IFMA's Leadership and Strategy Course

Student Guide
Acknowledgements

The references in this course have been selected solely on the basis of their educational value to the IFMA FMP Credential Program and on the content of the material. IFMA does not endorse any services or other materials that may be offered or recommended by the authors or publishers of the books and publications listed in this course.

Every effort has been made to ensure that all information is current and correct. However, laws and regulations are constantly changing. Therefore, this program is distributed with the understanding that the publisher and authors are not offering legal or professional services.

We would like to thank the following dedicated subject matter experts (SMEs) who shared their time, experience and insights during the development of the IFMA FMP Credential Program.

Mark Beese, MBA, BSc, PMP, CFM
Stephen Brown, CFM, SFP, FMP, CPE, CPMM, MBCP, CBCP, CESCO, REM
Laverne C. Deckert, BA
Alana F. Dunoff, FMP, IFMA Fellow
Paul O. Erubami, CBIFM, CFM, SFP, FMP
Rich Greco, MS, BS, AAS, MCR, CFM, RS
Christopher P. Hodges, P.E., CFM, LEED AP, IFMA Fellow, FRICS
Dennis Kowal, AIA, WELL AP, LEED AP, SFP, FMP, CID
Jon E. Martens, FMP, SFP, CFM, CFMJ, IFMA Fellow
Phyllis J. Meng, CFM, SFP, IFMA Fellow
Larry A. Morgan, CFM, SFP, FMP
Basavaraju NL, FMP
Patrick H. Okamura, CFM, SFP, FMP, CCS, CIAQM, LEED AP, IFMA Fellow
Samantha Rosenthal, MA, BA
Christian O. Salazar, CFM
Mark R. Sekula, CFM, FMP, SFP, LEED AP, IFMA Fellow
Guy Thatcher, CMC, FMP, IFMA Fellow
Michel Theriault, FMP
Irene Thomas-Johnson, BA, CFM, BOC
Brenda J. Varner, RCFM
John Vinken, MSc Eng, RCFM, CEM, CRSP, CET, FMP, SFP
**Intellectual Property and Copyright Notice**

All printed materials and information in the companion online components in the IFMA FMP® Credential Program are owned by IFMA and protected by the United States Copyright Law as well as the international treaties and protocols, including the Berne Convention. The IFMA FMP Credential Program and companion online components are for your personal educational use only and may not be copied, reproduced, reprinted, modified, displayed, published, transmitted (electronically or otherwise), transferred, resold, distributed, leased, licensed, adapted, passed all, uploaded, downloaded or reformatted.

In addition to being illegal, distributing of the FMP materials in violation of copyright laws will limit the program’s usefulness. IFMA invests significant resources to create quality professional development opportunities for its members and the associated FM industry. Please do not violate intellectual property rights or copyright laws.

© 2020 International Facility Management Association
# Table of Contents

IFMA Credentials .......................................................................................................................... 1
About IFMA Credentials ................................................................................................................ 1
Facility Management Professional (FMP) Program ........................................................................ 1
Course Overview ............................................................................................................................ 2
Course Audience ........................................................................................................................... 2
Course Chapters ............................................................................................................................ 2
Course Objectives .......................................................................................................................... 3
Course Introduction ....................................................................................................................... 3
Facility Management (FM) .......................................................................................................... 3
Role of Facility Managers as related to Leadership and Strategy ................................................. 3
Benefits of Having Leadership Skills ......................................................................................... 4

Chapter 1: Plan Strategically ........................................................................................................... 7

Introduction to Strategic Planning ................................................................................................. 10
  What is a Strategy? ...................................................................................................................... 12
  Understanding the Demand Organization’s Mission, Vision, Values and Culture ................. 13
Strategic Planning Overview .......................................................................................................... 14
Strategy Life-Cycle Model Overview ............................................................................................ 20
Lesson Activity ............................................................................................................................... 21

Align FM’s Strategic Requirements to Demand Organization’s Requirements ................................ 23
  Understanding Phase .............................................................................................................. 24
  Mission and Vision ............................................................................................................... 26
  Inputs Related to Aligning Strategy ..................................................................................... 30
  Processes Related to Aligning Strategy .............................................................................. 40
  Outputs Related to Aligning Strategy ............................................................................... 42
  Aligning FM Strategic Plan to the Demand Organization’s Strategic Plan ....................... 45
Lesson Activity ............................................................................................................................. 53

Develop and Implement a Strategic Planning Process ................................................................. 57
  Analysis Phase ..................................................................................................................... 58
  Inputs .................................................................................................................................. 60
  Processes ............................................................................................................................ 60
  Outputs ............................................................................................................................... 79

