



ADVANCING OUR PROFESSION

BIFM Qualifications Specification

BIFM Level 3 Award in Facilities Management (QCF)

BIFM Level 3 Certificate in Facilities Management (QCF)

BIFM Level 3 Certificate in Facilities Management Practice (QCF)

BIFM Level 3 Diploma in Facilities Management (QCF)

Contents

Introduction to BIFM	3
The Qualifications and Credit Framework	4
Structure of the Qualifications (Rules of Combination)	5
Qualification titles covered by this specification	5
Structure of the qualifications	6
BIFM Level 3 Award in Facilities Management	6
BIFM Level 3 Certificate in Facilities Management	7
BIFM Level 3 Certificate in Facilities Management Practice	9
BIFM Level 3 Diploma in Facilities Management	11
Level 3 Ofqual descriptor	12
Key features	13
Teaching, learning and assessment	13
Recognition of Prior Learning (RPL)	14
Glossary of a sample of the command words used in the assessment of the BIFM qualifications	16
Unit FM3.01: Introduction to facilities management	17
Unit FM3.02: Corporate social responsibility and sustainability in facilities management	21
Unit FM3.04: Specification and procurement of facilities supplies and services .	30
Unit FM3.05: Health and safety responsibilities in facilities management	35
Unit FMP413 Manage operational performance in facilities management	39
Unit FM3.06: Project management within facilities management operations	43
Unit FM3.07: Budget management of facilities management operations	47
Unit FM3.08: Understanding facilities management within the context of an organisation	51
Unit FM3.09: Understanding support services operations in an organisation	54
Unit FM3.10: Space allocation in facilities management	57
Unit FM3.11: Building maintenance in facilities management	61
Unit FM3.12: Understand the estate management function for facilities managers	65
Unit FM3.13: Contribute to disaster recovery and contingency planning	69
Unit FM3.14: Understanding access management and inclusion	73

Introduction to BIFM

The British Institute of Facilities Management ("BIFM") is the professional body for facilities management (FM) in the UK. Founded in 1993, the Institute represents and promotes the interest of members and the wider FM community.

BIFM delivers a range of services and benefits, including information, qualifications, continuing professional development, training and networking for over 13,000 individual and corporate members. Our strategy is to increase participation and collaboration, promote professional standards, support career development and build an effective relationship with stakeholders including Government.

Facilities management professionals are responsible for services that support business. Their roles can cover management of a wide range of areas including: health and safety, risk management, business continuity, procurement, sustainability, space planning, energy, property and asset management. They are typically responsible for activities such as catering, cleaning, building maintenance, environmental services, security and reception.

References to third party material made in this specification are made in good faith. BIFM does not endorse, approve or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Material may include textbooks, journals, magazines and other publications and websites.)

The Qualifications and Credit Framework

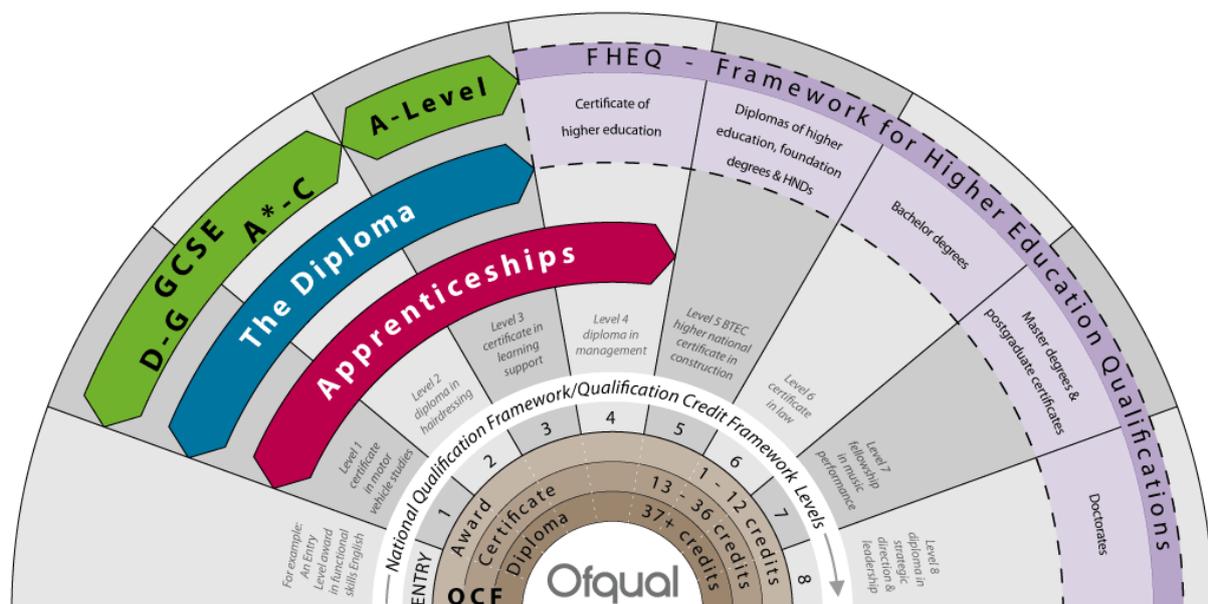
The BIFM qualifications in Facilities Management are at Levels 2 to 7 in the Qualifications and Credit Framework (QCF) and have been developed to provide professional work-related qualifications in the facilities management industry.

The BIFM qualifications have been aligned, where appropriate, with the BIFM FM Professional Standards and National Occupation Standards and as such provide much of the underpinning knowledge, understanding and application for the sector. The qualifications have received the support of Asset Skills, the Sector Skills Council for the facilities management sector.

The QCF is a national framework which awards credit for units and qualifications and offers an increased flexible approach to the attainment of qualifications for learners and the opportunity for employers to tailor the qualification to their specific skill and knowledge requirement needs to ensure an empowered and appropriated skilled workforce.

In the QCF there are 8 levels which represent the challenge of the qualification, and at each level, there are three sizes of qualification:

- > Award (1 – 12 credits)
- > Certificate (13 – 36 credits)
- > Diploma (37+ credits)



Every unit and qualification has a specific credit value which will be awarded to a learner upon achievement.

The credit value is based on:

- > One credit equates to 10 hours of learning time
- > Learning time – defined as the time a learner takes to complete the learning outcomes of a unit to the standard as specified by the assessment criteria and includes the time taken to undertake learning and completion of the assessment.

The credit value of a unit remains constant regardless of the assessment method used by a centre.

Structure of the Qualifications (Rules of Combination)

Each qualification includes unit(s) which employers deemed as essential knowledge and understanding that facilities managers need and these are deemed as the “Mandatory” units. This allows either the learner or the employer to then choose from a range of “optional” units to build up the additional credits in order to achieve the qualification.

Qualification titles covered by this specification

BIFM Level 3 Award in Facilities Management	600/7760/8
BIFM Level 3 Certificate in Facilities Management	600/7750/5
BIFM Level 3 Certificate in Facilities Management Practice	600/7751/7
BIFM Level 3 Diploma in Facilities Management	600/7749/9

The above shows the qualification title and the qualification number that will appear on the learner’s certificate. A learner needs to be made aware of this when he or she is recruited by the centre and registered with BIFM. It is crucial the centre undertakes an assessment of the learner before registration to ensure the level and size of qualification is appropriate to the learner’s expectations and ability. Providing this happens, a centre will be able to describe the programme of study and develop an assessment plan for the learner leading to the award of the qualification.

Structure of the qualifications

BIFM Level 3 Award in Facilities Management

The BIFM Level 3 Award in Facilities Management is a 110-hour qualification (11 credits) 54 guided learning hours and consists of two mandatory units only

Ref:	<i>Unit title</i>	<i>Credit value</i>	<i>Type of unit</i>
FM3.01	Introduction to facilities management	6	knowledge
FM3.03	Customer and stakeholder relations in facilities management	5	knowledge

Duration	Completion within two years of registration
Assessment	Assessment could include: <ul style="list-style-type: none">> a requirement for the application of knowledge to a Facilities Management work-based scenario whenever possible> incorporation of a variety of multiple choice question paper, written, practical and oral testing of the Learning Outcomes
Entry requirements	BIFM does not state any formal entry requirements, but learners will normally be practising supervisory or first line management or will be progressing from a Level 2 Qualification in Facilities Management

BIFM Level 3 Certificate in Facilities Management

The BIFM Level 3 Certificate in Facilities Management is a 280-hour qualification (28 credits) approximately 135 guided learning hours and consists of four mandatory units (21 credits) plus additional optional units in order to achieve a minimum of 28 credits in total.

<i>Ref:</i>	<i>Unit title</i>	<i>Credit value</i>	<i>Type of unit</i>
Mandatory units			
FM3.01	Introduction to facilities management	6	knowledge
FM3.02	Corporate social responsibility and sustainability in facilities management	4	knowledge
FM3.03	Customer and stakeholder relations in facilities management	5	knowledge
FM3.04	Specification and procurement of facilities supplies and services	6	knowledge
Optional units			
FM3.05	Health and safety responsibilities in facilities management	5	competency
FMP413	Manage operational performance in facilities management	4	competency
FM3.06	Project management within facilities management operations	5	competency
FM3.07	Budget management of facilities management operations	4	knowledge
FM3.08	Understanding facilities management within the context of an organisation	4	knowledge
FM3.09	Understanding support services operations in an organisation	3	knowledge
FM3.10	Space allocation in facilities management	4	competency
FM3.11	Building maintenance in facilities management	5	knowledge
FM3.12	Understand the estate management function for facilities managers	4	knowledge

FM3.13	Contribute to disaster recovery and contingency planning	5	competency
FM3.14	Understanding access management and inclusion	5	knowledge

Duration	Completion within two years of registration
Assessment	<p>Assessment could include:</p> <ul style="list-style-type: none"> > a requirement for the application of knowledge to a Facilities Management work-based scenario whenever possible > incorporation of a variety of multiple choice question paper, written, practical and oral testing of the Learning Outcomes
Entry requirements	BIFM does not state any formal entry requirements, but learners will normally be practising supervisory or first line management or may be progressing from a Level 2 Qualification in Facilities Services

BIFM Level 3 Certificate in Facilities Management Practice

The BIFM Level 3 Certificate in Facilities Management Practice is a 280-hour qualification (28 credits) approximately 142 guided learning hours and consists of three mandatory units (14 credits) plus additional optional units in order to achieve a minimum of 28 credits in total.

