Synergy of FM Competencies

Matthew P. Tucker

Liverpool John Moores University, Liverpool, U.K.

M.P.Tucker@ljmu.ac.uk

Kathy O. Roper

Georgia Institute of Technology, Atlanta, GA, U.S.A.

Kathy.Roper@gatech.edu

+1 404-385-4139

ABSTRACT

Purpose Based on a content analysis of facility management (FM) competencies from three key professional associations, BIFM, IFMA and RICS, the resulting identified competencies for effective FM were found to be somewhat diverse based on association affiliation. However, the majority of emphasis clustered around five competencies that all groups coalesced around, demonstrating the strength of these shared competencies as core for FM.

Findings, Key among the findings was that the top five competencies included: Compliance & standards; Contracts & procurement; Maintenance & operations; Sustainability; and Projects. Further analysis showed that each association had unique approaches in specialized areas inherent to that association's purpose and history. There were also striking omissions on several competencies which point to a need for further discussion on whether to update/add competencies to align with other professional associations. What was clear was the balance of mentioned competencies within the full range of competencies for all three associations. It was an unexpected result which merits attention, especially in light of global standardization initiatives.

Design/methodology/approach A complete review of the methodology, analysis and findings is included in this paper, providing the ability for future research to develop standardization worldwide. With the current ISO standard for Facility Management (FM) undergoing task group development, these research findings are essential for addressing industry needs in a robust, academic way.

Originality/value.Discussion of the results across the broad spectrum of facility management researchers involved in EuroFM is needed to enhance standards development and advance the research agenda for academic facility management education.

KEYWORDS Facility Management, Core Competencies, Iso Standard, Content Analysis.

1   INTRODUCTION

Dating back over a decade, development in the field of FM was rapidly advancing, universities launched academic programs in facility management, and researchers expanded knowledge in a multitude of specific areas within FM. A recognized researcher and advocate for the field (Nutt, 1999) noted during that time that, "The FM field need(s) to collaborate to:

- clarify the distinctive features of the facilities management, clearly defining the unique FM functions that are not part of the fields covered by business management or the property professions;
- develop management concepts and expertise in these unique areas, focused on the specific roles of FM in managing resources, environment and services to provide logistic support to the operations of organisations;
- adapt and apply relevant management concepts and proven technical expertise that can be modified to directly support key areas of FM practice; and
- build an expert FM knowledge base with supporting methods, techniques and data structures linking FM practice and research."

Almost two decades on, these collaborative needs still exist and little clarity to distinguish facility management has emerged beyond a number of initiatives related to sustainability and life-cycle cost analysis for facilities. Therefore, the standardization of facility management practice, terms and methods is considered an important path to advancing and improving the field. This research utilized content analysis methods to learn the similarities and dissimilarities of core competencies as published from the three key industry associations for FM: British Institute of Facilities Management (BIFM); International Facility Management Association (IFMA); and the Royal Institution of Chartered Surveyors (RICS). It is also suggested that U.S. and U.K. impacts would be expected to have similar impacts in Europe since European facility management practice is similarly based on competencies as outlined in the approved EN 15221-1 2006 documentation for client demands in two areas: Space and Infrastructure; and People and Organisation (European Committee for Standardization, 2006). The findings from this analysis confirm that the industry has grown, matured and added substantial responsibilities beyond the basic maintenance and operational functions that formed the basis of the field. However, there were a number of dissimilarities that are worth noting as they provide points of departure for some of the overlapping but differing areas of competencies.

2   PROFESSIONAL DEVELOPMENT

Historically, "profession" has been controversial and among sociologists, never completely defined. However, considering "the nebulous area of the sociology of the professions" Habenstein states that

> "The concept of profession applies principally to an ongoing pattern of organized action. The representative schema is (1) cultural tradition, (2) functional requisites, (3) structures, (4) role interaction, and (5) (usually) strain." (Habenstein, 1963)

These four or five schemas form the basis of consideration for any occupation as a profession. Despite the fact that European countries do not formally acknowledge "profession" as a unique term as described by noted sociologist Sciulli, the globalization of society and the tendency in many service provision companies for cross-border growth requires a standardization of the profession or occupation.

"Not a single Continental language either before or after the Second World War developed indigenously a term synonymous with or generally equivalent to the English term 'profession'. Rather, the terms closest in German, French and Italian all refer to the educated middle classes generally (e.g. Bildungsburgertum). This situation on the Continent has not changed substantially even half a century after the Second World War." (Sciulli, 2007). In order to truly be considered a "profession" Cruess, et.al. (2004) propose the following definition:

> "Profession: An occupation whose core element is work based upon the mastery of a complex body of knowledge and skills. It is a vocation in which knowledge of some department of science or learning or the practice of an art founded upon it is used in the service of others. Its members are governed by codes of ethics and profess a commitment to competence, integrity and morality, altruism, and the promotion of the public good within their domain. These commitments form the basis of a social contract between a profession and society, which in return grants the profession a monopoly over the use of its knowledge base, the right to considerable autonomy in practice and the privilege of self-regulation. Professions and their members are accountable to those served and to society."

Similar definitions of "profession" by others focus on moral responsibilities, organized framework of education, and/or support to society (Barnes, 2014; Chotipanich, 2004; Dohner, 2004). Promoting these three foci, all three of the analyzed associations meet these criteria, providing the support to consider facility management as a profession. Growth and maturity

have added responsibilities to the practice of FM and Tay and Ooi (2001) provided a graphic shown in Figure 1 to enhance understanding of the themes and impacts that workplace provision requires for a typical facility manager. These themes are helpful, but do not provide accurate understanding of the breadth of responsibilities seen in most FM organizations.

Figure i. Common Themes of FM from Tay and Ooi, 2001

The International Federation of Accountants provides the following professional objectives which outline a more generic list of best practices for a profession and could be adapted for other professions like FM:

- "Protecting the public interest by ensuring observance by its members of the highest standards of professional and ethical behavior
- Determining the eligibility criteria for membership of the body
- Regulating members in public practice
- Promoting the interests of its members
- Determining the entry requirements for students
- Promoting the education, training and certification of accountants (including continuing professional development and practical experience)
- Developing good relationships with government, other national professional accountancy bodies and regional groupings" (International Federation of Accounts, 2010)

An identified challenge by Nenonen and Lindahl (2014) is the need to manage collaboration between the various fields of research within the facility management industry, and collaboration with business and other third parties to demonstrate results within practice. Nor, et.al. (2014) posit a primary differentiating focus between U.K. and U.S. facility management, as the U.K. focus on cost efficiency, whereas the U.S. focus is on organizational effectiveness. Their assessment is based on prior literature, pointing out a difference in research objectives between the two countries. As leaders in the development of the industry, these two countries' differing approaches demonstrate the need for more global focus on standardization, to maximize the impact and growth worldwide.

3   CORE COMPETENCIES DEFINED

The BIFM has identified 10 functional areas performed in FM. IFMA utilized a global job task analysis to determine 11 competency areas of FM. The RICS includes 10 mandatory competencies and additional technical competencies in their candidate achievement record documentation for assessment of professional competence (APC).

BIFM identifies these ten functional areas in their Facilities Management Professional Standards Framework

1. The role of facilities management – knowledge to add value to an organization
2. Strategy and policy development – develops FM strategy and policy
3. Leadership and management – develops and manages a highly motivated and skilled FM workforce in a dynamic environment
4. Business continuity and compliance – builds business resilience and contains business risk
5. Business support services management – delivery FM solutions aligned with business objectives
6. Property portfolio management – maximizes and protects the value of property assets and ensures fitness for purpose
7. Quality management and customer service – fulfills customer expectations and quality requirements
8. Finance and IT – optimses finance and IT resources
9. Procurement and contract management – creates value through procurement and contract management
10. Sustainability – Minimises impact on environment through sustainable practices and efficient use of resources

IFMA defines these eleven competencies:(Competency areas as determined by GJTA Task Force 3/30/2009)

1. Communication -- communication plan and processes for both internal and external stakeholders.
2. Emergency Preparedness and Business Continuity -- emergency and risk management plans, procedures.
3. Environmental Stewardship and Sustainability -- sustainable management of built and natural environments.
4. Finance and Business -- strategic plans, budgets, financial analyses, procurement.
5. Human Factors -- healthful and safe environment, security, employee development.
6. Leadership and Strategy -- strategic planning; organize, staff and lead facility organization.
7. Operations and Maintenance -- building operations and maintenance, occupant services.
8. Project Management -- oversight and management of all projects and related contracts.
9. Quality -- best practices, process improvements, audits and measurements.
10. Real Estate and Property Management -- real estate planning, acquisition, disposition.
11. Technology -- facility management technology, workplace management systems.

