

## WA14: Office Effectiveness and Efficiency

### 4.16 Manage Office Facilities



LO127: Demonstrate the ability to provide and maintain office facilities and equipment to meet the needs of the users.

LO128: Demonstrate the ability to co-ordinate the use of office resources.

LO129: Demonstrate the ability to implement, communicate, review and evaluate office systems and procedures.

LO130: Demonstrate the ability to ensure that office facilities and equipment are used effectively and efficiently.



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# Module Details



<b>Work Area Code:</b>	14
<b>Work area title:</b>	Office Effectiveness and Efficiency
<b>Unit Code:</b>	4.16
<b>Unit Title:</b>	Manage Office Facilities
<b>Learning Outcomes Ids:</b>	LO127, LO128, LO129, LO130
<b>Learning Outcomes titles:</b>	Demonstrate the ability to provide and maintain office facilities and equipment to meet the needs of the users. (LO127) Demonstrate the ability to co-ordinate the use of office resources. (LO128) Demonstrate the ability to implement, communicate, review and evaluate office systems and procedures. (LO129) Demonstrate the ability to ensure that office facilities and equipment are used effectively and efficiently. (LO130)
<b>Recommended Duration:</b>	5 hours
<b>Trainer:</b>	



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# The importance of office and facility management



The role of the office facility » to provide support to its users:

- Managers
- Technical/Sales staff
- Specialists
- Customers and contractors



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# Range of office facilities and equipment



Depends on the type of the building, its design and layout, the type and the size of the business



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# Range of office facilities and equipment



## Standard office items

- Office furniture: desks/chairs/filing cabinets etc.
- Reception area or reception desk
- Telephone system
- Answering machine/voicemail
- Computer network
- Computer software and email
- Computer workstations/VDUs
- Laptops
- Photocopier(s)/scanner(s)/printer(s)
- Fax machine(s)
- Shredder(s)
- Laminators
- Binding machines
- Mailing equipment
- Stationery store with range of small equipment (calculators, staplers etc.) and stationery
- Audio equipment
- Mobile telephones



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# Range of office facilities and equipment



## Additional items and facilities

- Kitchen area with microwave, fridge, jug kettle etc.
- Vending machine
- Water cooler
- Air conditioning
- Central heating
- Outside areas and car park
- Keys

- Burglar alarm
- Meeting rooms
- Video conferencing
- Changing rooms and shower facilities
- Lockers



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# Range of office facilities and equipment



## Specialist items

- Facilities, equipment or resources specific to industry or sector; e.g. electronic whiteboards, OHPs, data projectors, flipcharts and textbooks in an educational establishment



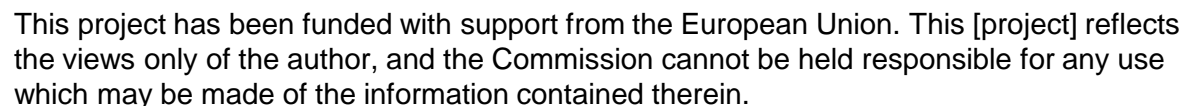
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# EUROPEAN PERSONAL ASSISTANT LEVEL 4



- 







- What are the typical **reasons** behind changing of user needs?
- What **methods** have you used in the past to identify the needs of the users of the office facilities?

## Group discussion



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# Identifying user needs



## Influencing factors examples:

- Many visitors to the office → need for a reception area
- Workes visit office only occasionally and usually operate in the field (eg. sales people, consultants) → Hot-desking might be appropriate (shared office stations, where people plug in their laptops )



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## Needs change over time because of:

- Technological developments – equipment gets outdated, different type of working is introduced (eg. emails replaced fax-machines)
- Increase of work demands – additional facilities and resources are required
- New task and activities of the business are undertaken
- Legal requirements, changes to office systems and procedures (records management, data management, safety, ...)



## 1, ASKING PEOPLE

This can be done **formally** or **informally**, **individually** or **collectively**.

Doing it formally means communicating in writing so that you have a record. You could issue a **questionnaire** or **send an email** to find out users' views.

Informally means **chatting** to people in the office.

You can save time by talking to them as a **group**, such as during a **team meeting**, if there is an issue that you want to raise with several people at once.



## 2. OBSERVATION

- If there is a queue at the photocopier and the water cooler every morning then, unless everyone is just standing around gossiping, you can be fairly certain that these items are well-used.
- If you see that notices on the staff noticeboard are all over three months old because everyone now prefers to use email you can be fairly certain that this resource is no longer needed.





