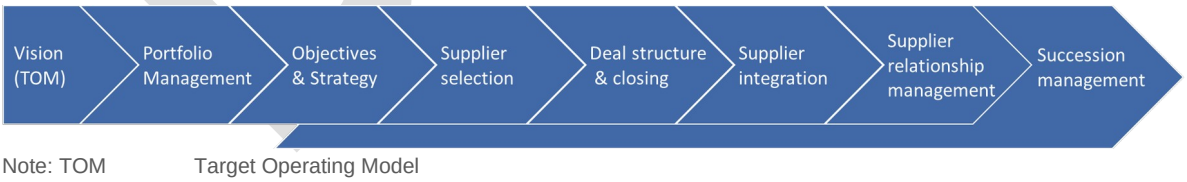
- Supporting a supplier partnership by putting in place a high level governance structure involving both client and supplier.
- Seeking through contract conditions to encourage supplier innovation where outcomes are clearly linked to business benefit.
- Using outcome-based commercial models for strategic services, with outcomes defined in the terms of the Performance Management capability.
- Writing the Framework into the specification of outsourced services, stating the capabilities required of the supplier, and reviewing and assessing the supplier against those capabilities at regular intervals through the term.
- Ensuring contracts protect intellectual property rights.
- Ensuring that contracts include an exit plan in the event the contract is terminated.
- Ensuring that all performance and operational data that relate to the workplace belong to the client organisation, are accessible during the contract in usable form, and are transferred when the contract finishes.
- Ensuring that contracts for technology and data services specify interoperability and open interfaces, so that the organisation's data is not locked in a supplier's system.

10.3 Selection of suppliers

Given the effort and costs incurred in going through the selection and mobilisation of a new supplier, it is important that the selection process is done thoroughly and employs best practices. It is essential that before starting a process of market testing there is a clear understanding of how the outcome of this process will support the strategic goals of the business. A clear understanding of this will also clarify what the selection criteria should be and who should be involved in the selection process.

An example of a selection process that is based upon a concept of a value chain, which sets out an end-to-end process to be followed to ensure maximum value is achieved from the outsourcing process and risk is appropriately managed, has been used by some procurement functions and is illustrated below:

Outsourcing Process Value Chain



Note: TOM Target Operating Model

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Best practices include:

- The provision of up-to-date strategic plans for the supply of services to the workplace.
- The implementation of a formal supplier selection process.
- Clearly defined selection criteria for suppliers based on those agreed by stakeholders.
- An assessment of the cultural fit of a supplier with the client organisation and the 'workplace experience' the client organisation is seeking to achieve as a part of supplier selection.
- The inclusion of steps for prequalification and visits to reference sites.
- The inclusion of social value, modern slavery compliance, living wage commitments and supplier carbon (Scope 3) among the selection criteria, with evidence required rather than declarations.

10.4 Flexible space, landlords and managed services

A growing part of the organisation's workplace is supplied by parties who are not conventional service providers: operators of coworking and flexible space, landlords who offer managed amenities, building operating platforms and shared facilities, and providers of fully managed offices. These arrangements give the organisation flexibility that a conventional lease does not, and they are an important instrument of Capacity Management. They are also supply, and the experience they deliver to the organisation's people is part of the workplace experience for which the organisation is accountable.

Best practices include:

- Treating flexible-space operators and service-providing landlords as suppliers within the supply chain strategy, with defined requirements, performance measures and governance.
- Specifying the experience, service and data requirements in the agreement, including the organisation's access to utilisation and service data for the space it uses.
- Assessing the operator's financial standing, continuity arrangements and security practices as for any critical supplier.
- Including flexible space in the organisation's performance reporting, so that its cost, use and experience are compared with the organisation's own estate.

10.5 Technology and data suppliers

The suppliers of booking, sensing, access, building management and workplace analytics systems hold the data on which the management of the workplace now depends. Their selection and governance require the same discipline as the selection of a facilities provider, and additional provisions on data.

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Best practices include:

- Including technology and data suppliers within the supply chain strategy and governance, jointly with IT.
- Requiring, in every contract, that data generated about the organisation's workplace belongs to the organisation, is accessible in usable form during the contract, and is transferred on exit.
- Requiring open interfaces and documented data models, so that systems can be integrated and replaced.
- Assessing suppliers' security and privacy practices, and their use of AI within the service, against the organisation's own standards (see Risk Management).
- Avoiding dependence on a single supplier for the whole stack where the organisation's scale does not justify the risk.

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11 CAPACITY MANAGEMENT



CAPACITY MANAGEMENT

Definition for this Framework

The provision of appropriate levels of physical assets, services and technology needed to achieve the organisation's strategic purpose in the most economical way.

Summary

Requires understanding of the capacity of the workplace, services and technologies and the constraints and limitations these may have. It also requires knowledge of the actual consumption of these. Under hybrid working, consumption is variable and is created at team level; the capacity question is no longer how many people the organisation has but how many it must accommodate on its busiest days, and at what cost of flexibility.

Best Practice

- Creation and maintenance of databases of capacity data of all physical assets, including flexible space and the home where the organisation provides for it.
- Maintenance of records of all constraints of physical assets, e.g. floor loadings, maximum power supply, HVAC, health and safety.
- Continuous measurement of occupancy and utilisation, with peak, average and distribution reported.
- Use of models that estimate the changes in demand for services and assets resulting from changes in the business, in working patterns and in the adoption of artificial intelligence.
- Strategies for acquisition and disposal of physical assets, for the use of flexible space, and for the management of redundant assets or vacant space.
- Systems that integrate the data of the integrated workplace management system with building information and operational data in a digital twin.
- Knowledge of utilisation of assets and services provided by Resource Management.

Outputs

Strategic

- Accommodation plans that support the business's strategic plans, with the balance between committed and flexible supply stated.
- Space standards and desk-sharing ratios, derived from measured demand.
- Space charging.
- Policies for management of vacant space.
- Policies for acquisition and disposal of workplace assets and for the use of flexible space.
- Models that illustrate the effect of hybrid and activity based working on use of assets.

Delivery

- Maintenance of records of capacity and constraints to capacity for all buildings.
- In conjunction with Resource Management, meeting the changing requirements of the organisation.
- Identification of potential shortfalls in capacity, including peak-day shortfalls.
- Identification of areas of over-supply.

Other sources

ISO 41011 Facility management Vocabulary

IPMS International Property Measurement Standards (Office)

IWFM Professional Standards

RICS Property Measurement standard

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Capacity Management is primarily about understanding the true capacity of the workplace supply (assets and services) to support the business and the degree to which that supply is being consumed (demand), along with constraints associated with supply. Resource Management (defined in the next section) is concerned with the day to day management of the supply.

