BIFM Qualifications Specification

BIFM Level 4 Award in Facilities Management

BIFM Level 4 Certificate in Facilities Management

BIFM Level 4 Diploma in Facilities Management

Contents

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 12,000 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 Regulated Qualifications Framework (RQF)

The BIFM qualifications in Facilities Management are at Levels 2 to 7 in the Regulated Qualifications Framework (RQF) 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 Professional FM Standards and National Occupation Standards and as such provide much of the underpinning knowledge, understanding and application for the sector. The qualifications received the support of Asset Skills, the Sector Skills Council for the facilities management sector.

The BIFM Qualifications 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 RQF 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)

RQF level	Equivalent level of challenge
7	Masters degree
6	Bachelors degree
5	Foundation degree
4	Certificate of higher education
3	A levels
2	GCSE A*–C

Challenge (upward arrow)

BIFM Level 7 in Facilities Management
Who is it for? Strategic head of facilities
N/A | Certificate | Diploma

BIFM Level 6 in Facilities Management
Who is it for? Senior, strategic facilities managers
Award | Certificate | Diploma

BIFM Level 5 in Facilities Management
Who is it for? Specialist facilities managers
Award | Certificate | Diploma

BIFM Level 4 in Facilities Management
Who is it for? Operational facilities managers
Award | Certificate | Diploma

BIFM Level 3 in Facilities Management
Who is it for? First-line and supervisory managers
Award | Certificate | Diploma

BIFM Level 2 in Facilities Services
Who is it for? New entrants
n/a | Certificate | n/a

Size (arrow)

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 4 Award in Facilities Management   500/8346/6

BIFM Level 4 Certificate in Facilities Management   500/8348/X

BIFM Level 4 Diploma in Facilities Management   500/8381/8

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 4 Award in Facilities Management

The BIFM Level 4 Award in Facilities Management is a 12-credit qualification (total qualification time 120-hours) and consists of one mandatory unit (6 credits) plus additional optional units in order to achieve a minimum of 12 credits in total.

Ref	Unit title	Credits	Unit No.
Mandatory Units			
FM4.01	Overview of facilities management	6	Y/601/1700
Optional Units			
FM4.02	Understanding facilities management strategy	3	D/601/1701
FM4.03	Understanding people management in facilities management	8	H/601/1702
FM4.04	Understanding facilities management support services operations	6	M/601/1704
FM4.05	Managing health and safety in own area of facilities management	6	A/601/1706
FM4.06	Understanding risk management in facilities management	6	J/601/2132
FM4.07	Understanding financial management in facilities management	6	J/601/1708
FM4.08	Understanding the business organisation and its impact on facilities management	6	L/601/1709
FM4.09	Understanding performance measurement in facilities management	3	F/601/1710
FM4.10	Understanding leadership and management in facilities management	6	L/601/1712
FM4.11	Understanding the management of information and knowledge in facilities management	3	Y/601/1714
FM4.12	Understanding facilities management projects	6	H/601/1716
FM4.13	Developing relationships with suppliers and specialists in facilities management	3	M/601/1718
FM4.14	Understanding quality management in facilities management	4	M/601/1721
FM4.15	Managing customer service in facilities management	4	A/601/1723

FM4.16	Understanding property and asset management for facilities managers	4	J/601/1725
FM4.17	Understanding property, fabric and building services maintenance for facilities managers	8	Y/601/1728
FM4.18	Understanding space management for facilities managers	3	R/601/1730
FM4.19	Understanding sustainability and environmental issues and the impact on facilities management	3	R/601/2134
FM4.20	Understanding energy and utilities management and the impact on facilities management	3	Y/601/2135
FM4.21	Understanding procurement and contract management in facilities management	3	T/601/1736
FM4.22	Managing accessibility and inclusion and its impact on facilities management	6	A/506/9076

Duration	Completion within two years of registration
Assessment	Assessment could include: > a requirement for the application of knowledge to a Facilities Management work-based scenario whenever possible > incorporation of a variety of 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 middle management or will be progressing from a Level 3 Qualification in Facilities Management

BIFM Level 4 Certificate in Facilities Management

The BIFM Level 4 Certificate in Facilities Management is a 24-credit qualification (total qualification time 240-hours) and consists of two mandatory units (12 credits) plus additional optional units in order to achieve a minimum of 24 credits in total.

Ref	Unit Title	Credits	Unit No.
Mandatory Units			
FM4.01	Overview of facilities management	6	Y/601/1700
FM4.05	Managing health and safety in own area of facilities management	6	A/601/1706
Optional Units			
FM4.02	Understanding facilities management strategy	3	D/601/1701
FM4.03	Understanding people management in facilities management	8	H/601/1702
FM4.04	Understanding facilities management support services operations	6	M/601/1704
FM4.06	Understanding risk management in facilities management	6	J/601/2132
FM4.07	Understanding financial management in facilities management	6	J/601/1708
FM4.08	Understanding the business organisation and its impact on facilities management	6	L/601/1709
FM4.09	Understanding performance measurement in facilities management	3	F/601/1710
FM4.10	Understanding leadership and management in facilities management	6	L/601/1712
FM4.11	Understanding the management of information and knowledge in facilities management	3	Y/601/1714
FM4.12	Understanding facilities management projects	6	H/601/1716
FM4.13	Developing relationships with suppliers and specialists in facilities management	3	M/601/1718
FM4.14	Understanding quality management in facilities management	4	M/601/1721
FM4.15	Managing customer service in facilities management	4	A/601/1723

FM4.16	Understanding property and asset management for facilities managers	4	J/601/1725
FM4.17	Understanding property, fabric and building services maintenance for facilities managers	8	Y/601/1728
FM4.18	Understanding space management for facilities managers	3	R/601/1730
FM4.19	Understanding sustainability and environmental issues and the impact on facilities management	3	R/601/2134
FM4.20	Understanding energy and utilities management and the impact on facilities management	3	Y/601/2135
FM4.21	Understanding procurement and contract management in facilities management	3	T/601/1736
FM4.22	Managing accessibility and inclusion and its impact on facilities management	6	A/506/9076

Duration	Completion within two years of registration
Assessment	Assessment could include: > a requirement for the application of knowledge to a Facilities Management work-based scenario whenever possible > incorporation of a variety of 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 middle management or may be progressing from a Level 3 Qualification in Facilities Management

BIFM Level 4 Diploma in Facilities Management

The BIFM Level 4 Diploma in Facilities Management is a 48-credit qualification (total qualification time 480-hours) and consists of five mandatory units (29 credits) plus additional optional units in order to achieve a minimum of 48 credits in total.

Ref	Unit Title	Credits	Unit No.
Mandatory Units			
FM4.01	Overview of facilities management	6	Y/601/1700
FM4.02	Understanding facilities management strategy	3	D/601/1701
FM4.03	Understanding people management in facilities management	8	H/601/1702
FM4.04	Understanding facilities management support services operations	6	M/601/1704
FM4.05	Managing health and safety in own area of facilities management	6	A/601/1706
Optional Units			
FM4.06	Understanding risk management in facilities management	6	J/601/2132
FM4.07	Understanding financial management in facilities management	6	J/601/1708
FM4.08	Understanding the business organisation and its impact on facilities management	6	L/601/1709
FM4.09	Understanding performance measurement in facilities management	3	F/601/1710
FM4.10	Understanding leadership and management in facilities management	6	L/601/1712
FM4.11	Understanding the management of information and knowledge in facilities management	3	Y/601/1714
FM4.12	Understanding facilities management projects	6	H/601/1716
FM4.13	Developing relationships with suppliers and specialists in facilities management	3	M/601/1718
FM4.14	Understanding quality management in facilities management	4	M/601/1721
FM4.15	Managing customer service in facilities management	4	A/601/1723

FM4.16	Understanding property and asset management for facilities managers	4	J/601/1725
FM4.17	Understanding property, fabric and building services maintenance for facilities managers	8	Y/601/1728
FM4.18	Understanding space management for facilities managers	3	R/601/1730
FM4.19	Understanding sustainability and environmental issues and the impact on facilities management	3	R/601/2134
FM4.20	Understanding energy and utilities management and the impact on facilities management	3	Y/601/2135
FM4.21	Understanding procurement and contract management in facilities management	3	T/601/1736
FM4.22	Managing accessibility and inclusion and its impact on facilities management	6	A/506/9076

Duration	Completion within two years of registration
Assessment	Assessment could include: > a requirement for the application of knowledge to a Facilities Management work-based scenario whenever possible > incorporation of a variety of 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 middle management or may be progressing from a Level 3 Qualification in Facilities Management

Level 4 Ofqual descriptor

Achievement of Level 4 qualifications reflects the ability to develop a rigorous approach to the acquisition of a broad knowledge base; employ a range of specialised skills; evaluate information, using it to plan and develop investigative strategies and to determine solutions to a variety of unpredictable problems; operate in a range of varied and specific contexts, taking responsibility for the nature and quality of outputs.

Key features

The BIFM professional qualifications are vocational programmes of study. They are linked, where appropriate, to the BIFM Professional FM 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 more mature 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 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 4 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.
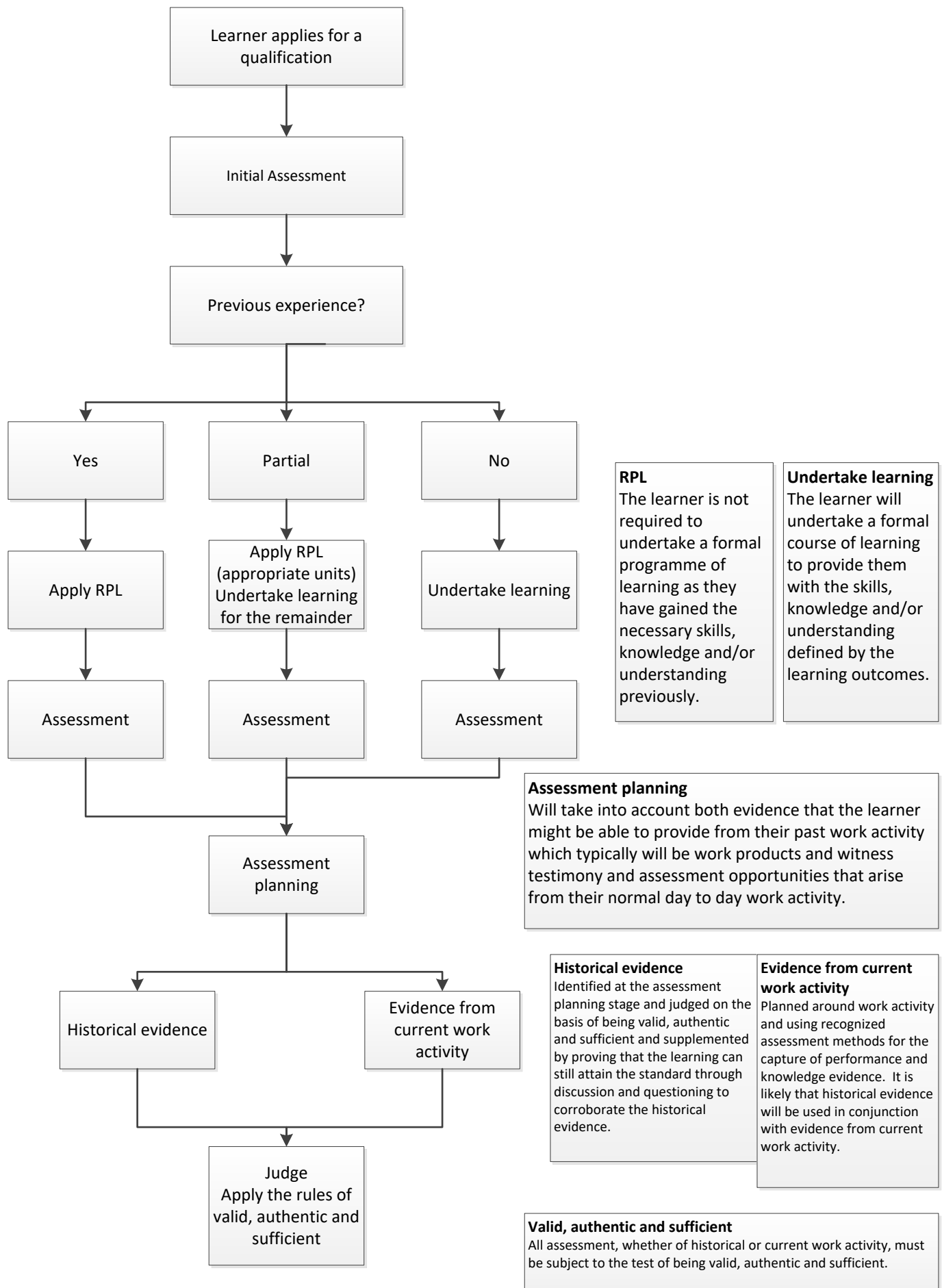
Assessment is normally undertaken by creating assignment briefs using the criteria — but contextualised to be relevant for learners. Assignment briefs are devised by centres and should ensure coverage of all criteria in the unit, as set out in the unit assessment criteria mapping grid (see Assessment 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.

