



BIFM Qualifications Specification

BIFM Level 5 Award in Facilities Management

BIFM Level 5 Certificate in Facilities Management

BIFM Level 5 Diploma in Facilities Management

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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 Qualifications and Credit Framework

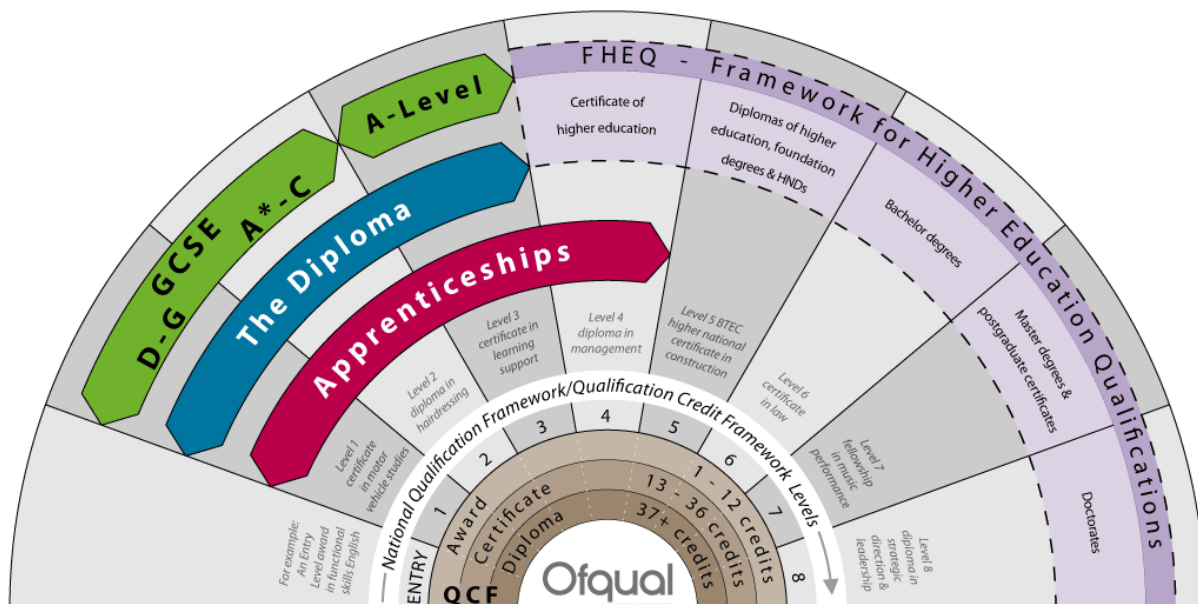
The BIFM qualifications in Facilities Management are at Levels 4 to 7 in the Qualifications and Credit Framework (QCF) and have been developed to provide professional work-related qualifications in the facilities management industry.

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

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

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

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



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

The credit value is based on:

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

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

Structure of the Qualifications (Rules of Combination)

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

Qualification titles covered by this specification

BIFM Level 5 Award in Facilities Management	501/2130/3
BIFM Level 5 Certificate in Facilities Management	500/8349/1
BIFM Level 5 Diploma in Facilities Management	500/8347/8

The above shows the qualification title and the reference 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 5 Award in Facilities Management

The BIFM Level 5 Award in Facilities Management is a 120-hour qualification (12 credits) 49 guided learning 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			
FM5.02	Organisational and facilities management strategy	6	A/601/1768
Optional Units			
FM5.01	Facilities management development and trends	6	K/601/1765
FM5.03	Managing people in facilities management	8	T/601/1770
FM5.04	Risk management in facilities management	6	L/601/1807
FM5.05	Financial management in facilities management	6	R/601/1808
FM5.06	Facilities management support services operations	6	Y/601/1809
FM5.07	Managing health and safety in facilities management	6	Y/601/1812
FM5.08	Performance measurement in facilities management	3	H/601/1814
FM5.09	Providing leadership & management in facilities management	4	H/601/1816
FM5.10	Managing Information and knowledge in facilities management	3	F/601/1819
FM5.11	Managing facilities management projects	6	T/601/1820
FM5.12	Managing negotiations in facilities management	3	L/601/1824
FM5.13	Managing relationships with suppliers and specialists in facilities management	6	Y/601/1826
FM5.14	Quality management in facilities management	6	D/601/1827
FM5.15	Customer service in facilities management	3	K/601/1829
FM5.16	Property and asset management for facilities managers	6	H/601/1831
FM5.17	Property, fabric and building services maintenance for facilities managers	6	A/601/1835
FM5.18	Space management for facilities managers	3	J/601/1837
FM5.19	Sustainability and environmental management and the impact on facilities management	4	R/601/1839
FM5.20	Energy and utilities management and the impact on facilities management	3	R/601/1842
FM5.21	Managing procurement and contracts in facilities management	4	H/601/1845
FM5.22	Implementing change in an organisation and managing the impact on facilities management	4	T/601/1848

Duration	Completion within two years of registration
Assessment	<p>Assessment could include:</p> <ul style="list-style-type: none"> > a requirement for the application of knowledge to a Facilities Management work-based scenario whenever possible > incorporation of a variety of 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 or a BIFM Level 4 Qualification in Facilities Management

BIFM Level 5 Certificate in Facilities Management

The BIFM Level 5 Certificate in Facilities Management is a 240-hour qualification (24 credits) 98 guided learning hours and consists of two mandatory units (14 credits) plus additional optional units in order to achieve a minimum of 24 credits in total.

