



Code	SBCS Assured Certificate in Facilities Management
Course Title	Facilities Management: Projects and Operations
Guided Learning Hours	120

Aims

This programme provides the learner with an in-depth understanding of Facilities Management

The course focuses on the process of managing facilities starting with development of policies and strategies. After identifying the various types of facilities and their interaction with each other, the roles and responsibilities of the Facility Manager are established. The student shall be able to determine types of maintenance required and evaluate between in-house or outsourced resources to prepare appropriate maintenance strategies. Learner shall be capable of discussing indoor air quality as it pertains to sick building syndrome and learn to evaluate feasibility of maintenance options using financial tools such as net present value and future value as well as life cycle costing to prepare business cases. In addition, students shall be able to use appropriate project management framework to execute facilities management projects as well as understand the operations of a Computerized Maintenance Management System.

Detailed focus is placed on financial tools, the process of scoping projects adequately in order to prepare proper contracts and agreements and execute projects within budget. Other key areas addressed are incident and emergency planning, and emphasis on carrying out energy efficient maintenance or replacement projects.

Learning Outcomes:

On successful completion of this course a student will be able to:

#	Topic
1	Provide and monitor facilities for clients
2	Manage facilities management projects
3	Monitoring operational performance
4	Maintain property and assets
5	Manage space
6	Carry out energy management
7	Understanding sustainability and environmental issues and the impact on facilities management
8	Procure supplies
9	Specify, commission and manage external contracts and agreements
10	Manage a budget for own area or activity of work

Indicative Content

- Provide and monitor facilities for clients: understand the facilities service needs of clients, be able to negotiate the delivery of services to clients, be able to organise the delivery of services, be able to monitor the effective delivery of services to clients.
- Manage facilities management projects: understand the project planning process, be able to plan the delivery of projects, be able to carry out facilities management projects.
- Monitoring operational performance: understand the principles of operational performance measurement, be able to establish and monitor performance indicators,
- Maintain property and assets: be able to identify maintenance requirements, be able to plan and schedule the maintenance of property and assets, be able to carry out required maintenance activities.
- Manage space: understand the principles of space utilisation, be able to identify the space needs of clients, be able to manage the space needs of clients.
- Carry out energy management: Understand the principles of energy management, be able to identify energy management processes,
- Understanding sustainability and environmental issues and the impact on facilities management: understand sustainability and corporate responsibility, understand the impact of facilities management on the environment, understand how to manage waste and its safe disposal, understand how to improve environmental awareness and responsibility
- Procure supplies: be able to identify requirements for supplies, be able to evaluate suppliers that meet identified requirements, be able to select suppliers and obtain supplies, be able to monitor supplier performance.
- Specify, commission and manage external contracts and agreements: understand the requirements for specifying, commissioning and managing external contracts and agreements, be able to specify, commission and manage external contracts and agreements
- Manage a budget for own area or activity of work: be able to prepare a budget for own area of responsibility, be able to manage a budget, be able to review budget management performance.

Learner Competencies:

Provide and monitor facilities for clients (16 hrs)

- Describe how different organisational structures and cultures create different types of facilities management requirements
- Describe the relationship between the client's core business drivers and facilities management functions
- Explain the role of facilities management services in achieving the client's business objectives
- Identify the types of additional or improved services which can be offered to clients in order to exploit business opportunities
- Assist clients in establishing the nature of the facilities management services they require
- Identify cost effective facilities management services which are consistent with the client's objectives, policies and constraints
- Check that proposed services comply with legal and regulatory requirements
- Identify the range of office services, equipment and resources to be used to deliver the agreed facilities management programme
- Agree effective formal agreements with clients and how they will be monitored

- Agree channels of communication with clients and arrangements for dealing with issues and problems in service delivery
- Explain the content and requirements of service level agreements to deliver services
- Carry out work in accordance with service level agreements, approved procedures and instructions
- Ensure behaviour, appearance and dress meet organisational requirements
- Communicate with colleagues, clients and others in a way that promotes effective formal and informal working relationships
- Ensure that information, instructions and documentation given to others is authorised, accurate and up to date
- Work safely following agreed procedures
- Follow procedures for monitoring the delivery of the agreed services
- Maintain accurate and up-to-date records of all monitoring and evaluation activity using agreed formats
- Identify problems likely to affect the safety and use of premises and take immediate remedial action
- Report on service delivery to clients
- Evaluate if facilities and services are meeting original requirements and identify additional services that could be offered
- Identify alternative ways of improving service delivery and make recommendations and suggestions to clients

Manage facilities management projects (8 hrs)