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 *(source: TAQA)*.

```
┌─────────────────────┐
│ Learner applies for a │
│    qualification      │
└─────────────────────┘
           │
           ▼
┌─────────────────────┐
│  Initial Assessment   │
└─────────────────────┘
           │
           ▼
┌─────────────────────┐
│ Previous experience?  │
└─────────────────────┘
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┌──────────┐     ┌──────────┐     ┌──────────┐
│   Yes    │     │ Partial  │     │    No    │
└──────────┘     └──────────┘     └──────────┘
     │                │                │
     ▼                ▼                ▼
┌──────────┐   ┌──────────────┐   ┌──────────────┐
│ Apply RPL │   │ Apply RPL     │   │ Undertake    │
│           │   │(appropriate   │   │ learning     │
│           │   │ units)        │   │              │
│           │   │ Undertake     │   │              │
│           │   │ learning for  │   │              │
│           │   │ the remainder │   │              │
└──────────┘   └──────────────┘   └──────────────┘
     │                │                │
     ▼                ▼                ▼
┌──────────┐   ┌──────────────┐   ┌──────────────┐
│Assessment │   │ Assessment   │   │ Assessment   │
└──────────┘   └──────────────┘   └──────────────┘
```

RPL
The learner is not required to undertake a formal programme of learning as they have gained the necessary skills, knowledge and/or understanding previously.

Undertake learning
The learner will undertake a formal course of learning to provide them with the skills, knowledge and/or understanding defined by the learning outcomes.

```
┌──────────────┐
│ Assessment   │
│ planning     │
└──────────────┘
       │
   ┌───┴───┐
   ▼       ▼
┌──────────┐  ┌──────────────┐
│Historical │  │ Evidence from │
│ evidence  │  │ current work  │
│           │  │ activity      │
└──────────┘  └──────────────┘
       │            │
       └─────┬──────┘
             ▼
      ┌──────────────┐
      │ Judge         │
      │ Apply the     │
      │ rules of      │
      │ valid,        │
      │ authentic and │
      │ sufficient    │
      └──────────────┘
```

Assessment planning
Will take into account both evidence that the learner might be able to provide from their past work activity which typically will be work products and witness testimony and assessment opportunities that arise from their normal day to day work activity.

Historical evidence
Identified at the assessment planning stage and judged on the basis of being valid, authentic and sufficient and supplemented by proving that the learning can still attain the standard through discussion and questioning to corroborate the historical evidence.

Evidence from current work activity
Planned around work activity and using recognized assessment methods for the capture of performance and knowledge evidence. It is likely that historical evidence will be used in conjunction with evidence from current work activity.

Valid, authentic and sufficient
All assessment, whether of historical or current work activity, must be subject to the test of being valid, authentic and sufficient.

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

Analyse	separate information into components and identify their characteristics
Apply	put into effect in a recognised way
Compare & contrast	Compare: identify similarities. Contrast: identify differences.
Demonstrate	can do what the assessment criteria requires. The learner will have to provide evidence of actually doing the requirements of the assessment criteria/task.
Describe	set out characteristics
Develop	take forward or build upon given information
Evaluate	judge from available evidence
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.
Manage	ensure that the product/process etc., works using relevant management techniques following the development of a product/process.
Monitor	observe or report an activity or performance
Organise	arrange methodically or in order
Produce	bring into existence
Report	an account prepared after investigation and published
Select	Choose
Undertake	do something
Use	put into action

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

Unit FM4.01: Overview of 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 enables learners to develop an understanding of the scope and extent of the facilities management function and the range of associated services, the roles and responsibilities in different organisations and contexts as well as the importance of the contribution of facilities management in both societal and economic contexts

Title:	Overview of facilities management
Level:	4
Credit value:	6

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand the scope and extent of the facilities management function	1.1 Explain the scope and extent of the facilities management function *(supporting the explanation with examples of hard services, soft services and specialist functions that might be provided, rather than trying to provide an exhaustive list).* 1.2 Describe the range and diversity of contexts in which facilities management services are provided *(including public, private and not-for-profit sectors, and to in-house, outsourced (TFM and partial outsourcing) models).* 1.3 Explain the relationship between the facilities management function and

	other business functions *(including supporting the core business, managing the working environment, and adding value).*
2. Understand the range of services offered by facilities management	2.1 Explain what is meant by support services *(supporting the explanation with examples of soft facilities management, rather than trying to develop an exhaustive list).* 2.2 Explain what is meant by building services *(supporting the explanation with examples of hard facilities management, rather than trying to develop an exhaustive list).* 2.3 Explain what is meant by office and building space and its effective management *(including references to the cost of space, to space planning metrics (e.g. GIA/NIA), to the allocation of usable space for work, support and ancillary functions (e.g. circulation space, routes to evacuate the building), and to innovative ways of cost saving (e.g. hot desking))* 2.4 Explain the ways that properties and fixed assets are managed and maintained *(treating separately property management, property maintenance, fixed asset management and fixed asset maintenance, and supporting the explanations with examples of the use of asset registers and maintenance regimes)*
3. Understand the range of facilities management roles and responsibilities across different organisations	3.1 Explain the key management functions within facilities management *(including budget planning and control, contract management, project management, task and team management, health and safety management)* 3.2 Describe the various roles and responsibilities that a facilities manager

	could have within different organisations and at different levels *(including reference to strategic, tactical and operational levels of facilities management).*
4. Understand the importance of the contribution of facilities management in a wider business and social context.	4.1 Explain the principles of corporate responsibility and sustainable facilities management *(supporting the explanation with examples such as promoting equality and diversity, environmental management, health and safety)* 4.2 Describe the tools and techniques that can be used to ensure that these principles are operating within the facilities management function *(including staff surveys, quality management and continuous improvement, supplier management, audits).*
5. Contribute to internal and external customers' understanding of facilities management using a range of communication methods.	5.1 Use methods of communication to ensure understanding of facilities management by both internal and external customers *(explaining reasons for the choice of communications channels (e.g. face to face, email, newsletter, social media) and how the level of detail is matched to specific customer needs)*
Unit expiry date	31st December 2020
Unit reference number	Y/601/1700
Link to National Occupational Standards	FM401

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
Facility Management Reference Library CD 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
Croner Facilities Management
FM World - www.fm-world.co.uk
Facilities Management Journal - http://www.fmj.co.uk/
FMUK - www.fmuk-online.co.uk
http://www.emeraldinsight.com/
www.bifm.org.uk

Unit FM4.02: Understanding facilities management strategy

Aim of the unit:

This unit enables learners to develop knowledge and understanding of the drivers, tools and principles involved in developing and monitoring facilities management strategies in relation to risk profiles and the overall business strategy.

Title:	Understanding facilities management strategy
Level:	4
Credit value:	3
Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand how strategy is developed for organisations and their facilities management function	1.1 Explain the key components of a facilities management strategy including its drivers, measures and objectives *(relating it to the business mission statement and including issues such as CSR, compliance, customer needs)* 1.2 Explain the importance of the strategy to the facilities management function. *(showing how it influences management decisions and relating it to matters such as ethics, behaviours and objective setting)* 1.3 Explain the relationship between organisational and facilities management strategies *(including influences from the organisational to*

	the facilities management strategies, and vice versa)
2. Understand the impact of the organisational risk profile on the facilities management strategy	2.1 Describe risk profiles found in different organisations *(using example/s from the learner's own experience and/or case studies, and including different types of risk, such as legal compliance, financial, reputational and operational)* 2.2 Explain the ways in which the risk profile influences the facilities management strategy *(supporting the explanation using the same examples as for the previous assessment criterion, and showing how the risks were prioritised and addressed)*
3. Understand how facilities management strategy is monitored	3.1 Explain the principles and tools of monitoring the facilities management strategy *(including the use of KPIs, SLAs and other mechanisms such as balanced scorecards, customer feedback, benchmarking and RAG analysis, and role of different channels of communication)* 3.2 Explain how the results of the monitoring inform changes to the current facilities management strategy *(supporting the explanation with example/s from the learner's own experience and/or case studies)*
Unit expiry date	31st December 2020
Unit reference number	D/601/1701
Link to National Occupational Standards	FM402

FM Professional Standards reference	FM functional area:	FM functional area component:
	Strategy and Policy Development	Facilities Management Strategy

Resources:

Business Strategy: An Introduction by David Campbell, George Stonehouse, and Bill Houston

Plus resources identified under Unit FM4.01

Unit FM4.03: Understanding people management 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 enables learners to develop knowledge and understanding of the principles, practices and legal requirements of leading and managing staff in a facilities management context.

Title:	Understanding people management in facilities management
Level:	4
Credit value:	8

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand how to plan workloads and work allocation for staff within the facilities management function	1.1 Explain why human resource planning is critical to effective facilities management *(including function analysis and optimum resource levels, managing HR overheads, skills acquisition and maintenance, career progression and people motivation)* 1.2 Demonstrate workload planning and work allocation to ensure that an adequate staff resource is available *(using example/s from the learner's own experience and/or case studies)*
2. Understand the recruitment cycle	2.1 Explain why it is important to recruit people with the right skills, experience and approach for the role in question *(including supporting organisational*

	objectives, organisational culture, and the specific demands made on the facilities management function)
	2.2 Describe the stages of the recruitment process and explain the factors to be taken into account at each stage *(including a high-level overview of job analysis, job description, person specification, financial/management approval, attracting applications, managing applications, candidate selection, making appointments, welcoming new employees, and induction)*
	2.3 Identify the policies needed to encourage retention *(including reference to the effects of policies for matters such as equal opportunities, respect for diversity, work/life balance, flexible working, fair and transparent rewards and benefits, performance management, learning and development, discipline and grievances)*
	2.4 Explain the implications for an organisation when staff leave *(including issues such as loss of skill/expertise, costs of recruiting replacements, pressure on remaining team members, and loss of future potential)*
3. Understand staff appraisal and performance measurement	3.1 Describe how to set clear performance objectives for staff *(including the use of appropriate language, SMART objectives, alignment with team/organisational objectives, discussion and agreement team members)*
	3.2 Describe how staff appraisal contributes to performance measurement *(no additional guidance)*
	3.3 Explain the differences between formal and informal appraisal systems *(no additional guidance)*

4. Understand the importance of good communication when dealing with people	4.1 Explain the principles of effective communication when dealing with people *(including the value of personal integrity, and supporting the explanation with examples of effective outcomes, such as prevention of misunderstanding, resentment or poor morale, creation of coaching and/or mentoring opportunities)* 4.2 Describe different methods of communication and how a facilities manager can use them appropriate to the situation *(illustrating the description with examples, such as face to face, telephone, notice boards, journals and newsletters, letter, email and intranet, presentations, meetings and briefings, surveys and focus groups)*
5. Understand how to manage workplace stress	5.1 Describe the process of managing workplace stress *(providing an overview of primary, secondary and tertiary methods for the prevention and management of stress)*
6. Understand the key requirements of legislation effecting the employment and management of people	6.1 Explain the principles of relevant employment legislation *(including the reasons for such legislation)* 6.2 Explain the issues surrounding non-compliance with the legislation *(no additional guidance)* 6.3 Describe the legislation of employment, health and welfare of people *(including contracts of employment, pay and conditions, working hours, time off and sickness absence, diversity and equality of opportunity, discrimination, duty of care)* 6.4 Explain the principles and elements within Discrimination legislation *(including reference to direct and indirect discrimination, harassment and*

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	victimisation, and to groups specifically protected by law) 6.5 Describe the stages of a grievance and disciplinary process and explain the factors to be taken into account at each stage *(including the significance of correct process and documentation, and rights of appeal)*		
Unit expiry date	31st December 2020		
Unit reference number	H/601/1702		
Link to National Occupational Standards	FM409		
FM Professional Standards reference	FM functional area:		FM functional area component:
	Leadership and Management		People Management