RICS provides for three levels of competence and options for competency areas:

Mandatory competencies:
    Level 3 • Conduct rules, ethics and professional practice
    Level 2 • Client care • Communication and negotiation • Health and safety
    Level 1 •Accounting principles and procedures • Business planning • Conflict avoidance, management and dispute resolution procedures • Data management • Sustainability • Team working

Core competencies: Two competencies to Level 3 and two competencies to Level 2 from the list below. • Analysis of client requirements • Corporate real estate management • Maintenance management • Procurement and tendering • Project financial control and reporting • Supplier management

<u>Optional competencies</u>: One competency to Level 3 and two competencies to Level 2 from the list below (including any core competencies not already used). • Building Information modelling (BIM) management • Construction technology and environmental services • Consultancy services • Contract administration • Contract practice • Design and specification • Environmental management • Fire safety • GIS • Landlord and tenant (including rent reviews and lease renewals) • Project audit • Project financial control and reporting • Property management • Strategic real estate consultancy • Works progress and quality management • Conflict avoidance, management and dispute resolution procedures or Health and safety (must be taken to Level 3) or Sustainability

Plus one competency to Level 2 from the full list of technical competencies, including any not already chosen from the lists on this page. (RICS, 2014)
While similar in number of competency areas, the analysis revealed that the details defined in each association's competency standards differed to a great degree. Similarly, the number of individual occurrences of concepts was clustered in the 161, 152, and 151 occurrences (see Table 1 for list and total occurrences). However the distribution of these occurrences is different for each association as described in the methodology section to follow.

4   METHODOLOGY
In order to determine a synergized set of FM competencies across BIFM, IFMA and RICS, a content analysis approach was taken. Content analysis essentially involves the process of analyzing large amounts of qualitative data and reducing it into quantitative data, in which Grbich (2007) refers to data reduction as 'the process of reducing the data into meaningful groupings'. A more traditional/ established definition of content analysis is by Berelson (1952) who states that it is 'a research technique for the objective, systematic and quantitative description of the manifest content of communication'. Bryman and Bell (2011) provide an interesting critique of this definition identifying the two factors:
- Objectivity – being transparent in the coding of data; avoiding bias
- Being systematic – application of the coding process is done in a consistent manner

Therefore, to ensure that the competency documents were analyzed fairly and comprehensively, the following steps were taken:
1. Applying a definition to the recording units – in most instances sentences were classified as one recording unit, but sometimes this only consisted of one or two words, depending on the level of detail provided.
2. Definition of coding categories – these categories were developed organically depending on the content.
3. Reviewing of categories – once the categories had been created they were reviewed to ensure each was developed consistently.

The coding of the competency documents was achieved using a computer-assisted qualitative data analysis (CAQDA) tool known as NVivo. Within NVivo codes are stored in 'nodes', which 'become points at which concepts potentially branch out into a network of sub-concepts or dimensions' (Bazeley, 2007, p83). NVivo works similarly to a filing system, where sources can be filed away into organized folders, or in these case nodes, which are created for a particular code or theme to be stored. The steps that were taken to effectively code the data using NVivo follow a similar framework to the one suggested by Braun and Clarke (2006), which took the following steps:
1. **Familiarizing yourself with the data** – each professional document was read through informally by the readers in order to help familiarize with the depth and breadth of the content and rough notes were made at this point with any initial thoughts or ideas.

2. **Generating codes within Nvivo** – once the authors were familiar with the content within the documents, they were coded by identifying features of the data that appeared interesting to the authors (Braun and Clarke, 2006).

3. **Searching for themes** – once the data was coded, the analysis could move to a broader level by looking across all cases and restructuring the free nodes into possible themes. Within Nvivo, these themes are known as 'tree nodes'.

4. **Reviewing themes** – once the broad themes were generated, which by this point formed the main competency areas, the themes were reviewed to understand whether they should be merged into larger themes, or separated into smaller themes, depending on how many times they were coded.

5. **Defining and naming themes** – the definition of each theme was then reviewed to ensure the correct terminology was being used so it was easily recognizable.

6. **Producing the report** – finally a coding report was produced identifying the number of coded passages of text for each theme, which was split across the three professional documents.

One of the main reasons for using Nvivo was to aid in the organized method of storing codes and themes within the nodes as described by Bazeley and Jackson:

- "The original source (transcript) always remains intact
- Information about the source and location of a quote is always preserved
- It is always possible to view coded passages in its original context
- Changes to the document are reflected in the text viewed through nodes" (2013).

5 FINDINGS

The results of the content analysis of the BIFM, IFMA and RICS competencies are displayed in Table 1. There were 25 competencies in total that were coded. Interestingly there was a fairly even distribution of codes produced across the three competency frameworks, however when each of the 25 competency areas are explored in more detail, it is evident that there are some clear discrepancies between the frameworks. Table 1 illustrates that the darker shaded boxes have a higher number of text passages or occurrences.

The two most frequently coded categories – compliance and standards and contracts and procurement – have a fairly even distribution across the three frameworks; however the third highest ranking category – maintenance and operations – is significantly dominated by IFMA only.

The other most significant discrepancies occur with RICS competencies. In particular, the significance RICS places on the role of project management and real estate management are dominant, as well as role of building design and construction. Perhaps it could be argued that this is due to the surveying background of the Institution and the fact that RICS hold the term Chartered FM Surveyor.

The BIFM also demonstrate some significant differences to the other competency frameworks. Most notably in terms of the importance they attach to strategy and planning, which is surprisingly only mentioned once by IFMA and twice by RICS. Finally, it is interesting to see that the role of ethics is the least mentioned category within the three competency frameworks, giving a sense of irony as this is one of the underpinning attributes of any professional. Perhaps the small number of mentions results from the assumption that ethics is in play; however, in framing a set of international standards, the authors believe it is of critical importance to include ethics in order to standardize that expectation which is known to be widely varied across regions of the world. (Allen & Bunting 2008, George 2008, Walani 2014) As Buller, et. al. (1991) argue, the time is ripe and now perhaps overdue, to encourage the standardization of global ethics. They report that "Ultimately, as consensus increases on global ethics, these ethics will have increasing influence on societal and

corporate ethics." The clear delineation of standardized ethical statements by the three major FM associations can only help to advance global consensus and alignment.

Table 1: FM Competency Matrix, Darkest shading indicates most occurrences, lighter shading several occurrences, and white few or no occurrences.

	BIFM	IFMA	RICS	Total
Compliance and standards	18	12	17	47
Contracts and procurement	11	14	16	41
Maintenance and operations	7	24	4	35
Sustainability	14	8	11	33
Projects	5	6	17	28
REM-PM	6	6	16	28
Information and knowledge	14	6	6	26
Finance	7	5	13	25
Strategy and planning	17	1	2	20
Performance	6	11	2	19
Management	7	9	1	17
Risk	6	10	1	17
Customer perception	6	5	4	15
Technology	2	7	6	15
Building design & construction	0	0	14	14
Relationships	6	1	6	13
Leadership	5	7	0	12
Communication	0	8	2	10
Change	7	2	0	9
Role of FM	6	3	0	9
Consultancy	0	0	7	7
Innovation	5	2	0	7
Space planning	5	1	1	7
Conflict	1	2	2	5
Ethics	0	2	3	5
	161	152	151	

6   CONCLUSION

While this research on competencies of facility management compared the three key associations supporting the field, there is similarity and yet, still diversity, among what each considers being the core competencies required of proficient members. Competencies rating highly among all associations included:

- Compliance and standards
- Contracts and procurement
- Maintenance and operations
- Sustainability
- Projects

These five competency areas could form a basis for minimal standards utilized globally, and related competencies may be defined as further details included within these competencies. For instance "customer perception," "relationships," and "communication" could all be elements of "Contracts and procurement" competency. In an effort to refine the broad facility management field, it may be helpful to consolidate tasks rather than call each one out

individually, which could result in 25 or more areas of "competency". Anywhere overlap exists, only one competency area should be referenced.

The need for global agreement, at least on key competency issues, can assist the advancement and ease of cross-border contracting for numerous international companies that provide facility services or open facilities across the world. The expectation that regional differences will exist is expected, but more clarity on standard meaning, definitions and measurements will enable more rapid advancement of the facility management industry and growth overall.

Future research could conceivably use these core competency areas to further reduce or minimally consolidate the diverse tasks within FM so that future researchers, students, employers and standard-setting organizations may more clearly understand this diverse and highly valuable role in business and society today, and help to professionalize its definition.

REFERENCES

Allen, C. and Bunting, R., 2008, "*A Global Standard for Professional Ethics," Journal of Accountancy,* May, accessed November 24, 2014 online at: http://www.journalofaccountancy.com/Issues/2008/May/AGlobalStandardforProfessionalEthics.htm

Barnes, R.L (2014) "*Competencies, Credentials, Education and Training,"* Chapter 2 in International Facility Management, John Wiley & Sons, Oxford, U.K., pp. 5-7.

Bazeley, P. (2007) Qualitative data analysis with NVivo, 2nd Edition, SAGE, London.

Bazeley, P. and Jackson, K. (Eds.) (2013) *Qualitative data analysis with NVivo*. SAGE, London.