Ref	Unit Title	Credits	Unit No.
Mandatory Units			
FM5.02	Organisational and facilities management strategy	6	A/601/1768
FM5.03	Managing people in facilities management	8	T/601/1770
Optional Units			
FM5.01	Facilities management development and trends	6	K/601/1765
FM5.04	Risk management in facilities management	6	L/601/1807
FM5.05	Financial management in facilities management	6	R/601/1808
FM5.06	Facilities management support services operations	6	Y/601/1809
FM5.07	Managing health and safety in facilities management	6	Y/601/1812
FM5.08	Performance measurement in facilities management	3	H/601/1814
FM5.09	Providing leadership & management in facilities management	4	H/601/1816
FM5.10	Managing Information and knowledge in facilities management	3	F/601/1819
FM5.11	Managing facilities management projects	6	T/601/1820
FM5.12	Managing negotiations in facilities management	3	L/601/1824
FM5.13	Managing relationships with suppliers and specialists in facilities management	6	Y/601/1826
FM5.14	Quality management in facilities management	6	D/601/1827
FM5.15	Customer service in facilities management	3	K/601/1829
FM5.16	Property and asset management for facilities managers	6	H/601/1831
FM5.17	Property, fabric and building services maintenance for facilities managers	6	A/601/1835
FM5.18	Space management for facilities managers	3	J/601/1837
FM5.19	Sustainability and environmental management and the impact on facilities management	4	R/601/1839
FM5.20	Energy and utilities management and the impact on facilities management	3	R/601/1842
FM5.21	Managing procurement and contracts in facilities management	4	H/601/1845
FM5.22	Implementing change in an organisation and managing the impact on facilities management	4	T/601/1848

Duration	Completion within two years of registration
Assessment	<p>Assessment could include:</p> <ul style="list-style-type: none"> > a requirement for the application of knowledge to a Facilities Management work-based scenario whenever possible > incorporation of a variety of 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 or a BIFM Level 4 Qualification in Facilities Management

BIFM Level 5 Diploma in Facilities Management

The BIFM Level 5 Diploma in Facilities Management is a 480-hour qualification (48 credits) 196 guided learning hours and consists of five mandatory units (32 credits) plus additional optional units in order to achieve a minimum of 48 credits in total.

Ref	Unit Title	Credits	Unit No.
Mandatory Units			
FM5.01	Facilities management development and trends	6	K/601/1765
FM5.02	Organisational and facilities management strategy	6	A/601/1768
FM5.03	Managing people in facilities management	8	T/601/1770
FM5.04	Risk management in facilities management	6	L/601/1807
FM5.05	Financial management in facilities management	6	R/601/1808
Optional Units			
FM5.06	Facilities management support services operations	6	Y/601/1809
FM5.07	Managing health and safety in facilities management	6	Y/601/1812
FM5.08	Performance measurement in facilities management	3	H/601/1814
FM5.09	Providing leadership & management in facilities management	4	H/601/1816
FM5.10	Managing Information and knowledge in facilities management	3	F/601/1819
FM5.11	Managing facilities management projects	6	T/601/1820
FM5.12	Managing negotiations in facilities management	3	L/601/1824
FM5.13	Managing relationships with suppliers and specialists in facilities management	6	Y/601/1826
FM5.14	Quality management in facilities management	6	D/601/1827
FM5.15	Customer service in facilities management	3	K/601/1829
FM5.16	Property and asset management for facilities managers	6	H/601/1831
FM5.17	Property, fabric and building services maintenance for facilities managers	6	A/601/1835
FM5.18	Space management for facilities managers	3	J/601/1837
FM5.19	Sustainability and environmental management and the impact on facilities management	4	R/601/1839
FM5.20	Energy and utilities management and the impact on facilities management	3	R/601/1842
FM5.21	Managing procurement and contracts in facilities management	4	H/601/1845
FM5.22	Implementing change in an organisation and managing the impact on facilities management	4	T/601/1848

Duration	Completion within two years of registration
Assessment	Assessment could include: <ul style="list-style-type: none"> > a requirement for the application of knowledge to a Facilities Management work-based scenario whenever possible > incorporation of a variety of 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 or a BIFM Level 4 Qualification in Facilities Management

Level 5 Ofqual Descriptor

Achievement of Level 5 Qualifications reflects the ability to identify and use relevant understanding, methods and skills to address broadly-defined, complex problems. It includes taking responsibility for planning and developing courses of action as well as exercising autonomy and judgement within broad parameters. It also reflects understanding of different perspectives, approaches or schools of thought and the reasoning behind them.

Key features

The BIFM professional qualifications are vocational programmes of study. They are linked, where appropriate, to the BIFM competences 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

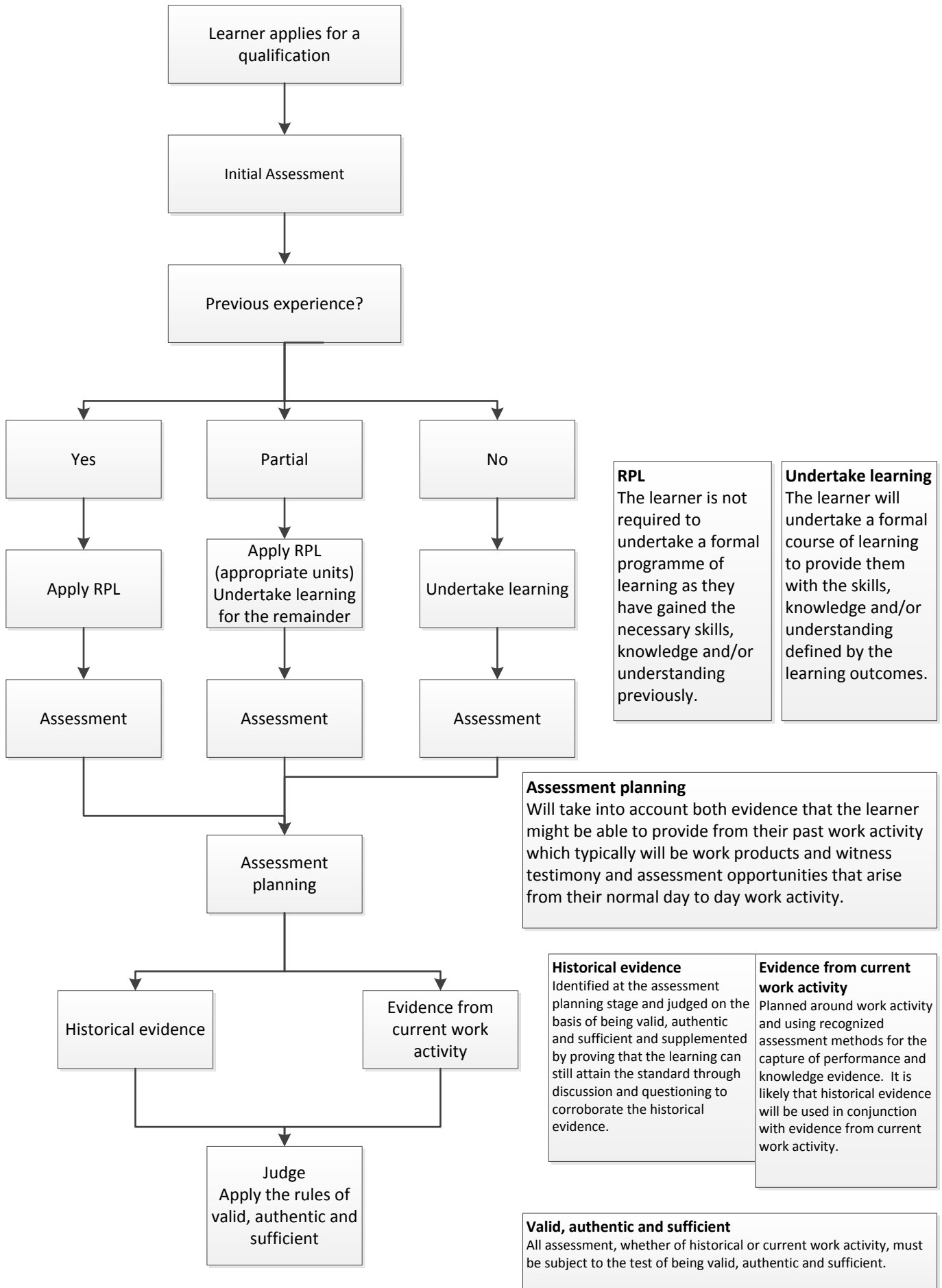
centres and should ensure coverage of all criteria in the unit, as set out in the unit assessment criteria mapping grid (see Assessment Guidance manual). Criteria should be clearly indicated on each assignment to provide a focus for learners (for transparency and to help ensure that feedback is specific 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*)