For workplace leaders, the most common example of balancing demand and supply is to provide solutions to the changing needs for physical accommodation. The reconciliation of demand and supply is at the heart of accommodation planning. Demand can arise from the implementation of strategic initiatives, determined through Strategic Management processes, or from tactical changes, identified through effective Client Relationship Management. The balancing of demand and supply during continual change represents a major challenge for workplace leaders. This can be alleviated through accommodation planning based upon hybrid and activity based working, the use of flexible supply, and improving the use of resources.

Best practices include:

- Having an effective process for maintaining up-to-date data on the capacity constraints on each floor of every building the organisation occupies, to ensure that through changes there is a sound basis for making capacity decisions. These constraints may be floor loadings, maximum power supply, HVAC, health and safety issues and the like.
- Constituting the Workplace Steering Group populated by leaders from the business, IT, HR, CRE and Sustainability, and led by the workplace leader.
- Close working relationships between FM, Workplace and CRE to ensure real estate strategy is aligned to the business's demands for the workplace.
- Using systems to measure the actual use of space during the day, month and year to make decisions upon the allocation of space, including utilisation of desks, meeting rooms and other settings.
- Using systems to model the requirements for space from forecast future business requirements and working patterns.
- Using agreed strategies for the acquisition and disposal of accommodation, for the use of flexible space, and for the management of vacant space. Such strategies need to be updated regularly to align them with changing corporate business needs.

11.1 Hybrid demand modelling

In 2014 the demand for the office could be approximated from headcount. Under hybrid working demand is a distribution, and the organisation must decide which point on the distribution it will provide for.

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The elements of hybrid demand modelling are:

- **Attendance pattern by team**: the days on which each team intends to be, and is observed to be, in the office. Gathered from team charters, surveys and booking or access data.
- **Peak-day demand**: the number of people present on the busiest days, which is typically far above the average and is concentrated on the middle of the week. The organisation pays for capacity at the peak.
- **Variability**: the spread of demand by day of week, by week of year and by team, which determines how much capacity must be held in reserve and how much can be shared.
- **Desk-sharing ratio**: the ratio of people to work settings that the measured distribution supports at an agreed level of service, derived from the data rather than adopted from a benchmark.
- **Setting mix**: the proportions of focus, collaboration, meeting and social settings that the activities performed require, derived from activity analysis (see Section 7.3).

Best practices include:

- Modelling demand from team-level patterns rather than from organisation-level headcount.
- Reporting and planning for peak and distribution, and making an explicit, executive-endorsed decision on the level of peak demand the organisation will provide for and the means by which demand above that level will be managed (for example by team scheduling, by flexible space, or by accepting occasional shortage).
- Distinguishing structural over-supply (which justifies disposal) from peak-day shortage (which does not justify acquisition), and resolving the two together.
- Including the effect of artificial intelligence on headcount and roles as a scenario in every demand model, so that commitments are not made on the assumption of historic growth.
- Reviewing the model at intervals against measured demand, and recording the accuracy of its forecasts.

11.2 Portfolio flexibility

Because demand is variable and uncertain, the organisation's supply should be structured so that it can be adjusted at the lowest cost and disruption. The instruments available have widened since 2014.

- **Lease structure**: shorter terms, more frequent break options and staged expansion or contraction rights, at a price which should be compared against the cost of being wrong on a longer commitment.
- **Flexible space**: coworking and serviced space, used as a buffer for peak demand, for growth not yet proven, for locations where a conventional lease is not justified, and for people who would otherwise travel far to a main office.

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- **Hub and spoke**: a smaller central office for the activities that require the organisation to be together, with smaller local or flexible spaces nearer to where people live.
- **Shared and sub-let space**: the sub-letting of surplus space, or its sharing with other organisations, where the lease permits.
- **Managed offices**: fully serviced accommodation under a single agreement, which transfers operational effort and some risk to the provider.

Best practices include:

- Stating in the accommodation plan the proportion of supply that is committed and the proportion that is flexible, with the rationale.
- Valuing flexibility explicitly in portfolio decisions, by comparing the premium for flexible supply with the expected cost of over- or under-commitment on the organisation's demand scenarios.
- Using lease events as the principal opportunity to re-balance committed and flexible supply, and planning them well in advance (see the role of the workplace strategist before a lease is signed).
- Governing flexible-space providers as suppliers (see Section 10.4).

11.3 The home as workplace capacity

Where the organisation's working policy expects or permits people to work from home, the home is part of the workplace supply. It is capacity that the organisation does not own or control, but on which it relies, and for which it carries obligations.

Best practices include:

- Recording the extent to which the organisation relies on home working in its capacity plan, so that the dependence is visible.
- Setting the organisation's provision for the home (equipment, furniture, allowances, connectivity) as policy, agreed with HR, and recording what has been provided.
- Assessing the suitability of the home workplace where the organisation's duty of care requires it (see Risk Management), without intruding on the person's private life beyond what the duty requires.
- Ensuring that the technology provided to the home is specified and supported as part of the workplace technology strategy.

11.4 Digital twins and integrated workplace management systems

The integration of CAFM with building information modelling, anticipated in 2014, has become the integrated workplace management system (IWMS) and, in its fuller form, the digital twin: a continuously updated model of the estate combining its physical description with live occupancy, environmental, energy and service data.

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Best practices include:

- A single system of record for space, assets and occupancy, with processes that keep it current through moves, changes and projects.
- Integration of booking, sensing, access and building management data into the system of record, so that the model of capacity and the measure of consumption are held together.
- Use of the model for scenario testing (stacking, consolidation, closure of floors on low-demand days) before decisions are made.
- Governance of the model's data for accuracy and for privacy.

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12 RESOURCE MANAGEMENT



RESOURCE MANAGEMENT

Definition for this Framework

The day to day management of resources needed to deliver effective workplaces and services. It covers physical assets, human resources, technologies and utilities, in the office and in the distributed estate.

Summary

Resource Management covers the management of all resources used to provide workplaces and services. In conjunction with the management of capacity it addresses the need to balance the demand for workplaces and services with their supply. Its evidence is now continuous: occupancy, environmental and energy data are available in real time and the discipline is to act on them.

Best Practice

- Continuous monitoring of the occupancy of floors and settings to ensure they are not under- or over-used.
- Regular audits of storage.
- Processes to ensure the system of record is up to date and takes account of day to day moves and installs.
- Use of systems that measure the actual use of assets and services, e.g. utilisation of various work spaces, workstations and meeting rooms.
- Ensuring space standards and desk-sharing arrangements are operated as designed.
- Management systems that highlight excessive use of energy and operate the building to measured demand.
- The services of a certified energy manager are used to highlight opportunities for better use of energy and progress against net zero targets.
- Management of the equipment, technology and services provided to people working at home and in third places.