Resources:

Managing for Performance: Delivering Results Through Others by Pam Jones
New and bestselling books by Michael Armstrong cluster sheet: Performance Management: Key Strategies and Practical Guidelines: 5 by Michael Armstrong
Performance Management by Herman Aguinis
Key Performance Indicators (KPI): Developing, Implementing, and Using Winning KPIs by David Parmenter
Harvard Business Essentials: Managing Employee Performance by Harvard
Performance Management: The New Realities (Developing Practice) by Michael Armstrong and Angela Baron
Managing Performance: Managing Performance in Action by Michael Armstrong and Angela Baron
People Management and Performance by John Purcell, Nicholas Kinnie, Juani Swart, and Bruce Rayton
Fast Track to Success: People and Performance Management by David Ross
Human Resource Management by Derek Torrington, Stephen Taylor, and Laura Hall
Fundamentals of Human Resource Management: Managing People at Work by Derek Torrington, Laura Hall, and Steven Taylor
Human Resource Management: AND Employee Relations by Derek Torrington, Laura Hall, Stephen Taylor, and Mr Graham Hollinshead
Human Resources Management: AND "How to Succeed in Exams and Assessments" by Derek Torrington, Laura Hall, Stephen Taylor, and Kathleen McMillan
Recruiting, Selecting and Inducting New Staff in the Workplace Super Series by Institute of Leadership and Management
Harvard Business Review on Finding and Keeping the Right People ("Harvard Business Review" Paperback) by Harvard Business School Press
Introducing Human Resource Management: AND MyLab Access Code by Margaret Foot and Caroline Hook
Armstrong's Handbook of Human Resource Management Practice by Michael Armstrong
Fundamentals of Human Resource Management: Managing People at Work by Derek Torrington, Laura Hall, and Steven Taylor
Mastering People Management by Mark A. Thomas
Chartered Institute of Personnel and Development - www.cipd.co.uk
www.bifm.org.uk
FM World - www.fm-world.co.uk
Workplacelaw - www.workplacelaw.net

Unit FM4.04: Understanding facilities management support services 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 enables learners to develop an understanding of a wide range of facilities management support services operations and how to manage and monitor the delivery of those services within safe systems of work and budgetary constraints.

Title:	Understanding facilities management support services operations
Level:	4
Credit value:	6

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand the support services and the options for delivery that are typically provided in facilities management	1.1 Describe a typical range of services which may be encompassed within facilities management in all sectors of the private, public and not-for-profit economy *(by reference to examples rather than trying to develop an exhaustive list)* 1.2 Explain the different options for delivery of support services *(in-house, and/or outsourced to include single-service contracts, bundled contracts and total facilities management contracts)*

	1.3 Explain the cost effectiveness of the various delivery options *(by reference to factors that might influence the cost of the options listed above such as costs of employing staff, risks of employing staff, contractors' need for profit, risks of contractor failure, and factors that might influence the effectiveness of the same options such as efficiency of supervision, access to specialist expertise, responsiveness to change)*
	1.4 Explain the relationship between the facilities management strategy and the preferred option for delivery of support services *(using example/s drawn from the learners own experiences and/or case studies)*
2. Understand how support services in facilities management are identified and managed	2.1 Describe ways of identifying the requirements of the users *(who should be consulted, methods of consultation, other sources of evidence such as business objectives, compliance requirements, current deficiencies)*
	2.2 Explain how support services are managed and monitored to ensure that they meet required standards *(providing an overview of general management principles for service delivery, and of additional mechanisms used to manage contractors, such as service level agreements and key performance indicators)*
3. Understand the importance of health and safety in the delivery of support services in facilities management	3.1 Explain the importance of safety systems associated with the management and control of contractors and in-house staff undertaking support services work *(by reference to the legislation associated with compliance risk, and to example/s of health and safety risks drawn from the learners' own experiences and/or case studies)*

	3.2 Explain the role of a Facilities Manager in ensuring compliance with legislation and good practice related to the delivery of support services *(by identifying methods that can be used to mitigate the different types of risk listed above)*
4. Understand how to manage the revenue/operational budgets in the provision of support services	4.1 Explain how to determine, monitor and manage support services budgets *(an overview of systems used to classify costs, to forecast expenditure (by reference to precedent and from first principles), to agree budgets, to monitor actual expenditure against forecasts, and to address variances)* 4.2 Identify adverse budget variation and explain options for reconciliation *(using example/s drawn from the learners own experiences and/or case studies)*
Unit expiry date	31st December 2020
Unit reference number	M/601/1704
Link to National Occupational Standards	FM403

FM Professional Standards reference	FM functional area:	FM functional area component:
	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 - www.fm-world.co.uk

www.bifm.org.uk

Professional Outsourcing - http://www.professionaloutsourcingmagazine.net/

Facilities Management Journal - http://www.fmj.co.uk/

Unit FM4.05: Managing health and safety in own area of 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 enables learners to develop and enhance knowledge and understanding of Health and Safety in the workplace and the Facilities Manager's role and responsibilities in monitoring and reviewing safety systems.

Title:	Managing health and safety in own area of facilities management
Level:	4
Credit value:	6

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand the legal requirements for the management of health and safety and environment in the workplace	1.1 Identify specific legislation, regulations, guidelines and codes of practice relating to health and safety and environment *(including the Health & Safety at Work Act, the "Six Pack" of H&S regulations, and an example of H&S measures in the workplace, such as RIDDOR, Regulatory Reform Order (for fire safety))* 1.2 Explain why health and safety in the workplace is important *(including welfare, the motivational value of proactive H&S management, and the*

	business and regulatory penalties of non-compliance)
	1.3 Describe the minimum legal requirements for the management of health and safety *(by reference to the Management of Health & Safety at Work Regulations)*
	1.4 Explain the roles and responsibilities as outlined in an organisation's health and safety policy *(supporting the explanation with example/s drawn from the learner's own experience and/or case studies)*
	1.5 Produce a report which outlines compliance with issues within own area of responsibility *(using an example drawn from the learner's own experience or a case study)*
2. Understand personal responsibilities for health and safety in the workplace	2.1 Explain an individual's responsibilities and liabilities under health and safety legislation *(no additional guidance)*
	2.2 Explain the resources required and ways of providing health and safety information, induction and training for a team *(see below, and including induction, specialist and refresher training)*
	2.3 Explain how and when to consult with other people on health and safety issues within own area of responsibility *(see below, and including relevant issues such as the need for two-way communication encouraging best practice, confirming training standards, observing behaviours, ensuring accessibility of information)*
	2.4 Explain why and how health and safety should inform planning and decision making *(see below)*

	2.5 Explain ways of providing health and safety information, induction and training for team in own area of facilities management responsibility *(see below, and including methods such as the use of training plans and records, induction for new staff, face to face communications (e.g. "tool box" briefings for contractors and FM staff), hard copy information, intranet)* *(Achievement of criteria 2.2, 2.3 and 2.4 should be evidenced using example/s from the learner's own experience and/or case studies)*
3. Understand how to communicate and record workplace health and safety hazards and risk assessments	3.1 Explain how to communicate the written health and safety policy statement to people who work in own area of responsibility and other relevant parties *(see below)* 3.2 Explain how to develop a culture which puts health and safety first, within own area of facilities management responsibility *(see below, and including examples such as leading by example, incentive schemes, introducing good practice from elsewhere)* 3.3 Explain how the risk assessment record should be communicated to ensure control measures are implemented in the workplace *(see below and including the choice of appropriate channels of communication, such as face to face, site manuals, intranet)* *(Achievement of criteria 3.1, 3.2 and 3.3 should be evidenced using example/s from the learner's own experience and/or case studies)*
4. Understand the five step process for risk assessment	4.1 Describe the five steps of carrying out a risk assessment *(as prescribed by the HSE)*

	4.2 Undertake a risk assessment of the health and safety hazards in own workplace *(see below)*
	4.3 Select effective elimination or control methods and explain how they meet legal requirements and sector standards *(see below)*
	(Achievement of criteria 4.2 and 4.3 should be evidenced using example/s from the learner's own experience and/or case studies)
5 Understand how to monitor and review workplace health and safety policies and systems	5.1 Explain how and when to review the written health and safety policy statement *(including responsibilities, protocols to ratify changes, and schedules)*
	5.2 Explain how to establish systems for monitoring, measuring and reporting on health and safety performance within own area of responsibility *(including different sources of data, such as maintenance regimes together with performance parameters and tolerances, analysis of accident records, reporting to H&S Committee)*
	5.3 Explain how to keep up-to-date with health and safety risks, issues and developments which affect own industry or sector *(including the HSE website and other sources such as the internet, journals and other publications, continuous professional development, networking, conferences and seminars)*
Unit expiry date	31st December 2020
Unit reference number	A/601/1706
Link to National Occupational Standards	FM411

	Management Standards Centre E6 Managing Health and Safety in own area of responsibility	
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 by Tolleys
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 - www.fm-world.co.uk
www.bifm.org.uk - Health & Safety Special Interest Group
Workplacelaw - www.workplacelaw.net
Facilities Management Journal - http://www.fmj.co.uk/
Safety & Health Practitioner - www.shponline.co.uk

Unit FM4.06: Understanding risk management 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 enables learners to develop knowledge and understanding of the principles, techniques and methodologies of risk management in a range of scenarios and the Facilities Manager's role in business continuity planning and disaster recovery.

Title:	Understanding risk management in facilities management
Level:	4
Credit Value:	6

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand risk analysis	1.1 Describe the principles of risk analysis *(by reference to methods that may be used to identify risks, to estimate their likelihoods and to estimate their potential effects)* 1.2 Identify the specific areas in which these principles are used *(by reference to one or more typologies of risk relevant to the learner's work environment or to a prospective work environment)*
2. Understand risk management	2.1 Describe the principles of risk management *(in terms of the costs and benefits of different strategies, such as risk mitigation, reduction, transfer and acceptance)*

	2.2 Identify the specific areas in which these principles are used *(by reference to the same typology or typologies of risk as for the previous learning outcome)*
3. Understand how risks are managed	3.1 Describe the sources of risks for which Facilities Managers are responsible *(showing how risks commonly associated with the provision of facilities contribute to the different categories of risk in the typology or typologies used for the previous learning outcomes)*
	3.2 Explain the techniques that may be used to manage risks from these different sources *(for the different sources of risk and including techniques appropriate for different risk management strategies such as risk mitigation, reduction, transfer and acceptance)*
4. Understand how risks can be minimised and reduced	4.1 Explain the principles and benefits of risk minimisation in a range of facilities management scenarios.
	4.2 Explain the extent to which risk could be mitigated, reduced or transferred in different scenarios *(using examples, drawn from the learner's own experiences and/or case studies, including* • *risk analyses based on application of the relevant principles* • *risk management strategies being chosen by reference to the relevant principles* • *specific risk management techniques being chosen and/or applied in facilities management to achieve risk mitigation, reduction or transfer* • *evaluations of the effectiveness of the chosen risk management techniques)*

5. Understand business continuity planning	5.1 Describe a business continuity plan and the role of facilities management in its implementation *(including the purpose of such plans, how they are developed and resourced, their reliance on the facilities management function, and their relationship to disaster recovery plans)*
	5.2 Explain how services can be restored to ensure business can continue to operate *(for services typically provided within facilities management, and using examples of arrangements drawn from the learner's own experiences and/or case studies, such as accommodation, servers backed up offsite, etc.)*
	5.3 Describe the methodology to monitor and update the effectiveness of the business continuity plan *(no additional guidance)*
6. Understand incident management and disaster recovery	6.1. Describe the attributes of a disaster recovery plan *(including the purpose of such plans, how they are developed and resourced, and their reliance on the facilities management function)*
	6.2 Explain the systems and processes that need to be in place to manage the incidents, emergencies and disasters *(focusing on activation and maintenance of the arrangements for the restoration of services used for the previous learning outcome)*
7. Know the five steps to risk assessment in the management of health and safety at work	7.1. Describe the five steps to risk assessment *(no additional guidance)*
	7.2 Explain how the risk assessment process is used for good health and safety practices in the workplace *(by reference to the general process and*

	using specific examples drawn from the learner's own experiences and/or case studies)
Unit expiry date	31st December 2020
Unit reference number	J/601/2132
Link to National Occupational Standards	FM412

FM Professional Standards reference	FM functional area:	FM functional area component:
	Business Continuity and Compliance	Risk Management

Resources:

Fundamentals of Risk Management: Understanding, Evaluating and Implementing Effective Risk Management by Paul Hopkin
The Essentials of Risk Management: The Definitive Guide for the Non-risk Professional by Michel Crouhy, Dan Galai, and Robert Mark
The Essentials of Risk Management by Michel Crouhy, Dan Galai, and Robert Mark
Corporate Risk Management by Tony Merna and Dr. Faisal F. Al-Thani
Risk Management: 10 Principles by Jacqueline Jeynes
The Definitive Handbook of Business Continuity Management by Andrew Hiles
Practical Business Continuity Management: Top Tips for Effective, Real-World Business Continuity Management by Andy Osborne
The Route Map to Business Continuity Management: Meeting the requirements of BS 25999 by John Sharp
The Disaster Recovery Handbook - A Step-by-Step Plan to Ensure Business Continuity and Protect Vital Operations, Facilities, and Assets by Wallace
The Definitive Handbook of Business Continuity Management by Andrew Hiles and Peter Barnes
The Definitive Handbook of Business Continuity Management by A Hiles
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
Business Continuity Management: Building an Effective Incident Management Plan by Michael Blyth
Business Continuity Management: A Crisis Management Approach by Dominic Elliott, Ethné Swartz, and Brahim Herbane
Disaster and Recovery Planning: A Guide for Facility Managers by Joseph F. Gustin
Risk and Financial Management in Construction by Simon A. Burtonshaw-Gunn
The Institute of Risk Management www.theirm.org
FM World - www.fm-world.co.uk
www.bifm.org.uk
Facilities Management Journal - http://www.fmj.co.uk/

Unit FM4.07: Understanding financial management 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 enables learners to develop knowledge and understanding of the principles and application of management accounting, the use of capital and revenue budgets, cash flow and the preparation of financial cases in a facilities management context.