Ref:	Unit title	Credit value	Type of unit
Mandatory units			
FM3.05	Health and safety responsibilities in facilities management	5	competency
FMP413	Manage operational performance in facilities management	4	competency
FM3.06	Project management within facilities management operations	5	competency
Optional units			
FM3.01	Introduction to facilities management	6	knowledge
FM3.02	Corporate social responsibility and sustainability in facilities management	4	knowledge
FM3.03	Customer and stakeholder relations in facilities management	5	knowledge
FM3.04	Specification and procurement of facilities supplies and services	6	knowledge
FM3.07	Budget management of facilities management operations	4	knowledge
FM3.08	Understanding facilities management within the context of an organisation	4	knowledge
FM3.09	Understanding support services operations in an organisation	3	knowledge
FM3.10	Space allocation in facilities management	4	competency
FM3.11	Building maintenance in facilities management	5	knowledge
FM3.12	Understand the estate management function for facilities managers	4	knowledge

FM3.13	Contribute to disaster recovery and contingency planning	5	competency
FM3.14	Understanding access management and inclusion	5	knowledge

Duration	Completion within two years of registration
Assessment	<p>Assessment could include:</p> <ul style="list-style-type: none"> > a requirement for the application of knowledge to a Facilities Management work-based scenario whenever possible > incorporation of a variety of multiple choice question paper, written, practical and oral testing of the Learning Outcomes
Entry requirements	BIFM does not state any formal entry requirements, but learners will normally be practising supervisory or first line management or may be progressing from a Level 2 Qualification in Facilities Services

BIFM Level 3 Diploma in Facilities Management

The BIFM Level 3 Diploma in Facilities Management is a 480-hour qualification (48 credits) 225 guided learning hours and consists of five mandatory units (26 credits) plus additional optional units in order to achieve a minimum of 48 credits in total.

Ref:	Unit title	Credit value	Type of unit
Mandatory units			
FM3.01	Introduction to facilities management	6	knowledge
FM3.02	Corporate social responsibility and sustainability in facilities management	4	knowledge
FM3.03	Customer and stakeholder relations in facilities management	5	knowledge
FM3.04	Specification and procurement of facilities supplies and services	6	knowledge
FM3.05	Health and safety responsibilities in facilities management	5	competency
Optional units			
FMP413	Manage operational performance in facilities management	4	competency
FM3.06	Project management within facilities management operations	5	competency
FM3.07	Budget management of facilities management operations	4	knowledge
FM3.08	Understanding facilities management within the context of an organisation	4	knowledge
FM3.09	Understanding support services operations in an organisation	3	knowledge
FM3.10	Space allocation in facilities management	4	competency
FM3.11	Building maintenance in facilities management	5	knowledge
FM3.12	Understand the estate management function for facilities managers	4	knowledge

FM3.13	Contribute to disaster recovery and contingency planning	5	competency
FM3.14	Understanding access management and inclusion	5	knowledge

Duration	Completion within two years of registration
Assessment	Assessment could include: <ul style="list-style-type: none"> > a requirement for the application of knowledge to a Facilities Management work-based scenario whenever possible > incorporation of a variety of multiple choice question papers, written, practical and oral testing of the Learning Outcomes
Entry requirements	BIFM does not state any formal entry requirements, but learners will normally be practising supervisory or first line management or may be progressing from a Level 2 Qualification in Facilities Services

Level 3 Ofqual descriptor

Achievement at level 3 reflects the ability to identify and use relevant understanding, methods and skills to complete tasks and address problems that, while well defined, have a measure of complexity. It includes taking responsibility for initiating and completing tasks and procedures as well as exercising autonomy and judgement within limited parameters. It also reflects awareness of different perspectives or approaches within an area of study or work.

Key features

The BIFM professional qualifications are vocational programmes of study. They are linked, where appropriate, to the BIFM FM Professional Standards and the National Occupational Standards and are clearly work-related. The qualifications provide short vocational programmes of study that meet the needs of individual learners. There is a strong emphasis on the development of practical skills and acquisition of sector specific knowledge and understanding.

The BIFM qualifications are particularly suitable for learners who wish to follow a programme of study directly related to their work experience or to an aspect of employment that they wish to move into. On successful completion of these qualifications, recognition by employers enables learners to progress into or within employment and/or continue their study in the vocational area.

Learners are also able to build a portfolio of qualifications across a range of subject areas. Professional qualifications also support continuous professional development, as well as progression to larger qualifications and/or qualifications at higher levels.

The BIFM qualifications are designed to meet a range of different needs. The range of qualifications offers:

- > maximum flexibility with shorter programmes available across Levels 2 to 7.
- > the opportunity to certificate smaller blocks of learning, designed to motivate learners and encourage widening participation in education and training.
- > courses that relate to the particular training and employment patterns in facilities management.
- > courses that may offer preparation for specific jobs when in employment.
- > the opportunity to use a variety of delivery methods.
- > opportunities for learners to develop skills that support career and professional development.
- > programmes that can enable progression either to higher levels of study or to other courses at the same level of study.

Teaching, learning and assessment

The process of assessment should be part of effective planning of teaching and learning by providing opportunities for both the learner and the assessor to obtain information about progress towards learning goals. The assessor and the learner must be actively engaged in promoting a common understanding of the assessment criteria (i.e. what it is they are trying to achieve) for further learning to take place. Therefore, learners need constructive feedback and guidance

about how to improve, capitalising on strengths with clear and constructive comments about weaknesses and how these might be addressed.

The purpose of assessment is to ensure that effective learning of the content of each unit has taken place.

Assessment is normally undertaken by creating assignment tasks using the criteria — but contextualised to be relevant for learners. Assignments are devised by centres and should ensure coverage of all criteria in the unit, as set out in the unit assessment criteria mapping grid (see Assessment Guidance manual). Criteria should be clearly indicated on each assignment to provide a focus for learners (for transparency and to help ensure that feedback is specific to the criteria) and to assist with internal standardisation processes. Tasks/activities should enable learners to produce evidence that directly relates to the specified criteria.

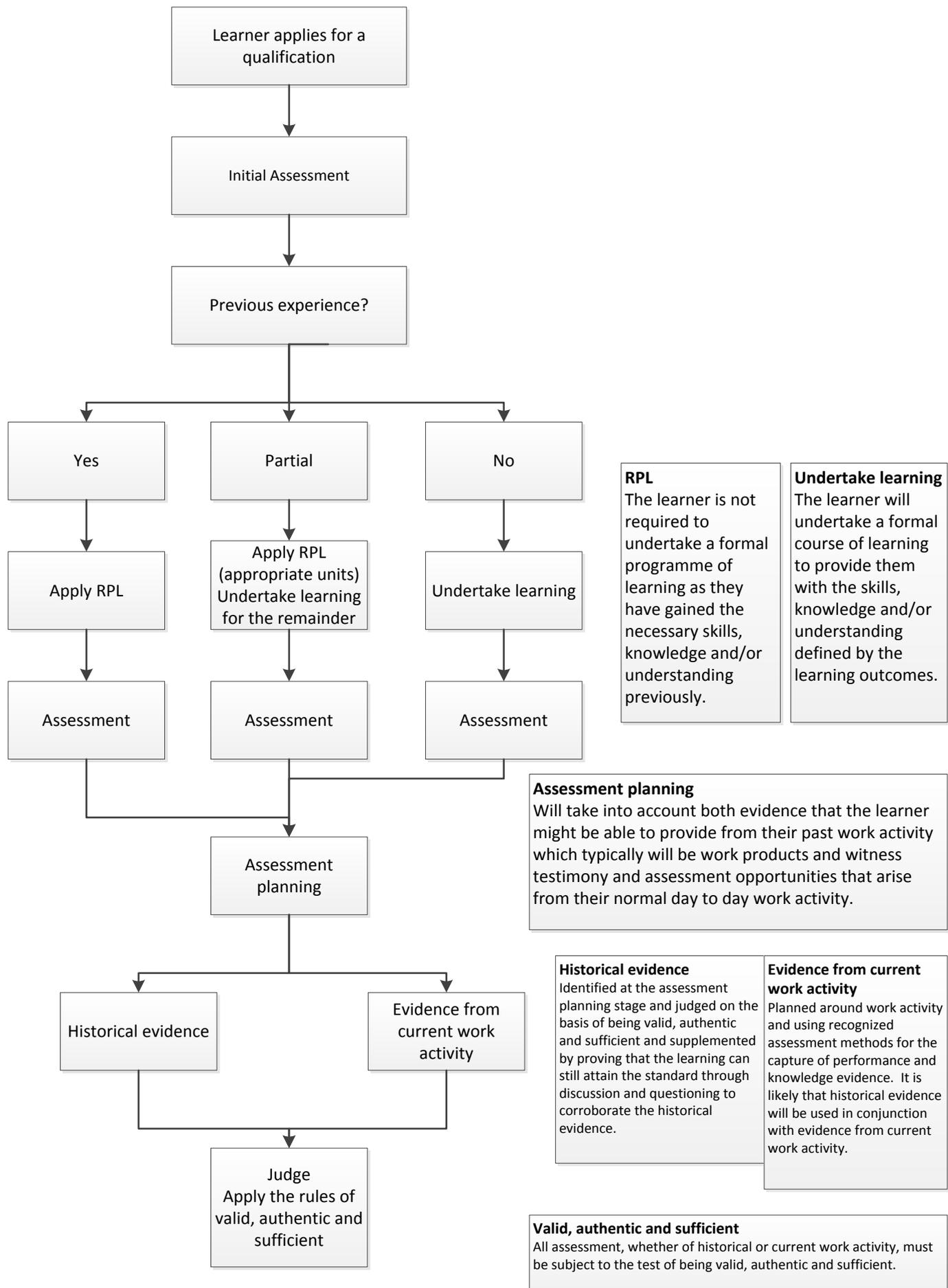
Assessment of knowledge units may also be undertaken by multiple choice question style examination papers.

One of the requirements is that the BIFM assessment process complies with the following principles of assessment: validity, reliability, comparability, manageability, and the minimisation of bias. Each of these principles is defined and explained in the BIFM Assessment Guidance manual (including the definitions provided by Ofqual).

Recognition of Prior Learning (RPL)

BIFM encourages centres to recognise a learner's previous achievements and experience through RPL. A learner may have evidence generated from previous study, from his or her previous or current employment or whilst undertaking voluntary work relating to one or more of the units in the qualification. Assessors should assess this evidence against the qualification standards in the specifications in the normal way. As with all evidence, assessors should be satisfied about the authenticity and currency of the material when considering whether or not the outcomes of the unit have been met.

See chart on following page for guidance on RPL.



Glossary of a sample of the command words used in the assessment of the BIFM qualifications

Analyse	separate information into components and identify their characteristics
Assess	make an informed judgement
Calculate	work out the value of something
Compare	identify similarities
Complete	finish a task by adding to given information
Define	specify meaning
Describe	set out characteristics
Develop	take forward or build upon given information
Explain	set out purposes or reasons
Identify	name or otherwise characterise
Interpret	translate information into recognisable form. To construe the significance of.
List	produce a number of relevant items which apply to the assessment criteria. Further description is not required.
Outline	set out main characteristics
Report	an account prepared after investigation and published
Review	survey information
Use	put into action

Reference: (Ofqual Fair access by design Guidance document No: 040/2010)

Unit FM3.01: Introduction to facilities management

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit addresses the definition of facilities management, its role within organisations, and how it can be set up in ways that will help the organisation to function more effectively. The unit addresses the potential impact of an organisation's arrangements for facilities management on the organisation's internal environment.