Outputs

Strategic

- Models of utilisation for different ways of working.
- Sustainability and net zero programmes for the operation of the estate.
- The service model for the distributed workforce.

Delivery

- Utilisation data of all assets and services.
- Trend analysis of utilities and services.
- Space planning services that support moves and installs.
- Demand-led operation of buildings.

Other sources

ISO 14001 Environmental management systems

ISO 50001 Energy management systems

ISO 41001 Facility management

IWFM Professional Standards

NABERS UK

Management systems

BREEAM In-Use

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Resource Management is concerned with the use of all resources used in the provision of workplace services (space, energy, technology, soft services such as catering, and the resources that support people outside the office). The following best practices provide evidence of the utilisation of the physical workplace and services so that:

1. Decisions are informed by evidence of actual use.
2. Changing patterns of demand and supply can be balanced in the most cost effective and productive way.
3. The requirements for sustainability are achieved.

Best practices include:

- Having processes in place to ensure that data on all classifications of space is up to date and takes account of changes made through day to day moves and installs.
- Electronic monitoring of the occupancy of desks, meeting spaces and social spaces to ensure they are not under- or over-occupied.
- Proactively managing the location and allocation of space to teams so as to achieve the best balance of supply and demand on a daily basis and to ensure an effective experience for people is maintained.
- The provision of regular audits on the need for storage.
- The maintenance of space standards and delivery processes which are reviewed in the light of changing business needs and working methods.
- The provision of management systems that are used to highlight trends in excessive energy use.
- Ensuring that the services of a certified energy manager are used to ensure that opportunities for better use of energy are identified.
- Putting in place measurements of the utilisation of desks, meeting rooms and other workplace ‘objects’.

12.1 Continuous occupancy measurement

The periodic utilisation study, conducted by observers over two weeks, has been superseded by continuous measurement from sensors, booking systems, access control and network data. Continuous data reveals the distribution of demand that a short study cannot, and allows the office to be operated day to day on evidence.

Best practices include:

- Selecting measurement methods appropriate to each setting type and to the organisation’s privacy standards, and documenting their known biases.
- Combining sources (for example access data for building occupancy and sensors for setting utilisation) and reconciling them at intervals.

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- Using the data operationally: to open and close floors, to adjust the mix of settings, to release unused bookings, and to direct cleaning and catering to where people are.
- Making the data available to the Performance, Capacity and Client Relationship capabilities in a consistent form.
- Governing the collection and use of occupancy data for privacy and transparency (see Risk Management), and communicating to people what is measured and why.

12.2 Energy management and demand-led operation

The organisation's net zero commitments are delivered in large part through the day to day operation of its buildings. Under hybrid working the opportunity is substantial: a building serving a variable population can be operated to its measured demand rather than to its design capacity.

Best practices include:

- Operating building systems (heating, cooling, ventilation, lighting) to measured occupancy, by floor and by time, with floors or zones closed on days of low demand where the working policy permits.
- Measuring energy and carbon against occupancy as well as against area, so that the effect of demand-led operation is visible.
- Working with landlords on the operation of base building systems and on the data needed to manage them, and including these matters in lease negotiation.
- Progressing a programme of energy efficiency and retrofit measures against the net zero strategy, with the business case stated in cost, carbon and experience.
- Certified energy management expertise, in-house or contracted, with authority to act.

12.3 Resources for the distributed workforce

A large part of the organisation's people now work, for part of the week, in places the organisation does not operate. The resources that support them (equipment, furniture, connectivity, collaboration technology, and the services they can call on) are part of the workplace and must be managed.

Best practices include:

- A defined service model for people working at home and in third places: what the organisation provides, how it is requested, supported, maintained and recovered, and who is accountable.
- An asset register covering equipment provided to the home, integrated with the organisation's asset management.
- Collaboration technology specified for mixed in-person and remote working, in meeting rooms and at home, and supported as a single service with IT.

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- The inclusion of the distributed workforce in the service desk, in experience measurement and in the performance reports, so that their experience is managed with the same seriousness as the office's.

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13 IMPROVEMENT MANAGEMENT



IMPROVEMENT MANAGEMENT
Definition for this Framework
The management of all processes aimed at improving, in a cost effective manner, the workplace experience and the performance of service delivery processes.
Summary
Seeks to ensure that failures in the workplace and services are dealt with swiftly and economically through the engagement of all people involved in their delivery. It involves processes which capture, develop and implement innovations in the provision of the workplace and services. The service desk is now digital and in many organisations partly automated; its record is the richest source of evidence on where the workplace fails, and Improvement Management depends on analysing it.
Best Practice
▪ Maintaining detailed and full records of all failures, in service and in experience. ▪ Systematic detailed analysis of the root causes of problems identified, using the service desk record and experience data. ▪ Actions identified to remove such root causes. ▪ All such actions are included in Quality Improvement Plans. ▪ Post implementation reviews carried out and lessons learned are included in Quality Improvement Plans. ▪ SLAs and Experience Level Agreements are reviewed in the light of quality performance criteria. ▪ Encouragement of a culture of Quality Improvement across the entire supply chain.
Outputs
Strategic ▪ Quality Improvement Plans. ▪ Review of service quality provided by suppliers. ▪ Working with suppliers to support awareness programmes aimed at reinforcing a culture of Quality Improvement and innovation. **Delivery** ▪ Resolution of day to day problems. ▪ Regular detailed analysis of failures and problems. ▪ Monitoring of action against the Quality Improvement Plans.
Other sources
ISO 9000 ISO 41001 Facility management EFQM Model Six Sigma IWFM Professional Standards

Most leaders with responsibility for managing the workplace would regard the resolution of day to day problems as the most fundamental of all their operational responsibilities, and service desk systems are widely used as the means of effectively handling the process. Service desk systems also provide a rich resource in understanding the quality of the services being delivered over time. The cumulative

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information collected, properly analysed, should lead to identifying root causes and form an integral part of Quality Improvement Plans.

Active management of problems and failures in the workplace and their resolution should result in:

1. Workplace services and experiences that meet the requirements of all clients and users.
2. Failures being dealt with swiftly and economically.
3. Lessons being learned, leading to the elimination of repetitions through a continuous improvement process.