BIFM, *The Facilities Management Professional Standards Framework*, accessed November 7, 2014: http://www.bifm.org.uk/bifm/careerdevelopment/prostandards

Berelson, B. (1952) *Content Analysis in Communication Research*, The Free Press, Glencoe, Illinois

Braun, V. and Clarke, V. (2006) Using thematic analysis in psychology, *Qualitative Research in Psychology*, Vol. 3, pp. 77-101.

Bryman, A. and Bell, E. (2011) *Business Research Methods, 3rd Edition*, Oxford University Press. Oxford

Buller, P.F., Kohls, J.J. and Anderson, K.S. (1991) "The Challenge of Global Ethics*," Journal of Business Ethics,* Vol. 10, No. 10 Oct., pp. 767-775

Chotipanich, S. (2004) "Positioning facility management", *Facilities,* Vol. 22 Iss: 13/14, pp.364 – 372.

Cruess, S.R, Johnston, S. and Cruess, R.L (2004) "Profession": A Working Definition for Medical Educators", *Teaching and Learning in Medicine: An International Journal, Vol. 16, Iss 1, pp. 74-76.*

Dohner, R. (2004) "Corporate real estate management: a profession?" *Journal of Corporate Real Estate*, Vol. 6 (3), pp 200-203.

European Committee for Standardization (2006) accessed via ISO Standards 12 January 2015 at: ISO_TC_267___SC_N_5.pdf.

George, B. (2008) "Ethics Must Be Global, Not Local," *Bloomberg BusinessWeek*, accessed November 24, 2014 at: http://www.businessweek.com/stories/2008-02-12/ethics-must-be-global-not-localbusinessweek-business-news-stock-market-and-financial-advice

Grbich, C. (2007) *Qualitative Data Analysis: An Introduction*, Sage, London

Habenstein, R.W, (1963) "Profession" as a Sociological Category, *The Sociological Quarterly*, Vol. 4, No. 4 (Autumn), pp. 291-300.

IFMA, *The Core Competencies of Facility Management*, accessed November 7, 2014: http://www.ifma.org/about/what-is-facility-management

International Federation of Accounts, *"Establishing and developing a professional accountancy body"* 2010, accessed October 29, 2014:

http://www.ifac.org/sites/default/files/publications/files/Establishing-and-Developing-a-Professional-Accountancy-Body.pdf

Nenonen, S. and Lindahl, G. (2014) "Competencies for Multi-, Inter- and Trans-disciplinary Research in Facilities Management Research," *13th EuroFM Research Symposium Proceedings,* EuroFM Research Network Group, pp. 270-278.

Nor, N.A.M., Mohammed, A.H. and Alias, B. (2014) "Facility Management History and Evolution," *International Journal of Facility Management*, Volume 5, Number 1.

Nutt, B. (1999) Linking FM practice and research, *Facilities,* Volume 17, Number 1-2, January/February, pp. 11–17.

RICS, *Assessment of Professional Competence, Facilities Management, August 2014*, accessed November 7, 2014: http://www.rics.org/Global/RICS-APC-Pathway-Guide-Facilities-Management-Aug-2014-WEB.pdf

Sciulli, D. (2007) "Paris Visual Académie as First Prototype Profession: Rethinking the Sociology of Professions Theory," *Culture & Society*, January, 24, pp. 35-59.

Tay, L and Ooi, J.T.L (2001),"Facilities management: a "Jack of all trades?", *Facilities*, Vol. 19 Iss 10, pp. 357 – 363.

Walani, A.S. (2014) "Research ethics committees: Need for harmonization at the national level, the global and Indian perspective" *Perspect Clin Res*. April; 5(2), pp. 66-70.

The use of action learning sets within facilities management

Paul Wyton

Facilities Management Development at Sheffield Hallam University

p.g.wyton@shu.ac.uk

0044 114 225 4565

Andrew Currie

ajcpeople@yahoo.co.uk

Robin Payne   Quality Project and Facilitation Services Ltd.

robin.payne@hotmail.co.uk

ABSTRACT

Purpose Action learning sets (ALS) have proved to be effective in supporting active learning in a number of contexts. This paper explores the process, content and impact of two cases of the use of ALS with facilities managers to gain understanding of the process and benefits of a participative, co-creative and reflective approach to learning and action.

Design/methodology/approach. An action research was completed through the observation of a number of ALS meetings over the life cycle ALS groups, these observations supported by reflective feedback discussions, interviews and focus group. An interpretive inductive approach to allow theme to emerge from the data was adopted.

Findings Facilities managers can exist in an isolated role and encounter a wide variety of challenging problem contexts. ALS can create a safe environment in which FM's can explore and support each other in addressing problems. ALS provide the space and time to explore the developing nature of a problem and its proposed solution provide the means for considered action and the development of the FM as a reflective practitioner.

ALS take time and commitment to establish and maintain but can be a powerful means to problem resolution and personal support within the challenging roles that facilities managers fulfil. Participation in action learning sets requires a compelling reason, this may well be an external driver, the cessation or removal of the driver may well lead to the end of the group even if functioning effectively and delivering reported value to the individuals and the wider business.

The purpose of the ALS and relationships between the group members should be considered before establishing the process, business driven ALS being appropriate for a problem centered group where members work together and know each other, critical ALS appropriate where members do not work together and personal development and support is the purpose.

KEYWORDS Facilities Managers, Action Learning Sets, Trust, Reflective Practice

1 INTRODUCTION

Facilities management (FM) is a function with a wide range of responsibilities and impacts throughout the organisation suggesting the need for facilities managers (FM's) to be able to understand the organisation from a systemic viewpoint, to achieve a gestalt (Davies 2011). Separately individual FM's are often the only person within an organisation or contract with a particular set of responsibilities and skill sets, they report feeling alone. These conditions suggest the need for collaborative learning and problem solving approaches.

In arguing for a cognitive approach to learning within FM in order to accommodate social construction Roper (2012:196) emphasized the importance of problem based learning and collaboration and suggested the need for "more elaborate and thoughtful approaches to educating the fully rounded professional' and Bull (2015) stated 'there is a need to encourage FMs to be more open to reflection'. These thoughts highlight the need to provide different learning opportunities that support action and development of the individual, action learning

sets (ALS) provide just that collaborative, problem, action and reflection focused learning and are being used within FM.

Action learning is not new, action focused learning can be traced back to Lewin (1947), but the use of ALS has not featured in the FM literature. This paper addresses that gap through an action research investigation of 2 cases where ALS were used within FM, to better understand practical application, their process, content and impact. The paper demonstrates the power of ALS to support learning within FM, whilst recognizing challenges, limitations, characteristics and applicability of two differing contexts and approaches adopted.

2   Literature REview

Burnes (2004: 984) built upon the writings of Lewin stating 'understanding comes from changing the system that the purpose of understanding is action, and understanding comes from reflection on the totality of their situation'. Action learning has been described as a 'continuous process of learning and reflection, with the support of colleagues, working on real problems with the aim of getting things done' (McGill and Brockbank 2004: 11) and hence shows emancipatory and performative knowledge characteristics (Pedler et al 2005).

As Trehan and Pedler (2011:184) describe, action learning takes a number of forms, has '*varied interpretations applications and impacts*' but is essentially a learning not a training activity, is pragmatic and has action as a focus. Action learning requires a well-designed process with time and space to learn, think and experiment, allowing emergence, creativity and challenge (Kuhn and Marsick 2005, Flood 2010). Pedler *et al* (2005:58), whilst acknowledging the challenge created by a lack of agreed definition, recognize the notion of Revans's classic principles (RCP) holding the following characteristics:

- the requirement for action as the basis for learning
- profound personal development resulting from reflection upon action
- working with problems, not puzzles
- problems being sponsored and aimed at organisational as well as personal development
- action learners working in sets of peers to support and challenge each other
- the search for fresh questions and questioning insight takes primacy over access to expert knowledge

Pedler *et al* (2005) go on to recognise dilutions or evolutions that lead to 6 alternative approaches including critical action learning and business driven action learning. Business driven action learning sees '*groups work on projects identified by senior managers and make recommendations for action. This form of action learning is organisation-focused and emphasises problem-solving*'. Pedler *et al* (2005:59) particularly draw upon Wilmot (1997) to define critical action learning as '*a pedagogy that focuses upon management as a lived experience*' through which '*managers can be enabled to develop habits of critical thinking*'. Both of the cases studied drew heavily upon RCP, however the first placed emphasis on organisational problem solving demonstrating some characteristics of business driven action learning, the second demonstrated a number of characteristics that would see it defined as a critical action learning.

3   Methodology

The two cases observed were quite different in context leading to differing approaches to and involvement within the ALS. To gain an understanding of the process, content and impact of ALS would require embeddedness to understanding of the micro of behaviour and the macro of wider context (Whittington 2011). Therefore action research emerged as the appropriate method. Action research can be seen as an umbrella term for participatory and action

orientated research methods that are focused '*on the real world*'(Dick 2006), '*on practice in order to inform practice*' (Craig 2009:4) having origins in the philosophy of pragmatism. Action research can '*support a more holistic understanding of phenomena*' (McKay and Marshall 2001:49) for '*theory grounded in action*' (Susman and Everard 1978:48) an interpretive methodology that took an inductive approach (Easterby-Smith et al 2012). The action research cycle for each of the ALS were established through post activity reflective discussions between the facilitators to explore ideas and emergent themes, to test observations and addressed process, content and impact of the ALS for adaptation of the process.