- Identify the primary components of project planning
- Describe different models of project management and planning
- Identify methods for assessing risk and ways of minimising them
- Explain the impact of resources and financial control on project planning
- Identify ways of estimating the human, physical and time resources required for delivery of the project
- Identify measurable outcomes and evaluation methods
- Establish the project's scope and definition and its contribution to the wider objectives of the organisation
- Identify the key stakeholders and their expectations of the project
- Establish the financial, physical and time resources and constraints for the project
- Conduct a risk assessment and identify risk control measures required
- Agree methods of communication and reporting of project progress
- Identify measures by which the project outcomes will be assessed
- Plan for contingencies throughout the life of the project
- Establish the skills mix required to achieve the project's outcomes and where to obtain the skills
- Develop a detailed project plan and evaluate its feasibility
- Establish and assign roles and responsibilities for those involved in project
- Assist in selecting and supporting team members
- Establish and maintain clear lines of reporting and control
- Contribute to effective communication and information exchange across team members
- Set up and operate effective financial and resource control systems, working with others
- Obtain feedback on success of project against agreed outcomes

Monitoring operational performance (12 hrs)

- Explain how performance measurement contributes to organisational objectives and activities
- Identify external operational standards and standard setting bodies
- Explain procurement theories, models and practices for operational and contract management
- Identify systems for gathering business data to allow the measurement of historical performance
- Align operational business activities to a common set of objectives to improve effectiveness
- Specify performance indicators that can be cost effectively measured in terms of what needs to be delivered, to what standard and in what timeframe(s)
- Ensure that systems are in place to set, gather, collate, analyse and refine the key performance information from operational clusters
- Establish and operate systems for communicating variances between actual performance and targets clearly to permit senior management to take appropriate action
- Ensure regular monitoring of contractor performance against contracts, service level agreements and other performance measurement tools
- Establish effective control systems to monitor progress and identify and record deviations from service levels
- Re-define contract results where monitoring indicates this is necessary
- Provide contractors with the necessary information and accurate feedback on their work to enable them to deliver the required operational outcomes

Maintain property and assets (14 hrs)

- Identify the different types of maintenance required for particular properties and assets
- Identify the legislation controlling the carrying out of maintenance activities
- Review information on property's age, condition and usage together with previous maintenance activity
- Conduct maintenance inspections and identify faults and problems requiring corrective or preventative action and keep accurate records of inspections
- Ensure that clients and building users obligations comply with statutory and lease requirements
- Prioritise the type and nature of maintenance activity required
- Prepare or review existing maintenance plans and schedules
- Identify the resources or expertise required to carry out maintenance activity against agreed budget
- Organise the required resources, expertise or specialist services and agree timing and costs of activity
- Ensure authorisation has been given for maintenance activity and costs
- Agree with clients and building users the nature and timing of maintenance activity and any implications for them
- Monitor the quality of maintenance activities and maintain accurate records
- Review maintenance requirements over time in relation to building and assets usage and recommend changes as required

Manage space (15 hrs)

- Explain how to identify, prioritise and balance the space needs of individual clients in a managed facility
- Identify the criteria used in the allocation of space to ensure that the needs of all clients are taken into account
- Identify the legislative and regulatory factors influencing the use of space

- Allocate space and facility allocation against identified needs and priorities
- Ensure that space and facility allocation is confirmed with property owners, clients and other interested parties
- Ensure that space and facility allocation is compatible with adjacent uses and relevant legislation
- Ensure that approvals required for planned allocation of space and facilities are notified to clients
- Identify where space and/or facilities requested exceed what is available or can be provided and realistic alternatives discussed with clients
- Ensure regular consultation with people in your area of responsibility or their representatives on space management issues
- Seek and make use of specialist expertise in relation to space management
- Review the options for occupancy, use, facilities, servicing and maintenance regularly with clients and advise on potential benefits of any planned change
- Operate appropriate monitoring and control systems to ensure the continuing effective use of space
- Ensure that legal and regulatory requirements are met in relation to: insurance cover linked to types of use and categories of occupier and required certificates, approvals and inspection reports
- Conduct regular reviews with clients on existing and future space and facility needs and revise delivery plans

Carry out energy management (18 hrs.)