Best practices include:

- Ensuring that the service desk or fault reporting system covers all problems with every service provided by the organisation responsible for the management of the workplace, including services to people working at home and in third places.
- Requiring that systems track work requests through to completion.
- Providing consumers with the ability to follow the progress of a reported problem and consciously to give feedback on its resolution.
- Requiring service providers to regularly review all problem trends with a view to recommending corrective and improvement actions.
- Surveying users' views on the effectiveness of the problem resolution process in leading to improvements.

13.1 Problem workflow

These best practices are most appropriate for the internal team responsible for the workplace and the supplier of the service desk system to consider.

Best practices include:

- A process for ensuring that the service desk checks for user satisfaction with the fault resolution prior to closing a problem.
- That the service desk accurately reflects office moves and changes to SLAs.
- Ensuring that information from the service desk is used to validate invoices presented for work done and work tickets raised.
- The requirement that the service desk promptly escalates outstanding problems which fail SLAs.
- That historic data held by the service desk is archived and available to establish long term trends in the performance of the supply chain.

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13.2 Digital service desks and AI-assisted triage

The service desk has moved from the telephone to the application, and in many organisations the first response is now automated: requests are classified, routed and in simple cases resolved by software, with people handling the exceptions. Self-service (reporting a fault from a mobile device, booking a service, checking status) has reduced effort for both consumer and provider. These developments improve speed and reduce cost; they also change where failures hide, since a poorly classified request will be poorly routed at scale.

Best practices include:

- A single digital point of entry for all workplace requests, available wherever people work, integrated with the IT service desk where the organisation's people cannot be expected to know which function is responsible.
- Automated classification and routing, with the classification reviewed for accuracy and corrected, and with a clear route to a person for any request the automation cannot resolve.
- Transparency to the consumer on the status of their request and on whether it is being handled by software or by a person.
- Analysis of the full service desk record, including free text, using AI tools where appropriate, to identify recurring failures, emerging problems and the settings or services that generate the most demand.
- Governance of the automation: defined accountability for its decisions, monitoring of its performance, and the ability to withdraw it.

13.3 Experience failure

Service failure is a service not delivered to its agreed standard: a light not working, a room not cleaned. Experience failure is the workplace not doing its job for the person: arriving to find no suitable place to work; a hybrid meeting in which remote participants cannot hear; a day in the office without seeing the people one came to see; an environment too noisy to concentrate in. Experience failures are rarely reported to the service desk, because there is no fault to report, and they are therefore rarely resolved. They are, for the high-touch workplace, the failures that matter most.

Best practices include:

- Capturing experience failures as a category in their own right, through point-of-use feedback, pulse surveys, the analysis of booking and occupancy data (for example, teams unable to book space on their chosen day), and the service desk.
- Analysing experience failures for root cause in the same manner as service failures, recognising that the cause is more often policy, design or demand than a single service.
- Including experience failures and their resolution in Quality Improvement Plans, and reviewing them with clients.

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- Feeding the lessons into the design of the experience and the setting mix (Strategic and Capacity Management).

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14 RISK MANAGEMENT



RISK MANAGEMENT

Definition for this Framework

The management of all forms of risk that impact upon the ability of people and the workplace to work effectively. It covers the identification and analysis of sources of risk and those practices that minimise its impacts, as well as how recovery from failures and disasters will be handled.

Summary

The scope of risk management includes:

- Security of physical and information assets, including the cyber-physical security of building systems.
- Health, safety and wellbeing risks to people, wherever they work.
- Risks arising from change and projects.
- Risks to the effectiveness of work arising from failure of delivery of services.
- Environmental and climate-related risk.
- Business continuity planning.
- The privacy and ethical risks arising from workplace data and monitoring.

Best Practice

- Processes to regularly update understanding of business priorities from a workplace viewpoint.
- Systematic tools and processes for identifying, evaluating and addressing risk.
- All changes and projects that have high impacts upon business priorities are risk assessed and are subject to an authorisation process.
- A communication plan which covers awareness of health, safety, wellbeing, security, environmental and data policies.
- Business continuity plans are in place and tested, and include the distributed workforce as a continuity mechanism and as a dependency.
- A data protection impact assessment for every system that collects data about people's presence or behaviour in the workplace.

Outputs

Strategic

- Risk management strategy and policies.
- Security strategy based upon corporate risk, covering physical and cyber-physical security jointly with IT.
- Strategies that cover health, safety, wellbeing and protection of the environment.
- Workplace data privacy and ethics policy.
- Expertise in risk assessment.
- Continuous monitoring of major sources of risk.
- Identification of key areas of business and their reliance upon workplace assets and services.
- Alignment with IT risk management.

Delivery

- Business continuity plans in working order.
- Systematic processes to identify and evaluate risks.
- Projects are evaluated and authorised appropriately according to the level of risk.
- All major changes to working conditions are risk assessed and appropriate provisions made in change management plans.
- An effective physical security service is provided to protect assets.
- Processes ensure that the health, safety and wellbeing of people at work are protected, including at home.
- Fire and evacuation drills are regularly done.
- Security services meet requirements.
- Data protection impact assessments completed and reviewed.

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Other sources
ISO 45001 Occupational health and safety management systems
ISO 22301 Business continuity management systems
ISO 27001 Information security management systems
ISO 28000 Security management systems for the supply chain
ISO 31000 Risk management
UK GDPR and Data Protection Act 2018
NEBOSH
WELL Building Standard

Risk management awareness and accountability have continued to increase and become more complex in response to:

1. Awareness of the potential of terrorism and civil disorder to disrupt operations and lives.
2. The experience of pandemic, and the knowledge that a workplace can be closed at short notice for a long period.
3. Increasing frequency and severity of climate-related events (heat, flood, storm) affecting buildings and travel.
4. Disruption to energy supply and cost.
5. Geopolitical disruption affecting locations, supply chains and travel.
6. Enhanced awareness of work-related risks to physical and mental health and the responsibilities everyone holds.
7. Situations where large numbers of workers and/or customers are congregated.
8. Dependence on data, connectivity and building systems for the operation of the workplace, and the exposure of those systems to cyber attack.
9. Hybrid working and the implications it has for continuity, security, health and safety and duty of care.
10. The collection of data about people's presence and behaviour in the workplace, and the obligations and sensitivities that attach to it.

14.1 Risk assessment

The assessment of risk, business continuity planning, workplace security, workplace health, safety and wellbeing and environmental management are essential to reduce the likelihood of security incidents and failures in projects, services and workplaces, and to reduce any adverse impact upon the business.

Risk assessment is a decision-making resource. Analysis should be comprehensive and include: identification, probability, impact, exposure, mitigating actions, contingency plans and triggers. Assessment should be initiated as an integral part of any change where significant risk factors have been identified, resulting in a formal status report. There should be evidence that a systematic approach has been used to assess and manage risks.