3.1   THE FIRST CASE:

The FM function of a multinational pharmaceutical introduced lean management through a change programme commencing with a training intervention. Recognising that the short (2 day) training programme could only start the change process a programme of activities were designed to support development, the design drawing heavily upon the ideas of Kolb's (1984) learning cycle encompassing experimentation, experience and reflection to compliment the conceptual learning activities. The approach accommodated Schein's (2010) view that intentional change is managed learning, and that for change learning anxiety should be reduced, therefore those engaged in the change intervention were offered support activities such as coaching, service audits, external site visits and ALS.

Two action learning sets were established, A with 10 members and B with 7, the members of the sets were known to each, several working together. Participation in the ALS was voluntary, members were level 3 and 4 managers within the organisation. The sets held 5 meetings approximately monthly with a typical agenda of:

* Review our purpose;
* Review previous meeting notes;
* Re-connect with the principles;
* Review progress on key themes and develop actions;
* Consider additional themes.

The action learning sets were established on the basis of six components, as suggested by Marquardt and Wadill (2004, 187):

* A problem or challenge of importance to the group;
* A group of 4–8 members ideally from diverse backgrounds and or parts of the organisation;
* A process that emphasises questions and reflection;
* The power to take action on strategies developed;
* A commitment to learning at the individual, team and organisation level;
* An action learning coach who focuses on and ensures time and energy are devoted to capturing the learning and improving the skill level of the group.

The ALS were established and facilitated by the change manager and a researcher invited to participate and assist in facilitation, and who was completing a larger study of the sustainability of change. The role of the facilitator is important, recognised as an expert, guiding the process but not the decision maker (Mumford 2001), there was a constant drive to make the discussions and activity participant lead. Members of the groups presented problem contexts within a confidential and safe environment, an agreed approach to problem resolution guided by the facilitators was adopted and the problem used to explore the use of the desired tools and techniques. The aim of these groups was to explore the change, develop

understanding and competence with the associated tools and techniques and address issues with the introduction of the change. This structure of ALS had a problem centered focus, the overarching problem context identified by the change intervention and therefore can be argued to be a business driven action learning (Pedler et al 2005). Data was gathered through observation of the ALS captured through contemporaneous notes, the reflective post ALS discussions between facilitators and post intervention interviews with 10 of the group members, the interviews being unstructured reflective discussion (Simpson 2009).

3.2   THE SECOND CASE

A large FM service provider requested a bespoke leadership development programme for contract managers that led to a university qualification. An ALS was established for the 6 members of the course to support personal development through collaborative problem solving as an action focused learning activity and to develop reflective practice. Importantly the group members worked on different contracts, they were not known to each other prior to the programme and did not work together. The six members each attended 5 multi day workshops over 7 months, at each of the workshops a morning was allocated for the ALS, the head of learning and development for the organisation facilitated the meetings, the course leader was invited to observe and contribute.

These ALS group meetings were different to the business driven action learning, they were established with a different set of operating guidelines, each member had a set time, they could introduce any problem context, and discuss with the group. The other group members were allowed to ask open, non-judgmental questions but not provide answers or suggestions, key characteristics included being respectful, honest, lacking in judgment, confidential and humour. This style enabled the individual with the problem to explore that problem in a safe environment, gain their own understanding and develop personal solutions. In style the approach can be seen as close to critical action learning (Pedler et al 2005:59) in demonstrating a critical exploration of a problem context through the lived experience accommodating '*embededness in the structural media of power relations*'.

Data was gathered through observation of the ALS, feedback from the individuals participating as they reflected upon the process at each workshop, post workshop discussion between the facilitator and course leader and an evaluative focus group completed at the end of the leadership programme. The data collected from the two cases was analysed through concept maps (Davies 2011) to identify emergent themes and the '*general inductive approach*' (Thomas 2006) was adopted to structure data and help explore.

4   Discussion of results

What emerged was a conclusion that action learning sets work for FMs, they provide a means of collaborative learning, enhanced reflective self-awareness and problem solving, however they are challenging to establish and maintain. The analysis generated a number of themes recognising the different approaches taken and the differing impact that these had indicating the need to be clear about the purpose of the ALS, to consider set up, format, functioning and membership. The ALS, different in their style, produced significant reported benefits, they had an impact, though the impacts were quite different. Two related themes emerge, that action learning sets have a lifecycle and that for each individual there needs to be a compelling reason to engage and continue participation as one participant noted individuals '*must feel something from it on a personal level*', the compelling reason in each of the cases an external driver.

4.1   BUSINESS DRIVEN ACTION LEARNING

4.1.1   Process

Participation was voluntary, this resulted in a limited number of highly motivated individuals engaged. Of the two sets one (A) had a consistent attendance, they matured over time

developing together as an effective problem solving group and achieving action learning cycles. The second group (B) did not achieve the same maturity, attendance was inconsistent and although members reported benefit and action the group was observed achieving far less progress than the more mature group, each meeting feeling as an isolated event compromising the learning cycle. These differing experiences highlight the need for consistency and recognising that maturity and performance can take time and requires thought and support, and the continued compelling reason.

The importance of the facilitator is highlighted, changing over time, initially taking a leadership position, establishing the group and providing guidance. There was an observed need to enable leadership to pass to the group and act as a coordinator, the facilitator discussed this role: '*I think individuals are still too often trying to prove their own worth rather than helping each other deliver of their best*', in this he was recognising that the ALS is not about the facilitator. Within the change intervention a tension emerged between the needs of individuals, the group and the organisation. Holding a role of change lead the facilitator acknowledged demands to demonstrate success, the '*quick wins*' (Kotter 2005) or as he described, '*projects to prove it*', the project lead and facilitator roles can lead to conflict in objectives and create a drive that leads to the facilitator 'forcing' to meet their own rather than the needs of the group.

One of the group had a more senior manager attending the first meeting, and this caused some conflict, challenge and restricted the conversations. Significant thought is required as to make up of a group particularly if action is the purpose, the ALS requires '*The power to take action on strategies developed*' (Marquardt and Wadill (2004:187), however the inclusion of senior managers can act to stifle conversations and collaborative problem solving as the hierarchy of the organisation is maintained.

The ALSs associated with the change intervention stopped when that particular intervention was ceased, demonstrating the lifecycle as the change manager noted *I think action learning groups are difficult to keep alive as long as they follow the same pattern month after month, so there may be a natural three or four month time period where a certain model and style works and then there needs to be a change*'. Despite one of the groups functioning very effectively they did not continue without the purpose of the particular change, the compelling reason disappeared.

4.1.2   Content

The groups were participant led and focused upon learning as indicated by the purpose statement one group developed '*To embed and apply our lean learning through action learning and support for each other*'. Through reflective after thought the need to emphasis action and impact was recognised, as the facilitator noted '*Discussion led to the conclusion that this statement works but may not indicate sufficient external effect for the group*' highlighting the business driven approach. One member recognising the role of ALS in supporting the intervention '*I got really right behind ALS because it is the culture change that is needed*'.

The purpose placed emphasis on the facilitator as a technical expert, advising on suitable tools or techniques for a type of problem, technical execution within the event and supporting introduction of solutions identified. As the meetings progressed so the problems addressed became better defined, and the groups became better at utilizing the tools and techniques involved. For the more mature group the discussion did at times develop into what felt like 'therapy sessions' of mutual support. Perhaps this is not the intended outcome from the ALS but could be considered an important and undervalued outcome?

A key feature of ALS is the power to take action, throughout the discussions the significance of perceptions of empowerment was evident, a note after the first meeting '*A key point throughout was decision making…..lack of clarity around scope for decision making…trust to*

get on with it?....'. An interesting observation from discussions with the groups and the senior management, the groups felt they were not empowered, the senior managers firmly believed they had empowered the group to act. At one of the ALS meetings senior managers were invited, this was a powerful meeting, significant honesty and challenge provided in what is a traditionally conservative and hierarchical organisation. The senior managers were part of the change intervention, but entered the ALS as a guest, this involvement enabling the issue of empowerment to be discussed, though never fully resolved.

4.1.3   Impact

By design the ALS had a purpose of learning through collaborative action, emphasis was placed upon co-operative co-creation of solutions to presented problem contexts. The groups, particularly the first, reported significant learning feelings of capability but not always execution as one manager noted '*we are very good at lining up the snowballs at the top of the hill not very good at letting them go'*. Despite this there was reported success in delivering significant learning, process change and savings. The members of the groups reported a personal benefit as illustrated by the response of one member, *'without a doubt yes'*. Those involved in the development activity reported personal development, learning and several could identify where the thinking had changed them as managers, a strong example included attitude to failure confronting issues of blame, however limitations created by perceived internal organisational barriers were not always addressed, limitations to perceptions of empowerment compromising action.