Title:	Understanding financial management in facilities management
Level:	4
Credit Value:	6

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand financial reporting systems and processes	1.1 Identify systems for the management of budgets and finances *(including cash accounts, nominal accounts (ledgers), VAT accounts, profit & loss accounts, balance sheets)* 1.2 Describe the use of financial information contained in management reports *(including budgeting, financial planning, business strategy, objective setting, pricing)* 1.3 Explain cost centres and devolved budgets *(supporting the explanation with example/s from the learner's own experience and/or case studies, and*

	including reasons for the use of cost centres and devolved budgets)
2. Understand the use of capital and revenue budgets in a facilities management context	2.1 Explain the difference between capital and revenue budgets *(including the tax implications of depreciation)*
	2.2 Describe the budget approval cycle and processes. *(illustrating the description with example/s from the learner's own experience and/or case studies, and including setting budgets by reference to precedent and from first principles)*
	2.3 Describe the techniques used by facilities managers to manage capital and revenue budgets. *(including the relevance to capital budgets of asset values, whole life costing, discounted cash flow (DCF), net present value (NPV), and balance sheet values)*
	2.4 Explain the methods to identify variance in budget and possible courses of action and remedies *(supporting the explanation with example/s from the learner's own experience and/or case studies)*
3. Understand how to manage cash flow	3.1 Describe the basic principles, techniques and processes of using cash-flow projections for managing the flow of cash within the facility management business cycle *(including the use of rolling projections)*
	3.2 Explain how a Facilities Manager manages cash flow. *(including raising and processing of purchase orders, authorising payments, managing stocks of materials, flexing people resources and budgets, revenue protection)*
4. Understand how to prepare financial cases	4.1 Describe the principles and techniques associated with preparing financial cases *(including whole life costing, cost/benefit*

	analyses, strategic fit, risk analyses and financial consequences of inaction) 4.2 Prepare a financial case for a project/purchase. *(using example/s from the learners own experience and/or case studies)*
Unit expiry date	31st December 2020
Unit reference number	J/601/1708
Link to National Occupational Standards	FM410

FM Professional Standards reference	FM functional area:	FM functional area component:
	Finance and IT	Financial Management

Resources:

Management Accounting for Business by Colin Drury
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
Key Management Ratios (Financial Times Series) by Ciaran Walsh
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 by Colin Barrow
Practical Financial Management: Key Financial Statement Tools of Financial Analysis Business Planning and Budgeting (Business Success) by Colin Barrow
Fundamentals of Financial Management (Concise Edition) by Eugene F. Brigham and Joel F. Houston
Risk and Financial Management in Construction by Simon A. Burtonshaw-Gunn
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

Unit FM4.08: Understanding the business organisation and its impact on 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 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. The unit helps learners to understand the Facilities Manager's role and responsibilities for identifying areas for making improvements to benefit the business organisation.

Title:	Understanding the business organisation and its impact on facilities management
Level:	4
Credit value:	6

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand the structure of business organisations	1.1 Compare and contrast the different business structures *(relating different structures to matters such as risk/liability, shareholder value, business operation, funding)* 1.2 Compare and contrast the ways in which the different business structures have an impact on the way facilities management is delivered *(relating different business environments, demands and accountabilities to different options for facilities management)*

2. Understand the importance of corporate culture	2.1 Describe the company culture of an organisation *(using an example drawn from the learner's own experience and/or a case study)*
	2.2 Explain how the work environment can enable or restrict cultural change within an organisation *(supporting the explanation with examples such as open plan versus cellular accommodation, decorative schemes, breakout areas)*
	2.3 Explain how Facilities Managers can influence the company culture to make a positive contribution to change *(supporting the explanation with examples such as developing relationships with building users to facilitate ideas that support the business strategy, and benchmarking service delivery and costs)*
3. Understand how business organisations develop operational plans	3.1 Develop an operational plan *(see below)*
	3.2 Produce monitoring and controls for the plan so that it achieves its overall objectives *(see below, and including SLA's, KPI's, use of performance data, user feedback, comparing performance against objectives and communication to relevant stakeholders)*
	3.3 Describe the issues which the monitoring and control of the plan may identify *(see below)*
	(Achievement of all of these criteria should be evidenced using example/s from the learner's own experience and/or case studies)
4. Understand the decision-making processes within organisations	4.1 Describe the decision-making processes which a Facilities Manager can influence *(supporting the description with examples, such as FM strategy, preventative maintenance planning, legal and regulatory compliance, space*

	planning, environmental management issues)
	4.2 Explain how external decisions can affect facilities management *(supporting the description with examples, such as reducing facilities budgets, office relocation, opening or closing sites, implementing legislation, outsourcing all or part of the facilities function, organisational restructuring)*
5. Understand change management	5.1 Explain the need for organisational change in response to changes in the business environment *(supporting the explanation with examples such as reduced business turnover, change in longer term business objectives, change in leadership of organisation, cost reduction)*
	5.2 Identify changes in circumstances and adjust plans and activities accordingly *(using example/s from the learner's own experience and/or case studies)*
	5.3 Explain how to develop new work processes, procedures, systems, structures and roles to achieve the vision behind the change *(using the same example/s as for the previous assessment criterion, and including analysing the impact of change and communicating findings before obtaining agreement on adjustments and monitoring their implementation)*
	5.4. Identify potential barriers to change *(using the same example/s as for the previous assessment criterion, and including barriers such as employee attitudes, available resource and its capability, legal and regulatory requirements, available space, cost, contractual obligations)*

Unit expiry date	31st December 2020	
Unit reference number	L/601/1709	
FM Professional Standards reference	FM functional area:	FM functional area component:
	The Role of Facilities Management	Sector Knowledge
	Leadership and Management	Change Management

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
Organizational Behaviour Plus Companion Website Access Card by Dr Andrzej Huczynski and Prof David Buchanan
Organizational Behaviour: An Introductory Text by Prof David Buchanan and Dr Andrzej Huczynski
The Corporate Culture Survival Guide (JB Warren Bennis Series) by Edgar H. Schein
Balanced Scorecard Strategy for Dummies by Charles Hannabarger, Frederick Buchman, and Peter Economy
Harvard Business Review on Decision Making ("Harvard Business Review" Paperback) by Harvard Business School
Decision Making and Problem Solving (Creating Success) by John Adair
Making Sense of Change Management: A Complete Guide to the Models, Tools and Techniques of Organizational Change by Esther Cameron and Mike Green
Change Management Masterclass: A Step-by-step Guide to Successful Change Management by Mike Green
The Theory and Practice of Change Management by John Hayes

Unit FM4.09: Understanding performance measurement 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 enables learners to develop their understanding of the techniques and processes of setting business objectives and performance management within the facilities management function.

Title:	Understanding performance measurement in facilities management
Level:	4
Credit value:	3

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand the principles of business objectives	1.1 Explain the purpose of setting business objectives *(no additional guidance)* 1.2 Explain the elements used to set business objectives *(including elements such as vision, strategy and compliance, and supporting the explanation with example/s from the learner's own experience and/or case studies)*
2. Understand the principles of performance measurement	2.1 Explain the techniques used in performance measurement as it applies to teams, suppliers, assets and the facilities management function *(including performance management, compliance to relevant legislation and codes of conduct, benchmarking, SLA's, KPI's, SMART targets, monitoring of processes, regular review and customer & peer feedback,*

	and supporting the explanation with example/s from the learner's own experience and/or case studies)
3. Understand the relationship between business objectives and performance measurement	3.1 Explain how performance measurement can help in achieving business objectives. *(supporting the explanation with example/s from the learner's own experience and/or case studies)* 3.2 Explain how the results from performance measurement can support a programme of continuous improvement *(supporting the explanation with example/s from the learner's own experience and/or case studies)*
Unit expiry date	31st December 2020
Unit reference number	F/601/1710
Link to National Occupational Standards	FM413

FM Professional Standards reference	FM functional area:	FM functional area component:
	Quality Management and Customer Service	Quality Management

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 - www.fm-world.co.uk
Facilities Management Journal - http://www.fmj.co.uk/

Unit FM4.10: Understanding leadership and management in facilities management

Aim of the unit:

This unit enables learners to understand the application of management and leadership theories and their impact on facilities management, individuals, teams and organisations. It helps them to link individual performance to the overall strategy of an organisation and the different approaches to management and models of team working

Title:	Understanding leadership and management in facilities management
Level:	4
Credit value:	6
Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand how management style affects organisations and individuals	1.1 Explain how different theories and approaches can be used to influence individual behaviour and motivation *(relating relevant theories (e.g. Maslow, Herzberg, McGregor) to example/s from the learner's own experience and/or case studies)*
	1.2 Explain the techniques used to empower individuals in the workplace and how they can contribute to effective and positive responses from employees *(supporting the explanation with examples (e.g. clear objectives,*

	terms of reference, positive ("can do") culture, "open door", constructive feedback, training and development) rather than trying to provide an exhaustive list)
	1.3 Explain the principles and practices of mentoring and coaching *(making clear the distinction between the two)*
2 Understand how to motivate, manage and lead staff	2.1 Describe theories of leadership and how they apply to the facilities management role *(relating relevant theories (e.g. situational, behavioural, participative leadership) to example/s from the learner's own experience and/or case studies)*
	2.2 Explain how to manage and improve the facilities management team and individual performance *(including the relevance of organisational strategy, task/function objectives, job descriptions, team/individual target setting, personal development plans, performance measurement and appraisal)*
	2.3 Describe how to motivate and support people in facilities management to achieve their work and development objectives and provide recognition when they are successful *(supporting the explanation with examples (e.g. team-building, reward, recognition, thanks and praise) rather than trying to provide an exhaustive list)*
3. Understand how to provide leadership in your area of responsibility	3.1 Explain how to create a vision within own area *(see below)*
	3.2 Explain how to communicate the vision to different target audiences *(see below and including the suitability of different communication methods to different audiences and circumstances, supporting the explanation with*

	examples (e.g. face to face, formal presentation, team briefing, intranet) rather than trying to develop an exhaustive list)
	3.3 Describe what needs to be communicated *(see below)*
	3.4 Evaluate the extent to which the objective can then be achieved *(see below)*
	(Achievement of all of these criteria should be evidenced using example/s of project/s from the learner's own experience and/or case studies)
4. Understand different models of team-working	4.1 Compare and contrast different models of team-working *(using examples rather than trying to develop an exhaustive list (e.g. Forming-Storming-Norming-Performing (Tuckman), Action Centred (Adair), Team Roles Model (Belbin))*
	4.2 Use an appropriate model to evaluate and improve effectiveness of the team *(relating one of the models described for the previous assessment criterion to an example from the learner's own experience and/or a case study)*
Unit expiry date	31st December 2020
Unit reference number	L/601/1712

FM Professional Standards reference	FM functional area:	FM functional area component:
	Leadership and Management	People Management

Resources:

How to Lead: What You Actually Need to Do to Manage, Lead and Succeed by Jo Owen
How to Lead by Jo Owen
The Best of Adair on Leadership and Management by John Adair and Neil Thomas
A Force for Change: How Leadership Differs from Management by John P. Kotter
Leadership: Plain and Simple (Financial Times Series) by Steve Radcliffe
Effective Leadership: How to be a successful leader by John Adair
How to Manage: The Art of Making Things Happen by Jo Owen
Leadership: Theory and Practice by Dr. Peter G. Northouse
Leadership and Management Development by Jeff Gold, Richard Thorpe, and Alan Mumford
Developing the Leader within You (Maxwell, John C.) by John C. Maxwell
www.i-l-m.com
http://www.managers.org.uk/

Unit FM4.11: Understanding the management of information and knowledge 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 enables learners to develop knowledge and understanding of using and managing data and information and the applications, benefits and costs of IT systems to support facilities management.