## 3. RECORD AND MONITOR COMPLAINTS BY USERS

This enables you to check whether a problem is a 'one-off' or is widespread.

## 4. CHECK THE RECORDS

These should tell you whether an item of equipment is breaking down more often or needing more frequent servicing; and whether a particular resource is required more. They should enable you to check whether concerns and complaints by users are justified.





- Used to collect standardised data from large numbers of people so that the same information is collected in the same way.
- Used to collect data in a statistical form.
- Generally used to make generalisations, therefore, the surveys are usually based on carefully selected samples.
- Consist of the same set of questions that are asked in the same order and in the same way in order that the same information can be gathered.





- Questions can be:

- Open ended (more difficult to extract quantifiable data)
- Closed
- Fixed-choice
- Likert scale - where participants are given a range of options (agree, strongly agree, disagree...)



## Advantages



- Practical
- Large amounts of information can be collected from a large number of people in a short period of time and in a relatively cost effective way
- Can be carried out by the researcher or by any number of people with limited affect to its validity and reliability
- The results can usually be quickly and easily quantified
- Can be analysed 'scientifically' and objectively



## Disadvantages

- Cannot capture subtle information like changes of emotions, behaviour, feelings etc.
- It is asking only a limited amount of information without explanation
- There is no way to tell how truthful a respondent is being
- People may read differently into each question and therefore reply based on their own interpretation of the question
- There is a level of researcher imposition, meaning that when developing the questionnaire, the researcher is making their own decisions and assumptions as to what is and is not important...therefore they may be missing something that is of importance





# Methodological tool

- Designing questionnaire
- EUPA\_LO\_127\_M\_001



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- **Monitoring facilities** can mean anything from spotting that a sink is blocked and arranging for a plumber to call, to checking that the reception area is tidy before some visitors arrive. *In terms of office services, it means ensuring that quality and deadline targets are met.*
- **Providing and maintaining office equipment** means checking that equipment is regularly serviced, arranging for it to be repaired when required and obtaining quotes for replacement or new items when necessary.





- **Arranging for resources**  
includes scheduling or allocating shared resources so that everyone is treated fairly or according to need, ordering small items of equipment and stationery, and arranging cash advances to staff travelling on business.



# Maintenance of office facilities



## **Purchases of facilities and equipment (checklist)**

1. Research the item required to identify the most appropriate features and facilities required for the users
2. Agree the budget available and amount that can be spent
3. Obtain quotes or discuss requirements with 2 or 3 suppliers
4. Compare offers and accept „best value for price“ features and delivery
5. Submit official order with appropriate information accurately and clearly included
6. Pay bill promptly



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# Maintenance of office facilities



## Repairs to facilities and equipment (checklist)

1. Take care of equipment by following all recommended procedures and having it serviced regularly
2. Make basic checks, if there is a problem or damage, before requesting assistance
3. Don't try to carry out home repairs to equipment
4. Have a plan ready in case the problem is serious
5. Report the problem accurately and concisely
6. Accept there may be a short delay before a repair can be undertaken
7. Be courteous to all supplier staff visiting the office
8. Pay bill promptly



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# Maintenance of office facilities



## Sourcing stock and equipment (checklist)

1. Store items appropriately and securely
2. Have a system for booking out resources to prevent problems and crises
3. Allow sufficient time for items to be replenished
4. Submit official orders with all info accurately and clearly included
5. Check items on delivery
6. Report accidental over-supply as well as under-supply
7. Pay bill promptly



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- Generate solutions to the provision of office facilities and equipment in case these are not available within the company. (office suppliest stock, car, meeting rooms, ...)
- Can you recommend any best practice from your past experience?

## Group discussion



# Types of problems in the office



**A, Supplier problems**

**B, User problems**

**C, Damage, breakdowns and crises**



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# Types of problems in the office



## A, Supplier problems

- If you have developed a good relationship with a supplier then these will usually be minimised. At the very least, if a problem is unavoidable, your supplier will tell you in advance and suggest alternatives.
- Problems can include:
  - late delivery of goods you have ordered
  - faulty goods being delivered
  - the wrong goods being delivered
  - poor or shoddy work by a supplier
  - no one turning up to do the work as agreed
  - the account for the work (or supplies) bearing very little relation to the quote you received.