Title	Introduction to facilities management	
Ofqual ref	D/504/5742	
Level	3	
Credit value	6	
GLH	24	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand the nature of facilities management	1.1	define facilities management <i>(Using a definition provided by a relevant professional body, e.g. BIFM. Indicate the source of the definition)</i>
	1.2	distinguish between: <ul style="list-style-type: none"> • facilities management • other support services • core business activities <i>(No further guidance)</i>
	1.3	explain the role of facilities management in: <ul style="list-style-type: none"> • meeting end-user requirements • reducing costs • maintaining business

	<ul style="list-style-type: none"> continuity • ensuring legal and regulatory compliance • supporting corporate social responsibility <p><i>(Using example(s) from the learner's own experience or case study to support the explanation)</i></p>
<p>2. understand responsibilities commonly delegated to facilities management</p>	<p>2.1. describe typical mechanical and electrical assets for which facilities management will be responsible, and outline the different assets' maintenance requirements <i>(See below)</i></p> <p>2.2. describe typical support services for which facilities management will be responsible <i>(See below)</i></p> <p>2.3. identify typical risks to the provision of facilities, and outline arrangements that can be made to maintain business continuity <i>(See below)</i></p> <p><i>(ACs 2.1 to 2.3 should each be evidenced by reference to examples rather than developing an exhaustive list)</i></p>
<p>3. understand different service delivery models for facilities management</p>	<p>3.1 outline different service delivery models for facilities management, including in-house, partially outsourced, wholly outsourced, total facilities management (TFM), and private finance initiatives (PFI) <i>(No further guidance)</i></p> <p>3.2 describe the advantages and disadvantages of each of these models, including cost, quality, compliance and user satisfaction <i>(No further guidance)</i></p>
<p>4. understand the range of facilities management roles</p>	<p>4.1. explain the key management functions within facilities management <i>(Including, for example, people management,</i></p>

	<p><i>financial management, contract management, asset management, project management, risk management and compliance, health and safety management)</i></p> <p>4.2. describe the various roles that a facilities manager could take, and the associated responsibilities (<i>By reference to strategic, tactical and operational levels of facilities management</i>)</p>	
5. understand the benefits of good communication	<p>5.1. describe the principles of effective communication (<i>No further guidance</i>)</p> <p>5.2. describe the various methods of communication a manager can use, and when each method may be appropriate or inappropriate (<i>Including written and verbal communications and the technology facilitating these, face-to-face communication, one-to-one and group situations</i>)</p> <p>5.3. describe the nature and benefit of active listening (<i>No further guidance</i>)</p>	
Additional information about the unit		
Details of the relationship between the unit and relevant National Occupational Standards or other professional standards or curricula (if appropriate)	The unit is mapped to the Facilities Management National Occupational Standards FM301, FM320 and FM326	
FM Professional Standards reference	FM functional area:	FM functional area component:
	The Role of Facilities Management	Sector Knowledge

Resources:

[Facilities Management Handbook](#) by Frank Booty
[Total Facilities Management](#) by Brian Atkin and Adrian Brooks
[Facilities Management](#) by Peter Barrett and David Baldry
[The Facility Management Handbook](#) by David G. Cotts, Kathy Roper, and Richard Payant
[The Facility Management Handbook](#) by Cotts
Facility Management Reference Library CD, Second Edition by Ed Bas, Heinz P. Bloch, Allan R. Budris, and Joseph F. Gustin
Facilities Management by David M. Stipanuk and Harold Roffmann
[Facilities Manager's Desk Reference](#) Jane M. Wiggins
FM World - <http://www.fm-world.co.uk/>
[A Practical Guide to Facilities Management](#) by Ian C Barker MCIIOB

Unit FM3.02: Corporate social responsibility and sustainability in facilities management

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit addresses the definition of corporate social responsibility and sustainability; and the contribution that can be made by facilities management. The unit addresses the potential impact of an organisation's arrangements for facilities management on the organisation's external environment.

Title	Corporate social responsibility and sustainability in facilities management	
Ofqual ref	H/504/5743	
Level	3	
Credit value	4	
GLH	16	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand the nature of corporate social responsibility	0.1	explain the natures of corporate social responsibility and of sustainability <i>(including economic, social, ethical and environmental impacts)</i>
	0.2	explain the relationships between corporate social responsibility and sustainability <i>(including stakeholder identification and engagement, responsibility to current and future generations, application of the precautionary principle (i.e. preventative actions to minimise risk of environmental impact), reporting/assurance of environmental impacts)</i>

	<p>0.3 identify legislation and standards relevant to corporate social responsibility and sustainability <i>(for example, ISO 26000, ISO 14001, Environmental Management System (EMS), Triple Bottom Line (TBL) reporting, Brundtland Report 1987. Also, include examples of relevant sustainability legislation, e.g. the Climate Change Act 2008).</i></p>
<p>2 understand how to ensure that facilities supplies and services are provided in ways that take account of corporate social responsibility</p>	<p>2.1 explain how to ensure that facilities supplies and services take account of corporate social responsibility <i>(Using example(s) from the learner’s own experience and/or case study to demonstrate knowledge, understanding and compliance with an organisation’s CSR policy. Also, application of procedures and instructions relevant to the CSR policy).</i></p> <p>2.2 identify corporate social responsibility issues relating to the:</p> <ul style="list-style-type: none"> • procurement of facilities supplies and services • management of facilities supplies and services • employment, recruitment and management of staff and associates involved in the delivery of facilities supplies and services <p><i>(Including ethical and sustainable procurement practices, ethical employee and customer relations (e.g. compliance with the Equality Act 2010), health and safety, supply chain management, community investment and public protection).</i></p>
<p>3 understand how energy required for facilities supplies and services can be provided and used in ways that take account of</p>	<p>3.1 describe the potential consequences of inefficient energy use for an organisation’s future, and for the future of the local and</p>

sustainability	<p>wider environments (<i>by reference to factors including business performance and cost, CSR and legal compliance, reputational risk</i>)</p> <p>3.2 describe alternative energy sources that could be used by an organisation, and outline the sustainability issues associated with each of the alternatives (<i>for example, solar, wind power, geothermal, tidal and hydroelectric sources</i>)</p> <p>3.3 describe how to apply simple measures of energy usage to evaluate the effects of initiatives to improve efficiency (<i>including hard measures (e.g. direct cost reduction through improved efficiency or money-saving initiatives) and soft measures (e.g. customer satisfaction, improved corporate image)</i>)</p>	
Additional information about the unit		
Details of the relationship between the unit and relevant National Occupational Standards or other professional standards or curricula (if appropriate)	The unit is mapped to the Facilities Management National Occupational Standards FM301, FM311 and FM324.	
FM Professional Standards reference	FM functional area:	FM functional area component:
	Strategy and Policy Development	Corporate Social Responsibility
	Business Continuity and Compliance	Compliance
	Sustainability	Environment Management

Resources:

[Sustainable Practice for the Facilities Manager](#) by Sunil Shah
[The Principles of Sustainability](#) by Simon Dresner
[Making Sustainability Work: Best Practices in Managing and Measuring Corporate Social, Environmental and Economic Impacts](#) by Marc J. Epstein
[Sustainability Indicators: Measuring the Immeasurable?](#) by Simon Bell and Stephen Morse
[Strategy for Sustainability: A Business Manifesto](#) by Adam Werbach
[People, Planet, Profit: How to Embrace Sustainability for Innovation and Business Growth](#) by Peter Fisk
[Solid Waste Management and Environmental Remediation \(Environmental Remediation Technologies, Regulations and Safety\)](#) by Timo Faerber and Johann Herzog
[Essentials of Environmental Management](#) by Paul Hyde and Paul Reeve
[Environmental Law](#) by Nancy K. Kubasek and Gary S. Silverman
[Understanding Environmental Issues](#) by Susan Buckingham and Mike Turner
[Environmental Law](#) by Prof John McEldowney and Mrs Sharron McEldowney
[Waste Management \(Environment in Focus\)](#) by Cheryl Jakab
[Waste Management](#) by Hilary Stone
[Energy Management Principles and Practice. A Companion to BS EN 16001](#) by Vilnis Vesma
[Energy Management Handbook, Eighth Edition](#) by Wayne C. Turner and Steve Doty
[Guide to Energy Management](#) by Barney L. Capehart, Wayne C. Turner, and William J. Kennedy
www.sustainabilityinfm.org.uk
www.bifm.org.uk
FM World - <http://www.fm-world.co.uk/>
[A Practical Guide to Facilities Management](#) by Ian C Barker MCIIOB

Unit FM3.03: Customer and stakeholder relations in facilities management

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit addresses methods to ensure that customers and other stakeholders contribute to the maintenance, and evaluation of facilities supplies and services. It relates closely to the unit on specification and procurement of facilities supplies and services (FM3.04), which addresses the customers' and suppliers' roles specifying what supplies or services will be required. Both units are written to apply at an operational rather than at a strategic level.

<i>Title</i>	Customer and stakeholder relations in facilities management	
<i>Ofqual ref</i>	K/504/5744	
<i>Level</i>	3	
<i>Credit value</i>	5	
<i>GLH</i>	20	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand the needs of customers and other stakeholders affected by a facilities supply or service	1.1	distinguish between the: <ul style="list-style-type: none"> clients responsible for commissioning a facilities supply or service users of the supply or service other stakeholders who will be affected by the way in which the supply or service is delivered <i>(See below)</i>
	1.2	identify the main interests of each of these groups in the facilities

	<p>supply or service <i>(See below)</i></p> <p>1.3 determine the information that the different groups will require to monitor their interests <i>(See below)</i></p> <p>1.4 determine how delivery of the information will need to be scheduled so that they can take timely action if necessary <i>(See below)</i></p> <p><i>(ACs 1.1 to 1.4 should be evidenced using examples from the learner's own experience and/or case study. The interests/information requirements of each group might cover a variety of factors including cost/financial performance, legal/statutory compliance, specific performance against contract, service specification, customer service, risk management and business continuity)</i></p>
<p>2 understand how the information required can be supplied by using different channels of communication</p>	<p>2.1. describe how to use communications channels that provide access to information, and the benefits and limitations of such mechanisms, including help desks, web pages and meetings <i>(No further guidance)</i></p> <p>2.2. describe how to use communications channels that send information to users, and the benefits and limitations of such mechanisms, including briefings, guidance notes, email, telephone, newsletters and formal reports <i>(No further guidance)</i></p> <p>2.3. identify appropriate communications channels for the information required by clients, service users and other stakeholders <i>(Using examples)</i></p>

	<p><i>from the learner's own experience and/or case study to apply the evidence provided for ACs 2.1 and 2.2 above)</i></p>
<p>3 understand how customer satisfaction can be monitored by using different channels of communication</p>	<p>3.1 identify and analyse relevant management data to provide information about customer satisfaction and potential difficulties, including usage rates, key performance indicators and performance standards <i>(See below)</i></p> <p>3.2 describe how to use mechanisms that enable customers to volunteer feedback, and the benefits and limitations of such mechanisms, including complaint logs and staff suggestion schemes <i>(See below)</i></p> <p>3.3 describe how to use methods that ask customers directly for feedback, and the benefits and limitations of such methods, including interviews, focus groups and questionnaires <i>(See below)</i></p> <p><i>(ACs 3.1 to 3.3 should be evidenced using examples from the learner's own experience and/or case study)</i></p>
<p>4 be able to recommend actions to resolve issues affecting customer satisfaction</p>	<p>4.1. identify the causes of the issues affecting customer satisfaction <i>(See below)</i></p> <p>4.2. identify practical actions to address the causes, where possible <i>(See below)</i></p> <p>4.3. identify additional forms of communication to publicise the actions, and/or to address the customers' perceptions <i>(See below)</i></p> <p><i>(ACs 4.1 to 4.3 should be evidenced using the same examples as ACs 3.1 to 3.3)</i></p>