The focus of a business driven ALS being problem solving, learning can be evidenced through outcomes:

- Increased use of the voice of the customer and resultant changes in situation perception amongst operational teams;
- Increased use of visual management, providing focus and motivation for improvement work;
- Increased use of plan-do-check-act operational meetings, leading to increased efficiency and effectiveness in problem solving;
- Increased use of standardisation, reducing variations in service performance and hence normalising customer expectations;
- A change in the attitude towards deviations; expressing interest in them as opportunities for improvement, rather than making excuses for them.

Individual projects evidencing impact within the organisation:

- An improved approach to customer relationship management within a technical area including the introduction of streamlined service level agreements;
- A revision to the means of managing plant rooms and the expectations placed on all contractors working within the site.
- A significant contribution to the vision and strategy adopted by the leadership team;
- Improved clarity of departmental decision making processes

A post intervention capability assessment against an internal evaluation grid found that the ALS led to enhanced practice of lean (Wyton and Payne 2013:56):

- 100% were able to describe Lean as a philosophy and range of management tools, and express its potential value to the organisation. (Foundation)
- 100% of managers felt competent to solve standard problems by apply Lean tools (Competent)

- 80% felt able to apply a number of tools and approaches when working with their team mates, non-business critical problems are solved as part of continuous improvement (Professional)
- 60% were willing to act as Lean Champions; able to coach and advise others, develop innovative solutions, (Professional)

4.2   CRITICAL ACTION LEARNING
4.2.1   Process
The focus of the ALS within the learning development programme was reflective addressing of problem contexts, solutions emerging through self-analysis supported by those in the group. Reflection supported by non-judgmental open questioning enabled a trusting culture to emerge over time. The ability to ask open questions, be non-judgmental and not '*provide the answer'* was observed to develop over the course of the meets, this later recognised by members of the group as important for supportive and empowering leadership.

Again facilitation was important to the setup of the group and establishing behaviours, within this format the facilitator is seen as an expert in running ALS. As the group became more proficient and self-policing the facilitator role became less significant and the facilitator's capability within organisational development and coaching became valued. The importance of confidentiality, being non-judgmental but also working in different parts of the business and therefore not working with each other became recognised significant to success of a critical ALS.

4.2.2   Content
This was a leadership development programme that placed reflective practice at the heart of that learning and development, the ALS providing practical means of developing reflection. The changing conversations, the deepening of the discussion and the addressing of personal issues demonstrated the success of the approach. The nature of the problems presented and the conversations that emerged changed significantly from the first to the later workshops. Problems presented at the first meeting were more technical in nature such as changing a security process, or more superficial management issues, conversations were about problem resolution. As the group matured the problem contexts presented became steadily more challenging, presented in much greater depth and far more personal such as individual resistance within contract restructuring, handling demanding clients, and personal dilemmas that one member recognised as '*challenging their moral compass'*. Another entering a rebid situation felt senior managers were not fully aware of issues or supportive of the bid process, this emerged later in the programme and later the member reported greater confidence to engage and challenge those managers.

Facilities managers' report operating in what can be perceived a quite a lonely place, often they are the only person of their level and technical experience within an organisation or contract, there is a reported lack of '*someone to talk to'* about technical and service related problems. These feelings were expressed within the ALS demonstrating the developing trust and value placed on the opportunity. One member addressing a new and very challenging change process within a contract reported the feeling of being very alone another expressing feelings of isolation and lack of support. An important observation given the feelings of isolation within a stressful role*, 'it helps to get it off your chest'.* The ALS provided the opportunity to explore those feelings with others who had experienced similar contexts. The conversations enabled technical/ practical action but also reported support to the individual.

4.2.3   Impact
 Members reported addressing significant technical problems, ideas were floated, contacts made and action taken collaboratively outside of the ALS meetings. Significant benefit was

delivered to the organization through such collaborative problem solving. Participant reported examples of action derived from or decisions supported by the workshops included:

- Introduction of new shut down procedures for a financial data centre with 24 hour demand
- Enhanced reporting processes that identified saving opportunities and built trust with client
- Introduction of innovative condition based maintenance to a high pressure environment
- Confidence to introduce new cleaning processes
- Development and visualization of a 5 year plan enabling recognition of risk management and improved relationships with client managers
- Improved prioritisation and understanding of the key issues for a multi-site national contract

The focus was development of reflective practice, the reported impact after completion of the programme was powerful, when asked what difference the ALS had made comments from participants included:

- 'Awareness of self in the workplace' and 'questioning if I was effective, breaking the cycle of *the busy fool'*
- 'Now recognizing a difference between leading and managing'
- 'Recognising that micro management is wrong and beginning to let people find the answer'
- 'Stepping back and taking time to think'
- 'Recognising the need to solve the problem with the team'
- 'Listening and the practical application of reflection'
- 'The power of reflection and facing up to areas of development'

The recognition of reflection in their practice highlights the significance of action learning in providing a means to develop this capability, to become a reflective practitioner, returning to Bull (2014) '*there is a need to encourage FMs to be more open to reflection'*. The ALS worked very well, however on completion of the course the group stopped, despite the reported impact and personal gain, the compelling reason to engage and contribute was missing. Compulsion with action earning sets will probably be counterproductive, yet action learning sets can provide significant learning, co-creation of solutions, and personal support, to maintain the sets there is a need to identify a continuing compelling reason.

5   Conclusion

Within facilities management ALS can have a significant impact, providing opportunity for collaborative action focused problem solving, reflective personal and contextual awareness, and emotional support. Through the study of two differing cases this paper has identified issues of process, content and impact to support the use of ALS in FM. The process of the ALS should fit the needs of the context. Where members know each other, work together and there are specific issues to address a business driven action learning may be appropriate. Here the problem and co-created means of solving the problem provide the learning opportunity, supported by action and reflection, ALS can provide significant improvement in understanding of the problem, enhanced solutions and learning about problem solving. Where members are unknown to each other and do not directly work together a critical action

learning may be more appropriate. A supportive, non-judgmental and confidential environment that provides opportunity for a more personal and reflective problem exploration that is supportive of the individual whist generating enhanced solutions generates significant improvement and learning.

ALS have a lifecycle, and appear to require a compelling reason for members to attend. Individual members must '*feel something from it on a personal level'* in order to remain committed. A form of external driver such as a development course or change intervention can provide that compelling reason, but functioning and successful ALS do not appear to continue after completion or cessation of that external driver. An experienced facilitator, respected and trusted, is important to manage the practical arrangements, and the process of the actual meetings without dominating and adjust behaviour through the lifecycle of the ALS as appropriate, a difficult task. FMs often feel isolated, ALS provide a safe environment in which to explore a range of problems and '*get things off their chest',* enabling the psychological safety to challenge and express that can lead to better solutions and greater awareness and confidence of 'self'.

The continuity of membership of an ALS enables a level of trust in the others to be built and a group maturity to develop. Trust can aid in overcoming learning anxiety to enable a fuller engagement, contribution and an increasing complexity of problem addressed, and can support the development of an FM as a reflective practitioner.

REFERENCES

Baskerville, R. and Wood-Harper, A.T. (1998), "Diversity in information systems action research methods". *European Journal of Information Systems*, 7**,** 90–107

Bull, M. (2015), "Improving Facilities Managers through reflective practice education", EuroFM Research Conference, 2015, Glasgow

Burnes, B. (2004), "Kurt Lewin and the planned approach to change: a reappraisal", *Journal of Management Studies*, 41 (6), 977-1002

Dick, B. (2006), "Action research literature 2004-2006: themes and trends" A*ction research*, **4** (4), 439-458

Easterby-Smith, M., Thorpe, R. & Jackson, P. (2012) *Management research,* 4th Edition, London: Sage

Davies, M. (2010), "Concept mapping, mind mapping and argument mapping: What are they and do they matter?", *Higher Education*, 62, 3, 279-301

Kolb, D. (1984), *Experiential learning*. Englewood Cliffs, NJ

Kotter, J. and Rathgeber, H. (2005), Our iceberg is melting: Changing and succeeding under any conditions. Basingstoke: Pan Macmillan

Lewin, K. (1947), "Frontiers in group dynamics: Concept, method and reality in social science; Social equilibrium and social change, *Human Relations*, 1, 5, 5-41

McGill, I. and Brockbank, A. (2004), *The action learning handbook,* Routledge Falmer

McKay, J., and Marshall, P. (2001), "The dual imperatives of action research", *Information Technology & People* 14, 1, 46-59.

Marquardt, M and Wadill, D (2004), "The power of learning in action learning: a conceptual analysis of how the five schools of adult learning theories are incorporated within the practice of action learning", *Action Learning: Research and Practice,* 1, 2, 185-202

Pedler, M., Burgoyne, J. and Brook, C. (2005), "What has action learning learned to become." *Action Learning: Research and Practice* 2, 1, 49–68.