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# Types of problems in the office



## B, User problems

- If your communications with your users are good and if there are systems and procedures to control what they can and cannot do, then you are likely to prevent many of these problems.
- They can include:
  - incorrect use of equipment – which breaks or damages it
  - trying to correct problems – and making matters worse
  - forgetting to book or order items in advance
  - not following the correct procedure
  - causing an injury to themselves or others
  - having requirements that conflict with those of other users.



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# Types of problems in the office



## C, Damage, breakdowns and crises

- Good maintenance procedures will minimise these types of problem, but that does not mean you can allow for every eventuality. And you can be sure that the most crucial item of equipment will always choose your busiest day on which to break down completely! So your problems may include:
  - vandalism, break-ins or theft
  - equipment malfunction/breakdown
  - IT security breaches
  - indiscretion by a colleague
  - major disruptions of a key service, such as your phone line or Internet connection.



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# Problem solving step by step



1. Check the information you have been given to make sure the facts are correct and ask appropriate questions to fill in any gaps or clarify any doubtful areas.
2. Assess the seriousness of a problem by considering its impact on others and the business and the consequences of delaying or not taking action.
3. Check if there are any procedures you should follow before you try to solve the problem – such as reporting it to your line manager or obtaining authorisation.



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# Problem solving step by step



4. Identify whether you and your colleagues can solve the problem yourselves or whether you need external help. If you are in any doubt about this, obtain expert advice.
5. Consider the range of solutions that are possible. If you must act quickly, remember that you may have to settle for a compromise between what would be ideal and what you can live with.



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# Problem solving step by step



6. If you are struggling to get agreement amongst different users, try to identify any common ground or indisputable facts that can be used as a basis for negotiation. Someone might have a better idea than you that works.
7. If you can afford the time, remember that sleeping on a difficult problem often helps you to think of a solution.
8. After the problem has been solved, think about why it occurred. What can you do now to prevent a recurrence?



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# Maintenance of office facilities



## TIP FOR YOU:

**Develop a checklist for planning the maintenance of facilities and equipment to prevent major breakdowns!**



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# Maintenance of office facilities



## EXAMPLE:

1. Check that all equipment is sited and/or stored according to recommendations in the handbook.
2. Check the recommended maintenance/servicing requirements. If these are part of a service contract, put the dates in your diary to remind you to check they are carried out.
3. Read the instruction booklet – particularly the troubleshooting section – so that you know what to do if a problem occurs.
4. Have procedures in place to ensure the equipment is used only for its intended purpose.



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# Maintenance of office facilities



## EXAMPLE CONTINUED:

5. Routinely check the condition of equipment for which you are responsible and note any problems.
6. Carry out routine cleaning and maintenance operations yourself, as detailed in the user handbook. Alternatively, train users how to do this correctly.
7. Make sure there is a proper procedure for all users to report promptly any problems they experience. They must never try to carry out repairs themselves unless they are qualified to do so.
8. Create a plan that will enable you, so far as possible, to remain operational even if an important item of equipment is out of action for a short time.



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# Supervising work of others: Find the balance



**authoritarian  
leadership**



**laissez-faire**



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# How to make it happen!



1. Lead by example
2. Be consistent
3. Be accountable
4. Communicate effectively
5. Set reasonable expectations
6. Delegate responsibilities
7. Reward accomplishments
8. Encourage growth



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Example of criteria you could use to when supervising the routine work of other admin staff to evaluate their performance on dealing with provisions and maintenance of office facilities and equipment:

- *Dependability*
- *Speed of work*
- *Quality of work*
- *Client approach*
- *Efficiency in use of resources*
- *Providing support*
- *Conflict resolution*
- *Teamwork/communication*
- *Ethics/fraud/integrity*
- *Time management*
- *Decision making/Problem solving*
- *Planning and organizing*
- *Resource allocation*
- *Safety*
- *Positive approach*



# Evaluating work of others tips



1. Say at least something positive about the work of others
2. Propose ways for improvement
3. Don't humiliate people
4. Be honest and polite in evaluating people's work.
5. Understand that people have invested time, energy, and resources



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# Evaluating work of others tips



6. Be specific and precise in your feedback
7. Encourage people about their work.
8. When you do not understand something, ask!
9. Evaluation is not about finding everything that is wrong. Highlight things that are done well in a work.
10. Explain your rationale for the way you evaluate