Unit FM5.01 Facilities management development and trends

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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to undertake an analytical overview of the scope and context of facilities management, including the impact of change, development and innovation on facilities management practices.

Title:	Facilities management development and trends	
Level:	5	
Credit value:	6	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Understand how the scope and extent of the facilities management industry has changed	1.1 Review the changes and developments within different aspects of the facilities management function <i>(no additional guidance)</i> 1.2 Analyse the changing contexts in which facilities management services are provided <i>(by reference to specific contexts such as CSR, security, economic pressure & strategy, rather than by trying to develop an exhaustive list)</i> 1.3 Analyse the changing relationships between the facilities management function and other business functions <i>(by reference to specific business functions such as core activity, business continuity, procurement & strategy, rather than by trying to develop an exhaustive list)</i>	

<p>2. Understand the importance of innovation and change in delivering services within facilities management</p>	<p>2.1 Review the relevance and application of the latest developments to the services provided within facilities management. <i>(using example/s from the learner's own experience and/or case studies)</i></p> <p>2.2 Review innovations in office and building space management <i>(no additional guidance)</i></p>
<p>3. Understand the changing facilities management roles and responsibilities across different organisations</p>	<p>3.1 Analyse the ways in which the key management functions within facilities management are changing <i>(by reference to business drivers, such as cost efficiency, contribution to bottom line, image, risk containment, compliance, sustainability, business continuity)</i></p> <p>3.2 Review the implications of these changes for the various roles and responsibilities that a Facilities Manager could have within different organisations and at different levels <i>(including operational, tactical and strategic levels of management and across public, private and not-for-profit business sectors)</i></p>
<p>4. Understand the impact of social and economic changes on facilities management</p>	<p>4.1 Analyse the ways in which the principles of corporate responsibility are applied in <i>different facilities management contexts. (no additional guidance)</i></p> <p>4.2 Develop a strategy to ensure these principles are operating within the facilities management function <i>(using an example from the learner's own experience and/or a case study)</i></p>
<p>Unit expiry date</p>	<p>31st October 2017</p>
<p>Unit reference number</p>	<p>K/601/1765</p>
<p>Details of the relationship between the unit and other standards or curricula (if appropriate)</p>	<p>BIFM Competence 1: The Business Organisation</p>

Resources:

Facilities Management: Innovation and Performance by Keith Alexander, Brian Atkin, Jan Bröchner, and Tore Haugen
Infrastructure and Facilities Management by Bev Nutt and Stephen Bennett
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, Second Edition by Ed Bas, Heinz P. Bloch, Allan R. Budris, and Joseph F. Gustin
Facilities Management by David M. Stipanuk and Harold Roffmann
Facilities Change Management in Context by Professor Edward Finch
Croner Facilities Management
FM World - www.fm-world.co.uk
www.bifm.org.uk
Facilities Management Journal - www.mpp.co.uk
Facilities Management Excellence - www.fmxmagazine.co.uk
FMUK - www.fmuk-online.co.uk
Facilities - www.emeraldinsight.com/products/journals/journals.htm?id=f
Facilities Management - www.lnbconnect.co.uk/Compliance/Facilities-Management.html

Unit FM5.02 Organisational and facilities management strategy

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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

The unit enables a learner to analyse, implement, review and update the facilities management strategy based on an understanding of its relationship with organisational strategies and effectively communicate the facilities management strategy to a wide audience.

Title:	Organisational and facilities management strategy	
Level:	5	
Credit value:	6	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Understand how organisations develop and review their business strategy	1.1 Explain how the business strategy is developed and put into practice <i>(including how the drivers and strategic objectives of the organisation shape the strategy, and the roles of communication and measurement in implementation)</i> 1.2 Evaluate the impact of the business strategy on the services offered by the facilities management team <i>(using example/s from the learner's own experience and/or case studies)</i>	
2. Understand approaches to developing facilities management strategies	2.1 Analyse the context in which facilities management services are provided and compare different approaches to developing an appropriate strategy. <i>(including contexts such as location, restructuring, compliance, technology and resourcing (in-house versus outsourcing), and comparing the merits of standard tools such as</i>	

	<p><i>PESTLE and SWOT)</i></p> <p>2.2 Analyse the relationship between organisational and facilities management strategies and the ways in which they influence each other. <i>(using example/s from the learner's own experience and/or case studies)</i></p>
<p>3. Be able to develop and implement a facilities management strategy</p>	<p>3.1 Develop a facilities management strategy which relates to and is consistent with the overall business strategy and core business operation of an organisation <i>(using an example from the learner's own experience and/or a case study)</i></p> <p>3.2 Describe how the facilities management strategy will be implemented <i>(including communication methods and the use of standard tools such as balanced scorecards and SLA's/KPI's)</i></p>
<p>4. Be able to review and identify the need to change the facilities management strategy</p>	<p>4.1 Use a variety of evaluation and review techniques to measure the effectiveness of the facilities management strategy <i>(applying standard evaluation tools, such as Deming, RAG and benchmarking, to the strategy related to the previous learning outcome)</i></p> <p>4.2 Analyse changes in an organisation that may require the facilities management strategy to be changed <i>(including how changes, such as to operational requirements, market, legislation and compliance, could require changes to be made to the strategy related to the previous learning outcome)</i></p>
<p>5. Be able to communicate the facilities management strategy effectively</p>	<p>5.1 Communicate with a wide range of target audiences about the facilities management strategy <i>(see below)</i></p> <p>5.2 Use appropriate methods to communicate a variety of <i>(see below)</i></p> <p>5.3 Evaluate the methods used to determine the level of understanding by recipient audiences <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The target audiences should include different types of stakeholder. The communication methods chosen should take into account both the nature of the messages and the different types of</i></p>