Revans, R. (1993), *The ABC of action learning*. Chartwell-Bratt, Bromley

Roper, K. (2012), "Educational implications of an FM social constructionist view". In: Alexander, K. and Price, I. (Eds) *Managing Organizational Ecologies. Space, Management and Organizations.* Routledge, New York, 189-197.

Schein, E.H. (2010), *Organizational culture and leadership*. 4th ed., San Francisco, Jossey Bass.

Trehan, K. and Pedler, M. (2011), "Action learning and its impact", *Action Learning: Research and Practice,* 8, 3, 183-186.

Susman, G.I. and Evered, R.D. (1978), "An assessment of the scientific merits of action research. *administrative science quarterly"*, 23, 4, 582-603

Whittington, R. (2011), "The practice turn in organization research : Towards disciplined transdisciplanarity", *Accounting, Organizations and Society*, 36, 3, 183-186.

Wyton, P. and Payne, R. (2014), "Exploring the development of competence in Lean management through action learning groups: A study of the introduction of Lean to a facilities management function", *Action Learning: Research and Practice,* 11, 1, 42-61

Improving Facilities Managers through reflective practice education

Melanie Bull

Sheffield Hallam University

m.bull@shu.ac.uk

+ 44 114 225 3240

ABSTRACT

Purpose: Reviews the use of reflective practice education in facilities management (FM) and the impact this can have on decision making and innovation in the workplace. The two main drivers for the research were to understand how reflective practice was used by facilities managers and to comprehend whether reflective practice had benefitted individuals professionally.

Design/methodology/approach: Results came from a hermeneutic study exploring the use of reflective practice in FM. This study engaged practitioners who had all completed a part time undergraduate certificate in FM, delivered via block study and distance learning. The research was carried out using unstructured interviews, and emailed questions.

Findings: The research evidenced that there are benefits to facilities managers being more reflective in their working practice and facilities managers need encouragement to become reflective practitioners and to contribute to the wider organisation through improved service and innovation.

Research limitations/implications: One of the potential limitations was that the research was carried out with a small section of professional FM students from one university, and has not focused on FMs that have not been engaged in further education; although this was a qualitative piece of work and not aimed at generalisation.

Practical implications: Professional bodies, organisations and educators need to consider how they engage and encourage the concept of the reflective facilities manager.

Originality/value: Whilst there is literature in relation to reflective practice in education and management per se, this focused on the use of reflective practice in the workplace within an FM context. The benefits of such an approach have not, to my knowledge, been formally assessed in FM.

KEYWORDS: Facilities management, reflective practice, innovation

1   INTRODUCTION

Facilities Management education does tend towards the more formal, technology based routes, as Steenhuizen et al (2014) discussed in their research on FM education within Europe focusing on professionals in Portugal and their definition of FM, how they deliver FM within their organisations and what education would be best for the Portuguese market. They recognised from their interviews that the majority of their interviewees discussed 'place' and did not acknowledge people or process and the managers had an in depth technical knowledge but felt that education needed to focus more on the soft skills in relation to management.

Alexander (2009:6) discussed the role of education in FM as being paramount and recognition of the need for managers, researchers and educators to be aware of organisational issues and trends to which FM must *'contribute and respond'*. Roper (2012:191) also recognised the issues with more traditional technology based education for FM, and reviewed a need for the FM to be able to cope with the '*complex social impacts that the workplace has on the worker and that the workers impart on the workspaces and the interactions of the users and space'* This approach is drawn from a social constructionism view and she feels that FM should be taught from this perspective. This would draw on a different way of

thinking and this research suggests reflective practice has the potential to address these needs and engage FM students to see the world differently. Her ideas concur with our current course approach in using problem based learning, but we can further develop a greater understanding of how different people view the world from a different standpoint; as Roper suggested (2012:196) *"more elaborate and thoughtful approaches to educating the fully rounded professional"*.

As Coenen and von Felton (2014) discussed facilities management is a service based industry and therefore education needs to also focus on management in relation to process, the tangibility management (the brand of FM, including uniforms of the FM staff, logos etc.), personnel management and relationship management. The author's wider doctoral research has highlighted how reflective practice has led to a change in all four elements, from the improvements in decision making and therefore innovation (process), the raised profile of themselves within the organisation (tangibility), increased self-awareness leading to improved communication with staff and end users (personnel management) and their ability to flex their behaviours according to the situation has improved relationships. This paper focuses on how teaching reflective practice in FM education to professional students leads to engagement in reflective practice in the workplace and improved performance.

2   Literature review

Bengtsson (1995) highlights four basic aspects of reflection: reflection as self-reflection, reflection as thinking, reflection as self-understanding and the distancing function of self-reflection. This is further reiterated by Boyd and Fales (1983), who see reflective learning as an individual process and internal examining resulting in a changed conceptual perspective. According to Bolton (2010:xix) reflective practice is *"paying critical attention to the practical values and theories which inform everyday actions by examining practice reflectively and reflexively. This leads to developmental insight."* Bolton further explains the concepts of reflection and reflexivity alongside the concept of values. *"Reflection is an in depth consideration of events or situations: the people involved, what they experienced and how they felt about it."* She also discusses that to fully engage in reflection, we have to be prepared to *"relive or review the experience"* and be able to *"replay from diverse points of view"*. She continues to explain reflexivity as a way of "*standing outside the self to examine, for example, how seemingly unwittingly we are involved in creating social or professional structures counter to our espoused values."* By the meaning of values, she continues in explaining that these are manifested in practice. For example, *"we are what we do"*. The recognition of the difference between our values in practice and our espoused values can be further explored through reflective practice to try to enable us to make them harmonious with each other. The definition from Bolton in relation to the terminology used to explain reflective practice complimented this piece of research, and agreed with my own pre-existing knowledge and understanding in relation to reflective and reflexive practice. Osterman and Kootkamp (2004:13-14) refer to reflective practice being designed as a way to " facilitate identification, examination, and modification of the theories-in-use that shape behaviour... requiring change in deeply held action theories". This explanation identifies the active as opposed to passive engagement with this practice. It is not simply naval gazing but a way of changing our own inbuilt assumptions and behaviours.

Reflective Practice in Teaching

Reflective practice, as referred to by Bolton (2010:3) can be considered as being *"a state of mind"*, and therefore this is something that individuals have to engage with, it is not just a tool or technique to be used at particular moments but more a way of living.   Reflective practice allows us to explore and question our own values, beliefs, behaviours ideologies and assumptions not just in the workplace or in our home environment, but in everything we do. Reflective practice often leads to action or a deeper reflective exploration of 'self'.

The concept of reflexivity according to Cunliffe (2009) is taking reflective practice further in relation to not only understanding our practices but also how we relate with others; the creation or organisational realities of shared practice and also how we talk and use language. We can then recognise how our circumstances and relationships are considered in relation to our behaviours as opposed to merely reacting to them and this can help us to understand and revise ethical ways of being. We could also consider whether there is a difference between our values in practice and our espoused values, these being our core moral beliefs. This can be affected by our organisational values being different to our own. Bolton (2010) refers to reflexivity as an awareness of how I am experienced and perceived by others. Bolton also discussed her use of reflective and reflexive practice as a "through-the-mirror" method to allow for a combined reflexive and reflective journey.

Locating reflection in teaching practice can be evidenced back to Dewey (1933) as he considered the way of taking in new knowledge and the thought process that this can commence; he defined reflection as *"active, persistent and careful consideration of any belief or supposed form of knowledge in light of the grounds that support it and further conclusions to which it tends constitutes reflective thought"* (Dewey, 1933:9). As discussed previously this still has some focus on an active as opposed to passive process. Whilst Dewey does not refer to the emotional engagement in relation to learning and reflective practice, Boud et al (1985:19) defines reflection as *"a generic term for those intellectual and affective activities in which individuals engage to explore their experiences in order to lead to new understandings and appreciations"*.

3   Research Methodology

This section will focus on the approach to the research strategy, the chosen research method and some discussion on the social actors used within the research.

3.1   RESEARCH STRATEGY

The research has been carried out using a hermeneutic exploration. Hermeneutics is the study of interpretation (Follesdal, 2001) and the research has been an exploration of whether facilities managers are engaged in reflective practice and the benefits they feel this may have given them from both a personal and organisational context. The approach to the research has been through a qualitative investigation through the hermeneutic tradition as this allows for the researcher to engage in the understanding of meaning of everyday language and to try to form some concepts from this social world (Giddens, 1976) or the "lived experience" (Laverty, 2003) and also to ensure it is an interpretation of the information as opposed to a translation. Hermeneutics allows for a bottom up approach by adopting the position of the researcher as the learner rather than expert; therefore the learning will be taken from the experiences of the social actors. These lay concepts are taken to allow for the researcher to create more technical concepts which are created through iterations of examination and reflection, and further re-examination. The concept is not static and therefore allows for the researcher to explore the information and for it to be evolving throughout the process. The aim is to provide a useful description and understanding to fit the research being discussed (Blaikie, 2010).