- Explain the importance of energy management in the workplace
- Identify the legislation, regulations, guidelines, codes of practice and best practice which impact on energy management
- Explain the major methods and systems for managing energy use
- Explain methods of creating and communicating energy management policies and procedures
- Explain ways of evaluating the advantages and disadvantages of different strategies and methods for implementing energy management policies
- Identify realistic goals for savings and improvements in energy usage
- Identify own personal responsibilities and liabilities for energy management
- Agree the strategies and methods for implementing the energy management policy
- Identify sources of energy and water wastage on site and make recommendations on how to minimise them
- Seek and make use of specialist expertise in relation to energy management
- Ensure advice on energy management is based on accurate, relevant and up to date information
- Give advice to clients which takes into account organisational objectives and constraints which influence energy use
- Ensure that sufficient resources are allocated across your area of responsibility to deal with energy management issues
- Ensure that systems are in place for the effective monitoring, measuring, implementation, testing and reporting of energy management performance in your area of responsibility
- Conduct regular reviews with clients on existing and future energy management needs and revise delivery plans

Understanding sustainability and environmental issues and the impact on facilities management (6 hrs)

- Explain the terms sustainability and corporate responsibility
- Explain the legislation that is associated with sustainability and environmental issues

- Explain the role and responsibility that a Facilities Manager has in supporting a corporate responsibility policy
- Explain the range of impacts of facilities management activities on the environment Explain how the Facilities Manager can mitigate, reduce or manage the impact of their activities on the environment
- Explain the environmental advantages and disadvantages inherent within the various resources utilised by Facilities Managers
- Explain new and ongoing developments in environmental management and explain how these may affect Facilities Managers
- Explain the principles of waste minimisation
- Describe methods and systems used to manage waste
- Identify the relevant legislation in relation to handling, transporting, treating and disposing of waste
- Explain how the Facilities Manager can influence uses of natural resources, consumption and emissions control to improve the environment
- Explain how the Facilities Manager can increase awareness and involvement of staff, contractors and suppliers in relation to environmental policies and sustainability

Procuring supplies (9 hrs.)

- Select colleagues to agree requirements for supplies
- Produce a specification for supply requirements
- Identify suppliers that meet resource, organisational and legal requirements
- Evaluate suppliers against requirements
- Select supplier(s) that best meet requirements
- Explain how to agree with the contractual terms with selected supplier(s)
- Identify how to monitor supplier performance and delivery against agreed contractual terms
- Explain the procedure for dealing with breaches of contract

Specify, commission and manage external contracts and agreements (8 hrs.)

- Outline national and organisational policies and procedures on commissioning and service level agreements
- Specify different sources of external suppliers/service providers and how to select them
- Describe the different types of contractual agreements that may be used across the sector
- Outline the difference between inputs, outputs and outcomes
- Describe how to monitor and evaluate contract/agreement progress and compliance, and what steps to take if requirements are not met
- Outline the rewards and sanctions relating to the performance of the contractor
- Explain the ethical and legal requirements relating to the commissioning process
- Assess the need for outsourcing products/services and agree with appropriate stakeholders
- Develop the contract/agreement specification and agree with appropriate stakeholders
- Publicise contract specification in appropriate ways and invite tenders/bids
- Draw up a shortlist of potential suppliers/service providers using agreed criteria
- Select contractor and establish contractual agreement following agreed national and organisational procedures
- Agree and review quality control compliance monitoring procedures
- Keep internal and external stakeholders informed about the contractual process

- Develop a contract compliance monitoring plan, agreeing protocols and procedures with stakeholders and external suppliers
- Implement and manage contract/agreement compliance with external supplier
- Review and evaluate contract progress and outcomes with supplier/service provider and agree any actions

Manage a budget for own area or activity of work (14 hrs.)

- Evaluate information on resource requirements for own area of activity or work
- Produce a draft budget
- Communicate the final budget with relevant stakeholders
- Analyse variances between planned and actual expenditure
- Provide information on performance to relevant stakeholders
- Explain how to take corrective action within the limits of own authority, in response to budget variances and developments
- Explain proposed revisions to budget and obtain agreement where actions are beyond the scope of own authority
- Review performance against budget
- Assess improvements for future budget planning and management
- Monitor budget performance and implement changes within the limits of own authority or obtain agreement

Portfolio details:

1. Develop checklists to monitor facilities
2. Develop resource loading tables
3. Establish performance measuring tools and identify indicators
4. Develop maintenance strategy
5. Develop space allocation plan
6. Develop energy management policy
7. Develop waste management plan
8. Develop procurement management plan
9. Develop typical outsourcing service contract
10. Develop and monitor a typical budget

Assessment Details

Assessment Details:		
Methods of SUMMATIVE Assessment	Portfolio	Examination
Nature of FORMATIVE assessment supporting student learning		
Outcome(s) assessed by summative assessment (Please use the numbers above to refer to these)		
Grading Mode	Numeric	Numeric
Weighting %	50%	50%
Pass Mark	40%	40%
Word Length	5,000-10,000	N/A
Outline Details	Portfolio of formative and summative assessments	3 hour unseen
Are students required to pass all components in order to pass the course?	Yes. 40% minimum in each component. 50% overall for the unit.	