	<i>above. Actions should include those that distinguish between issues that can be measured objectively (i.e. using data) and those that derive from customer perception (i.e. subjectively based) of facilities management performance)</i>	
Additional information about the unit		
Details of the relationship between the unit and relevant National Occupational Standards or other professional standards or curricula (if appropriate)	The unit is mapped to the Facilities Management National Occupational Standards FM 301, FM302, FM304, FM305, FM310, FM317 and FM319.	
FM Professional Standards reference	FM functional area:	FM functional area component:
	Quality Management and Customer Service	Customer Service
		Stakeholder Relationships

Resources:

[The CRM Handbook: A Business Guide to Customer Relationship Management \(Information Technology\)](#) by Jill Dyché

[The Service Level Agreement SLA Guide - SLA Book, Templates for Service Level Management and Service Level Agreement Forms. Fast and Easy Way to Write Your SLA](#) by Gerard Blokdijk and Ivanka Menken

[Service Level Agreement 100 Success Secrets: SLA, Service Level Agreements, Service Level Management and Much More](#) by Gerard Blokdijk

[Foundations of Service Level Management \(Sams Professional\)](#) by Rick Sturm and Wayne Morris

[The Nordstrom Way to Customer Service Excellence: A Handbook for Implementing Great Service in Your Organization](#) by Robert Spector and Patrick D. McCarthy

[The Nordstrom Way to Customer Service Excellence: A Handbook for Becoming the "Nordstrom" of Your Industry](#) by Robert Spector and Patrick D. McCarthy

[Customer Care Excellence: How to Create an Effective Customer Focus \(Customer Care Excellence: How to Create an Effective Customer Care\)](#) by Sarah Cook

[Unleashing Excellence: The Complete Guide to Ultimate Customer Service](#) by Dennis Snow and Teri Yanovitch

[Happy About Customer Service?: Creating a Culture of Customer Service Excellence](#) by Ken Welsh

[Best Practice Guide for Customer Service Managers: An Activity-based Workbook for Leaders of Teams That Strive for Service Excellence \(Customer Service Best](#)

Practice Guides) by Trevor G. Arden, Stephanie E. Edwards, and Anne-Marie Sonneveld
Customer Service: Aiming for Excellence by Timothy P. Bonomo
Business Success Through Service Excellence by Moira Clark and Susan Baker
FM World www.fm-world.co.uk
www.bifm.org.uk
www.instituteofcustomerservice.com/
[A Practical Guide to Facilities Management](#) by Ian C Barker MCIIOB

Unit FM3.04: Specification and procurement of facilities supplies and services

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit addresses all of the stages of procurement, which necessarily include liaison with customers and other stakeholders. The unit relates closely to the unit on customer and stakeholder relations in facilities management (FM3.03), which addresses how to ensure that the customers and other stakeholders have a continuing role in maintenance and evaluation of the supply or service. Both units are written to apply at an operational rather than strategic level.

Title	Specification and procurement of facilities supplies and services	
Ofqual ref	T/504/5746	
Level	3	
Credit value	6	
GLH	24	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand the function and nature of specifications used in the procurement of facilities supplies and services	1.1	describe the functions of a specification in the procurement of facilities supplies and services <i>(Enlarge upon the definition of a specification as an explicit set of requirements to be satisfied by a product or service and place in a facilities management context)</i>
	1.2	describe the nature of input and output specifications, and explain their advantages and disadvantages <i>(No further</i>

	<p><i>guidance)</i></p> <p>1.3 identify essential and desirable requirements for a low-value supply or service, including legal and regulatory requirements, through research and through liaison with the internal client <i>(Using example(s) from the learner's own experience or case study. Show justification for classifying individual requirements as either "essential" or "desirable".)</i></p> <p>1.4 draft a specification for the supply or service, defining requirements in sufficient detail to provide the basis for procurement <i>(Using the same example as AC 1.3 above)</i></p>
<p>2 understand different procurement processes used for facilities supplies and/or services</p>	<p>2.1 describe and explain the main processes used for the procurement of facilities supplies and services, including quotations, full tendering and framework agreements <i>(Provide an outline of the main elements or components of these procurement types)</i></p> <p>2.2 describe the means by which the integrity of these processes is assured, including the involvement of independent witnesses, group decision-making, and segregation of duties <i>(Using examples from the learner's own experience and/or case study to demonstrate how procurement processes ensure the principle of competitive procurement is applied and prevent/minimise the risk of fraud or maladministration)</i></p>
<p>3 understand different contractual arrangements used for facilities supplies and/or services</p>	<p>3.1 describe the elements of a contract and the responsibilities of the various parties <i>(As a minimum include: parties, date, specification of goods or services to be supplied, price, warranties)</i></p>

	<p><i>and exclusion of liability, term and termination, intellectual property rights and confidentiality. See below)</i></p> <p>3.2 recognise when a contract is made <i>(By reference to the legal implications of offer, acceptance and consideration. Could also refer to intention to create legal relations and contractual capacity. See below)</i></p> <p>3.3 recognise failings that could invalidate a contract <i>(By reference to misrepresentation, mistake, illegality, duress/undue influence. See below)</i></p> <p>3.4 explain the different types of contract commonly used in facilities management, including purchase orders and call-off contracts <i>(No further guidance. AC 3.4 is not limited to the examples stated – see requirements for AC 3.5 below)</i></p> <p>3.5 identify which of these types are most commonly used for different aspect of facilities management and explain why, including: maintenance, cleaning security, stationery, office furniture, information technology, reprographics and fleet hire <i>(Using examples from the learner's own experience and/or case study)</i></p> <p><i>(ACs 3.1 to 3.3: Only a brief overview of legal terms, sufficient to show their relevance to facilities management contracts, is necessary; a detailed explanation of contract law is not required)</i></p>
<p>4 understand how contracts are managed to ensure delivery to specification and, where possible, to achieve added value</p>	<p>4.1 identify information flows and reporting processes to enable delivery to be monitored against service level agreements and key</p>

	<p>performance indicators <i>(Using examples from the learner's own experience and/or case study)</i></p> <p>4.2 identify reasons for delivery failures <i>(Using examples from the learner's own experience and/or case study. Examples might include inadequate specification, insufficient resources, inadequate training and/or instructions, inadequate supervision, unrealistic expectations, changes in user requirements)</i></p> <p>4.3 identify possible remedies in association with the contractors <i>(see below)</i></p> <p>4.4 determine how to return delivery to specification, through discussion with the contractors <i>(see below)</i></p> <p>4.5 identify when it would be appropriate and describe how to implement sanctions for poor performance <i>(Sanctions should be limited to those necessary in the short term to return the contract to agreed performance, e.g. withholding payment until defects are corrected, not placing additional work with contractor. It is not necessary for AC 4.5 to address remedies at law, e.g. liquidated damages, specific performance or termination. See below)</i></p> <p><i>(ACs 4.3 to 4.5 should use the same examples from ACs 4.1 and/or 4.2)</i></p>
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Additional information about the unit	
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Details of the relationship between the unit and relevant National Occupational Standards or other	The unit is mapped to the Facilities Management National Occupational Standards FM301, FM314, FM321 and
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professional standards or curricula (if appropriate)	FM326.	
FM Professional Standards reference	FM functional area:	FM functional area component:
	Procurement and Contract Management	Procurement

Resources:

[Purchasing and Supply Chain Management](#) by Dr Kenneth Lysons and Dr Brian Farrington

[Strategic Purchasing and Supply Chain Management](#) by Mr Malcolm Saunders

[Procurement, Principles and Management](#) by Peter Baily, Prof David Farmer, Barry Crocker, and Prof David Jessop

[Supply Management and Procurement Best Practices](#) by Fred Sollish C.P.M. and John Semanik C.P.M.

[Project Procurement Management: A Guide to Structured Procurements](#) by Stephen Guth

[The Wiley Guide to Project Technology, Supply Chain, and Procurement Management \(The Wiley Guides to the Management of Projects\)](#) by Peter Morris and Jeffrey K. Pinto

[Management of Procurement](#) by Denise Bower

[The Aqua Group Guide to Procurement, Tendering and Contract Administration](#) by Mark Hackett, Ian Robinson, and Gary Statham

[Logistics and Supply Chain Management \(Financial Times Series\)](#) by Prof Martin Christopher

[Procurement, Principles and Management](#) by Peter Baily, Prof David Farmer, Barry Crocker, and Prof David Jessop

[Legal Aspects of Purchasing and Supply Chain Management](#) by Ian Longdin

BIFM Good Practice Guide - www.bifm.org.uk

FM World - <http://www.fm-world.co.uk/>

www.cips.org/

www.businesslink.gov.uk/bdotg/action/detail?itemId=1073792572&type=RESOURCES

[A Practical Guide to Facilities Management](#) by Ian C Barker MCIQB

Unit FM3.05: Health and safety responsibilities in facilities management

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

The unit addresses the lines of responsibility for health and safety in facilities management, and how those responsibilities can be discharged.

Title	Health and safety responsibilities in facilities management	
Ofqual ref	F/504/5748	
Level	3	
Credit value	5	
GLH	20	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand their own health and safety liabilities and responsibilities	1.1. outline an organisation's liabilities and responsibilities under health and safety legislation (<i>See below</i>) 1.2. identify their own liabilities and responsibilities under health and safety legislation (<i>See below</i>) 1.3. outline the liabilities and responsibilities of other staff under health and safety legislation, up and down the line of management (<i>See below</i>) <i>(ACs 1.1 to 1.3 should be evidenced by reference to the duty of care imposed by the Health and Safety at Work Act</i>	

	<p><i>1974 so far as it applies individually and corporately, together with the penalties that can be enforced for a serious breach of statutory duty (including the effect of the Corporate Manslaughter and Corporate Homicide Act 2007)</i></p>
<p>2 be able to help maintain healthy and safe working environments, procedures and policies</p>	<p>2.1 maintain systems to monitor, measure and report on health and safety performance <i>(Using examples from the learner's own experience and could include, for example, building inspections and review of accident records and risk assessments (conducted where necessary with trade union or other H&S representatives). It can also include reference to statutory compliance checks)</i></p> <p>2.2 establish and use systems for risk assessments, and for determining actions to reduce or eliminate the risks <i>(Using an example of a health and safety risk assessment from the learner's own experience or case study)</i></p> <p>2.3 describe how and why to:</p> <ul style="list-style-type: none"> • consult staff or their representatives on health and safety issues • draw on specialist sources of expertise on health and safety <p><i>(No further guidance)</i></p> <p>2.4 recommend and present evidence to justify changes to facilities, procedures and the written health and safety policy to reduce or eliminate risks <i>(Using example(s) from the learner's own experience or case study)</i></p>
<p>3 be able to help ensure healthy and safe working practices</p>	<p>3.1 maintain behaviours that set a good example to others in relation to health and safety <i>(See below)</i></p>