The process of the hermeneutic cycle was drawn on from Gummesson's model (2000) which involved initial discussion of pre understanding, and acknowledgement of own life history and also exploration of the literature in reflective practice. The text from the interviews was then revisited in several iterations to reflect on the text, thoughts and the theory until understanding was gained on that particular theme.

Using the hermeneutic approach allowed understanding and reporting on the social reality of the "actors" and to create meanings and interpretations of their own thoughts, whilst trying to remain true to their language; there is also a need for the researcher to ensure that their own

interpretations remain true to the actors. It is important to stay within the information and to remain within the hermeneutic cycle and the recognition of own influences and the impact this has on the study needs to be recognised. In order for the research to be robust, all decisions should be reflected upon, including the use of the theoretical framework and be made explicit to others (Koch, 1996). The research has taken an emergent format within the tradition of interpretative research, and therefore the use of narrative and approaches evolved through the engagement with the text.

3.2   THE SOCIAL ACTORS

The social actors were taken from students/alumni that have engaged with our professional programmes in facilities management, as these are all underpinned by reflective practice. As the students are based all over the UK due to the delivery method of the course, there is a mixture of face to face interviews and telephone interviews; and also emailed questions. These students are all part time professionals studying on a blended learning basis. From our course perspective, blended learning relates to part time distance learning and part time block study. The research included 34 email responses, 7 face to face interviews and 5 telephone interviews and I felt at this point that I had achieved theoretical saturation as there was nothing new coming from the interviews (Blaikie, 2010).

4   The Hermeneutic exploration

There is a dearth of literature in relation to facilities management and reflective practice, and whilst the professional body in the UK, British Institute for Facilities Management, discusses this as being a skill for facilities managers, there was no evidence of research focused on the benefits of using reflective practice in facilities management in the workplace.

- To aid the narrative discussions, Høyrup (2004) discussed the need to be able to understand the differences between levels of reflection and also to understand organisational learning and the links between the two. Moon (1999) stated there was no common and agreed upon concept of reflection but Høyrup focuses on the need to not necessarily define reflection but to distinguish between the levels of reflection, drawing on individual, interactional and organisational. Van Woerkom's (2003) view of reflection refer to the individual reviewing an experience, and refers to this as the reflective practitioner, however individuals can reflect together in an organisational context and this type of reflection is important for teams. To draw further on the discussion of reflection and critical reflection, Mezirow discussed critical reflection in relation to not only understanding the task itself, but also understanding the premise of problem solving. It involves a "critique of the presuppositions on which our beliefs have been built" Mezirow (1990:1). There is more concern with the why we have behaved or carried out a task in a certain way; the deeper exploration of self. Høyrup (2004:445) believes that 'reflection builds the bridge between individual and organisational learning.'

4.1   THE USE OF REFLECTIVE PRACTICE IN THE WORKPLACE

As part of the interview discussions and the emailed questions students were asked whether they engaged in reflective practice and if so whether they could give some examples. The first examples lead to the use of reflective practice to focus on improvements within project work and/or how they delivered a service.

- "… reflecting on any similar work that has previously been undertaken which could guide future decisions. I would also reflect on situations and interactions when conducting staff appraisals for my team" (DO-email response)
- "Since 2011 then the FM team has carried out over 10 small office refurbishments with success, this has been achieved through me using my reflection skills and looking at how I project managed the very first project and how I managed the whole

process but more importantly how I felt as a person and project leader, and how my actions effected the project in general." (MP -email response)

From the interview text, reflective practice was used as a productive tool to aid learning from mistakes and to understand how this could be improved for the future. Reflective practice appears to be a practical tool which can be applied to understand how organisational practice and processes can be improved moving forward. This links to Dewey's (1933) concepts in relation to defining the problem and thinking ahead, therefore drawing from observation and investigation and leading to three areas, formation of a guiding idea for action or a plan; playing the new ideas with others, such as within the team; and then testing the idea in action (Høyrup, 2004). Boud et al (1985) refer to reflection as a process that links experiences (and this could be emotions, behaviours as well as processes) and a commitment to action, which again as discussed by the social actors appears to be the route that has been taken. The need to allow for time is crucial as well, to allow distance from the experience. Interestingly one of the email responses stated that they actually planned time in their diary for the purpose of reflection.

- I use it daily, a 1 hour session scheduled in my diary to take time out to reflect on work issues. I find it a really effective way of working out root cause of issues, outcomes and ways of making improvements for future. (LT - email response)

Referring back to Schön's (1991) concept of reflection in and on action, the responses showed evidence of reflection on action, having taken time away; as Boud et al (1985) would agree with, to reflect on their actions and the implications of them to then gain some further understanding to be able to make the changes. However Schön does discuss professionals relying heavily on the 'knowing in action' which relates to their tacit knowledge, and can allow individuals to make a split second decision based on their previous experiences and perhaps this relates to the very practical application of reflection by the social actors in relation to problem solving.

Verdonschot (2006) takes reflective practice further to try to address whether reflective practice can aid innovation in the workplace, and from the views of the students, there was evidence that having time and space to reflect on service delivery, or projects can lead to changes of improvement, and therefore some innovation in the workplace. For FM as an industry, the concept of innovation is vital, as most outsourced contracts now actually state a percentage of innovation is required every month. One of the respondents acknowledged the reactive nature of FM, but equally the importance of engaging with reflective practice with his team. Whilst this could be considered as a quality review, the reflective practice is evidenced by him recognising the need to engage in this process.

- "There is strength in the operational stuff that we do, for the reactive stuff we do, for the planning stuff we do… absolutely vitally important because most of the time if you are reacting to something it is not planned, it is last minute and if it is an emergency 'let's crack it, let's do it, but get it done'. But then, yes, take the time out and it is the hardest thing to do because you are moving onto the next thing, but what you need to do is stand back and get everybody round the table and go right okay, how did that go? (BF -telephone interview)

The above statement acknowledges how FMs can see reflective practice initially, "I am too busy"; "don't have time for that stuff"; "got to move on the next thing" etc., there could be a million and one reasons not to engage but the reality is above in black and white that actually having to deal with the situation in the moment is key, and decisions have to be made quickly sometimes, however, there also needs to be realisation that to prevent the same mistakes occurring the situation needs to be reflected upon to be able to change. In FM there needs to be a pause button at some point to understand the deeper issues behind the problems.

The other aspect that came out in the use of reflective practice was the difference in dealing with situations involving people (as opposed to process or projects) linking to more general organisational behaviour. "*It can be a snap shot reflection after an interaction with someone and I think to myself 'did that go ok?' - Yes or no. Was I fair there? - Yes or no? Did I get what I needed there? - Yes or no. Depending on the answer and the importance of the situation will depend on if I give it anymore thought!*" (WE- email response) This response lends itself to the view of Schön's (1991) reflection in action and on action with evidence of both and also agrees with Swan and Bailey (2004) in recognition of interactions that went well. One of the FMs reflected on the working with other people and recognised that she had changed her style through using reflective practice… "*It has become a big part of how I work and how I treat other people now. …previously I had just gone' right, you are moving there' and just done it. Now, I am going 'okay, well how are they going to perceive it and trying to think ahead and stand back and think if that was me, how would I feel about it? What would be my concerns? … You are going into meetings and you are coming from their point of view. They realise that you are working with them and not against them.*"(FC-face to face interview) There is greater consideration of people in relation to change projects and the use of empathy to explore potential misgivings from the people that are being moved and allowing her to review the way the change is delivered and how the people are engaged; evidencing a more in depth level of reflection.

4.2   "I DON'T USE REFLECTIVE PRACTICE"

Out of the social actors that engaged with the research only two stated they didn't engage with it, however their comments evidence some engagement with their teams and their own personal reflection and learning, which led me to believe that there may be a barrier with the terminology. Both students reflected on learning and changes to service delivery, for example "*I haven't, although encouraged my team to do so and explained the process of learning. We do reflect on practice in working terms, for lessons learned, as opposed to personal behaviours and skill naturally, but perhaps not formally. Learning from experiences etc. (DL -email response)* In trying to understand and interpret the comments, it draws back to Schön's (1983) ideas on reflection in and on action in relation to the individuals perhaps not perceiving this as reflective practice as they are doing it in the moment, or 'thinking on their feet'. This concept of the terminology being alien as opposed to the practice would concur with the view of the student below:

"Reflective practice is something strange to me. I found it quite enjoyable when I got into it. I have actually done this for many years but never realised I was doing it. So I have been doing it unknowingly for many years, it is just basically reflective practice to me is going away and taking a long hard look at yourself and thinking right … what have you done right and what have you done wrong and being honest with yourself and learning.   Reflective practice to me is a method for me to basically learn and improve what I am and how I behave. (TE - face to face interview)

Revisiting Edwards and Thomas's (2010) question whether reflective practice can be taught, their discussions almost counteract this, in that they have engaged with the learning and are now drawing on reflective practice as a learned skill and also, as Dewey (1933) discussed, as "lived practices" to enable them to become more self-critical.