Title:	Understanding the management of information and knowledge in facilities management
Level:	4
Credit value:	3

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand how to collate data within a facilities management context	1.1 Identify the wide variety of information to be collated in a facilities management context *(including risk assessments & legal compliance, building & engineering data, property & asset registers, financial & CSR, contractual, SLA & KPI and customer service)* 1.2 Describe relevant and appropriate methods of data collection. *(including surveys, focus groups, electronic & paper reporting systems and help-desk calls)* 1.3 Describe the sources of data and information which are available. *(illustrating the description with examples such as manuals, maintenance schedules, contracts, P&P, electronic*

	systems (SAP/CAFM) local authorities, compliance bodies, professional bodies and the internet)
2. Understand how to analyse data within a facilities management context	2.1 Use statistical methods and make calculations to analyse data. *(using example/s from the learner's own experience and/or case studies, and including means, probability, bell curves and scatter diagrams)*
	2.2 Use graphical illustrations to illustrate data analysis. *(using example/s from the learner's own experience and/or case studies, and including pie charts and graphs)*
3. Understand how to use information effectively	3.1 Explain how to select the most appropriate information. *(see below)*
	3.2 Explain how to use it to support decision making *(see below)*
	3.3 Interpret statistical data, graphs and diagrams and explain when and how to use the information effectively *(see below)*
	3.4 Explain how information could be used for improvement or innovation. *(see below)*
	(Achievement of all of these criteria should be evidenced using example/s of project/s from the learner's own experience and/or case studies)
4. Understand how to manage information and knowledge flow within current legislative requirements	4.1 Explain the impact of accessing and sharing information and knowledge *(including reference to factors that might affect such sharing, such as remote working, immediacy information, data accuracy & consistency)*
	4.2 Describe the techniques associated with managing information flow and retrieval *(illustrating the description using*

	examples such as Data Management systems) 4.3 Explain how the Facilities Manager can ensure that information is held securely and is compliant with latest legislation. *(including measures to ensure data security, limited access, periodic back up and data validity, and relating these measures to relevant legislation such as the Data Protection Act)*
5. Understand the types of IT systems used to support facilities management and the legislative requirements	5.1 Describe the most common types of hardware and software applicable to facilities management. *(including the hardware and software required to support facilities management systems such as building management systems and access control, as well as to support more general office and communications functions)* 5.2 Describe the legislation affecting the use of IT systems. *(including the Data Protection Act, IP & copyright, VDU risk assessment)*
Unit expiry date	31st December 2020
Unit reference number	Y/601/1714

FM Professional Standards reference	FM functional area:	FM functional area component:
	The Role of Facilities Management	Information and Knowledge Management
	Business Continuity and Compliance	Compliance
	Finance and IT	Information Technologies

Resources:

Knowledge Management: Concepts and Best Practices by Kai Mertins, Peter Heisig, and Jens Vorbeck

Information Security Risk Management - Handbook for ISO/IEC 27001 by Edward Humphreys

Making Enterprise Information Management (EIM) Work for Business: A Guide to Understanding Information as an Asset by John Ladley

Introducing Information Management: the business approach by Matthew Hinton

BiSL: A Framework for Business Information Management (2nd Edition) by Van Haren Publishing

Management Information Systems: Global Edition by Ken Laudon and Jane Laudon

Management Information Systems by Terry Lucey

Management Information Systems by Effy Oz and Andy Jones

Cultivating Communities of Practice: A Guide to Managing Knowledge by Etienne Wegner, Richard Mcdermott, and William Snyder

http://www.aiai.ed.ac.uk/~alm/kamlnks.html

http://www.kmworld.com/

http://www.information-management.com/

http://www.aslib.com/

http://www.elsevier.com/wps/find/journaldescription.cws_home/30434/description#description

www.bifm.org.uk

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

Facilities Management Journal - http://www.fmj.co.uk/

Unit FM4.12: Understanding facilities management projects

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 knowledge and understanding of project management from start to finish in a facilities management context.

Title:	Understanding facilities management projects
Level:	4
Credit value:	6

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand project management in facilities management	1.1 Explain the objectives, roles and responsibilities of a project manager *(including delivery to time, cost and quality, compliance with health & safety and environmental requirements, and communication with stakeholders).* 1.2 Describe the methods, tools and techniques a project manager may use to plan, monitor and manage a facilities management project *(providing an overview of related techniques (e.g. Critical Path Analysis, Gantt charts), software (e.g. Microsoft Project), and process-based methodologies (e.g. PRINCE).* 1.3 Describe a range of projects which Facilities Managers are typically expected

	to organise and manage *(no additional guidance).*
2. Understand how to develop facilities management project brief	2.1 Develop a project brief including aims and objectives *(see below)* 2.2 Develop and manage project programme *(see below)* 2.3 Develop and manage project budget *(see below)* *(Achievement of all of these criteria should be evidenced using example/s of project/s from the learner's own experience and/or case studies)*
3. Understand how to assemble facilities management project teams	3.1 Explain how to devise, create and develop a facilities management project team capable of undertaking the tasks to successfully complete the project *(including stakeholder representation)* 3.2 Describe the benefits of cross-functional teams in facilities management *(see below)* *(Achievement of all of these criteria should be evidenced using the same example/s of project/s as for the previous learning outcome.)*
4. Understand how to monitor and review facilities management project progress	4.1 Organise and monitor a project to meet the requirements of the project and programme *(see below)* 4.2 Identify the problems which a project manager may need to address and explain how to agree changes where appropriate *(see below and including problems such as changes in user specification, supplier costs, changes of business priorities, change of project personnel)* 4.3 Report on progress to the project sponsor and other interested parties *(see below and including techniques for*

	reporting progress, updating project timelines and budges, comparing delivery against user specifications, addressing variations)
	4.4 Monitor budget *(see below)* *(Achievement of all of these criteria should be evidenced using the same example/s of project/s as for the previous learning outcome.)*
5. Understand project completion, sign-off and review	5.1 Explain how, at the end of a facilities management project, all aspects are properly completed and the project signed-off to the client. *(no additional guidance).* 5.2 Explain how to evaluate the project and identify successes and development needs to improve future performance. *(no additional guidance).*

Unit expiry date	31st December 2020	
Unit reference number	H/601/1716	
Link to National Occupational Standards	FM405	
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 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 by Sebastian Nokes and Sean Kelly
Project Management by Dennis Lock
A Guide to the Project Management Body of Knowledge: PMBOK Guide by Project Management Institute
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: A Systems Approach to Planning, Scheduling, and Controlling by Harold Kerzner
Fast Track to Success: Project Management by Patrick Harper-Smith and Simon Derry
Project Management in Construction by Anthony Walker
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
Code of Practice for Project Management for Construction and Development by Chartered Institute of Building
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
Facilities Management Journal - http://www.fmj.co.uk/

Unit FM4.13: Developing relationships with suppliers and specialists 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 enables learners to develop their understanding of the importance of relationships with suppliers and specialists and how to appoint, manage and monitor suppliers and specialists and the potential risks

Title:	Developing relationships with suppliers and specialists in facilities management
Level:	4
Credit value:	3

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand the role of specialists and suppliers	1.1 Describe the role of specialists and suppliers within facilities management *(no additional guidance)* 1.2 Explain the benefits of specialist involvement and when it is appropriate to involve specialists *(supporting the explanation with example/s from the learner's experience and/or case studies to demonstrate benefits (e.g. transfer of risk, industry expertise, economies of scale, efficiency, scalability))*
2. Understand how to select and appoint suppliers and	2.1 Explain how to decide selection criteria and prepare appointment briefs *(making reference to the reasons for outsourcing (e.g. flexibility, cost*

specialists	*efficiency, risk management), the preparation of detailed requirements, the specification of selection criteria (e.g. capacity, capability, time scale, cost, experience) and how different methods of procurement (e.g. open market tender) can be appropriate to different situations)*
	2.2 Explain how to agree reporting arrangements and deliverables *(using example/s from the learner's experience and/or case studies)*
3. Understand how to manage and monitor specialists and suppliers performance	3.1 Explain the importance of objective setting and review when managing specialist or supplier performance *(no additional guidance)*
	3.2 Explain the way in which specialist or suppliers performance is monitored and measured *(supporting the explanation with examples rather than trying to develop an exhaustive list (e.g. reviewing actual performance against SLA, formal contract review meetings, informal discussion, escalation procedures, customer satisfaction surveys and feedback)*
	3.3 Explain ways to encourage specialists or supplier to continually improve performance *(supporting the explanation with examples rather than trying to develop an exhaustive list (e.g. benchmarking, potential for additional business, client references for future contracts).*
	3.4 Explain the kind of remedial plans that are needed if performance is below the standards required *(supporting the explanation with examples rather than trying to develop an exhaustive list (e.g. agreed improvement plans, increased frequency of review meetings, actions by the client to*

	support the supplier, penalties for non-compliance, recognition for improvements made))
4. Understand what is involved in ending a specialist or supplier relationship	4.1 Explain the factors to be considered that inform the decision to end a specialist or supplier relationship *(including failures in contract delivery, changes in the organisation's business direction or requirements, failures in client/supplier relationships, costs)*
	4.2 Explain the processes and procedures to be followed when ending a specialist or supplier relationship *(including confirming reason/s for termination, substantiating any failures cited, addressing contractual termination requirements (notice period, etc.), review meetings, exit management plans, termination dates, plans for replacement of service)*
	4.3 Explain potential risks of ending contractual obligations *(supplementing the explanation with examples rather than trying to develop an exhaustive list (e.g. worsening performance, negative brand image, skills transfer, intellectual property rights, claims for unreasonable termination, costs of setting up replacement contracts, discouraging contractors from applying for future contracts))*
Unit expiry date	31st December 2020
Unit reference number	M/601/1718

Link to National Occupational Standards	FM408	
FM Professional Standards reference	FM functional area:	FM functional area component:
	Quality Management and Customer Service	Stakeholder Relationships
	Procurement and Contract Management	Procurement

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
FM World - www.fm-world.co.uk
www.bifm.org.uk
Facilities Management Journal - http://www.fmj.co.uk/

Unit FM4.14: Understanding quality management 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 enables the learners to develop their understanding of the theories and principles of quality management and quality standards and how to implement them within facilities management.