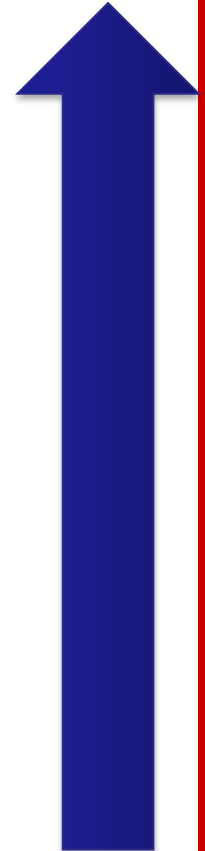




# The evaluation scale



<b>Level 5</b>	The employee's performance is excellent and clearly exceeds all job requirements and the quantitative and qualitative objectives assigned to the employee.
<b>Level 4</b>	The employee's performance satisfies all job requirements very well. The performance exceeds the quantitative and qualitative objectives assigned to the employee in many respects.
<b>Level 3</b>	The employee's performance satisfies the job requirements and the objectives assigned to the employee well. Performance attains a high quality standard in key fields of duty.
<b>Level 2</b>	The employee's performance satisfies the basic job requirements and the principal objectives assigned to the employee. Some aspects of performance are nevertheless in need of improvement.
<b>Level 1</b>	There is a substantial need for improvement in the employee's performance.



**What methods can be used to coordinate the use of office resources and equipment?**

**Group discussion**



# Wall planners

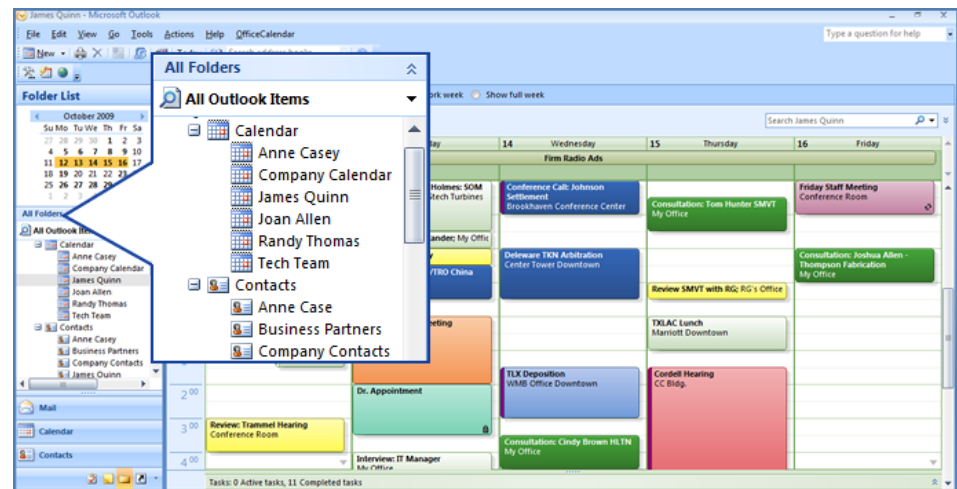
- In many organisations there are one or more wall planners in each staff maintained room which are updated regularly. These are useful as they are always within sight.
- Special designs are available to suit different purposes
- Paper based
- White Board / Stickers
- Magnetic



# Electronic diary systems



- What can an electronic diary be used for except personal time-management?
  - Viewing free times
  - Managing meeting rooms
  - Carpool management
  - Managing equipment such as projector or flip-charts



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# Activities involved in managing office resources



1. Obtain the information you need about new activities or requested changes
2. Prioritise requested changes or new entries
3. Identify the implications for existing entries (if any)
4. Solve problems that arise by negotiating alternative arrangements
5. Record agreed changes
6. Inform agreed changes to those affected
7. Keeping the system up-to-date



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# Managing office resources



## Prioritizing when making changes

1. Consider the type of event or activity and its urgency or importance.
2. Consider the hierarchy of the employees involved
3. Look at the order in which you received the requests.
4. Changes that affect office on the day that you receive them, will need dealing with, before those related to future events.



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# Managing office resources



## Communicate the changes

- Electronic diary systems may **automatically** communicate changes to those involved whose systems are networked with yours
- **Hovewer, it is likely that they might miss the notification!**
- So, better to get in touch with anybody else affected.
- Depending on the timescales involved, this may be done by telephone, e-mail, fax, letter or verbally.