Perceived risks of not engaging in reflective practice

This was an interesting question that came out in some of the interviews as they were unstructured discussions; but the responses led to interesting reflections on learning and being able to move forward. Some of the students reflected on the role of FM and equally the impact of working in the public sector and perceived risks of being outsourced. "*I think you constantly need to reflect on what you are doing, either whether you are in the private sector and wanting to expand and move out, or whether you are in the public sector and you are*

delivering the service and you want to make it better and constantly keep up there so you won't be outsourced" *(BS - face to face interview)* There was also a view of "*If you don't reflect, you don't learn; you don't improve. If we don't learn, we don't develop and we don't improve; we leave ourselves open to outsourcing or rival private organisations coming in and taking it from us.*" *(TE -face to face interview)* Another view from an FM in a private sector organisation with an inhouse provision stated "*If you don't reflect, you don't identify any opportunities*" *(BF-telephone interview).*

There was recognition of the need to continually improve service. Verdonschot (2006) discussed reflection with the future as a good starting point as this can lead to innovation and breaks away from the more traditional or dominant ways of thinking. "It can have three starting points - past, present and future" (Verdonschot, 2006:675). This was reiterated by TM (face to face interview) as she stated "*I think once you start using it, it makes you stop and think about your actions in the future. You sort of almost reflect in advance, well it's not reflecting in advance but you think about the implications in advance and what the possible outcomes could be, so it is a more measured response than we might have had in the past.*" This concurs with Op de Weegh (2004) who discusses the need to let go of existing frames of reference and create new ones.

Perceived importance of engagement in reflective practice for facilities managers

Throughout the interviews, discussions took place about the importance of reflective practice in relation to facilities management. The British Institute of Facilities Management (BIFM) encourages reflective practice through their courses and as part of the continuing personal development of their members and there was a need to understand from our students whether they felt reflective practice was a key skill for the industry. Some of the comments reinforced the importance of reflective practice for the profession:

"I think BIFM need to train their FMs to think before they shoot really. FMs … are very lively people and they are very vocal by virtue of what they do and I think the reflective practice would help them more in their role to be more accepting… it is getting back to the communications side as well and how you communicate in the right way with the right people at the right time." (FC -telephone interview)

- "It identifies opportunity for process improvement I think, that could be financial, that could be engagement that could be how you are perceived within the business as a department. Another benefit is that if you do it right you take your relationship with your contractors or your staff to another level?"(BF-telephone interview)

Both statements have focused on improved relationships and a more honest and open environment for communication drawing also on empathy. Some of the social actors also referred to engaging their team in reflective practice to have the concept embedded in order to encourage improvements in service delivery; they did identify that they didn't use the terminology, but explained the concepts as "it is about revisiting, looking back and would you change anything" (BF-telephone interview). The approach has enabled the team to understand the reasons behind reflective practice, but has also enabled them to continually learn from these experiences.

Emancipation and empowerment are considered in Moon (1999) in a discussion of the purposes and potential outcomes for reflection. In summary these are:

- Consider the process of our own learning
- Critically review something
- Build theory from observations
- Engage in personal or self-development
- Empower or emancipate ourselves (Moon, 1999:23)

In relation to the delivery of the reflective practice module on the FM course, the first 4 elements of these are addressed not only through the module but across the course which does ask students to use their reflection across several models to aid in their critique of organisational practice. The element of empowerment or emancipation of self can be a demonstration of reflection to understanding self and moving away from 'group think'. However, I hasten to add that this research was not focusing on emancipation. Moon (1999) encapsulated the discussions from the social actors, in the sense of engagement and reviewing performance from a critical perspective.

5   Conclusion

In a fast moving environment there is a need to encourage FMs to be more open to reflection to allow them the time and space to think differently, to change the organisational treadmill and to make differences to the practice. As Raelin (2002) highlighted action is paramount from an organisational perspective, but this research highlighted that the ability to take the time to step back and reflect on the delivery of FM services, has led to improved ways of working. So whilst the decision or the action may not be immediate, the benefits outweigh the time of correcting or resolving problems. Facilities management is a complex working environment, which deals with operational, tactical and strategic issues and has numerous amounts of very different soft and hard services roles falling under its remit. Using reflective practice as an underpinning for all courses related to facilities can help the individuals to constantly challenge their values and beliefs in the workplace in order to continually innovate in the changing world that is FM.

The learning from the research and the use of reflective practice can also be considered in team development. As evidenced by the social actors, they have taken the use of reflective practice to further develop their own FM teams and their skills to enhance working practice from an interpersonal and organisational perspective. To encourage a lived practice (Dewey, 1933) students need to be engaged in reflective practice from the start of the course, in relation to their learning and also their workplace practice. King (2005) discussed adult education theory and suggested that learners may reawaken their intellectual side by their return to education and therefore in learning which encourages critical reflection may then be able to challenge their own values and beliefs as their level of confidence grows. FM by nature requires individuals to manage a myriad of relationships, and using reflective practice and gaining increased self-awareness may be a way of improving them.

REFERENCES

Alexander, K. (2009) *European Facilities Management. The next generation. Futures EuroFM research project.*[Online] *Last accessed 4 August 2014 at* www.ifma.org/docs/fm-forecasts/2010_eurofm.pdf?sfvrsn=2. Bengtsson, J (1995) What is reflection? On reflection in the teaching profession and teacher education. *Teachers and Teaching: Theory and Practice*, Vol. 1, No. 1, pp. 23-32.

Blaikie, N. (2010) *Designing Social research,* (2nd ed.) Polity Press, Cambridge

Bolton, G (2010) *Reflective Practice. Writing and Professional Development,* 3rd Edition. Sage, London

Boud D., Keogh R. & Walker D. (1985) Reflection: Turning Experience into Learning, *Kogan Page, London*

Boyd, E.M., and Fales, A.W. (1983) Reflective learning: key to learning from experience. *Journal of Humanistic Psychology,* Vol 23, No. 2 pp 99-117.

Cunliffe, A.L. (2009) Reflexivity, learning and reflexive practice. In: Armstrong, S. and Fukami, C (Eds). *Handbook in Management Learning, Education and Development.* Sage, London

Dewey, J. (1933) *How we think.* Houghton Miffin Company, Boston, MA

Edwards, G. and Thomas, G. (2010) Can reflective practice be taught? *Educational Studies.* Vol 36, No. 4, pp 403-414.

Follesdal, D. (2001) Hermeneutics. *International Journal of Psychoanalysis*, Vol 82, No.2, pp375-379.

Giddens, A (1976) *New rules of sociological method: A positive critique of interpretative sociologies.* Hutchinson, London

Gummesson, E. (2000) *Qualitative Methods in Management Research* (Second Edition), Sage, London

Høyrup, S. (2004) Reflection as a core process of organisational learning. *The Journal of Workplace Learning,* Vol 16, No. 8, pp 442-454.

King, K.P. (2005) *Bringing transformative learning to life.* Malabar, FL: Kreiger, Koch, T. (1996) Implementation of a hermeneutic inquiry in nursing: philosophy, rigour and representation. *Journal of Advanced Nursing*, Vol. 24, pp174-184

Laverty, S. M. (2003). Hermeneutic phenomenology and phenomenology: A comparison of historical and methodological considerations. *International Journal of Qualitative Methods, Vol 2, No. 3.* [Online] Last accessed 9 July 2014 at
http://www.ualberta.ca/~iiqm/backissues/2_3final/pdf/laverty.pdf

Mezirow, J. (1991). *Transformative Dimensions of Adult Learning.* Jossey-Bass, San Francisco, CA

Moon, J. (1999) *Learning Journals.* Kogan Page Limited, London:

Op de Weegh, S. (2004) *How to break through: a research on knowledge productivity focusing on breakthroughs at Habiforum Innovations Projects*, University of Twente, Enschede.

Osterman, K.F. and Kootkamp, R.B. (2004) *Reflective Practice for Educators,* 2nd Edition, Corwin Press (Sage), London

Raelin, J.A. (2002) "I don't have time to think! Versus the art of reflective practice. *Reflections,* Vol 4, No. 1, pp 66-79

Roper, K. (2012) Educational implications of an FM social constructionist view. In: Alexander, K. and Price, I. (Eds) *Managing Organizational Ecologies. Space, Management and Organizations.* Routledge, New York, pp 189-197.

Schön, D. A (1983, 1991) *The reflective practitioner. How professionals think in action.* Ashgate Publishing Ltd, Aldershot

Swan, E. and Bailey, A. (2004) Thinking with feeling: the emotions of reflection. In: Reynolds, M. and Vince, R. (Eds) *Organizing reflection.* Ashgate Publishing Company, Aldershot, pp 105-125.

Van Woerkom, M. (2003) *Critical reflection at work. Bridging individual and organisational learning*, PhD Thesis, Twente University, Enschede/Print Partners, Ipskamp.

Verdonschot, S. (2006) Methods to enhance reflective behaviour in innovation processes. *Journal of European Industrial Training*, Vol 30, No. 9, pp 670-686.