Title:	Understanding quality management in facilities management
Level:	4
Credit value:	4

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand the principles of quality management and apply them in a facilities management context	1.1 Describe the principles of quality management *(including the 8 core principles of quality management)* 1.2 Describe the benefits that quality management can bring to facilities management *(relating each of the 8 core principles to facilities management)* 1.3 Explain how a Facilities Manager can apply quality management principles to initiate improvements *(supporting the explanation with example/s drawn from the learners own experiences and/or case studies)*

2. Understand quality standards and accreditation schemes	2.1 Describe quality standards and accreditation schemes applicable to facilities management *(including ISO 9001:2000 Quality Management Systems, European Foundation for Quality Management, Investors in People, International Organisation for Standardisation)*
	2.2 Explain how quality standards and accreditation schemes impact on facilities management *(supporting the explanation with examples of how quality standards and accreditation schemes can guide the set-up of systems and processes to ensure that critical FM requirements (such as maintenance, statutory compliance and end user satisfaction) are all addressed successfully)*
3. Understand how to implement a quality standard	3.1 Describe the steps to implement a known quality standard in the context of facilities management *(including reviewing the requirements of the standard, assessing the requirements against the business operation, documenting the work flows or process maps for all activities, identifying any gaps in current processes or management, taking steps to mitigate risk, improving processes and closing gaps, monitoring on-going performance against the standard)*
	3.2 Explain the methods to monitor and review the successful implementation of the quality standard *(supporting the explanation with examples of performance measurement, process audits, stakeholder meetings, corrective action plans, and process updates)*
4. Understand the concepts of continuous improvement	4.1 Explain what is meant by continuous improvement and its equal importance to the facilities management function and

	the core business of an organisation *(no additional guidance)*
	4.2 Describe the principles, tools and techniques used to evaluate performance *(providing an overview of general quality management tools such as Deming's cycle, Lean manufacturing, six sigma and TQM)*
	4.3 Demonstrate the methods of collecting and assessing information on performance *(using example/s from the learner's own experience and/or case studies)*
	4.4 Use the findings to identify areas for continuous improvement *(using the same example/s as for the previous assessment criterion)*
	4.5 Explain how the programme of continuous improvement benefits an organisation, its customers and other key stakeholders. *(no additional guidance)*
Unit expiry date	31st December 2020
Unit reference number	M/601/1721

FM Professional Standards reference	FM functional area:	FM functional area component:
	Quality Management and Customer Service	Quality Management

Resources:

Quality Management Essentials by David Hoyle
ISO 9000 Quality Systems Handbook - updated for the ISO 9001:2008 standard: Using the standards as a framework for business improvement by David Hoyle
Managing Quality by Barrie G. Dale, Ton van der Wiele, and Jos van Iwaarden
The Lean Six Sigma Pocket Toolbook: A Quick Reference Guide to 70 Tools for Improving Quality and Speed by Michael L. George, John Maxey, David T. Rowlands, and Malcolm Upton
Total Quality Management: The route to improving performance by John S. Oakland
Quality Management for Organizational Excellence: Introduction to Total Quality by David L. Goetsch and Stanley Davis
Quality Management: Creating and Sustaining Organizational Effectiveness by Donna C. Summers
Quality Management in Construction (The Leading Construction Series) by Brian Thorpe
Foundations of Service Level Management (Sams Professional) by Rick Sturm and Wayne Morris
Service Level Agreement 100 Success Secrets: SLA, Service Level Agreements, Service Level Management and Much More by Gerard Blokdijk
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
https://www.gov.uk/government/organisations/cabinet-office
Chartered Quality Institute - www.thecqi.org/
www.bifm.org.uk
FM World - www.fm-world.co.uk
Facilities Management Journal - http://www.fmj.co.uk/

Unit FM4.15: Managing customer service 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 enables learners to develop their understanding of the importance of customer relationship management and the ways in which Facilities Managers can deliver a customer focused service and how service level agreements can be managed, evaluated and improved.

Title:	Managing customer service in facilities management
Level:	4
Credit value:	4

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand the service culture in a facilities management context	1.1 Describe the responsibilities that Facilities Managers have to their customers *(including service delivery, service improvement, value enhancement, provision of management reports)* 1.2 Explain the ways in which customer relationships are managed and improved *(in terms of general management and communication methods, and including additional mechanisms used to manage contractors, such as service level agreements and key performance indicators)*

2. Understand how to deliver a customer focused service	2.1 Explain what is meant by the term "customer focused service" *(supporting the explanation with example/s drawn from the learner's own experience and/or case studies to demonstrate the benefits of 'standing in the customers shoes', good communication channels and providing the services required)*
	2.2 Describe a range of communication methods used in delivery of a customer focused service *(using examples such as contract review meetings, operational meetings, face to face, telephone, e-mail, messaging, customer surveys, feedback forms, notice boards, intranet, table top, poster communications, job request, complaint channels)*
3. Understand how to identify various customers, assess their requirements and satisfaction levels	3.1 Describe how to identify the customer base of an organisation *(no additional guidance)*
	3.2 Explain the techniques that Facilities Managers can utilise to determine customer requirements *(supporting the explanation with examples (e.g. customer needs analysis, customer mapping, customer surveys, focus groups, feedback forms) rather than trying to provide an exhaustive list)*
	3.3 Explain the ways in which Facilities Managers can determine what customers feel about the services that they receive *(supporting the explanation with examples (e.g. surveys and audits) rather than attempting to develop an exhaustive list)*
	3.4 Explain how Facilities Managers can utilise the information that they gather to improve facilities management services *(supporting the explanation*

	with examples to show how customer information can be reviewed to identify trends and emerging issues, and can be used to influence items such as procedures, SLA's, targets, KPI's and improvement plans)
4. Understand how to develop and manage service level agreements	4.1 Explain how service level agreements are developed and agreed *(no additional guidance)* 4.2 Describe the tools that may be used to measure the performance of a Service Level Agreement *(including the standard tools of KPI's, customer feedback surveys, audits, customer feedback forms, benchmarking)* 4.3 Explain how service level agreements can be managed so that all stakeholders understand expectations, responsibilities and priorities *(including communication tools such as review meetings, publication of customer feedback, P&P, transparency of contract content)*
5. Understand the importance of customer relationship management	5.1 Explain the importance of customer relationship management in the context of facilities management *(including the need to build long standing relationships, to keep present customers, to maximise profit and to build a reputation that attracts other potential clients)* 5.2 Describe the sensitive areas of customer relationship management *(including data protection, HR issues, and intellectual property issues)* 5.3 Explain how to build customer loyalty and confidence *(supporting the explanation with example/s from the learner's own experience and/or case*

	studies, and including partnership approaches)
	5.4 Explain the ways in which customer relationships are managed, evaluated and improved *(supporting the explanation with example/s drawn from the learners own experiences and/or case studies)*
Unit expiry date	31st December 2020
Unit reference number	A/601/1723

FM Professional Standards reference	FM functional area:	FM functional area component:
	Quality Management and Customer Service	Customer Service

Resources:

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/
Facilities Management Journal - http://www.fmj.co.uk/

Unit FM4.16: Understanding property and asset management 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 enables learners to develop knowledge and understanding of the principles and practices of property and asset management in a range of different scenarios and how to plan and manage property relocations.

Title:	Understanding property and asset management for facilities managers
Level:	4
Credit value:	4

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand the requirements of property leases	1.1 Describe different types of leases and other contractual arrangements between landlords and tenants. *(including general leases, finance leases, true leases, operating leases, skip leases, deferred leases, pre-paid purchase leases and sub leases)* 1.2 Explain the ways in which leases are created and administered *(no additional guidance)* 1.3 Identify the key legislation affecting the ownership and use of property and assets *(including specific legislation (such as property, covenants, planning consent, CDM, sustainability & carbon legislation as they apply to*

	landlord/tenant agreements, tax legislation, business rates) and more general legislation that has an impact (such as the Disability Discrimination Act, Sex Discrimination Act, Race Relations Act)
	1.4 Explain the obligations of landlord and tenant to each other *(supporting the explanation with examples of the landlord's obligations (e.g. repairs to the structure, exterior & interior of the property, safety of gas and electrical appliances, fire safety of furniture and furnishings) and of the tenant's obligations (e.g. paying rent, utility bills and council tax, and taking care of the property) rather than trying to provide an exhaustive list)*
2. Understand property costs and charges	2.1 Explain the costs associated with occupying or owning property. *(providing an overview of both capital and revenue costs)*
	2.2 Explain how the property costs, taxes and associated charges can be managed. *(including the different financial reporting and tax implications of ownership and leasing)*
3. Understand how to set up and manage registers for property and fixed assets	3.1 Explain the principles, rationale and costs involved in setting up and maintaining a property and fixed asset register. *(including financial, maintenance and legislative compliance)*
	3.2 Describe the technology that can be used to assist in setting up and managing such a register *(including the range of available technologies, from the spreadsheet to the CAFM package)*
	3.3 Describe the information which can be obtained from a property and fixed asset register and explain how this can be used to advantage by management

	(illustrating the description with example/s from the learner's own experience and/or case studies, rather than trying to develop an exhaustive list)
4. Understand the factors involved in property relocation	4.1 Explain the different factors involved in property relocation to fulfil business requirements *(supporting the explanation with example/s from the learner's own experience and/or case studies (e.g. handover procedures, space planning, change of use, cost reduction, consolidation, novation of contracts, TUPE, sustainability, corporate & social responsibility, employee relocation, redundancy, morale, motivation), rather than trying to develop an exhaustive list)*

Unit expiry date	31st December 2020
Unit reference number	J/601/1725
Link to National Occupational Standards	FM415

FM Professional Standards reference	FM functional area:	FM functional area component:
	Business Continuity and Compliance	Compliance
	Property Portfolio Management	Property and Asset Management

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
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
Facilities Management Journal - http://www.fmj.co.uk/

Unit FM4.17: Understanding property, fabric and building services maintenance 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 enables learners to develop their understanding of the range of strategies used in the delivery of effective property and building services maintenance in a variety of Facility Management contexts and the scope of management systems and technologies available.

Title:	Understanding property, fabric and building services maintenance for facilities managers
Level:	4
Credit value:	8

Learning outcomes A learner when awarded credit for this unit will:	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand building design	1.1 Explain the range of building types and their uses *(supporting the explanation with examples (e.g. commercial, educational, industrial) rather than trying to provide an exhaustive list)*
	1.2 Explain how particular building types may be used to best advantage *(supporting the explanation with examples of different types suited to different requirements, such as requirements relating to location, use of space, climate, environment, etc.)*
	1.3 Explain the advantages and disadvantages of different building structures *(relating performance*

	characteristics (e.g. structural strength, resistance to weather) to different types of structure (e.g. load bearing masonry, timber frame and steel frame constructions, cladding systems)
2. Understand the maintenance implications of building, fabric, structures and components	2.1 Explain the fabric maintenance implications of differing building structures and components (including load bearing masonry, timber frame and steel frame constructions, cladding systems and the use of steel, brick, concrete, wood, glass)
	2.2. Explain the benefits and drawbacks of the various structures and components used in old and new buildings (including the relative cost and complexity of maintenance, environmental performance and presence of hazardous materials, e.g. asbestos)
3. Understand how a strategy for the maintenance of the building fabric can be implemented	3.1 Describe the range of maintenance strategies that can keep buildings safe, useable and help to retain value (including periodic, reactive and preventative maintenance, and conditioned-based and risk-based maintenance)
	3.2 Explain the advantages and disadvantages of various ways of delivering fabric maintenance services (supporting the explanation with example/s from the learner's own experience and/or case studies, and including comparison of in-house versus outsourced resource models)
	3.3 Explain how to implement and monitor a building fabric maintenance programme (including condition surveys and forward maintenance plans)

	3.4 Explain with examples when it may be necessary to involve other specialists *(using example/s from the learner's own experience and/or case studies)*
4. Understand the elements of building services maintenance programmes	4.1 Explain the range of building services which could be incorporated into differing types of building structures *(including utilities (electricity, gas, water), sewage, heating and ventilation, communications (telephone and data))*
	4.2 Describe the constituent parts of a building services maintenance programme *(including analysis of risk, maintenance plan, tracking process, safe systems of work, record keeping, compliance, monitoring and reporting processes for mechanical, electrical, HVAC and lift maintenance)*
	4.3 Explain the factors to be considered in developing a building services programme *(supporting the explanation with example/s from the learner's own experience or case studies that illustrate challenges from requirements and for implementation)*
	4.4 Explain the advantages and disadvantages of various ways of delivering buildings services maintenance *(including reactive and planned/preventative maintenance and in-house versus outsourced service delivery)*
	4.5 Explain how to implement and monitor a building services maintenance programme *(including condition surveys and forward maintenance plans)*
5. Understand how to manage staff, contractors and specialists	5.1 Explain how to manage staff, contractors and specialists to ensure the required level of service is delivered *(providing an*

	overview of appropriate management techniques)
6. Understand building management systems (BMS) and technology used to control or manage building services	6.1 Explain the scope and use of buildings management systems *(from basic systems of data capture to integrated systems that allow remote monitoring, diagnosis and service engineer call-out)* 6.2 Explain what other technologies can be used in controlling or managing building services *(supporting the explanation with examples, such as access control, time management systems, CCTV, equipment performance monitors, energy consumption monitors).* 6.3 Explain how BMS can be used to help deliver sustainability in facilities management *(no additional guidance)*
Unit expiry date	31st December 2020
Unit reference number	Y/601/1728
Link to National Occupational Standards	FM417

FM Professional Standards reference	FM functional area:	FM functional area component:
	Property Portfolio Management	Property and Asset Management

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
Building Maintenance Management by Barrie Chanter and Peter Swallow
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
FM World - www.fm-world.co.uk
www.bifm.org.uk
Facilities Management Journal - http://www.fmj.co.uk/

Unit FM4.18: Understanding space management 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 enables learners to develop their understanding of the strategies and objectives of space management including the management of changes in the use of accommodation and emerging new developments within a facilities management context.