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Best practices include:

- Use of a formal process of risk identification, assessment and prioritisation which covers not only projects but also changes in the business, in working policy, in technology or in the external environment.
- Making all business stakeholders aware of the risks and involving them in assessing risk level and agreeing how these risks are to be managed.
- Integration of the workplace risk register with the organisation's enterprise risk management, so that workplace risks are visible at the level at which they are owned.

14.2 Business continuity planning

Business continuity planning (BCP) provides plans for continuity of business in the event of disasters, pandemics and other disruptions. The experience of 2020 demonstrated both that the whole office estate can become unavailable at once and that a distributed workforce, properly equipped, can sustain the organisation through such an event. Hybrid working is therefore a continuity mechanism in its own right. It is also a dependency: the organisation now relies on the home, on public connectivity and on collaboration platforms that it does not control.

Best practices include:

- A regular review of business priorities and the implications for the management of the workplace.
- The provision of processes that regularly update understanding of where business value is created and how it is supported by the management of the workplace.
- The identification of workplace management processes that are critical to the organisation, including the IT and connectivity requirements to maintain the service.
- The identification of those risks to business processes which are dependent upon the effectiveness of the workplace, in the office and in the distributed estate.
- Scenarios covering the loss of a building, the loss of all buildings (pandemic, civil emergency), the loss of connectivity or collaboration platforms, the loss of energy supply, and climate-related events, with the response to each.
- Determination of the organisation required in the recovery of normal services.
- The development of a response plan that will be needed to deliver the recovery of the service.
- The regular testing of the response plans, including after major changes in service providers, working policy or technology.

14.3 Security

Security provides protection for workplace resources from accidental or deliberate violation. In 2014 this Framework excluded IT security as the responsibility of the IT organisation. That boundary no longer holds. The systems that operate the workplace

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(access control, building management, sensing, booking, visitor management) are networked, are frequently supplied and maintained by parties outside IT, and are a recognised route of cyber attack into the organisation. Cyber-physical security is a shared responsibility of the workplace and IT functions and must be governed jointly.

Best practices include:

- The development of a security strategy, based upon a corporate risk assessment, covering physical and cyber-physical security together.
- That the risk assessment should include the implications of hybrid working: access to multiple buildings, the use of flexible space shared with other organisations, and work in public places and at home.
- Using a systematic approach to evaluate risks, vulnerabilities and threats which can relate to the security strategy.
- A register of all networked building and workplace systems, with ownership, patching and access control assigned, and their inclusion in the organisation's information security management.
- Security requirements, including for software and data, in all contracts for workplace technology and building systems (see Supply Chain Management).
- Senior executive endorsement of the strategy, as this is a key issue of business interest.

14.4 Health, Safety, Wellbeing and Environment

Health, safety and environment provides health and safety for people in the working environment and manages those services that impact upon the wider environment. The wellbeing of people at work has wider implications for organisational competitiveness. HR departments take a serious interest in the effect of absenteeism, unplanned staff turnover and 'presenteeism' on performance. Working with HR, managers responsible for the workplace can demonstrate the effect of the working environment on these factors.

Since 2014 the scope of the organisation's duty of care has widened in two ways. First, mental health, psychological safety and wellbeing are now recognised as matters of occupational health, supported by ISO 45003 and by regulatory expectation, and the workplace (its design, its policy and the behaviour it supports) is a determinant of them. Second, the duty extends to the home and to third places where the organisation expects or permits people to work, including ergonomics, equipment and working hours.

Indoor environmental quality (air quality, ventilation, temperature, acoustics and light) is now continuously measurable and is a known determinant of health and of cognitive performance. It should be monitored and managed against defined ranges.

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Best practices include:

- Ensuring that there are formal health, safety, wellbeing and environment policies and procedures, linked to the organisation's corporate strategy.
- Ensuring that company audits are carried out against standards for health, safety and environment.
- Effective collaboration with HR to understand the impact of working environments and working policy on health, wellbeing and productivity.
- Assessment of the home workplace where the duty of care requires it, by self-assessment supported by guidance and by provision of equipment.
- Continuous monitoring of indoor environmental quality against defined ranges, with action when they are breached.
- Ensuring that there are effective performance and reporting requirements for health, safety, wellbeing and environment in place.
- The regular briefing of workplace staff on current legislation and standards, including energy performance, carbon reporting and building safety.
- The organisation champions an environmental management system to achieve ISO 14001 or equivalent compliance, and considers WELL or Fitwel certification where it supports the strategy.

14.5 Data privacy and ethics in workplace monitoring

The data on which the management of the workplace now depends (occupancy sensing, access control, booking, network location, service desk records, survey responses, and in some cases the analysis of collaboration patterns) is data about people. Much of it can identify individuals or be combined to do so. Its collection and use are regulated, and beyond regulation they bear on the trust of the organisation's people, which is the foundation of the workplace experience.

Best practices include:

- A workplace data privacy and ethics policy, agreed with HR, Legal and the data protection officer, stating what is collected, for what purpose, at what level of identification, for how long, and who may access it.
- A data protection impact assessment for every system that collects data about people's presence or behaviour, completed before deployment and reviewed on change.
- Collection at the least identifying level that serves the purpose: aggregate and anonymised data for capacity and performance management, with individual-level data used only where there is a defined and lawful need.
- Transparency to the organisation's people: clear communication of what is measured, why, and how it is used, and the opportunity to ask.
- A prohibition on the use of workplace data for individual performance management or surveillance unless that use has been separately justified, assessed and communicated.

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- Governance of AI tools that analyse workplace data, including the data they are given access to and the decisions they inform.
- The inclusion of these requirements in contracts with technology and data suppliers.

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15 CHANGE MANAGEMENT



CHANGE MANAGEMENT

Definition for this Framework

The promotion, management and support of changes in the way in which the workplace and services are used and managed.

Summary

The overview of all day to day changes to services, moves and installs, and the proactive change management that arises from complex organisational change, hybrid and activity based working, and the adoption of artificial intelligence in work. It requires collaboration with IT, HR and the organisation itself.

Best Practice

- Formulation of strategies and processes that support effective changes to locations, space, technologies, systems, processes, behaviours, working patterns and services.
- Active management of politically complex change programmes, including changes to working and attendance policy.
- Policies and processes that cover routine moves and installs, integrated with those of IT.
- Processes which ensure continuity of services on changes to suppliers.
- All significant changes and projects are systematically risk assessed for impact on the workplace.
- Proactive support and encouragement for change resulting from hybrid and activity based working.
- Evaluation of each change against measured outcomes.