Internal and External Factors Driving FM ................................................................................... 84
  Monitoring Internal and External Factors ........................................................................... 85
Chapter 2: Lead the FM Organization

Introduction to Leadership and Management..................................................135
Leadership, Inspiration and Influence Terminology........................................136
Position Power versus Personal Influence......................................................141
Theories of Individual Behavior and Leadership..............................................145
Introduction to Leadership Theory.................................................................145
Individual Motivation and Behavioral Theories..............................................146
Leadership Theories.......................................................................................151
Lead, Inspire, Influence and Manage the FM Organization..............................157
Strategic Partnering.......................................................................................158
FM's Strategic Partner Role...........................................................................159
Leadership Roles of Facility Managers.........................................................161
FM Organization’s Goals...............................................................................167
Styles, Methods and Tools.............................................................................175
Lesson Activity...............................................................................................185
Advocate for Facility Management Needs and Priorities..............................188
Chapter 3: Manage the FM Organization .......................................................... 205

Develop Effective Teams .................................................................................. 207
  Team Types ....................................................................................................... 208
  Team Life-Cycle Model ................................................................................. 209
  Inputs, Process and Outputs of Teams ............................................................ 212
  Team Behavior Theories .............................................................................. 217
  Motivating Teams ............................................................................................ 221

Maintain Team Performance ............................................................................. 225
  Managing Team Performance ...................................................................... 226
  Quality Assurance ........................................................................................... 230
  Lesson Activity ............................................................................................... 231

Organize and Staff the FM Function ............................................................... 234
  Organizational Design and Structure ........................................................... 236
  FM Organizational Models ......................................................................... 247
  Selecting Organizational Structure .............................................................. 248
  Staffing ............................................................................................................ 250
  Assignments and Scheduling ...................................................................... 251

Develop, Implement and Evaluate FM Policies, Procedures and Practices .... 254
  Examples of FM Policies, Procedures and Practices .................................... 256
  Writing Policies, Procedures and Practices .................................................. 258
  Implementation and Compliance .................................................................. 258
  Audiences ......................................................................................................... 260
  Advantages and Disadvantages .................................................................... 262
  Evaluation and Change Process .................................................................... 264

Clarify and Communicate Responsibilities and Accountabilities ................... 266
  Level of Accountability .................................................................................. 268
  Job Design and Job Description .................................................................... 269
  Work Coordination Tools and Techniques .................................................... 274
  Individual Performance Evaluations ............................................................. 275

Resolve Conflicts ............................................................................................. 279
  Discovering Conflicts .................................................................................... 280
  Finding Root Causes of Conflicts .................................................................... 280
Chapter 4: Influence the Demand Organization ........................................ 293
Promote, Encourage and Adhere to a Code of Conduct .......................... 294
Codes of Conduct ................................................................................. 295
Enforcement ......................................................................................... 298
Ethical Leadership .............................................................................. 299
IFMA Code of Ethics ........................................................................... 299
Lesson Activity .................................................................................... 304
Develop and Manage/Oversee Relationships ........................................ 306
Relationship Management ................................................................. 307
Understand and Manage Compliance .................................................. 318
The True Cost of Noncompliance ......................................................... 319
Ensure Compliance with Corporate Social Responsibility Policies ......... 321
Progress Check Questions .................................................................. 320

Progress Check Question Answer Key ................................................ 333
Chapter 1: Plan Strategically ............................................................... 333
Introduction to Strategic Planning ......................................................... 333
Align FM’s Strategic Requirements to Demand Organization’s Requirements ............................................................................................................................. 333
Develop and Implement a Strategic Planning Process .......................... 333
Internal and External Factors Driving FM ............................................. 333
Develop a Facility Strategic Plan .......................................................... 333
Implement Strategy Using Tactical Plans .............................................. 333
Defining and Evaluating Performance Requirements .......................... 333
Chapter 2: Lead the FM Organization .................................................. 333
Introduction to Leadership and Management ....................................... 333
Theories of Individual Behavior and Leadership .................................. 333
Lead, Inspire, Influence and Manage the FM Organization .................. 334
Advocate for Facility Management Needs and Priorities ...................... 334
Chapter 3: Manage the FM Organization ............................................. 334
Develop Effective Teams ...................................................................... 334
Maintain Team Performance ............................................................... 334
Organize and Staff the FM Function .................................................... 334
Develop, Implement and Evaluate FM Policies, Procedures and Practices ................................................................. 334
Clarify and Communicate Responsibilities and Accountabilities .......... 334
Resolve Conflicts ......................................................................................................................... 334
Chapter 4: Influence the Demand Organization ........................................................................ 335
Promote, Encourage and Adhere to a Code of Conduct ....................................................... 335
Develop and Manage/Oversee Relationships ........................................................................... 335
Understand and Manage Compliance ....................................................................................... 335
Bibliography ............................................................................................................................ 335
Glossary ....................................................................................................................................... 341
Index ........................................................................................................................................... 368
IFMA Credentials

About IFMA Credentials

Based on the GTJA, we have defined 11 competency areas on which our three world class FM credentials — Facility Management Professional™ (FMP®), Sustainability Facility Professional® (SFP®), and Certified Facility Manager® (CFM®) — are based.