Title:	Understanding space management for facilities managers
Level:	4
Credit value:	3

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand how to develop a strategy for space allocation in buildings	1.1 Describe the rationale behind the development of strategies for space allocation *(using example/s from the learner's own experience and/or case studies, and including cost considerations as well as issues such as optimal use of assets, employee retention, environmental impact and company brand)* 1.2 Explain the principles of space allocation and space management *(including reference to factors such as space to perform tasks, adequate through routes, clear exit routes, adequate light & ventilation, reflecting/rewarding rank)*

	1.3 Explain the relationship between space allocation and the relevant legislation and its impact on facilities management *(supporting the explanation with examples of current legislation rather than attempting to develop an exhaustive list)*
2. Understand the impact of structure and services	2.1 Explain the implications of structure and services on space use *(using example/s from the learner's own experience and/or case studies)*
3. Understand how to prepare briefs for space layouts	3.1 Explain the relationship between space allocation and the operational requirements of customers *(supporting the explanation with example/s from the learner's own experience and/or case studies, and including how space can be used to help or hinder occupational synergies, efficient working and organisational aspirations)*
	3.2 Describe the technology available to assist in planning and managing space and the scope and limits of its capabilities. *(providing example/s of available tools and showing how they help address the challenges of churn)*
4. Understand how to programme and manage changes in accommodation	4.1 Explain the processes that Facilities Managers should follow when changes in accommodation are being planned and implemented and communicated to customers and others *(including an overview of how general project management processes are applied in such cases, and the relevant channels of communication)*
	4.2 Explain the objectives that Facilities Managers should consider when changes in accommodation are being planned and implemented *(supporting the explanation with example/s from the learner's own experience and/or*

	case studies, and relating the objectives to cost, time, quality and compliance requirements)
5. Understand new developments in the use of space	5.1 Explain the current and emerging innovative ways of using building space and what that means for facilities management *(providing an overview of emerging patterns of working and their implications for facilities management, by reference to current journals and recommendations for best practice)*
Unit expiry date	31st December 2020
Unit reference number	R/601/1730
Link to National Occupational Standards	FM416

FM Professional Standards reference	FM functional area:	FM functional area component:
	Business Continuity and Compliance	Compliance
	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
Facilities Management Journal - http://www.fmj.co.uk/

Unit FM4.19: Understanding sustainability and environmental issues and their impact on 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 enables learners to develop their understanding of corporate responsibility and the importance of sustainability and environmental issues and how facilities management impacts on the environment. The unit also develops understanding of the principles and methods of waste management

Title:	Understanding sustainability and environmental issues and their impact on facilities management
Level:	4
Credit value:	3

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand sustainability and corporate responsibility	1.1 Explain the terms sustainability and corporate responsibility *(including the wider relationship between the organisation, its stakeholders and the community)* 1.2 Explain the legislation that is associated with sustainability and environmental issues *(supporting the explanation with examples of specific legislation (e.g. waste management) and of relevant broader legislation and agreements (e.g. building regulations, town & country planning, Kyoto)* 1.3 Explain the role and responsibility that a Facilities Manager has in supporting a

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	corporate responsibility policy *(supporting the explanation with examples of relationships (e.g. with employees, suppliers, neighbours, local community etc.) and of specific responsibilities (e.g. for ISO 14001, environmental management systems, Carbon Trust certification)*
2. Understand the impact of facilities management on the environment	2.1 Explain the range of impacts of facilities management activities on the environment *(supporting the explanation with examples (e.g. potential impacts on greenhouse gases, pollution, resource depletion, biodiversity) rather than trying to provide an exhaustive list)*
	2.2 Explain how the Facilities Manager can mitigate, reduce or manage the impact of their activities on the environment *(supporting the explanation with example/s from the learner's own experience and/or case studies)*
	2.3 Explain the environmental advantages and disadvantages inherent within the various resources utilised by Facilities Managers *(supporting the explanation with example/s from the learner's own experience and/or case studies and including how the same activity can have a positive and a negative impact)*
	2.4 Explain new and on-going developments in environmental management and explain how these may affect Facilities Managers *(using to up-to date reference sources and examples rather than trying to develop an exhaustive list)*
3. Understand how to manage waste and its safe disposal	3.1 Explain the principles of waste minimisation *(by reference to the 3R's – reduce, reuse, recycle)*
	3.2 Describe methods and systems used to manage waste *(using example/s from*

	the learner's own experience and/or case studies) 3.3 Identify the relevant legislation in relation to handling, transporting, treating and disposing of *waste (by reference to the same example/s as for the previous assessment criterion)*
4. Understand how to improve environmental awareness and responsibility	4.1 Explain how the Facilities Manager can influence uses of natural resources, consumption and emissions control to improve the environment *(supporting the explanation with example/s from the learner's own experience and/or case studies (e.g. monitoring consumption, promoting better use of space and assets, encouraging use of video conferencing), rather than trying to develop an exhaustive list)* 4.2 Explain how the Facilities Manager can increase awareness and involvement of staff, contractors and suppliers in relation to environmental policies and sustainability *(supporting the explanation with example/s from the learner's own experience and/or case studies (e.g. environmental committee, publicising initiatives, targets and results, including in senior management and supplier review agenda), rather than trying to develop an exhaustive list)*

Unit expiry date	31st December 2020	
Unit reference number	R/601/2134	
Link to National Occupational Standards	FM419	
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
www.sustainabilityinfm.org.uk
www.bifm.org.uk
FM World - www.fm-world.co.uk
Facilities Management Journal - http://www.fmj.co.uk/

Unit FM4.20: Understanding energy and utilities management and the impact on 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 enables learners to develop their understanding of energy and utilities management principles, processes and monitoring systems and how to implement an energy and utilities management policy**.**

Title:	Understanding energy and utilities management and the impact on facilities management
Level:	4
Credit value:	3

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand the principles of energy and utilities management	1.1 Describe the principles of energy and utilities management *(including drivers of for the management policies (e.g. , compliance, environmental impact, cost efficiency) and the methods used to evaluate the policies' effectiveness (e.g. monitoring, measurement, analysis of usage)* 1.2 Explain what is meant by renewable sources *(no additional guidance)* 1.3 Explain how sustainable building design impacts on energy efficiency of building performance *(supporting the explanation with example/s from the learner's own experience and/or case studies).*

	1.4 Explain the legislation affecting energy use and efficiency in buildings *(supporting the explanation with example/s of such legislation relevant to the learner's own experience and/or case studies, rather than trying to provide an exhaustive list)*
2. Understand how to monitor utilities efficiency of buildings	2.1 Explain how to establish utilities consumption targets 2.2 Explain how to measure utilities consumption against targets *(supporting the explanations required by both assessment criteria with example/s from the learner's own experience and/or case studies).*
3. Understand what is involved in the energy efficiency of buildings	3.1 Explain how to measure and monitor use of energy in a building *(see below)* 3.2 Explain how facilities management can identify energy efficiencies in the operation of a building *(see below)* 3.3 Describe how buildings can generate a percentage of their own power from renewable sources *(no additional guidance)* 3.4 Explain how factors in energy efficiency are considerations in sustainable building development *(supporting the explanation with examples, such as the efficient use of space, light and natural ventilation, and technologies such as can be used to reduce carbon emissions, energy consumption, solar gain)* 3.5 Explain how results from monitoring can be used to benchmark a building's energy performance for continual improvement *(see below)* *(supporting the explanations required by assessment criteria 3.1, 3.2 and 3.5 by reference to the same example or*

	examples used for the previous learning outcome)
4. Understand how to implement an energy and utilities management policy	4.1 Explain the contents of an energy and utilities management policy *(including statement of purpose, target setting, monitoring activities, record keeping, and assignment of responsibilities).* 4.2 Explain how to implement an energy and utilities management policy *(using example/s from the learner's own experience and/or case studies)*

Unit expiry date	31st December 2020	
Unit reference number	Y/601/2135	
Link to National Occupational Standards	FM418	
FM Professional Standards reference	FM functional area:	FM functional area component:
	Business Continuity and Compliance	Compliance
	Sustainability	Energy Management

Resources:

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.bifm.org.uk
FM World www.fm-world.co.uk
Facilities Management Journal http://www.fmj.co.uk/

Unit FM4.21: Understanding procurement and contract management 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 enables learners to develop their understanding of the principles, processes and scope of procurement, contracts and contract management

Title:	Understanding procurement and contract management in facilities management
Level:	4
Credit value:	3

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1.Understand procurement	1.1 Describe the basic principles of procurement *(including the rights and responsibilities of the buyers and of the sellers)* 1.2 Explain the processes and stages of the procurement of goods and services to support the facilities management function *(including agreeing requirements defining specifications, agreeing adjudication criteria, sourcing suppliers, issuing tenders, receiving and adjudicating tenders, short listing , negotiating, awarding contracts and declining other bids, initiating contracts, monitoring provision)*

	1.3 Explain the tendering and bid processes *(including the use of spend analysis, supplier/market analysis, expressions of interest, pre-qualification, approved tenderer lists, schedules, adjudication criteria, invitations to tender, responses to tenderers' questions, supplier open days, e-auctions, formal opening of tenders, adjudication processes, short listing, presentations, negotiations)*
	1.4 Explain how to select appropriate contracts and service specifications *(including the influence of factors such as the types of goods or services to be purchased, commodities or bespoke, input or output specification, value and duration of contract, lease or buy, purchase order, call off contract, JCT forms 2005 (replacing JCT 1998) for building contracts)*
	1.5 Explain how the management of the procurement process should be organised *(including the definition of roles, (specifier, user, buyer, budget holder), separation of powers, levels of authority, keeping of records)*
	1.6 Explain the principles of relevant legislation *(including the EU procurement process, OJEU, open competition, Office of Government Commerce (OGC), environmental standards, employment (Working Time Directive, Right to Work, Discrimination), Sale of Goods Act 1979, Supply of Goods and Services Act 1982, Unfair Contract Terms Act 1979)*
2. Understand different types of contract	2.1 Explain the different types of contracts *(including verbal contracts, purchase orders, call off contracts (enabling or framework contracts), industry standard forms, e.g.; JCT forms 2005, PPI/PPP)*

	2.2 Explain the advantages and disadvantages of different types of contracts for a range of goods and services *(relating the different types of contract explained for the previous assessment criterion to different types of goods and services)*
	2.3 Explain how to select the most appropriate procurement option that suits the contract type *(supporting the explanation with example/s from the learner's own experience or case studies)*
	2.4 Explain how to select the most appropriate contract type that suits the procurement of a particular good or service *(supporting the explanation with example/s from the learner's own experience or case studies)*
3. Understand the use of specifications and terms and conditions in the procurement of goods and services	3.1 Explain how specifications are drafted and used for procurement of goods and services *(no additional guidance)*
	3.2 Explain the benefits of writing well defined specifications. *(no additional guidance)*
	3.3 Explain how standard terms and conditions are used in the procurement of goods and services *(no additional guidance)*
	3.4 Explain the advantages and disadvantages of the standard terms and conditions *(including factors such as ease of management, dispute resolution, availability, time, familiarity, flexibility, clarity, precedent, equitable)*
4. Understand procurement costs	4.1 Explain the elements which may make up the cost of goods or services *(including raw material, labour, manufacture, packaging, transport,*

	consumables, cost of sales, excise duty, insurance, overheads, profit)
	4.2 Explain the factors to consider when evaluating a procurement decision *(including cost, reliability, capacity, reputation, cost, time, quality, compliance)*

Unit expiry date	31st December 2020	
Unit reference number	T/601/1736	
Link to National Occupational Standards	FM414	
FM Professional Standards reference	FM functional area:	FM functional area component:
	Business Continuity and Compliance	Compliance
	Procurement and Contract Management	Procurement
		Contract Management

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 - www.fm-world.co.uk

www.cips.org/
https://www.gov.uk/government/organisations/cabinet-office
https://www.gov.uk/tendering-for-public-sector-contracts

Unit FM4.22: Managing accessibility and inclusion and its impact on 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 enables learners to develop their understanding of the managing accessibility and inclusion and its impact on facilities management.