Outputs

Strategic

- Appropriate change management policies and procedures.
- Training in managing complex change, grounded in behavioural science.
- Oversight of major projects.
- Championing opportunities for new ways of working.

Delivery

- Routine moves and installs are planned and managed.
- Changes are regularly reviewed with IT and HR.
- Changes are evaluated and the evaluation is used.

Other sources

Change Management: The People Side of Change	Hiatt and Creasey
ISO 41015 Facility management	Influencing organizational behaviours for improved facility outcomes
Behavioural science literature on habit	environment and organisational change
IWFM Professional Standards	

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Change has been a major theme in this document and the Change Management capability is highly important. Change Management covers the promotion, management and support of all changes in the way the workplace is used, along with the behavioural and process changes that are involved in hybrid and activity based working. The objectives of this capability are to:

- Make a lasting transition to new working practices, leadership techniques and behaviours through a carefully considered programme of activities designed to explain the concepts and the benefits that can be derived from them.
- Implement all necessary changes with the minimum of impact upon the day to day business through collaboration with all infrastructure service providers (workplace management, IT, Human Resources).
- Ensure that the workplace changes are embedded into the fabric of the business, so that they do not unravel after the main change initiative has been completed.
- Provide continuing support for changes in organisation, business practices and the way in which the workplace is used in the future.

15.1 Support for behavioural change

The transition to hybrid and activity based working is, for most organisations, made; what remains is the continual adjustment of it, and the management of changes to it. The organisational and behavioural aspects of such changes require skills for workplace leaders, with a high level of attention paid to the engagement of staff and leaders. As a change leader the workplace leader must demonstrate knowledge and credibility in the science of behavioural change.

Three findings from the evidence bear directly on workplace change:

- People's working patterns are habits, formed by environment and reinforced by their team, and are changed by changing the environment and the team's expectations rather than by instruction alone.
- The behaviour of leaders is the strongest single determinant of whether a working pattern is adopted: people do what their leaders do, not what the policy says.
- Management by outcome, in which people are held to what they deliver rather than to where they are seen, is the condition under which hybrid working performs; management by presence undermines it.

Best practices include:

- The development of a coherent, evidence-backed 'case for change' explaining what the new ways of working are, why the organisation should take them up, how they will work in practice and how the transition will be made and sustained.
- The leadership and facilitation of a cross-disciplinary team involving all stakeholders involved in the change (typically HR, IT, Risk, Security, Internal Communications, Sustainability).

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- The creation of an effective governance structure to implement a mandate for change, make decisions and agree communications mechanisms and messages.
- The generation and support of a network of ‘champions for change’.
- The development of leaders’ capability to lead by outcome and to model the working pattern the organisation intends.
- The generation of a communications plan to ensure that the truth about the change is consistently understood, enabling people to make a ‘mental trade-off’ in relation to their wins and losses from the changes proposed.
- Measurement of the change against defined outcomes (attendance, experience, collaboration, performance), reported openly, and used to adjust the programme.

15.2 Attendance and return-to-office changes

Changes to the organisation’s working or attendance policy (an increase in required office days, a change in which days, or a move from team discretion to organisational mandate) are among the most contested changes an organisation makes. They touch people’s domestic arrangements, their sense of autonomy and their trust in the organisation, and they are watched by the external labour market. They are frequently announced without the capacity, the experience or the evidence to support them, and are then eroded in practice.

Best practices include:

- Establishing, before any change is announced, that the office can accommodate the demand the change will create on its peak days (see Capacity Management), and that the experience on those days will justify the attendance.
- Grounding the change in the organisation’s own evidence on what in-person working is for, and stating that purpose, rather than asserting a number of days.
- Treating the change as a programme under this capability, with governance, a case for change, leadership alignment, communications and measurement, and not as an announcement.
- Allowing teams to determine how the policy is applied within it, so that attendance is organised around the team’s work.
- Monitoring attendance against intended pattern, experience and attrition after the change, and reporting the results to the Executive.

15.3 Change associated with artificial intelligence

The adoption of AI in work changes what people do, where and with whom they do it, and how many of them are needed. It is a change to the demand for the workplace and to the activities the workplace must support, and it is also a change to the delivery of workplace services (see Improvement and Performance Management). Both call for Change Management.

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Best practices include:

- Engagement with the organisation's AI adoption programme, so that its expected effect on roles, headcount, activities and locations is known to the workplace function and reflected in scenario planning and capacity models.
- Attention to the activities that remain for people when routine work is automated, which are typically the collaborative, creative and relational activities that the office is best placed to support, and adjustment of the setting mix accordingly.
- Change management for the introduction of AI into workplace services, so that the organisation's people understand what is automated, retain a route to a person, and trust the result.
- Development of the workplace team's own capability to use AI in its work.

15.4 Installs, moves and additions

The modern workplace is a complex system. A traditional office move may on the surface look like a simple change; in practice it requires a good understanding of the current state of workplace infrastructure and careful planning to ensure a smooth and fault-free experience for the workplace consumers. This aspect of the Framework deals with the management of changes to physical infrastructure to new locations, moving existing equipment, accommodating increases or decreases in headcount, acquisitions and disposals. Under activity based working the individual desk move has largely given way to the move of a team's 'neighbourhood' and the adjustment of the setting mix, which depend on the same disciplines.

Best practices include:

- The development of detailed processes that define: how a workplace change is defined and applied for by a business unit; the process for determining the validity of the change; an assessment of the technical preparations; the logistics and communications; and acceptance testing.
- The maintenance of comprehensive records defining the current state of the workplace, including power capacity, data cabling capacity, HVAC, lighting, layouts and the setting mix, in the system of record.
- Well-developed relationships and understanding between all the parties that have to work together to deliver the change, e.g. consumers, IT, building services, space planning and project management.

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16 PROJECT MANAGEMENT



PROJECT MANAGEMENT

Definition for this Framework

This competency is an essential process for CRE, FM and Workplace functions and requires skills in planning, organising, motivating and controlling resources, procedures and protocols to achieve specific project deliverables on time and on budget.

Summary

Workplace projects range from small moves and changes involving little risk to the business, to large relocations and new builds across multiple geographic domains. In these latter cases a high degree of individual project management skill and experience is needed, as well as organisational capability to support and provide governance across the many stakeholders involved. For large organisations the role of project management may involve a high degree of programme management and the ability to cope with cultural differences as well as political sensitivities. Workplace projects now also carry carbon, reuse and data obligations, and an increasing proportion of them are technology and pilot projects for which iterative delivery is better suited than the stage-gate model.