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# Common problems with shared diaries



- **Overlap of multiple requests** – care needs to be taken that requests do not overlap as they can create chaos
- **Duplicate or double bookings** – a common error that occurs when the diary is handled by multiple people and communication is poor
- **Not communicating requests or change in requests** – poor communication fails the entire system



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# Common problems with shared diaries



- **Not confirming requests** – requests need to be confirmed, otherwise one will not be sure if the request will go ahead. Sometimes this results in slots remaining vacant, putting the people in need on wait
- **Not recording the requests** - this will show as vacant when there actually is a request



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# Methodological tool

- Office resources
- EUPA\_LO\_128\_M\_001



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**Procedures** support a system because they tell users what to do, usually in a list of step-by-step instructions. You use procedures every day.

TYPE	MEANING	GENERAL EXAMPLE	BUSINESS EXAMPLE
<b>MANDATORY</b>	„Must do“ to comply with rules and regulations	When driving a car, stop at red traffic light	Evacuation procedures at an emergency
<b>RECOMMENDED</b>	„Should do“ to get best results	Recharge mobile every day	Removed jammed paper from a printer
<b>SUGGESTED</b>	„Could do“	Route from A to B	Organising your paperwork and desk drawers







**...make a long story short...**

**Systems** will help you supervise an office facility because they will help you to obtain a specific and consistent result

**Procedures** will provide a list of (usually) step by step guidelines for all users to obtain that result



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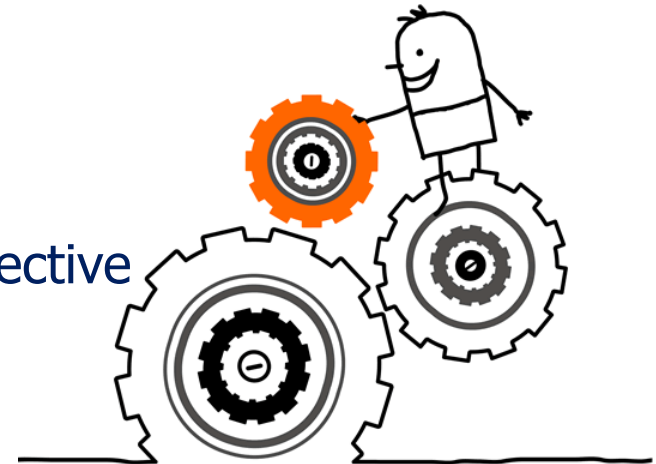


## Meaning of Office System

Office system means planning of an office work systematically to achieve the main and subsidiary objectives of an organization within minimum efforts and costs.

## Definition of Office System

An office system can be defined as an orderly arrangement of whole activities of an office and framing of procedures to be followed for the effective and economic performance of work.



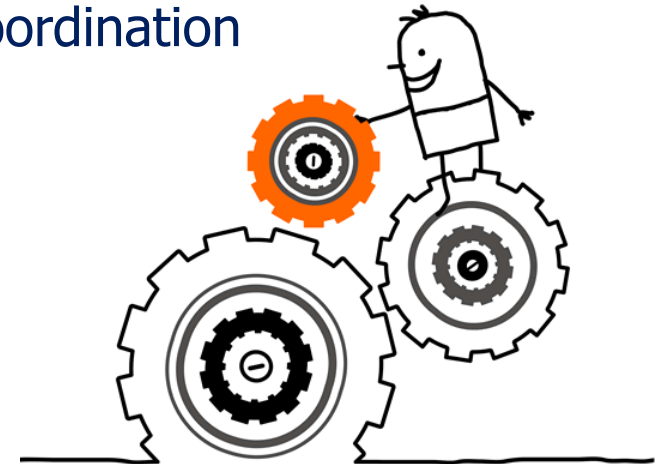
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# The need for systems and procedures



1. Improving Operating Efficiency
2. Maintaining Uniform Procedure
3. Optimum Utilization of Resources
4. Reduce office Expenses
5. Minimizing the Operating Expenses
6. Fixation of Responsibility
7. Achieving Organization Goals
8. Reducing errors
9. Prevention of fraud
10. Better coordination