	<i>stakeholder. The evaluation of those methods should include the use of standard feedback evaluation tools.)</i>
Unit expiry date	31 st October 2017
Unit reference number	A/601/1768
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 1: The Business Organisation 1.5 & 1.9

Resources:

Business Strategy: An Introduction by David Campbell, George Stonehouse, and Bill Houston
 Total Facilities Management by Brian Atkin and Adrian Brooks
 Facilities Management Journal - www.mpp.co.uk
 Facilities Management Excellence - www.fmxmagazine.co.uk
 FM World - www.fm-world.co.uk
www.bifm.org.uk

Unit FM5.03 Managing people 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to review, develop and implement human resource management strategies from recruitment through to exit, in compliance with employment legislation.

Title:	Managing people in facilities management	
Level:	5	
Credit value:	8	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Be able to undertake and review human resource planning in a facilities management context	1.1 Identify various approaches to workload planning and work allocation (<i>no additional guidance</i>) 1.2 Evaluate their effectiveness within the context of an organisation's overall strategy (<i>relating the approaches identified for assessment criterion 1.1 to an example from the learner's own experience and/or a case study</i>)	
2. Be able to review and improve processes for selecting and recruiting appropriate people	2.1 Evaluate the extent to which an organisation's process enables the Facilities Manager to recruit the right people with the right skills, experience and approach for the role in question (<i>using an example from the learner's own experience and/or a case</i>)	

	<p><i>study)</i></p> <p>2.2 Analyse and develop selection criteria to ensure the right people are recruited within facilities management (<i>no additional guidance</i>)</p> <p>2.3 Analyse the strengths and weaknesses in the recruitment process and make recommendations for change (<i>by reference to the example related to assessment criterion 2.1, and explaining how the different steps in the process can be optimised</i>)</p>
<p>3. Be able to use and review appropriate processes to manage staff retention</p>	<p>3.1 Analyse appropriate theories, principles and practices for motivating and retaining staff (<i>no additional guidance</i>)</p> <p>3.2 Apply appropriate theories, principles and practice to motivating and retaining staff and review their effectiveness (<i>relating the analysis provided for the assessment criterion above to the learner's own experience</i>)</p> <p>3.3 Evaluate the application of the dynamics of reward and recognition within a facilities management function (<i>relating different methods of reward and recognition, and their effects on staff motivation, to the learner's own experience</i>)</p> <p>3.4 Evaluate the extent to which they are successful (<i>as for the previous assessment criterion</i>)</p> <p>3.5 Analyse ways to develop staff (<i>including different reasons for developing staff and different methods of doing so</i>)</p> <p>3.6 Analyse ways to promote a learning culture within an organisation (<i>including how different ways of promoting a learning culture can contribute to personal development needs and organisational aims</i>)</p>
<p>4. Be able to use and review appropriate processes to manage staff exit</p>	<p>4.1 Analyse the reasons why staff leave and review implications (<i>no additional guidance</i>)</p> <p>4.2 Investigate the application of succession planning including its benefits (<i>including an explanation of succession planning and its purpose, and an analysis of benefits such as</i></p>

	<p><i>the effects on staff motivation, workload planning and business continuity)</i></p> <p>4.3 Investigate skill transference within the working environment including its benefits. <i>(including an explanation of skill transference and how this can be achieved, and an analysis of benefits such as the effects on personal development, succession planning and headcount)</i></p> <p>4.4 Evaluate the effectiveness of disciplinary and grievance procedures within an organisation <i>(including the steps required within disciplinary and grievance procedures, the benefits of the correct procedures, and the implications of failing to do so)</i></p>
<p>5. Be able to manage and monitor staff performance in a facilities management context</p>	<p>5.1 Apply the principles of staff monitoring and performance appraisal in a facilities management context <i>(relating these principles to example/s from the learner's own experience and/or case studies)</i></p> <p>5.2 Analyse their impact on productivity and recruitment costs <i>(using example/s from the learner's own experience and/or case studies and including reference to the costs and benefits of appraisal processes)</i></p> <p>5.3 Analyse methods used for improving team and individual performance <i>(using example/s from the learner's own experience and/or case studies)</i></p> <p>5.4 Explain how training and development is used to support improvement in performance <i>(including how to use a systematic approach from the identification of training and development needs through to the provision of support for improved performance)</i></p>
<p>6. Understand the importance of good communication methods within people management</p>	<p>6.1 Analyse different communication methods for different situations <i>(no additional guidance)</i></p> <p>6.2 Review the effectiveness of the communication methods within a range of different situations <i>(using example/s from the learner's own experience and/or case studies)</i></p>

<p>7. Be able to manage stress in the workplace</p>	<p>7.1 Analyse the extent and causes of work-related stress (<i>making reference to Health & Safety Executive information and statistics</i>)</p> <p>7.2 Propose ways of creating an organisational culture that will minimise stress levels (<i>relating the analysis prepared for the previous assessment criterion to example/s from the learner's own experience and/or case studies</i>)</p> <p>7.3 Explain how to manage own and staff stress issues (<i>relating current best practice to example/s from the learner's own experience and/or case studies</i>)</p>
<p>8. Understand the implications of compliance and non compliance with the key legislation</p>	<p>8.1 Analyse and evaluate the implications and impact of legislation relating to employment upon an organisation (<i>including both legal and other possible implications of non-compliance</i>)</p>
<p>Unit expiry date</p>	<p>31st October 2017</p>
<p>Unit reference number</p>	<p>T/601/1770</p>
<p>Details of the relationship between the unit and other standards or curricula (if appropriate)</p>	<p>BIFM Competence 7: Human Resources Management</p>

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
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 & Manangement
Harvard Business Review on Finding & 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
BIFM/People Management Forum
FM World - www.fm-world.co.uk
Workplacelaw - www.workplacelaw.net
People Management - <http://www.peoplemanagement.co.uk/pm/>

Unit FM5.04 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to develop a risk management policy, establish risk criteria and improve and review the risk management process and strategy.