Best Practice

- Project management is treated as a distinct skillset and discipline where project managers are trained and developed specifically to manage complex projects.
- Documented procedures are used throughout the project lifecycle.
- Projects are planned and managed using software and systems designed for that purpose.
- Risk assessments are routinely done on all major projects and programmes.
- Embodied carbon, reuse and the circularity of materials are assessed and reported on all fit-out and construction projects.
- An effective change control set of procedures is actively used.
- A project or programme governance structure acts as the authority to agree changes during the project.
- Clients and suppliers are actively involved throughout the project life cycle.
- A communications plan is used to ensure that all interests are properly informed throughout the project.
- A reporting structure is in place for all projects.
- Post implementation reviews, including post-occupancy evaluation against measured data, are held and used as a learning opportunity to improve and innovate.

Outputs

Strategic

- All workplace projects are reviewed in terms of their fit to the strategic plans and the net zero strategy.
- Risks are actively managed.
- The project or programme governance authorises all significant changes.
- Project and programme management skills are developed.

Delivery

- Multiple projects involving the interests of multiple stakeholders are successfully managed.
- The benefits of the project are realised and measured.
- Projects are delivered to time, scope, cost and carbon.
- Reports are delivered as planned.
- Post implementation reviews and post-occupancy evaluations are done.
- Learnings from reviews are progressed.

Other sources

ISO 21502 Project	programme and portfolio management — Guidance on project management

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PRINCE2	PMBOK Guide, Project Management Institute
APM Body of Knowledge	
BS EN 15978 Sustainability of construction works	Assessment of environmental performance of buildings; RICS Whole life carbon assessment
IWFM Professional Standards	

This capability covers best practices, skills and processes that deal with the whole project management cycle. This includes justification, governance, financial management and change management, through implementation, completion and post project review. These support the aims of:

1. Meeting project sponsors' requirements.
2. Achieving desired outcomes.
3. Learning from past experiences.

Best practices should exhibit evidence that all the following practices have been considered. The degree of detail will depend upon the scale of the project.

16.1 Defining requirements

16.1.1 Sponsors and governance

The role of business sponsors and the project governance mechanisms should be clear to all project members. Any significant changes to the sponsors should be taken into account in re-evaluating project risks.

Best practices include:

- The provision of an effective governance structure defining the parties to be involved in the project and their respective roles.

16.1.2 Risk assessment

Any project brings with it risks. The determination of project risks, and the potential implications and business impacts, is a critical capability which will drive decision-making.

Best practices include:

- The provision of clearly defined processes to undertake a comprehensive risk assessment which will include: identification of risk, probability, impact, exposure, mitigating actions, contingency plans and triggers.
- The initiation of an ongoing process of assessment during any project where significant risk factors have been identified, resulting in a published status report.
- The maintenance of records to provide evidence that a systematic approach has been used to assess and manage risks.

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16.1.3 Project and programme quality plan

Effective project management involves a rigorous planning process to determine a quality plan for the project that makes visible all aspects of the thinking associated with the plan.

Best practices in relation to the project plan:

- Quality expectations. The plan defines the standards and level of quality expected from the project in the funding call.
- Acceptance criteria. The plan defines acceptance criteria for major project outputs based upon the quality expectations set in the funding call.
- Quality plan. The plan includes a quality assurance plan showing how it will achieve the quality expected and the quality assurance processes it will put in place.
- Implementation. The plan defines the outputs and outcomes which, when implemented, are tested against the plan.
- Acceptance of outputs. The project submits its outputs, supported by evidence that they meet the quality expectations. Outputs are assessed against the acceptance criteria and accepted (or rejected) by the programme.

16.1.4 Project communication plan

A well planned project has a well planned communication strategy. The following is an example of such a Project Communication Plan.

What	Who/ Target	Purpose	When/Frequency	Type/Method(s)
Initiation Meeting	All stakeholders *	Gather information for Initiation Plan	FIRST Before Project Start Date	Meeting
Distribute Project Initiation Plan	All stakeholders *	Distribute Plan to alert stakeholders of project scope and to gain buy in.	Before Kick Off Meeting Before Project Start Date	Document distributed via hardcopy or electronically. May be posted on project website Project Snapshot or “Lite” Initiation Plan
Project Kick Off	All stakeholders *	Communicate plans and stakeholder roles/responsibilities. Encourage communication among stakeholders.	At or near Project Start Date	Meeting

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What	Who/ Target	Purpose	When/Frequency	Type/Method(s)
Status Reports	All stakeholders and Project Office	Update stakeholders on progress of the project.	Regularly Scheduled. Monthly is recommended for large/midsize projects.	Distribute electronically and post via web/OIT Blackboard site. Status Report
Team Meetings	Entire Project Team. Individual meetings for sub-teams, technical team, and Functional teams as appropriate.	To review detailed plans (tasks, assignments, and action items).	Regularly Scheduled. Weekly is recommended for entire team. Weekly or bi-weekly for sub-teams as appropriate.	Meeting Detailed Plan
Project Advisory Group Meetings (this may apply only to larger projects)	Project Advisory Group and Project Manager	Update Project Advisory Group on status and discuss critical issues. Work through issues and change requests here before escalating to the Sponsor(s).	Regularly Scheduled. Monthly is recommended.	Meeting
Sponsor Meetings	Sponsor(s) and Project Manager	Update Sponsor(s) on status and discuss critical issues. Seek approval for changes to Project Plan.	Regularly scheduled Recommended biweekly or monthly and also as needed when issues cannot be resolved or changes need to be made to Project Plan.	Meeting
Executive Sponsor Meetings (this may apply only to larger projects)	Executive Sponsor(s) and Project Manager	Update Sponsor(s) on status and discuss critical issues. Seek approval for changes to Project Plan.	Not regularly scheduled. As needed when issues cannot be resolved or changes need to be made to Project Plan.	Meeting

There should be evidence that such plans are commonly used.

16.1.5 Carbon, reuse and retrofit

Fit-out and construction projects are a material source of the organisation's embodied carbon, and the decision between retrofit of an existing building and relocation to a new one is among the largest carbon decisions the organisation makes. Project

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requirements should state the carbon and reuse expectations from the outset, so that they shape design rather than being assessed after it.

Best practices include:

- Whole-life carbon assessment (embodied and operational) as a requirement of the project brief, with targets, and reported at completion.
- Retrofit, refurbishment and the reuse of existing fit-out, furniture and equipment considered before new construction or new procurement, with the comparison recorded.
- Specification of materials and systems for durability, disassembly and reuse.
- Procurement criteria for carbon and circularity applied to project suppliers and contractors.
- Reporting of project carbon alongside cost and programme in governance and in the post-implementation review.