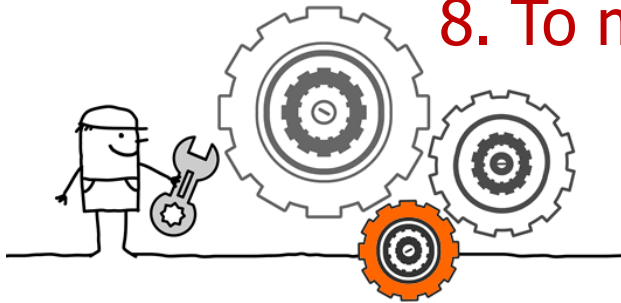
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# Principles of an office system



1. To avoid any interruption in the smooth running of office work.
2. To avoid unnecessary writing.
3. To avoid duplication of work and records.
4. To avoid unnecessary movement of persons.
5. To avoid using unnecessary forms.
6. To prepare the best use of specialization.
7. To adopt labour-saving machines.
8. To minimize the writing work of the staff.

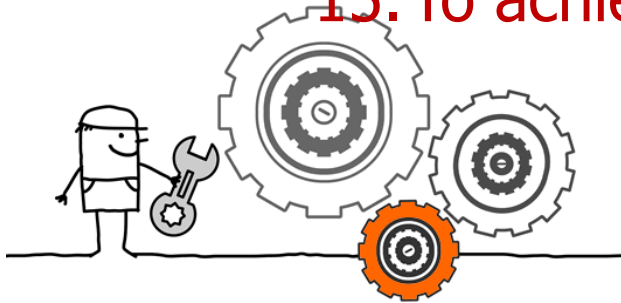


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9. To apply the principle of management by exception
10. To have simple, economic, efficient and practicable system and procedure.
11. To avoid unnecessary checking or verification.
12. To use simple forms to be filled in.
13. To avoid use of machines for personal gains.
14. To increase the efficiency of the office work.
15. To achieve goals at the minimum cost.



# Possible office systems and procedures



- **Purchasing equipment and consumables** – the type of items that can be routinely replaced and those that cannot; the completion of official purchase orders and who can sign these; the limits on expenditure; whether specific suppliers must be used.
- **Damage, loss and equipment breakdowns** – how these must be reported; the action that must be taken; the forms to be completed; the replacement policies.



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# Possible office systems and procedures



- **Taking valuable items off the premises** – who is allowed to do this; whether permission is required (and from whom); the forms that must be completed for insurance purposes; the length of time/ distance the item can be taken.
- **Allocating and coordinating the use of resources** – booking rooms or specific types of equipment; how this is done; the amount of notice that is required; what happens if there is a clash or a problem.



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# Possible office systems and procedures



- **Monitoring and checking usage of equipment or resources** – inspecting facilities or equipment to check the condition; checking actual usage records against predicted use; monitoring requests for particular items.
- **Stock control** – the method staff must use to order stationery items from internal stores; how these are booked out; the minimum and maximum amounts kept in stock; how deliveries are checked and booked in; how often stock checks are carried out.



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# Possible office systems and procedures



- **Mail processing** – the maintenance and use of mailroom equipment; times by which outgoing mail must be received; policy on use of first-class postage and so on.
- **Security issues** – the storage of valuable equipment and resources; access to confidential information; number of keys and named keyholders; the storage of key backup computer data off the premises; visitor procedures etc.
- **Carrying out risk assessments**



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Unless a procedure is mandatory or prescribed, you should be able suggest improvements if you find a better way of doing something.

Before you can start to suggest improvements, you need to be able to recognise the policies, objectives, systems and values that relate to your own job role.



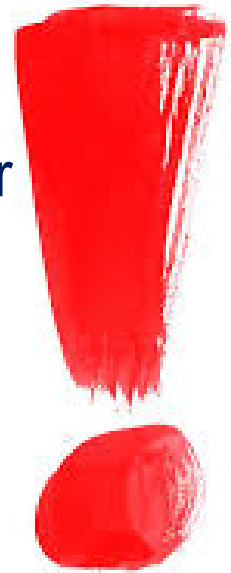
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# REMEMBER!



- Procedures should be kept as simple as possible to achieve their objective. If you make them overcomplicated or elaborate users will invent their own shortcuts to save time.
- You can always tell when there is no proper system or that users don't understand it because you will be asked the same questions over and over again!