Title:	Managing accessibility and inclusion and its impact on facilities management
Level:	4
Credit value:	6

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand the range of perspectives of disability and inclusion	1.1 Evaluate the different models of disability *(Social and medical model of disability)* 1.2 Characterize the potential environmental, attitudinal and organizational barriers to access to services *(Historical treatment of disabled people, Access requirements of people with sensory, cognitive and physical impairments; permanent and temporary impairments (e.g. older people, pregnant women, children, people with health conditions etc), Access to & usability of buildings, spaces, services, information, Use of language and communicating with disabled people)*

	1.3	Analyse the different ways in which the design of services can affect someone's access to those services *(People's perceptions and experiences of the accessibility of space, Access requirements of people with sensory, cognitive and physical impairments; permanent and temporary impairments (e.g. older people, pregnant women, children, people with health conditions etc), Access to & usability of buildings, spaces, services, information, Use of language and communicating with disabled people)*
2. Understand the principles of inclusive design in the built environment	2.1	Analyse the characteristics of an inclusive environment *(CABE's principles of inclusive design)*
	2.2	Analyse the spatial considerations of an inclusive environment *(Ergonomics (e.g. reach, space, visual, acoustic, cognitive))*
	2.3	Evaluate the use of visual contrast, lighting and acoustics *(Ergonomics (e.g. reach, space, visual, acoustic, cognitive))*
	2.4	Evaluate the use of technology *(Use of technology (e.g. hearing enhancement systems, readers, trembler alerts))*
	2.5	Analyse access and egress requirements *(Vertical and horizontal access and egress (e.g. generic and Personal Emergency Evacuation Plans))*
3. Understand the legal and regulatory framework of access and inclusion	3.1	Analyse the way in which equality legislation protects disabled and older people *(Equality Act, Legislation relating to health and safety, emergencies and fire safety)*
	3.2	Analyse the way in which regulations influence inclusive design and the management of access *(Planning and building legislation and regulations)*

	3.3 Analyse the way in which technical standards, guidance and good practice influence inclusive design and the management of access *(British Standards (e.g. BS 8300) and industry standards and guidance, Legislation relating to health and safety, emergencies and fire safety, Sustainability, Corporate Social Responsibility (CSR) and Building Information Modelling (BIM))*
	3.4 Evaluate the Facility Manager's role, responsibilities and sphere of influence *(FM's duty of care)*
4. Understand the management of access and inclusion in the built environment	4.1 Explain how to ensure that facilities meet inclusion requirements *(Audit techniques)*
	4.2 Characterize the nature of barriers to services *(Risk assessment)*
	4.3 Identify potential ways of overcoming barriers to services *(Engagement of stakeholders (e.g. disabled people), Opportunities for change: maintenance, refurbishment, adjustments)*
	4.4 Explain how to analyse the feasibility of reasonable adjustments *(Scope of reasonable adjustments, Analysis of feasibility including commissioning services)*
	4.5 Explain the requirements of an emergency evacuation plan *(Evacuation requirements and planning, Access documentation)*

Unit expiry date	31st December 2020	
Unit reference number	A/506/9076	
FM Professional Standards reference	FM functional area:	FM functional area component:

	Property Portfolio Management	Managing Accessibility and Inclusion

Unit FM4.23 Supporting change initiatives in an organisation and manage the impact on 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 helps a learner to understand the reasons that lie behind change initiatives and to be able to put in place plans, processes, procedures and make the change a reality as well as supporting others through the change process.

Title:	Supporting change initiatives in an organisation and manage the impact on facilities management
Unit Ref:	T/508/6619
Level:	4
Credit value:	6
Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1.Understand the need for organisational change	1.1 Summarise the environment in which the organisation operates 1.2 Analyse the drivers (internal and external) requiring an organisation to change 1.3 Describe the different types of change 1.4 Describe how the facilities management function can be an agent for change 1.5 Assess the potential impact of the change on individuals 1.6 Outline the positive impact of change
2.Understand the reasons for resistance to change and the ways it can be ameliorated	2.1 Analyse reasons for resistance to change 2.2 Prepare a stakeholder analysis

	2.3 Evaluate strategies that can be used to address resistance to change
	2.4 Explain the importance of employee engagement in successful change programmes
	2.5 Explain how to communicate the reasons for change
3. Be able to plan for organisational change	3.1 Apply SMART (specific, measurable, realistic and time bound) objectives with individuals and teams
	3.2 Identify resources available to support plans for organisational change
	3.3 Describe techniques used for monitoring and evaluating change progress
Unit expiry date	31st December 2020
Unit reference number	T/508/6619

FM Professional Standards reference	Leadership and Management	Change Management

Unit FM4.24 : Innovation 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 helps a learner to understand the purpose and benefits of innovation within a business environment, to be able to identify and create opportunities through innovation in order to transform business.

Title:	Innovation in facilities management
Unit Ref:	M/508/6618
Level:	4
Credit value:	5

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1.Understand the purpose and benefit of innovation in a business environment	1.1 Evaluate the purpose of innovation as a way of staying competitive and offering new solutions 1.2 Describe the underlying culture within the organisation 1.3 Explain own responsibility in promoting the organisation's vision and helping to shape the culture 1.4 Explain how culture influences innovation 1.5 Describe how an innovative approach to facilities management can lead to transformation in an organisation *(Summarise the current and emerging political, economic, social, technological, environmental and legal (PESTEL) developments for the organisation)*

2. Be able to research ideas for new approaches and solutions within facilities management	2.1 Explain the purpose of reviewing existing services and ways of delivery
	2.2 Evaluate ways of reviewing existing services
	2.3 Analyse the characteristics of best practice and continuous improvement in facilities management
	2.4 Identify sources of information for new approaches and solutions
	2.5 Identify potential sources of ideas for new services and/or improvements
	2.6 Explain how to select and apply different methods for motivating people to generate and develop ideas
	2.7 Evaluate the usefulness and reliability of sources of information and ideas
3. Be able to develop innovative ideas for improvements to facilities management	3.1 Analyse the characteristics of best practice and continuous improvement in facilities management
	3.2 Generate options that meet agreed criteria
	3.3 Establish the implications of proposed improvements
	3.4 Estimate the resource investment needed to implement improvements
	3.5 Present the business case for innovation in accordance with organisational requirements
	(• *Definition and types of innovation (e.g. disruptive, continuous improvement)*
	• *Sources e.g. site-based innovation, subcontractors, supply chain, trade shows, competitors*
	• *Who should be involved in developing ideas*
	• *Improvement criteria*
	• *How ideas are filtered*
	• *Tools and processes for capturing ideas*
	• *Cost-benefit analysis*

	• *Implications: to the business, to customers, to staff (e.g. learning centres); to safety; to the environment; to society*
	• *How to develop and present a business case)*
4.Be able to implement innovative ideas in facilities management	4.1 Develop plans for the implementation of an idea that addresses all aspects of the proposed innovation
	4.2 Explain how to assess and manage risk when implementing new ideas
	4.3 Assign roles, responsibilities and resources in accordance with the plan
	4.4 Brief those affected by the innovation and its implementation
	4.5 Develop processes and procedures that ensure the efficient implementation and legacy of the innovation
	4.6 Explain the use of a range of tools and techniques to address problems and unexpected developments
	4.7 Evaluate different methods of monitoring the implementation of innovations
	(• Project planning and objective setting
	• *Training Needs Analysis (TNA)*
	• *6 Sigma (theory and principles)*
	• *Lean Engineering (theory and principles)*
	• *Operational Excellence (OPEX)*
	• *Problem solving techniques (e.g. root cause analysis)*
	• *Securing support by staff and experts for innovations*
	• *Deep Dive": in depth analysis of how services could be made more efficient (e.g. finance, procurement, equipment, staff deployment, inspection, quality etc)*
	• *Monitoring techniques)*

5. Be able to manage relationships in the implementation of innovative ideas in facilities management	5.1 Assess the impact of innovation
	5.2 Engage support and agreement for innovation
	5.3 Communicate the benefit from innovation
	5.4 Evaluate the potential of innovation to further relationships
	5.5 Analyse any contractual implications of innovation
	(• Value of client support for innovation and how to engage them *• When, why and how to engage clients and other stakeholders* *• Considerations to be taken into account in assessing the impact (e.g. their expectations, perception of value, impact on strategic intent)* *• Understanding clients' strategic and financial processes)* *• Impact on clients, their processes and contracts (e.g. financial implications (savings, enhanced efficiency, image/reputation)* *• Use of Contract Design and Management (CDM) tools and processes)*

Unit expiry date	31st December 2020	
Unit reference number	M/508/6618	
FM Professional Standards reference	FM functional area:	FM functional area component:
	Business Support Service Management	Service Innovation
	Leadership and Management	Change Management

Unit FM4.25: Building Information Modelling for 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 enables learners to develop an understanding of the scope and extent of the facilities management function and the range of associated services, the roles and responsibilities in different organisations and contexts as well as the importance of the contribution of facilities management in both societal and economic contexts

Title:	Building Information Modelling for Facilities Management
Unit Ref:	D/508/6615
Level:	4
Credit value:	6

Learning outcomes *A learner when awarded credit for this unit will:*	Assessment criteria *Assessment of this learning outcome will require a learner to demonstrate that they can:*
1. Understand the principles of building information modelling (BIM) for facilities management	1.1 Explain the definition and characteristics of building information modelling
	1.2 Assess the uses and users of the BIM process and building information models
	1.3 Assess the uses of building information models through the facilities management project life cycle and the importance of the Employers Information Requirements (EIR)
	1.4 Describe the different BIM software tools
	1.5 Explain the role of national standards in the BIM process and how BIM software helps support the process

	1.6 Analyse the features and uses of the National Building Specification (NBS) toolkit
	1.7 Analyse the challenges of data storage and file sharing
	(• Purpose of BIMs
	• Role of the Organizational Information Requirements (OIR) & Asset Information Requirements (AIR) leading to Employers Information Requirements (EIR) in defining what FM needs from the BIM process
	• Physical and functional characteristics of places
	• Definitions and dimensions of BIM levels 1 – 3 and other dimensions of BIMs (3D, 4D& 5D)
	• Uses and users of BIMs
	• Life cycle: design; construction; alterations; facilities management; demolition; environmental clean-up; supporting cost, construction and project management; facility operation
	• FM ownership of the EIR
	• Formats and networks of BIMs
	• PAS 1192 (parts 1 – 5)
	• Scope and characteristics of BIM software; non-proprietary software and open standards
	• Role and use of national BIM standards and Facility Condition Index (FCI))
2. Understand the implementation of building information modelling for facilities management	2.1 Describe the role of a BIM Manager *(Role: responsibilities; training; communications; workflow management)*
	2.2 Analyse the requirements of a facilities management-focused strategy for a BIM implementation plan (BIM plan inc. current assessment of working practices & changes; business case; implementation strategy, targets, programme, budget; quality criteria; commitment)

	2.3 Analyse the implications for training and development *(Implications for training, skills and development)*
	2.4 Assess the uses, benefits and limitations of software to monitor BIM implementation *(Implementation monitoring software e.g. buildSMART)*
	2.5 Analyse the functioning of clash detection systems *(Clash detection)*
	2.6 Analyse ways in which BIM facilitates the detection and resolution of issues during the construction phase *(Identification of location of discrepancies and vulnerabilities; Leite and Akinci)*
	2.7 Analyse the uses and benefits of 3D laser scanning for model development and validation
3. Understand the value of building information modelling to facilities management	3.1 Analyse the principles of evaluating options for facilities management *(Options for: space, equipment, products, lifecycles, costings, access (maintenance & repair) etc)*
	3.2 Analyse the information needs of users and uses of building information models for different purposes *(FM's information requirements in the operational phase and for what purposes: e.g. fire escapes, maintenance, asset replacement etc)*
	3.3 Assess the suitability of different building information models for different types of facilities management projects *(Suitability: e.g. life of products, age & quality of building fabric)*
	3.4 Analyse the uses and benefits of "Soft Landings" *(Soft Landings: a process that facilitates handovers; involvement of FM from the start; interface of different aspects of BIM/FM)*
Unit expiry date	31st December 2020

Unit reference number	D/508/6615	
FM Professional Standards reference	TBC	TBC