16.1.6 Resource planning and budgeting

The project plan should evidence those milestones that have been determined. A best practice plan would include:

Milestone planning. Types of milestone: major, culminating in a deliverable and marking transitions between phases and transitions of responsibility across roles; interim, indicating early progress and segmenting large work efforts into workable pieces. Functions of milestones: review and synchronisation points; assessment of progress and mid-course correction; representation of team and customer agreement to proceed.

Project initiation. The start of a new project should be a formal agreement and be on the basis that all pre-project activities have been completed.

Reporting. Agreement to the reporting level, frequency and detailed content of reporting should be a pre-project activity, as described in the project communication plan.

Change control. For large projects there should be a formal process whereby changes to requirements are discussed and agreed and where the consequences of the change are communicated.

Project close-out. It is important that projects are not finished until the sponsor is satisfied that the requirements have been fully met. As with project initiation, this requires a formal sign-off.

16.2 Iterative delivery for technology and pilot projects

The stage-gate model described above suits construction and relocation, where requirements can be fixed before work begins and the cost of change rises steeply with

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time. It suits less well the growing class of workplace projects whose requirements are discovered in use: the deployment of booking, sensing or analytics systems; the pilot of a new setting type or service; the adjustment of a hybrid working arrangement. For these, iterative delivery (short cycles of build, measure and adjust, with the scope allowed to change on evidence) produces better results at lower risk.

Best practices include:

- Selecting the delivery method for each project on the basis of how well its requirements can be known in advance, and recording the choice.
- For iterative projects: a defined hypothesis and success measures at the outset; short delivery cycles with measurement at the end of each; governance that reviews evidence and decides to continue, change or stop; and a defined point at which the result is adopted into business as usual or withdrawn.
- Pilots designed so that they can be measured against a comparison (another floor, another period, another group) and not only against the pilot group's own report.
- The same disciplines of sponsorship, risk, communication and close-out as for stage-gate projects, adapted to the cycle.

16.3 Post-implementation review and post-occupancy evaluation

Post-project reviews ensure continuous learning: what went well, what went poorly, what should be done differently, and recommendations for the future. Their purpose is to facilitate individual and organisational learning. Post-project meetings can also be conducted at key milestones of long projects.

For workplace projects the review should extend beyond the delivery of the project to the performance of its outcome in use. A post-occupancy evaluation, conducted at an agreed interval after occupation (typically between six and twelve months) and using measured data, is the means by which the organisation learns whether the project achieved its purpose and by which the next project is improved.

Best practices include:

- A post-occupancy evaluation as a required element of every significant workplace project, planned and budgeted at the outset.
- Evaluation against the outcomes stated in the project brief, using the measures of the Performance Management capability: utilisation, experience, environmental quality, energy and carbon, cost, and where available productivity and cognitive performance measures.
- Comparison with the pre-project baseline, which must therefore be measured before the project begins.
- Reporting of the evaluation to the sponsor and to the Workplace Steering Group, and incorporation of its findings into design standards, space standards and the Workplace Strategy.

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17 GLOSSARY

ABW	Activity Based Working: the provision of a range of work settings designed for different activities, with people choosing the setting that fits the task rather than being allocated a single desk.
AI	Artificial Intelligence: software systems that perform tasks requiring analysis, prediction, classification or generation, including the large language models now used in knowledge work and in workplace services.
BCP	Business Continuity Plan.
BIM	Building Information Modelling.
BREEAM	BRE Environmental Assessment Method.
CAFM	Computer Aided Facilities Management.
CEM	Certified Energy Manager.
Cognitive performance	The capacity of a person to concentrate, reason, decide, learn, collaborate and sustain effective mental work over time; the outcome the high-touch workplace exists to support.
CPO	Chief People Officer.
CRE	Corporate Real Estate.
CSRD	Corporate Sustainability Reporting Directive (European Union).
Desk-sharing ratio	The ratio of people to work settings that the measured distribution of demand supports at an agreed level of service.
Digital twin	A continuously updated model of the estate combining its physical description with live occupancy, environmental, energy and service data.
DPIA	Data Protection Impact Assessment.
ELA	Experience Level Agreement: the agreed standard of experience for a defined setting or journey, measured by survey, point-of-use feedback and environmental data.
Flexible space	Office accommodation provided by an operator under a short-term agreement, including coworking, serviced and managed offices.
FM	Facilities Management.
HR	Human Resources.
HS&E	Health, Safety and Environment.
HVAC	Heating, Ventilation and Air Conditioning.
Hybrid Working	The division of working time between the office, the home and other places, under an organisational policy.
IPMS	International Property Measurement Standards.
ISO 41001	Facility management — Management systems — Requirements with guidance for use (2018), the international management system standard for facilities management, with the associated ISO 41000 series.
ISO 45001	Occupational health and safety management systems (2018), which replaced OHSAS 18001.

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ISSB	International Sustainability Standards Board.
IT	Information Technology.
IWFM	Institute of Workplace and Facilities Management, the professional body formerly known as BIFM.
IWMS	Integrated Workplace Management System.
KPI	Key Performance Indicator.
LEED	Leadership in Energy and Environmental Design.
NABERS UK	National Australian Built Environment Rating System as applied in the United Kingdom; an operational energy rating for offices.
NEBOSH	National Examination Board in Occupational Safety and Health.
Net zero	The state in which the greenhouse gas emissions attributable to the organisation or its estate are reduced as far as possible and the remainder balanced by removals.
Occupancy	The number of people present in a building, floor or area at a point in time or over a period.
Peak-day demand	The number of people present, or settings required, on the busiest days of the week or year.
PI	Performance Indicator.
POE	Post-Occupancy Evaluation: the assessment of a workplace in use, against the outcomes intended, using measured data.
PRINCE2	A project management methodology.
Scope 1, 2 and 3	Categories of greenhouse gas emissions: direct emissions (1), indirect emissions from purchased energy (2), and all other indirect emissions in the value chain, including suppliers (3).
SLA	Service Level Agreement.
TCFD	Task Force on Climate-related Financial Disclosures.
TCO	Total Cost of Ownership.
TOM	Target Operating Model.
Utilisation	The proportion of work settings in use at a point in time or over a period.
WELL	The WELL Building Standard, a certification for buildings and workplaces against health and wellbeing criteria.
WM	Workplace Management.
Workplace Experience	The totality of a person's perception of the places, services, technologies, policies and behaviours through which they do their work.
Workplace Strategy	The function, and the discipline, concerned with the alignment of place, technology, services, policy and behaviour with the way the organisation's people work and the outcomes it requires of them.

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