Title:	Risk management in facilities management	
Level:	5	
Credit value:	6	
Learning Outcome	Assessment Criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Be able to develop and disseminate a risk management policy and culture within the organisation	1.1. Develop a risk management policy setting out clear responsibilities for risk management at different levels <i>(relating categories and levels of risk to organisational levels within the organisation)</i> 1.2. Develop a strategy to communicate the policy across the organisation and to other relevant parties <i>(including methods appropriate to two-way communication with staff at different levels within the organisation and with the other parties)</i> 1.3. Produce a strategy to develop an organisational culture in which people are risk	

	<p>aware <i>(including methods to encourage, confirm and reward risk awareness at different levels within the organisation)</i></p>
<p>2. Be able to establish and review risk criteria for an organisation</p>	<p>2.1. Establish the risk criteria for an organisation taking account of the views of relevant people across an organisation and stakeholders <i>(for different categories in a typology of risk relevant to the organisation)</i></p> <p>2.2. Review and update the risk criteria for an organisation <i>(including describing and justifying the timetables and methods used to maintain the criteria established for the different categories of risk)</i></p>
<p>3. Be able to review and evaluate organisational activities and the potential risks that might emerge</p>	<p>3.1. Determine the review and updating process <i>(including describing and justifying the timetables and methods used to update the evaluation of specific risks)</i></p> <p>3.2. Evaluate current and planned organisational activities and identify potential risks associated with these <i>(including risks from the external environment as well as risks from the organisation's internal environment)</i></p> <p>3.3. Analyse the nature of these potential risks, their probability of occurrence and possible consequences for the facilities management function and an organisation <i>(no additional guidance)</i></p>
<p>4. Be able to manage and improve the risk management process in an organisation</p>	<p>4.1. Produce a risk profile of an organisation taking account of the risk criteria and other relevant information <i>(using the risk criteria and potential risks established and evaluated for the previous learning outcomes)</i></p> <p>4.2. Suggest practices to ensure senior management commitment to the risk management process <i>(with reference to the risk management policy related to the earlier learning outcome)</i></p>

	<p>4.3. Identify the resources that need to be allocated across an organisation to support and enable effective risk management <i>(to provide for the analytical and consultative processes referred to for the earlier learning outcomes, as well as for establishing and maintaining arrangements for disaster recovery and business continuity)</i></p> <p>4.4. Review and evaluate the effectiveness of the risk management process in an organisation, identifying potential improvements and making changes where necessary <i>(by reference to changing needs as well as cost-effectiveness, and including the risk management policy, the arrangements to establish risk criteria, the arrangements for the evaluation of potential risks, and the strategies chosen to address those risks that related to the earlier learning outcomes)</i></p>
<p>5. Be able to review the effectiveness of actions being taken to reduce risk and maintain business continuity</p>	<p>5.1. Collect and evaluate information from across an organisation on how identified risks have been or are being dealt with, including contingency plans which have been put in place <i>(using methods to investigate the relevant staff's awareness, competence and/or application of the relevant provision in the organisation)</i></p> <p>5.2. Review and update strategies for dealing with threats to business continuity and the robustness of disaster recovery plans <i>(by reference to changing needs as well as cost-effectiveness, and describing and justifying the timetables and methods used to review the strategies and plans in the organisation)</i></p>
<p>Unit expiry date</p>	<p>31st October 2017</p>
<p>Unit reference number</p>	<p>L/601/1807</p>

Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 3: Risk Management
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Resources:

Geohazard Risk Management for Linear Facilities (Springer Praxis Books / Environmental Sciences) by Michael Porter, Matthias Jakob, and Wayne Savigny
 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
 Corporate Risk Management by Tony Merna and Dr. Faisal F. Al-Thani
 Risk Management: 10 Principles by Jacqueline Jeynes
 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 Definitive Handbook of Business Continuity Management by Andrew Hiles and Peter Barnes
 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, Fifth Edition 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 - www.mpp.co.uk
 Facilities Management Excellence - www.fmxmagazine.co.uk

Unit FM5.05 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to apply the principles of financial management and financial policies to facilities management. To effectively manage budgets and cash flow and to prepare financial cases.

Title:	Financial management in facilities management	
Level:	5	
Credit value:	6	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Be able to understand the principles and practices of management accounting to facilities management	1.1 Describe management accounting techniques which support the facilities management process (<i>including return on capital employed, return on investment, internal rate of return discounted cash flow, asset values, balance sheets, profit and loss accounts, budget control and reporting, and accrual management</i>) 1.2 Describe the financial systems and processes used for the effective management of facilities management budget (<i>including accounts payable, accounts receivable, cash flow, budget coding and monitoring, capital and revenue spend profiling, asset registers</i>)	
2. Be able to understand sound financial policies within area of	2.1 Explain the principles of financial auditing (<i>including 'true and fair' probity,</i>	

<p>responsibility</p>	<p><i>conformance and accuracy)</i></p> <p>2.2 Describe how these principles are applied within own area of responsibility (<i>see below</i>)</p> <p>2.3 Review the financial implications of using codes of ethics in the context of corporate responsibility (<i>see below</i>)</p> <p>2.4 Make suitable adjustments to improve good practice and transparency (<i>see below</i>)</p> <p>2.5 Explain how a true and fair view of assets, liabilities, profits and costs can be presented (<i>see below</i>)</p> <p><i>(The second to fifth assessment criteria for this learning outcome can be addressed by reference to practice at an organisation where the learner works or has worked in the past. The principles of financial auditing should be related to process such as the use of levels of authority, devolved authority and sample checking. The implications of using codes of ethics should be related to concerns such as the avoidance of fraud & waste, ensuring best value for money, avoidance of financial penalties (fines) and maintaining reputation. The recommended adjustments and the explanation of how to present a true and fair view should be related to the management accounting techniques and financial systems described in relation to the previous learning outcome.)</i></p>
<p>3. Be able to manage and review capital and revenue budgets in a facilities management context</p>	<p>3.1 Prepare revenue budgets (<i>see below</i>)</p> <p>3.2 Review and manage revenue budgets (<i>see below</i>)</p> <p>3.3 Apply the techniques used by facilities managers to acquire capital budgets (<i>see below</i>)</p> <p>3.4 Set capital budgets. (<i>no additional guidance</i>)</p> <p>3.5 Review and manage capital budgets (<i>see below</i>)</p> <p>3.6 Explain the tools of financial appraisal and how these are used to inform financial management and budgetary decisions (<i>see</i></p>