	<p>3.2 ensure that health and safety factors are not compromised by lack of supplies or services (<i>See below</i>)</p> <p>3.3 ensure that other staff are made aware of their health and safety responsibilities and liabilities (<i>See below</i>)</p> <p>3.4 identify new risks and hazards to health and safety as they arise, and take appropriate action to reduce or eliminate the risks (<i>See below</i>) <i>(ACs 3.1 to 3.4 should be evidenced by examples from the learner's own experience or case study demonstrating procedures and personal actions that are in place to achieve these criteria)</i></p>
<p>4 be able to report incidents and emergencies</p>	<p>4.1 identify the nature, location and scope of an incident (<i>See below</i>)</p> <p>4.2 raise the appropriate alarms (<i>See below</i>)</p> <p>4.3 report the incident, providing accurate and unambiguous information to the relevant people (<i>See below</i>)</p> <p>4.4 complete all relevant documentation (<i>See below</i>) <i>(ACs 4.1 to 4.4 should be evidenced using an example from the learner's own experience or case study. The evidence should include a description or explanation of the processes followed and use of any relevant documentation, e.g. Accident Book, Incident Log, Risk Assessments, CAFM database).</i></p>

Additional information about the unit		
Details of the relationship between the unit and relevant National Occupational Standards or other professional standards or curricula (if appropriate)	The unit is mapped to the Facilities Management National Occupational Standards FM301, FM305, FM306 and FM310 and FM311	
FM Professional Standards reference	FM functional area:	FM functional area component:
	Business Continuity and Compliance	Compliance
	Property Portfolio Management	Managing Accessibility and Inclusion

Resources:

NEBOSH (The National Examination Board in Occupational Safety and Health) www.nebosh.org.uk

IOSH (Institution of Occupational Safety and Health) www.iosh.co.uk

Health & Safety Executive www.hse.gov.uk

[Introduction to Health and Safety at Work](#) by Phil Hughes MBE MSc FIOSH RSP and Ed Ferrett PhD BSc (Hons Eng.) CEng MIMechE MIEE MIOSH

[Health and Safety at Work Essentials: The One-stop Guide for Anyone Responsible for Health and Safety Issues in the Workplace](#) by Mary Duncan, Finbar Cahill, and Penny Heighway

[Principles of Health and Safety at Work](#) by Allan St. John Holt and Jim Allen

[Safety at Work](#) by John Ridley BSc CEng MIMechE FIOSH DMS and John Channing MSc(Safety) MSc(Chemistry) FIOSH RSP

[Tolley's Health and Safety at Work Handbook 2012](#)

[Health and Safety at Work: An Essential Guide for Managers](#) by Jeremy Stranks

[Introduction to Fire Safety Management: The handbook for students on NEBOSH and other fire safety courses](#) by Andrew Furness CFIOSH GIFireE Dip2OSH MIIRSM MRSH and Martin Muckett MA MBA CMIOSH MIFireE Dip2OSH

[Health and Safety Enforcement: Law and Practice](#) by Richard Matthews QC and James Ageros

[Tolley's Practical Risk Assessment Handbook](#) by Mike Bateman BSc MIOSH RSP

[5 Steps - Risk Assessment in your Workplace \(DVD\)](#)

[How to Complete a Risk Assessment in 5 Days or Less](#) by Thomas R. Peltier

FM World - <http://www.fm-world.co.uk/k>

www.bifm.org.uk

Workplacelaw - www.workplacelaw.net

[A Practical Guide to Facilities Management](#) by Ian C Barker MCIQB

Unit FMP413 Manage operational performance in facilities management

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Title:	Manage operational performance in facilities management	
Ofqual ref	600/7760/8	
Level:	4	
Credit value:	4	
GLH	20	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Understand the facilities management delivery model, the components of operational performance and how to implement them	<p>1.1 Explain the techniques available for identifying and defining functional, quality and performance requirements in facilities management. <i>(No additional guidance).</i></p> <p>1.2 Identify and describe the range of contract models and service level agreements that can be employed and how to identify the most appropriate to facilities management service delivery. <i>(No additional guidance).</i></p> <p>1.3 Explain ways of determining achievable objectives, timescales and key performance indicators and how to monitor them relevant to the organisation's business objectives. <i>(No additional guidance).</i></p>	

	<p>1.4 Identify how to use benchmarking to identify best practice as an aid to performance monitoring. <i>(No additional guidance)</i>.</p> <p>1.5 Describe methods of gathering and analysing performance data and using it to make objective evaluations of performance. <i>(No additional guidance)</i>.</p>
<p>2. Be able to define the performance requirements of facilities management services</p>	<p>2.1 Understand the level of service, performance and quality required and expected in the delivery of facilities management services. <i>(See below)</i>.</p> <p>2.2 Assess the service requirements for delivering facilities management services. <i>(See below)</i>.</p> <p>2.3 Understand appropriate best practice benchmarks relevant to current service delivery. <i>(See below)</i>.</p> <p><i>(Achievement of all these criteria should be evidenced using examples from the learner's own experience and/or case study. Evidence should include service definitions and specifications in documented form together with details of the policies, procedures and documentation necessary to provide quality assurance)</i>.</p>
<p>3. Be able to manage the delivery of facilities management to meet requirements</p>	<p>3.1 Ensure that objectives for facilities management delivery are achievable and measurable. <i>(See below)</i>.</p> <p>3.2 Agree the level of service to be delivered with relevant stakeholders. <i>(See below)</i>.</p> <p>3.3 Record service level agreements in a contract or other appropriate format. <i>(See below)</i>.</p> <p>3.4 Agree a system that allows the measurement of performance against agreements and</p>

	<p>specifications. <i>(See below)</i>.</p> <p>3.5 Identify areas for remedial action and improvement. <i>(See below)</i>.</p> <p><i>(Achievement of all these criteria should be evidenced using the same example(s) as for the previous learning outcome. Evidence should include Service Level Agreements together with key performance indicators (e.g. turn-round or delivery time, cost per head/unit/m², accuracy %) and how this data will be recorded/collected (e.g. helpdesk (CAFM) data, spot samples, customer satisfaction feedback forms).</i></p>	
<p>4. Be able to evaluate operational performance of facilities management services</p>	<p>4.1 Review the delivery of facilities management services against the requirements of the agreement or specification to identify opportunities for reducing costs and enhancing value. <i>(See below)</i>.</p> <p>4.2 Record evaluation of service performance and present suggestions for improvement to relevant stakeholders. <i>(See below)</i>.</p> <p><i>(Achievement of all these criteria should be evidenced using the same example(s) as for the previous learning outcome. Evidence should include reviews and evaluation (both qualitative and quantitative) in documented form).</i></p>	
<p>Additional information about the unit</p>		
<p>FM Professional Standards reference</p>	<p>FM functional area:</p>	<p>FM functional area component:</p>
	<p>Business Support Services Management</p>	<p>Service Innovation</p>
	<p>Quality Management and Customer Service</p>	<p>Quality Management</p>

Resources:

[The Basics of Performance Measurement](#) by Jerry L. Harbour

[Transforming Performance Measurement: Rethinking the Way We Measure and Drive Organizational Success](#) by Dean R. Spitzer

[Strategic Performance Management: Leveraging and Measuring your Intangible Value Drivers: 340](#) by Bernard Marr

[Performance Dashboards: Measuring, Monitoring, and Managing Your Business](#) by Wayne W. Eckerson

FM World [http: www.fm-world.co.uk/](http://www.fm-world.co.uk/)

[A Practical Guide to Facilities Management](#) by Ian C Barker MCIQB

Unit FM3.06: Project management within facilities management operations

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit addresses the project management of operational changes (such as churn) rather than the project management of strategic initiatives. In effect, it relates to the project management of small-scale projects of low complexity.

Title	Project management within facilities management operations	
Ofqual ref	R/504/5754	
Level	3	
Credit value	5	
GLH	20	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 be able to scope a small-scale project of low complexity, from an initial brief	1.1	develop a scoping document that includes sufficient detail about tasks/activities, resource requirements and risks to evaluate the feasibility of the initial brief <i>(See below)</i>
	1.2	finalise the project specification through discussion with the project stakeholders to agree realistic targets for quality, time and cost <i>(See below)</i> <i>(ACs 1.1 and 1.2 should be evidenced using an example from the learner's own experience or case study. The</i>

	<i>example should be a low-complexity facilities management related project)</i>
2 be able to prepare a project plan	<p>2.1 specify tasks/activities that will deliver the project specification efficiently (<i>Using a work breakdown structure based on the example from ACs 1.1 and 1.2 above</i>)</p> <p>2.2 determine the resources required for the various tasks/activities (<i>Including in-house and outsourced staff resources, financial budget</i>)</p> <p>2.3 schedule the various tasks/activities to run in parallel and/or in sequence to make efficient use of resources and to meet the project deadlines (<i>Using a project scheduling technique, e.g. Gantt chart, showing the relationships between precedent and dependent tasks and stand-alone tasks</i>)</p> <p>2.4 assess risks to the project in terms of their likelihood and impact, identify any risks that can be accepted, and plan how to reduce, transfer or mitigate the remainder (<i>No further guidance</i>)</p> <p>2.5 clarify the information needs of different stakeholders and prepare a communications plan to address those needs (<i>No further guidance</i>)</p> <p>2.6 prepare a project plan including the information from the preceding assessment criteria (<i>No further guidance</i>)</p>
3 be able to manage project delivery	3.1 identify information flows and reporting processes to enable

	<p>progress to be monitored against the project plan <i>(Including schedule, resource use and risk management)</i></p> <p>3.2 report on progress to stakeholders in accordance with the communications plan <i>(No further guidance)</i></p> <p>3.3 investigate reasons for variations from the project plan, determine options to restore the project to plan, and estimate the likely effects on quality and/or time and/or cost <i>(No further guidance)</i></p> <p>3.4 implement relevant change management processes to agree and action changes that will restore the project to plan or otherwise alter the project <i>(Include description of appropriate process for making and approving change requests)</i></p>
<p>4 be able to close the project</p>	<p>4.1 confirm project closure to the project sponsor <i>(See below)</i></p> <p>4.2 complete project documentation <i>(See below)</i></p> <p>4.3 inform relevant stakeholders of project closure, project results and lessons learned <i>(See below)</i> <i>(ACs 4.1 to 4.3 should be evidenced using an example from the learner's own experience or case study. It can be the same example as used for the previous Learning Outcomes if that project has been completed. Learning Outcome No 4 is concerned with demonstrating a formal process for closing-down a project, including an evaluation of how effective the project was in</i></p>

	<i>delivering the required results together with lessons learned for future projects)</i>	
Additional information about the unit		
Details of the relationship between the unit and relevant National Occupational Standards or other professional standards or curricula (if appropriate)	The unit is mapped to the Facilities Management National Occupational Standard FM312.	
FM Professional Standards reference	FM functional area:	FM functional area component:
	Leadership and Management	Project Management