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# Methodological tool

- Office systems and procedures
- EUPA\_LO\_129\_M\_001



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Select the appropriate communication method based its complexity and type of user, and their special needs such as:

- New staff during induction training
- Existing staff who are not certain, because they use the system seldom
- Staff from other departments
- People who frequently work off the premises
- External contacts such as suppliers who may enquire about your ordering or payment procedure
- All users in case of an unexpected problems that affects them



# Communicating procedures METHODS



	Advantages	Disadvantages
<b>Email</b>	Useful to give basic information about new/updated procedures	May be ignored or not understood
<b>Answering questions/ discussions</b>	Provides quick clarification of queries	Answers may be forgotten and Continual interruptions are disturbing
<b>Printed sheet</b>	Useful to give basic information on simple or updated procedure	Easily lost or forgotten by casual users



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# Communicating procedures METHODS



	Advantages	Disadvantages
<b>User handbook</b>	Can be kept with relevant equipment	Can soon become tatty or go missing – and be difficult to replace
<b>Procedure documents and manuals</b>	Ensures that related, complex procedures are stored safely	Too bulky/expensive for casual users to have own copy
<b>Company Intranet</b>	Ideal for holding information support pages on a variety of subjects	May not be available remotely to staff working off the premises
<b>Demonstration</b>	Ideal for showing how to do a particular task Users remember what to do if given chance to practise	Only appropriate if the demonstrator is an expert at the task, otherwise bad habits are passed on



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# Communicating procedures METHODS



	Advantages	Disadvantages
<b>Printed notice</b>	Useful near office equipment and unsupervised areas; e.g. stationery or equipment store to say basic procedure and whom to contact if the user has an urgent request	Can be overdone Too many notices are impersonal untidy and give the impression of being dictatorial
<b>Training session</b>	Enables complex procedures to be communicated properly and questions to be asked answered	Must be well organised and be the right length to retain interest



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# Methodological tool

- Induction Programme
- EUPA\_LO\_129\_M\_002



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**Efficiency** relates to being productive and working quickly and cost-effectively.

**Effectiveness** means doing high-quality work and prioritising correctly.



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# Benefits of effective and efficient office facility



**Managers** are free to concentrate on managing the enterprise and staff without having to concern themselves about routine office maintenance issues and supplies. They also know that policies, systems and procedures that have been laid down are followed and regularly monitored.

**Other users** can focus on their own job roles without worrying about whether equipment will be working or resources will be available. They can rely on administrative tasks being carried out promptly and efficiently to a high standard. They also know that they will be kept informed of proposed changes that will directly affect them.



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# Benefits of effective and efficient office facility



**Customers, contractors and all other business contacts** are treated courteously and professionally and their needs are dealt with promptly and appropriately.

Because the office runs smoothly and standards are high there are **fewer mistakes**, problems or misunderstandings to resolve.

**The costs of running the office are lower**, because facilities, equipment and resources are well maintained and used effectively.



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# Controlling optimal use of office facilities



All office facilities need to be controlled for the following reasons:

- to prevent theft or inappropriate use of equipment or resources
- to prevent damage
- to enable users' needs to be met as much as possible, even though these needs may conflict
- to enable scarce resources to be shared fairly amongst users.
- to enable the office facilities to be maintained in good condition for as long as possible
- to conserve the budget – so money is not spent on unnecessary repairs and replacements.



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Can you think of any examples from your past work experience where office facilities and equipment were not used in an effective or efficient way?

## Group discussion



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## Possible criteria:

- Functions, activity and duty requirements
- Meeting individual needs of users
- Flexibility
- Time effectiveness
- Possibility of error
- Cost
- Design
- Durability
- Safety
- Comfort of office work
- Need for supervision
- User friendliness



# How to ensure optimal use of office facilities and equipment?



- Office Manuals
- Office procedures
- Employee training
- Constant monitoring



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# Methodological tool

- Problems with office procedures and administrative personnel
  - EUPA\_LO\_130\_M\_001



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- **Review Question 1**
  - Describe possible methods to be used to identify the needs of the users
- **Review Question 2**
  - Describe possible office systems and procedures
- **Review Question 3**
  - List possible ways of communicating office systems and procedures to colleagues



- **Office system:**

- means planning of an office work systematically to achieve the main and subsidiary objectives of an organization within minimum efforts and costs
- is defined defined as an orderly arrangement of whole activities of an office and framing of procedures to be followed for the effective and economic performance of work.

- **Management of office facilities comprises of:**

- monitoring facilities
- providing and maintaining office equipment
- arranging for resources





# Well Done!

## You have completed this unit



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