	<p><i>below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The management of both revenue and capital budgets should take account of issues such as the lag between committed spend and payment, the use of stage payments and retentions, seasonal effects, and tracking of spend and savings against individual projects. The tools used to inform financial management and budgetary decisions should include examples such as whole life costing, discounted cash flow, net present value, internal rate of return, and return on capital employed.)</i></p>
<p>4. Be able to manage cash flow</p>	<p>4.1 Apply the principles, techniques and processes of cash-flow projections to manage the flow of cash within the facilities management business cycle <i>(see below)</i></p> <p>4.2 Apply the principles, techniques and processes in the management of cash flow for contracts and projects <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The principles, techniques and processes should include the raising and processing of purchase orders, authorisation of payments, accrual management, stock management, flexing of people, resources and budgets, and revenue protection. Their application should take account of the business case and the impact of time passing (eg, on project slippage, and on contracts that cover more than one financial year).)</i></p>
<p>5. Be able to prepare financial cases</p>	<p>5.1 Identify and apply the principles and techniques to prepare financial cases <i>(see below)</i></p> <p>5.2 Prepare financial cases to secure required approvals <i>(see below)</i></p> <p><i>(Both of the assessment criteria for this learning outcome can be addressed by an</i></p>

	<i>exercise based on practice at an organisation where the learner currently works or has worked in the past. The financial case should include analyses such as whole life costing, cost/benefit, strategic fit, next best alternative, and hard/soft estimates.)</i>
Unit expiry date	31 st October 2017
Unit reference number	R/601/1808
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 17: Financial Management

Resources:

Essentials of Financial Risk Management (Essentials Series) by Karen A. Horcher
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: 2 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
Fundamentals of Financial Management, Concise Edition by Eugene Brigham and Joel Houston
Financial & Management Accounting by Pauline Weetman
Financial Management: Principles and Applications by Sheridan Titman, John D. Martin, and Arthur J. Keown
Guide to Setting Budgets and Managing Cashflows, A by Jennifer Rhodes
www.icaew.co.uk
www.acca.org.uk

Unit FM5.06 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to develop and manage existing and new support services operations and review their effectiveness within a facilities management context.

Title:	Facilities management support services operations
Level:	5
Credit value:	6
Learning outcomes	Assessment criteria
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>
1. Understand how to review and evaluate support services	<p>1.1 Undertake a review of the current support services provision within a facilities management context <i>(see below)</i></p> <p>1.2 Undertake a needs analysis of those who use or have a stake in the support services provision <i>(see below)</i></p> <p>1.3 Analyse and evaluate options for providing the services <i>(see below)</i></p> <p>1.4 Make recommendations for any change to the provision of support services <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The support services considered should include hard, soft, strategic, technical and customer support services. The needs analysis should</i></p>

	<p><i>include all relevant stakeholders. The evaluation of options should include benefit and risk analyses. And the recommendations should be justified by reference to factors such as the business case, mobilisation strategy, and risk analysis.)</i></p>
<p>2. Be able to manage and review the performance of support services</p>	<p>2.1 Describe the mechanisms for managing employees and/or contractors in the delivery of support services. <i>(including mechanisms relevant to management and continuous improvement in different areas such as HR, contracts, H&S, P&P, compliance, CSR, benchmarking and measurement)</i></p> <p>2.2 Review how employees and/or contractors are managed and monitored within an organisation and evaluate the extent to which the required standards are being met <i>(relating the mechanisms described in relation to the assessment criterion above to example/s from the learner's own experience and/or case studies)</i></p> <p>2.3 Use information from the review to make recommendations for improved performance <i>(no additional guidance)</i></p>
<p>3. Understand how to review the delivery of support services in compliance with health and safety legislation</p>	<p>3.1 Review and evaluate the effectiveness of the delivery of the support services ensuring compliance with the relevant health and safety legislation <i>(using example/s from the learner's own experience and/or case studies)</i></p>
<p>4. Understand how to monitor and review budgets related to the provision of a range of support services</p>	<p>4.1 Review the effectiveness of the systems used for monitoring and reviewing support services budgets <i>(using example/s from the learner's own experience and/or case studies, and including the systems' efficiency with respect to the capture of financial information, and the ease of use of the reports)</i></p> <p>4.2 Analyse budget variation over time and evaluate the options used for reconciliation and their impact on the provision of the support services. <i>(using example/s from the learner's own experience and/or case studies, and including options for redress such as amendments to the service provision)</i></p>

	<i>and contractual recompense)</i>
Unit expiry date	31st October 2017
Unit reference number	Y/601/1809
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 14: Support Services Operations

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 - www.purplecowmedia.net
Facilities Management Journal - www.mpp.co.uk
Facilities Management Excellence - www.fmxmagazine.co.uk

Unit FM5.07 Managing health and safety 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to manage health and safety in the workplace, develop and review health and safety policies and promote a proactive health and safety culture in compliance with legislative requirements, within a facilities management context.

Title:	Managing health and safety in facilities management	
Level:	5	
Credit value:	6	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Understand the legislative framework for health and safety in the workplace in a facilities management context	1.1 Explain where and how to identify personal responsibilities and liabilities under health and safety legislation <i>(with reference to the Health & Safety at Work Act (1974): Duties of employees, and to the Health & Safety Executive (HSE) website and publications)</i> 1.2 Explain where and how to identify organisational responsibilities and liabilities under health and safety legislation <i>(with reference to the same sources as for the assessment criterion above)</i> 1.3 Identify the relevant regulations, guidelines and codes of practice <i>(using example/s from the learner's own experience and/or case studies, rather than by trying to develop an</i>	