Resources:

[Brilliant Project Management \(Revised Edition\): what the best project managers know, do and say \(Brilliant Business\) by Stephen Barker and Rob Cole](#)
[The Definitive Guide to Project Management: The Fast Track to Getting the Job Done on Time and on Budget \(Financial Times Series\) by Sebastian Nokes and Sean Kelly](#)
[Project Management by Dennis Lock](#)
[Project Management: How to Plan and Deliver a Successful Project \(Studymates\) by Vicky Billingham](#)
[Making Things Happen: Mastering Project Management \(Theory in Practice \(O'Reilly\)\) by Scott Berkun](#)
[The One-page Project Manager: Communicate and Manage Any Project with a Single Sheet of Paper by Clark A. Campbell](#)
[Project Management: Communicating, Deadlines, Budgeting, Planning, Troubleshooting \(Essential Managers\) by Peter Hobbs](#)
[Project Management: A Systems Approach to Planning, Scheduling, and Controlling by Harold Kerzner](#)
[Fast Track to Success: Project Management by Patrick Harper-Smith and Simon Derry](#)
[The Project Manager: Mastering the Art of Delivery by Richard Newton](#)
[The Principles of Project Management by Meri Williams](#)
[The Essentials of Project Management by Dennis Lock](#)
[Managing Projects Large and Small: The Fundamental Skills for Delivering on Budget and on Time \(Harvard Business Essentials\) by Harvard Business School Press](#)
www.businessballs.com/project.htm
www.pmi.org.uk/
www.bifm.org.uk/
[FM World - www.fm-world.co.uk/](http://www.fm-world.co.uk/)
[A Practical Guide to Facilities Management by Ian C Barker MCI OB](#)

Unit FM3.07: Budget management of facilities management operations

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit addresses delegated responsibilities for the budget management of operational functions, rather than budget management for facilities management as a whole.

Title	Budget management of facilities management operations	
Ofqual ref	D/504/5756	
Level	3	
Credit value	4	
GLH	16	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand the function of budgets and the processes by which they are prepared	1.1	explain how the use of budgets contributes to the financial management of facilities management operations (<i>By reference to fixed asset and revenue budgets and their different effects on financial management and reporting (e.g. Profit and Loss, Balance Sheet, Cashflow Forecast). Also, use of cost centres</i>)
	1.2	describe the processes of zero-based and incremental budgeting, and explain the advantages and disadvantages of each (<i>No further guidance</i>)
	1.3	identify different sources of

	<p>information used to inform the preparation of fixed asset and revenue budgets relevant to facilities management operations <i>(Including, for example, historic cost performance, supplier information (e.g. known price increases), cost drivers (e.g. space, staff headcount, production) together with known/anticipated changes, demand trends for services)</i></p>
<p>2 understand the processes by which progress against budget is monitored</p>	<p>2.1 describe how data on income and expenditure is captured to enable timely analysis <i>(See below)</i></p> <p>2.2 describe typical reports used to monitor expenditure against budget in facilities management <i>(See below)</i> <i>(ACs 2.1 and 2.2 should be evidenced using example(s) from learner's own experience, e.g. purchase order and invoicing processes, budget versus actual expenditure reports)</i></p>
<p>3 understand the processes by which variances between actual and budgeted expenditure are investigated</p>	<p>3.1 identify when variances can be attributed to changes in demand <i>(See below)</i></p> <p>3.2 describe how to investigate variances that cannot be explained by changes in demand, including variances that could have resulted from the misuse of resources <i>(See below)</i> <i>(ACs 3.1 and 3.2 should be evidenced using example(s) from learner's own experience or case study)</i></p>
<p>4 be able to recommend ways in which service delivery and/or</p>	<p>4.1 identify appropriate options to address the variances, based</p>

<p>budgets could be amended to address variances between actual and budgeted expenditure</p>	<p>on:</p> <ul style="list-style-type: none"> • possible changes to service delivery • reallocation of budgets so that under-spends fund over-spends • increasing the overall budget allocation <i>(No further guidance)</i> <p>4.2 compare the costs and benefits of the various options <i>(Including, for example, effect on internal customer satisfaction if service specifications are changed, effect on organisational efficiency by increasing overall budget allocation)</i></p>	
<p>Additional information about the unit</p>		
<p>Details of the relationship between the unit and relevant National Occupational Standards or other professional standards or curricula (if appropriate)</p>	<p>The unit is mapped to the Facilities Management National Occupational Standards FM308, FM319, FM321 and FM322.</p>	
<p>FM Professional Standards reference</p>	<p>FM functional area:</p>	<p>FM functional area component:</p>
	<p>Finance and IT</p>	<p>Financial Management</p>

Resources:

[Management Accounting for Business](#) by Colin Drury
[The Economist Guide to Financial Management](#) by John Tennent
[Mastering Financial Management: A Step-by-Step Guide to Strategies, Applications and Skills \(Financial Times Series\)](#) by Mr Clive Marsh
[Financial Management: Theory and Practice](#) by Eugene F. Brigham and Michael C. Ehrhardt
[Fundamentals of Financial Management](#) by J. Van Horne and Prof John M Wachowicz JR
[Financial and Management Accounting: An Introduction](#) by Prof Pauline Weetman
[Business Development Series: Practical Financial Management: A Guide to Budgets, Balance Sheets and Business Finance: 2](#) by Colin Barrow
[Fundamentals of Financial Management \(Concise Edition\)](#) by Eugene F. Brigham and Joel F. Houston
[Financial & Management Accounting](#) by Pauline Weetman
[Financial Management: Principles and Applications](#) by Sheridan Titman, John D. Martin, and Arthur J. Keown

[Guide to Setting Budgets and Managing Cashflows, A](#) by Jennifer Rhodes
www.icaew.co.uk
www.acca.org.uk
[A Practical Guide to Facilities Management](#) by Ian C Barker MCIQB

Unit FM3.08: Understanding facilities management within the context of an organisation

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit enables the learners to develop knowledge and understanding of the different ways that business organisations are structured and how their functions, culture and processes affect facilities management.

Title	Understanding facilities management within the context of an organisation	
Ofqual ref	L/503/9371	
Level	3	
Credit value	4	
GLH	18	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Understand trends within facilities management	<p>1.1 Explain current trends within facilities management (<i>By reference to examples (e.g. sustainability and energy management, complex building systems, space utilisation, aging building stock, emergency preparedness and business continuity, changing work styles) rather than developing an exhaustive list</i>)</p> <p>1.2 Identify a potential trend that may benefit own organisation (<i>providing relevant reasons for identifying this particular trend</i>)</p> <p>1.3 Identify which organisations are</p>	

	<p>considered to be market leaders in terms of facilities management (<i>in terms of the scope of the services and expertise that they offer. Identify features that give them their "competitive edge"</i>)</p>
<p>2 Understand the importance of facilities management within the context of own organisation</p>	<p>2.1 Describe the organisation's purpose, its culture, its performance goals and objectives (<i>No additional guidance</i>)</p> <p>2.2 Explain how facilities management can assist the organisation in achieving its purpose (<i>Relating facilities management strategy and objectives to organisational objectives and culture</i>)</p> <p>2.3 Describe the structure of the facilities management department in which you work (<i>Identifying the services provided, how they are shared between in-house and outsourced resources and the lines of management and responsibility</i>)</p> <p>2.4 Define the role of the facilities manager (<i>By reference to its various management functions, e.g. people, financial, contract, asset, risk and compliance</i>)</p> <p>2.5 Explain possible consequences of poor and ineffective facilities management (<i>By reference to, for example, legal/statutory compliance, cost performance, support for core business operations and business continuity, internal customer satisfaction</i>)</p> <p>2.6 Reflect on own ability to influence others to accept both popular and unpopular facilities management actions within the context of own organisation (<i>Using example(s) from learner's own experience or case study</i>)</p>
<p>3 Know how to set team and individual objectives that will</p>	<p>3.1 Explain how to set team and individual objectives that will</p>

ensure effective facilities management in own organisation	ensure effective facilities management to support organisational performance (<i>Using example(s) from learner's own experience applying SMART criteria</i>)	
4 Understand what external factors could affect facilities management within an organisation	4.1 List examples of external factors that could affect facilities management within an organisation (<i>for example using PESTLE to classify external factors</i>)	
5. Be able to raise the profile of facilities management in the organisation and local community	5.1 Explain ways in which you could raise the profile of facilities management in your organisation (<i>Using example(s) from learner's own experience or case study</i>) 5.2 Describe your own organisation, its relationship with the local community and how its standing with stakeholders could be enhanced (<i>By reference to the organisation's policy for Corporate Social Responsibility (CSR) and the role of facilities management within CSR</i>)	
Additional information about the unit		
FM Professional Standards reference	FM functional area:	FM functional area component:
	The Role of Facilities Management	Sector Knowledge
	Strategy and Policy Development	Corporate Social Responsibility

Resources:

[Management: Concepts and Practices](#) by Tim Hannagan
[Essentials of Organisational Behaviour](#) by Laurie J. Mullins
[Organisational Behaviour](#) by Stephen P. Robbins, Timothy A. Judge, Bruce Millett, and Terry Waters-Marsh
[Organizational Behaviour](#) by Ray French, Charlotte Rayner, Gary Rees, and Sally Rumbles
[Introduction to Organisational Behaviour](#) by Penny Dick and Steve Ellis
[A Practical Guide to Facilities Management](#) by Ian C Barker MCIQB

Unit FM3.09: Understanding support services operations in an organisation

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit enables learners to develop an understanding of facilities management support services operations and how to monitor the delivery of those services within safe systems of work and budgetary constraints.

Title	Understanding support services operations in an organisation	
Ofqual ref	J/503/9367	
Level	3	
Credit value	3	
GLH	7	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Understand the range of support services required by the organisation and the legislation that impacts on these services	1.1 Describe the range of support services that is required by own organisation, distinguishing between 'hard' and soft' services <i>(No further guidance)</i> 1.2 Identify the legislation that impacts on these services <i>(By reference to examples (e.g. the Food Safety Act 1990 in relation to catering) rather than developing an exhaustive list)</i>	
2 Understand what support services are and how they are currently	2.1 Describe the role of service level agreements, their typical structure and content <i>(See</i>	

being provided and delivered	<p><i>below)</i></p> <p>2.2 Describe how service level agreements are used with both customers and suppliers in own organisation (<i>See below)</i></p> <p>2.3 Describe what support services are currently being provided by the facilities management department and how these are delivered (<i>See below)</i></p> <p><i>(ACs 2.1 to 2.3 should be evidenced using example(s) from the learner's own experience or case study)</i></p>	
3 Understand the options of delivering support services	<p>3.1 Explain various ways of providing support services to meet organisational requirements (<i>for example, in-house, outsourced, bundled contracts and Total Facilities Management models)</i></p> <p>3.2 Explain how the quality of support services is measured and monitored (<i>Using examples of "hard" (quantitative) and "soft" (qualitative) measures)</i></p>	
Additional information about the unit		
FM Professional Standards reference	FM functional area:	FM functional area component:
	Business Continuity and Compliance	Compliance
	Business Support Services Management	Managing Service Delivery

Resources:

Managing Business Support Services: Strategies for Outsourcing and Facilities Management by Jonathan Reuvid and John Hinks
Managing Budgets (Essential Managers) by Dorling Kindersley
Smarter Outsourcing: An Executive Guide to Managing Successful Relationships by Mr Jean-Louis Bravard and Mr Robert Morgan
The Outsourcing Revolution: Why it Makes Sense and How to Do it Right by Michael F. Corbett
The Human Side of Outsourcing by Stephanie J. Morgan
The Service Level Agreement SLA Guide - SLA Book, Templates for Service Level Management and Service Level Agreement Forms. Fast and Easy Way to Write Your SLA by Gerard Blokdijk and Ivanka Menken
Service Level Agreement 100 Success Secrets: SLA, Service Level Agreements, Service Level Management and Much More by Gerard Blokdijk
Facilities Management Handbook by Frank Booty
Total Facilities Management by Brian Atkin and Adrian Brooks
The Facility Management Handbook by David G. Cotts, Kathy Roper, and Richard Payant
FM World [http: www.fm-world.co.uk/](http://www.fm-world.co.uk/)
www.bifm.org.uk
A Practical Guide to Facilities Management by Ian C Barker MCIIOB

Unit FM3.10: Space allocation in facilities management

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit addresses space management at an operational level, but also includes consideration of the more strategic issue of introducing alternative ways of working.