1. The FMP is the foundational credential for FM professionals and industry suppliers looking to increase their depth-of-knowledge on the core FM topics deemed critical by employers.

2. The SFP is the leading credential for all FM and like-minded professionals with an interest in the development of sustainable FM strategies.

3. The CFM is the premier certification for experienced FM professionals. A comprehensive exam assesses knowledge, skills, and proficiency across all FM competency areas.

Facility Management Professional (FMP) Program

IFMA’s Facility Management Professional (FMP) credential is an assessment-based certificate program. This program demonstrates the fundamentals of facility management (FM). Developed from a foundation based on IFMA’s global job task analysis (GJTA), the FMP Credential Program is continuously refreshed to align with current industry standards for FM knowledge, skills and tasks. The knowledge demanded by today’s global employers is taught and tested online or in the classroom.
The four knowledge domains that the FMP Credential Program provides content and assessments on are:

- Operations and maintenance
- Project management
- Finance and business
- Leadership and strategy

This course focuses on leadership and strategy. To receive the FMP credential, successfully complete all four courses (via eLearning or instructor-led channels) and final assessments and submit an FMP application to IFMA for approval.

Course Overview

Course Audience

This course is designed for persons intending to earn their FMP credential or enhancing their FM industry professional development.

Course Chapters

This course consists of the following chapters:

- Plan Strategically
- Lead the FM Organization
- Manage the FM Organization
- Influence the Demand Organization
Course Objectives

After you complete this course, you will be able to:

• Apply the appropriate tools and requirements to complete the inputs, processes and outputs in creating a strategic plan.
• Apply leadership theories, change management and communication planning to the FM role.
• Apply leadership best practices when managing people within the FM organization.
• Manage compliance with organizational policies and procedures through facility management leadership.

Course Introduction

Facility Management (FM)

FM encompasses multiple disciplines which ensure functionality of the built environment, this profession requires a broad range of knowledge and skills.

IFMA conducts a global job task analyses (GJTA) to identify task, knowledge and skill areas that are important for competent performance by facility managers. The GJTA updates the core foundation of competency areas that contain the body of knowledge for FM and FM professionals.

Role of Facility Managers as related to Leadership and Strategy

Leadership and strategy are tool sets that facility managers can use as appropriate to augment all FM activities. These activities include project management, operations and maintenance and finance and business.
Facility managers serve in two leadership roles:

- First, they must lead the FM organization by providing guidance to staff and service providers.
- Second, they must influence the decisions and attitudes of the organization’s leaders, occupants, government officials, suppliers, community leaders and business partners.

To be effective in both roles, facility managers must develop strategies to successfully carry out major initiatives and influence the decisions and attitudes of others. Effective strategies require facility managers to be able to integrate people, place and process. They must be able to align the facility portfolio and functionality with its organization’s missions and available resources. They must also be innovative in order to move forward with their staff and processes to respond to the ever-changing requirements.

This course on leadership and strategy is intended as a toolbox of concepts and ideas that can be applied as needed by facility managers and scaled to fit the needs of the FM organization. For example, strategic planning mentions a planning team, but in a lean organization, this team could consist of just the facility manager and the plans could likewise be very simple.

**Benefits of Having Leadership Skills**

Benefits for facility managers who develop leadership skills and earn a position as leaders of their staff may include the following:

- Facility managers can develop a shared vision with subordinates and extended stakeholders.
- Facility managers earn the trust and respect of superiors, equals and subordinates.
- Facility managers can allow position-based authority (i.e., position power) to remain in the background until warranted.
- Groups of subordinates may form into teams and begin to truly collaborate.
- Facility managers can integrate the efforts of the facility management organization and the entire organization into a cohesive whole.
- Facility managers can demonstrate and promote accountability and ethics through fair and responsible behavior.
- Facility managers and staff make time to devote to leadership development and relationship building.
The management processes of planning organizing and controlling are fundamental to an understanding of the role of facility managers as leaders. Therefore, this course discusses both leadership and management concepts.