	<p><i>exhaustive list).</i></p> <p>1.4 Explain how and why it is important to keep up to date with legislation and other health and safety developments (<i>including the legal implications of non-compliance, and other risks and potential benefits for the business</i>)</p>
<p>2. Develop, monitor and review health and safety policies and procedures</p>	<p>2.1 Develop a written health and safety policy statement and procedure (<i>see below</i>)</p> <p>2.2 Explain the relationship between health and safety and an organisation's overall business strategy (<i>see below</i>)</p> <p>2.3 Explain how to establish a system for monitoring, measuring and reporting your organisation's overall health and safety performance (<i>see below</i>)</p> <p>2.4 Identify the type of resources required to support an organisational approach to health and safety (<i>see below</i>)</p> <p>2.5 Explain how these resources should be allocated. (<i>see below</i>)</p> <p>2.6 Explain how and when to revise the written health and safety policy (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The policies and procedures should comply with HSE guidelines. The resource requirements and their allocation should relate to these policies and procedures and could include resources as diverse as internal staff requirements, specific appointments, external specialists, access to publications/websites, staff training time and resources, display screen equipment (DSE) assessment, committee time, budget requirements (eg personal protective equipment (PPE), signage, portable appliance testing (PAT) The explanation of how and when to revise the policy should include the processes for approving and communicating the changes, as well triggers for change, such as changes in legislation, business activity or personnel.).</i></p>

<p>3. Understand how to investigate and report incidents</p>	<p>3.1 Explain when investigations and reports must occur <i>(including the RIDDOR procedure)</i></p> <p>3.2 Explain how to investigate and report incidents and significant near-misses where health and safety has been breached <i>(including initial management of the incident, recording the incident and its investigation, reporting to relevant authorities, review of controlling documentation (eg risk assessments), remedial actions and improvement activities)</i></p>
<p>4. Understand how to communicate and promote the organisational culture of health and safety</p>	<p>4.1 Analyse ways of communicating the health and safety policy and policy statement to all relevant parties <i>(including the advantages/disadvantages of different communication methods for different audiences)</i></p> <p>4.2 Explain how and when to consult with people who work for an organisation or their representatives on health and safety issues <i>(including formal arrangements, such as induction and training, H&S briefings, H&S Committees, risk assessment processes, and also including informal arrangements, such as staff concerns, suggestions for improvement)</i></p> <p>4.3 Describe ways of developing an organisational culture in which people put health and safety first <i>(using example/s from the learner's own experience and/or case studies, and illustrating current best practice)</i></p> <p>4.4 Explain why developing this culture is important to an organisation <i>(by reference to benefits, such as reducing risk exposure, valuing employees, enhancing business reputation)</i></p>
<p>Unit expiry date</p>	<p>31st October 2017</p>
<p>Unit reference number</p>	<p>Y/601/1812</p>

Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 19 Legislation – 19.5 Developing a Health and Safety policy in the working environment. 19.6 Managing Health and Safety risk assessments effectively in the working environment
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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 2010 by Tolleys
 Tolley's Health and Safety at Work Handbook 2011
 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
 BIFM/Health & Safety Special Interest Group
 Workplacelaw - www.workplacelaw.net
 Facilities Management Journal - www.mpp.co.uk
 Facilities Management Excellence - www.fmxmagazine.co.uk
 Safety & Health Practitioner - www.shponline.co.uk

Unit FM5.08 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to develop knowledge and understanding of the techniques and processes of business planning, objective setting and performance management within the facilities management function.

Title:	Performance measurement in facilities management	
Level:	5	
Credit value:	3	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Understand the relationship between business planning processes and performance measurement in facilities management	1.1 Critically evaluate how the operating business plan of an organisation impacts on the facilities management function <i>(see below)</i> 1.2 Analyse and review a range of techniques and processes used for developing short, medium and long term plans to deliver facilities management strategies in the context of the business plans of an organisation <i>(see below)</i> <i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. Elements of the business plan such as a company mission statement, company drivers and short, medium and long term goals should be related to the FM)</i>	

	<i>function. The techniques to be analysed and reviewed could include tools such as SWOT, PESTLE, PM, Balanced scorecard, SLAs and KPIs.)</i>
2. Understand the principles of performance measurement	<p>2.1 Explain the relationship between business objectives and performance measurement <i>(see below)</i></p> <p>2.2 Explain the techniques and processes used to measure performance in order to achieve the business objectives <i>(see below)</i></p> <p>2.3 Describe the importance of regular review. <i>(see below)</i></p> <p>2.4 Explain how progress is monitored, reviewed and communicated. <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The business objectives and measurement techniques and processes will be specific to the organisation, but the latter could include techniques such as the use of team and individual objectives, KPIs & SLAs, end user feedback, contractual, legal, financial and CSR compliance and benchmarking. The discussion of regular reviews should include the value of two-way dialogue and of involving all stakeholders.)</i></p>
3. Be able to use performance measurement to drive forward the business plan	<p>3.1 Analyse a set of business performance data to identify opportunities and/or improvements <i>(using example/s from the learner's own experience and/or case studies)</i></p> <p>3.2 Make recommendations to support a programme of continuous improvement <i>(related to the analysis provided for the previous assessment criterion, and to the objectives in the business plan)</i></p>
Unit expiry date	31st October 2017
Unit reference number	H/601/1814

Resources:

Balanced Scorecards and Operational Dashboards with Microsoft Excel by Ron Person

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 - www.mpp.co.uk

Facilities Management Excellence - www.fmxmagazine.co.uk

Unit FM5.09 Providing leadership and 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to understand how leadership affects organisations and individuals, leadership and management theories and techniques, and how to apply and review them within a facilities management role.

Title:	Providing leadership and management in facilities management	
Level:	5	
Credit value:	4	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Understand the distinction between leadership and management	1.1 Compare and contrast leadership and management in the workplace <i>(no additional guidance)</i> 1.2 Evaluate leadership and management styles and how they influence organisational culture <i>(describing different styles of both leadership and management (making reference to existing theory), and the factors that can determine the most appropriate styles in different contexts)</i> 1.3 Analyse how effective leadership can support the development of organisations and individuals in the facilities management function <i>(including reference to the benefits of a motivated workforce, such as</i>	