Title	Space allocation in facilities management	
Ofqual ref	K/504/5758	
Level	3	
Credit value	4	
GLH	16	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand how space is categorised and how the different categories interrelate	1.1	use the terms gross internal area, net internal area, primary circulation, useable office space, workspace, support space and ancillary space (<i>Explain what each of these terms mean together with the purpose of a "fit factor". NB Useable office space is intended here as that area variably known as net occupiable area(US) or net usable area (EU)</i>)
	1.2	calculate quantities for these different categories of space in a building or layout (<i>Using an example of a single floor of a building of the learner's own</i>)

	<p><i>experience (or case study) to calculate the actual area of floor space represented by each of the space types described in AC 1.1)</i></p> <p>1.3 calculate simple metrics for space utilisation based on ratios between the quantities of these different categories of space <i>(relevance of (1) net internal area as % of gross internal area and (2) net occupiable area (useable office space) as % of net internal area with regard to building efficiency)</i></p>
<p>2 be able develop a space plan for a business unit located on a single floor</p>	<p>2.1 identify user requirements for the business unit in terms of the:</p> <ul style="list-style-type: none"> • business process/es to be performed • requirements for specialised equipment • need for proximities to other departments and/or teams • number of people to be accommodated • requirements for different categories of space <i>(See below)</i> <p>2.2 design a space plan to meet user requirements and to align with the organisation's space management strategy <i>(See below)</i> <i>(ACs 2.1 and 2.2 should be evidenced using an example of a <u>single floor</u> of a building of the learner's own experience (or case study). The example provided for AC 1.2 above can be used, showing suggested changes/improvements to present space use)</i></p>
<p>3 understand how alternative ways of working can be used to improve the efficiency of space utilisation</p>	<p>3.1 identify alternative ways of working that require more space or less space to be</p>

	<p>provided by an employer (<i>for example, open plan and cellular accommodation, breakout areas, hot-desking, hotelling, space intensification, space allocated according to function and/or seniority</i>)</p> <p>3.2 describe the potential impacts of these alternative ways of working on business processes and user satisfaction (<i>for example, productivity, creativity, communication, confidentiality, "territorial" space, space as a "status" symbol</i>)</p> <p>3.3 describe the advantages and disadvantages of using floor planning grids and standardised footprints (<i>for example, space planning and churn, accommodation policy, occupation densities, corporate identity, functional requirements, internal customer satisfaction</i>)</p>	
Additional information about the unit		
Details of the relationship between the unit and relevant National Occupational Standards or other professional standards or curricula (if appropriate)	The unit is mapped to the Facilities Management National Occupational Standard FM323.	
FM Professional Standards reference	FM functional area:	FM functional area component:
	Property Portfolio Management	Space Management

Resources:

Facilities Management and the Business of Space by Wes McGregor and Danny Shiem-Shin Then

The Power of Color: Creating Healthy Interior Spaces (Construction Business & Management Library) by Sara O. Marberry and Laurie Zagon

FM World - www.fm-world.co.uk/

www.bifm.org.uk

A Practical Guide to Facilities Management by Ian C Barker MCIQB

Unit FM3.11: Building maintenance in facilities management

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit addresses the contexts, strategies and accountabilities for building maintenance. It provides for an understanding of the facilities manager's role rather than for the skills required to deliver the maintenance.

Title	Building maintenance in facilities management	
Ofqual ref	M/504/5762	
Level	3	
Credit value	5	
GLH	20	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand the factors that determine maintenance requirements	1.1	identify the implications for maintenance requirements of legislative requirements, including those relating to health and safety, occupiers' liability, and statutory testing <i>(See below)</i>
	1.2	identify the implications for maintenance requirements of the needs to ensure business continuity, to maintain asset value, and to provide user comfort <i>(See below)</i>
	1.3	identify the implications for maintenance requirements of

	<p>contractual requirements, including conditions for the preservation of warranties (<i>See below</i>)</p> <p><i>(Assessment criteria 1.1 to 1.3 should be evidenced using examples from the learner's own experience or case study)</i></p>
<p>2 understand how maintenance strategies are developed</p>	<p>2.1 describe the purpose of condition surveys, how they are conducted and the typical make-up of the resulting reports (<i>No further guidance</i>)</p> <p>2.2 identify maintenance priorities for properties and assets on the basis of information provided in condition surveys, and on the basis of their potential life cycles (<i>By reference to priorities determined by factors identified in Learning Outcome No 1 above (e.g. level of urgency) and maintenance/replacement decisions based on asset life cycle</i>)</p> <p>2.3 describe how the maintenance priorities might be scheduled to provide a maintenance strategy, having regard also to resource use (<i>By reference to Forward Maintenance Plans showing how priorities can be scheduled over more than one budget period, having regard to the priorities identified in AC 2.2 above and available financial resources</i>)</p> <p>2.4 recognise when changes invalidate components of a maintenance strategy, and describe how the strategy might be amended appropriately (<i>Using example(s) from the learner's own experience or</i></p>

	<i>case study)</i>	
3 understand how different types of maintenance are used in operational delivery	3.1 describe different types of maintenance and their advantages and disadvantages, including planned-preventative maintenance, reactive maintenance, and condition-based maintenance (<i>No further guidance</i>)	
	3.2 describe appropriate types of maintenance for different types of building fabric and for different items of mechanical and electrical plant, in the context of an overall maintenance strategy (<i>Using example(s) of both fabric and M&E maintenance from the learner's own experience and/or case study to explain and/or justify their appropriateness</i>)	
4 understand responsibilities for maintenance and how these are managed	4.1 identify personal, legal responsibilities relating to property and asset maintenance (<i>Using the examples from AC 1.1 to 1.3 above</i>)	
	4.2 explain how different systems and processes are used to manage these responsibilities, including contract documentation, service level agreements, key performance indicators, third-party audits and contract progress meetings (<i>No further guidance</i>)	
Additional information about the unit		
Details of the relationship between the unit and relevant National Occupational Standards or other professional standards or curricula (if appropriate)	The unit is mapped to the Facilities Management National Occupational Standards FM301, FM307 and FM308.	
FM Professional Standards reference	FM functional area:	FM functional area component:

	Business Continuity and Compliance	Compliance
	Property Portfolio Management	Building Maintenance

Resources:

[Building Maintenance Management](#) by Barrie Chanter and Peter Swallow
[Workplace Strategies and Facilities Management: Building in Value \(Building Value\)](#) by Rick Best, Gerard de Valence, and Craig Langston
[Lee's Building Maintenance Management](#) by Paul Wordsworth
[Building Repair and Maintenance Management](#) by Gahlot/Sharma
[Building Maintenance](#) by Brian Wood
[Effective Building Maintenance: Protection of Capital Assets](#) by Herb Stanford
[Building Care](#) by Brian Wood
[CIBSE Guide M: Maintenance Engineering and Management](#) by cibse
[Manager's Guide to Preventive Building Maintenance](#) by Ryan Cruzan
[The Service Level Agreement SLA Guide - SLA Book, Templates for Service Level Management and Service Level Agreement Forms. Fast and Easy Way to Write Your SLA](#) by Gerard Blokdijk and Ivanka Menken
[Service Level Agreement 100 Success Secrets: SLA, Service Level Agreements, Service Level Management and Much More](#) by Gerard Blokdijk
 FM World - www.fm-world.co.uk/
www.bifm.org.uk
[A Practical Guide to Facilities Management](#) by Ian C Barker MCIIOB

Unit FM3.12: Understand the estate management function for facilities managers

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit provides an introduction to the estate management function. It is intended to provide context for the other facilities management functions, rather than to equip learners with the expertise required to take responsibility for estate management.

Title	Understand the estate management function for facilities managers	
Ofqual ref	A/504/5764	
Level	3	
Credit value	4	
GLH	16	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand the responsibilities associated with property ownership and occupation	1.1	explain legislation affecting the ownership and use of property and assets <i>(By reference to legislation affecting planning, environmental matters and occupiers' liability. Also, Landlord and Tenant Act 1954, health and safety legislation and Equality Act 2010. NB Only an overview of the relevance to facilities management in each case is required rather than a detailed explanation of the law)</i>
	1.2	explain the benefits and disadvantages of being a tenant

	<p>and of being an owner-occupier <i>(No further guidance)</i></p> <p>1.3 explain the obligations of landlord and tenant to each other <i>(By reference to either an example in the learner's own experience or by reference to generic/typical obligations in a lease of commercial premises)</i></p> <p>1.4. describe the difference between freehold and leasehold land tenure <i>(No further guidance)</i></p>
<p>2 understand property costs and charges</p>	<p>2.1 explain costs associated with the provision of property, including rent, rates, insurance and service charges <i>(Could also cover capital cost, depreciation and dilapidations)</i></p> <p>2.2 explain costs associated with occupying property, including maintenance, energy use and cleaning <i>(No further guidance)</i></p> <p>2.3 explain the effect of changes in occupancy levels on the costs associated with property provision and occupation <i>(Using examples to explain the relative effect on "fixed" and "variable" costs)</i></p>
<p>3 understand how to set up and manage registers for property and fixed assets</p>	<p>3.1 describe the purpose of a property asset register <i>(Including, for example, property information, e.g. lease renewal dates, to aid effective portfolio management, financial information for balance sheet, maintenance regimes and capital replacement plans)</i></p> <p>3.2 describe the technology that can be used to assist in setting up and managing a property asset register <i>(for example, simple spreadsheets and databases (e.g. MS Excel or MS</i></p>

	<p><i>Access), CAFM, financial/business management systems, e.g. SAP, bespoke IT programmes)</i></p> <p>3.3 describe the information that can be obtained from a property and fixed asset register and explain how this information is used <i>(for example, whole life costing, capital replacement, operating cost, performance comparison, legal compliance and asset utilisation rates)</i></p>	
<p>4 understand the factors involved in property relocation</p>	<p>4.1 describe the business factors driving the decision to relocate to new premises <i>(for example, organisation growth and/or change, shortage of space, financial pressures, operational efficiency, estate rationalisation)</i></p> <p>4.2 explain the factors to be considered in the choice of new premises <i>(for example, use of specialists (consultants), building appraisal, economic/financial appraisal)</i></p> <p>4.3 describe a process for organising the relocation to new premises <i>(Including preparations for move, appointing a removal contractor, programme for move, post-move activity)</i></p>	
<p>Additional information about the unit</p>		
<p>FM Professional Standards reference</p>	<p>FM functional area:</p>	<p>FM functional area component:</p>
	<p>Business Continuity and Compliance</p>	<p>Compliance</p>
	<p>Property Portfolio</p>	<p>Property and Asset</p>

	Management	Management
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Resources:

[A-Z of Facilities and Property Management](#) by David M. Martin
[Facilities Management: An Explanation \(Building & Surveying\)](#) by Alan Park
[Outdoor Site and Facility Management](#) by Wynne Whyman
[Recreation Facility Management](#) by Richard Mull, Brent Beggs, and Mick Renneisen
[Corporate Property Management: Aligning Real Estate with Business Strategy](#) by Victoria Edwards and Louise Ellison
[The CompleteLandlord.Com Ultimate Property Management Handbook](#) by William A. Lederer
[Property Management](#) by Robert Kyle, Floyd Baird, and Marie Spodek
[Property Asset Management](#) by Douglas Scarrett
[GIS in Land and Property Management](#) by Dr Martin P Ralphs, Martin P. Ralphs, and Peter Wyatt
[Economics of Property Management: The Building as a Means of Production](#) by Herman Tempelmans Plat
[Corporate Property Management: Aligning Real Estate with Business Strategy](#) by Victoria Edwards and Louise Ellison
[Business Occupier's Handbook: A Practical Guide to Acquiring, Occupying and Disposing of Business Premises](#) by Clifford Chance and Vicky Rubin
 BIFM Good Practice Guides:
<http://www.bifm.org.uk/bifm/knowledge/resources/goodpracticeguides>
 FM World: www.fm-world.co.uk/
www.bifm.org.uk
[A Practical Guide to Facilities Management](#) by Ian C Barker MCIQB

Unit FM3.13: Contribute to disaster recovery and contingency planning

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit addresses the disaster planning and contingency planning aspects of facilities management.

Title	Contribute to disaster recovery and contingency planning	
Ofqual ref	A/601/7053	
Level	3	
Credit value	5	
GLH	31	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand the principles and processes involved in disaster recovery and contingency planning	<p>1.1. explain the main features of a disaster recovery and contingency planning policy within a facilities management context <i>(Using an example from the learner's own experience or case study, including purpose/reason for the policy, objectives, metrics and responsibilities, management commitment, policy compliance statement)</i></p> <p>1.2. identify the sector specific legislation, regulations, guidelines and codes of practice relating to disaster recovery and contingency planning <i>(for example, Civil Contingencies Act, BS 7799 British Standard for Information Security, Regulatory Reform(Fire Safety) Order 2005, health and safety legislation)</i></p> <p>1.3 describe ways in which disaster</p>	

	<p>recovery and contingency planning policies and procedures are communicated to others <i>(including procedural manuals, intranet, meetings/briefings, risk register, business continuity rehearsals and training workshops)</i></p> <p>1.4 explain procedures for identifying hazards and assessing risks in relation to disaster planning and contingency planning <i>(Using example(s) from the learner's own experience or case study)</i></p> <p>1.5 describe the procedures and systems for monitoring, measuring and reporting on disaster recovery and contingency planning <i>(Including rehearsal of procedures, incident monitoring and incident logs (for trends, warning signs), regular reviews, audit)</i></p> <p>1.6 identify the major parties/stakeholders with an interest in disaster recovery and contingency planning <i>(No further guidance)</i></p>
<p>2 be able to identify disaster recovery and contingency planning requirements</p>	<p>2.1. identify your personal responsibilities and contribution to disaster recovery and contingency planning policies and plans <i>(No further guidance)</i></p> <p>2.2. seek and make use of specialist expertise in relation to disaster planning and contingency planning <i>(AC 2.2 can consider use of specialist disaster recovery suppliers and/or consultants/contractors specialising in specific aspects of facilities management services, e.g. mechanical and electrical maintenance)</i></p> <p>2.3. develop a partnership with clients to address adequately all</p>

	<p>recovery aspects of business functionality in relation to facilities management services <i>(Using example(s) from the learner's own experience or case study)</i></p> <p>2.4. ensure that a system is in place for identifying hazards and assessing risks in your area of responsibility and take measures to eliminate or control them <i>(No further guidance)</i></p> <p>2.5. ensure that sufficient resources are allocated across your area of responsibility to deal with disaster recovery and contingency planning <i>(No further guidance)</i></p>
<p>3. be able to monitor and adjust disaster recovery and contingency planning processes</p>	<p>3.1. develop a culture within your area of responsibility which puts disaster recovery and contingency planning a major priority <i>(See below)</i></p> <p>3.2. consult regularly with people in your area of responsibility or their representatives on disaster recovery and contingency planning issues <i>(See below)</i></p> <p>3.3. operate systems for the effective monitoring, measuring, implementation testing and reporting of disaster recovery and contingency planning performance in your area of responsibility <i>(See below)</i></p> <p><i>(ACs 3.1 to 3.3 should be evidenced using example(s) from the learner's own experience and/or case study demonstrating the systems/processes in place for education, promoting awareness, training and rehearsal of roles)</i></p>
<p>Additional information about the unit</p>	
<p>Details of the relationship between the unit and relevant</p>	<p>The unit is mapped to the Facilities Management National Occupational</p>

National Occupational Standards or other professional standards or curricula (if appropriate)	Standard FM320.	
FM Professional Standards reference	FM functional area:	FM functional area component:
	Business Continuity and Compliance	Risk Management
		Compliance

Resources:

[The Disaster Recovery Handbook: A Step-by-Step Plan to Ensure Business Continuity and Protect Vital Operations, Facilities, and Assets](#) by Michael Wallace and Lawrence Webber

[Disaster Recovery Planning](#) Jon William Toigo

[Disaster Recovery Planning: Getting to Business – Savvy Business Continuity](#) by Jon William Toigo

[The Business Continuity Management Desk Reference: Guide to Business Continuity Planning, Crisis Management and IT Disaster Recovery](#) by Jamie Watters

FM World - www.fm-world.co.uk/

www.bifm.org.uk

[A Practical Guide to Facilities Management](#) by Ian C Barker MCIQB

Unit FM3.14: Understanding access management and inclusion

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit addresses the access management and inclusion aspects of facilities management.

Title	Understanding access management and inclusion	
Ofqual ref	M/507/1343	
Level	3	
Credit value	5	
GLH	20	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand the legal requirements relating to access management and inclusion	1.1	explain the implications of legislative requirements on access management and inclusion (<i>Models of disability, Duties under the Equality Act for service providers and employers, see below</i>)
	1.2	differentiate between reactive and anticipatory legal requirements (<i>Models of disability, Legal and regulatory overview (the Equality Act, planning policies and building regulations, health and safety, fire evacuation, see below)</i>)
	1.3	explain the benefits of effective inclusive access management (<i>Design standards for new build and refurbishments, see below</i>)
	1.4	explain the purpose of access audits, access statements and access plans (<i>Auditing existing buildings, Design standards for new build and refurbishments,</i>

	<p><i>see below)</i></p> <p><i>(Concept of reasonableness v. prescription)</i></p>
<p>2 understand the impact of service design on disabled people</p>	<p>2.1 explain the way in which the design of services can affect their access to and use by people with different needs <i>(see below)</i></p> <p>2.2 identify ways in which barriers and risks may be eliminated or mitigated in the delivery of services <i>(see below)</i></p> <p>2.3 differentiate between providing information a variety of alternative formats <i>(see below)</i></p> <p>2.4 explain the importance of suitable emergency evacuation plans <i>(see below)</i></p> <p>2.5 explain how to ensure that events and meetings are accessible to all <i>(see below)</i></p> <p><i>(The issues for people with varying access needs including:</i></p> <ul style="list-style-type: none"> <i>○ Wheelchair users and people with mobility impairments</i> <i>○ People with sensory impairments (hearing, sight and speech)</i> <i>○ People with other physical impairments / health conditions eg. dexterity, respiratory, heart, neurological conditions</i> <i>○ People with a learning disability</i> <i>○ People with cognitive impairments (e.g. ADHD, Autism, dementia)</i> <i>○ People with a mental health condition)</i>
<p>3 understand good practice in inclusive design of building and procurement of goods and services</p>	<p>3.1 analyse the meaning of “access management and inclusion” and their implications for facilities design, procurement and the management of buildings and services <i>(Inclusive procurement strategies – commissioning of goods and services and engagement with affected stakeholders, The role of access and inclusive design in meeting</i></p>

	<p><i>the sustainability and CSR agenda, see below)</i></p> <p>3.2 identify the purpose, uses and users of the building (<i>see below</i>)</p> <p>3.3 explain the benefits and limitations of involving users and potential users in design and management decisions (<i>see below</i>)</p> <p>3.4 evaluate the scope for adaptations to facilities and any constraints (<i>see below</i>)</p> <p>3.5 analyse the potential consequences of poor design and the impact on facilities management in delivering accessible services (<i>see below</i>)</p> <p><i>(The role of building standards (e.g. building regulations, fire regulations, British Standards, industry guides), Overview of spatial, acoustic, visual design criteria), Horizontal circulation: doors, corridors, Vertical circulation: handrails, steps, lifts, ramps and slopes, Furniture, fixtures and fitting, Lighting and visual contrast, Visitor/public spaces, Housing and sleeping accommodation, Sanitary provision including wheelchair-accessible lavatories and enlarged WC cubicles for ambulant disabled people; showers and changing rooms; baby change and "Changing Places" facilities)</i></p>
<p>4 understand practical access management and inclusion</p>	<p>4.1 explain the roles and responsibilities of those involved in the management and maintenance of access to and use of facilities and services (<i>see below</i>)</p> <p>4.2 explain the key elements of access auditing and design appraisals (<i>Audits and assessments, see below</i>)</p> <p>4.3 analyse the consequences of buildings that are designed and managed with inadequate access or are managed inadequately (<i>see below</i>)</p> <p>4.4 evaluate the scope for adjustments to existing buildings</p>

	<p>and services <i>(see below)</i> <i>(Applying good practice standards e.g. BS8300, BIFM Good Practice Guide, Sources of management information)</i></p>	
Additional information about the unit		
<p>Details of the relationship between the unit and relevant National Occupational Standards or other professional standards or curricula (if appropriate)</p>	<p>Managing accessibility and inclusion (BIFM Professional Facilities Management Standards)</p>	
<p>FM Professional Standards reference</p>	<p>FM functional area:</p>	<p>FM functional area component:</p>
	<p>Property Portfolio Management</p>	<p>Managing Accessibility and Inclusion</p>