	<p><i>commitment to business objectives, increased efficiency, opportunities for skills transference, reduced staff turnover)</i></p> <p>1.4 Explain how the facilities management environment influences the typical management leadership model <i>(taking into account the specific characteristics of FM, such as delivering services against agreed objectives and requirements, performance measurement continuous improvement)</i></p>
<p>2. Understand how managerial behaviour affects organisations, teams and individuals</p>	<p>2.1 Compare the theories and approaches which can be used to manage and motivate individuals and teams <i>(no additional guidance)</i></p> <p>2.2 Analyse own preferred management style. <i>(relating it to the theories and approaches discussed in relation to the previous assessment criterion, and suggesting the style's benefits and limitations for the team and organisation as a whole)</i></p> <p>2.3 Describe how to adapt this style to appropriately deal with various work situations <i>(using example/s from the learner's own experience and/or case studies)</i></p>
<p>3. Be able to provide leadership in your area of responsibility in facilities management</p>	<p>3.1 Create a vision within own area of influence <i>(see below)</i></p> <p>3.2 Explain how to communicate the vision to different target audiences and the method of communication to be used <i>(see below)</i></p> <p>3.3 Review how to motivate and support people in your area to achieve their work and development objectives <i>(see below)</i></p> <p>3.4 Demonstrate how to provide recognition when people are successful <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The vision should also draw on inputs from other stakeholders. Different target audiences should be addressed by using appropriate communication methods, such as team meetings, newsletters, business plan, email</i></p>

	<i>and/or intranet, personal development meetings, video casts. Methods of motivation and support might include the communication of clear objectives, discussing and resolving concerns, performance measurement and review, empowerment, and training/coaching/mentoring. Methods of recognition might include personal recognition, team recognition, financial reward, promotion, training and development opportunities.)</i>
Unit expiry date	31st October 2017
Unit reference number	M/601/1816
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 2: Management Principles and BIFM Competence 6: Personal Leadership

Resources:

How to Lead: What You Actually Need to Do to Manage, Lead and Succeed 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 (NEW REVISED EDITION): 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. (Guy) 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 FM5.10 Managing 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to analyse data, manage knowledge and information and implement ICT systems within a facilities management context.

Title:	Managing information and knowledge in facilities management	
Level:	5	
Credit value:	3	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Be able to collate, analyse and evaluate data to support decisions	1.1 Analyse and evaluate a range of statistical methods to manipulate a wide variety of data <i>(including the benefits and limitations of deriving the mean, median, mode, spread, probability distribution, and regression)</i> 1.2 Use statistical methods to present information to support facilities management decisions <i>(using example/s from the learner's own experience and/or case studies)</i>	
2. Be able to manage information and knowledge	2.1 Compare and analyse the efficiency and cost effectiveness of different techniques for data, information and knowledge flow, storage, manipulation, and presentation <i>(see below)</i>	

	<p>2.2 Make proposals about the changes that can be made to information and knowledge management in order to improve business efficiency <i>(see below)</i></p> <p>2.3 Evaluate the security and information and ensure compliance with latest legislation <i>(see below)</i></p> <p>2.4 Propose systems that provide accurate and reliable information <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The initial analysis should include all relevant data sources and processing including sources such as help desk logging, service management, contractor notification, SLAs, H&S risk management, stock & purchasing control, property & asset management, resource management & data capture. The proposed changes should relate to the relevant facilities management requirements such as rapid information processing, accuracy of reporting, efficiency and control, accountability, and audit. Compliance should be checked against relevant legislation such as for HSE and data protection. The systems proposed should be specifically identified and justified.)</i></p>
<p>3. Be able to plan the implementation of IT systems to support facilities management</p>	<p>3.1 Explain how to keep abreast of new IT developments and applications <i>(including reference to specific sources of information such as named journals, conferences, trade shows, expert advice, and suppliers' web pages)</i></p> <p>3.2 Assess the uses, benefits and limitations of new IT developments and applications that are relevant to facilities management <i>(see below)</i></p> <p>3.3 Plan the implementation of a new or upgraded IT system within facilities management function <i>(see below)</i></p> <p>3.4 Know how to manage and evaluate the implementation process of a new or upgraded IT system in a way which ensures minimal business "down time" and evaluate</p>

	<p>the level of success <i>(see below)</i></p> <p>3.5 Evaluate the effectiveness of compliance with latest legislations affecting use of IT systems <i>(see below)</i></p> <p><i>(The last four of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The relevant IT systems to be assessed could include developments in software and/or hardware, such as BMS, RFI, CAFM, PDA, Pocket PC/net-books, GPS/GSM; and the assessment could be with reference to factors such as speed, accuracy, efficiency, loss of ownership, risk of failure, and cost. The planning, management and evaluation of the implementation should use standard project management processes and should include activities such as market research, contract documentation, multi-disciplinary project team, communication to users, data review and cleanse, pre-installation checks, system commissioning, user training, going live, post-project evaluation, and ongoing user support. The system's legal compliance should be confirmed using a process that includes identification of appropriate legislation, confirmation of systems and protocols to address relevant issues, identification of cases of failure, and testing for the system's robustness.)</i></p>
Unit expiry date	31st October 2017
Unit reference number	F/601/1819
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 4: Information and Knowledge Management

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 (Best Practice Introduction Guide) 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#de](http://www.elsevier.com/wps/find/journaldescription.cws_home/30434/description#description)
scription

www.bifm.org.uk

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

Facilities Management Journal - www.mpp.co.uk

Facilities Management Excellence - www.fmxmagazine.co.uk

Unit FM5.11 Managing 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to undertake a facilities management project; assemble and manage facilities management teams and undertake projects from planning, through monitoring and reporting to completion and review.

Title:	Managing facilities management projects	
Level:	5	
Credit value:	6	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Be able to plan facilities management projects	1.1 Select a project to manage within own area of responsibility and describe own role, objectives and responsibilities for that project <i>(see below)</i> 1.2 Compare and evaluate methods, tools and techniques of project management <i>(see below)</i> 1.3 Develop a plan to deliver, monitor and manage the project in a way which is appropriate to its objectives and scope <i>(see below)</i> 1.4 Identify stakeholders and explain how to influence them <i>(see below)</i> <i>(All of the assessment criteria for this learning outcome and for the remaining</i>	

	<p><i>learning outcomes in the same unit can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The project plan should include the project's agreed objectives (in terms of time, cost and specification), task and resource scheduling, budget and reporting structure. The discussion of stakeholders should include how their treatment is affected by their different levels of power and influence.)</i></p>
<p>2. Be able to prepare, manage and monitor project briefs</p>	<p>2.1 Prepare a project brief which identifies the objectives, outcomes and critical success factors <i>(see below)</i></p> <p>2.2 Manage and monitor the project to evaluate the extent to which deadlines are met, problems are appropriately addressed and changes are successfully managed. <i>(Using an example from the learner's own experience, describe the).</i></p> <p>2.3 Produce a progress report for the project sponsor and other interested parties which define the problems addressed and changes managed <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by the same exercise used for the previous and subsequent learning outcomes. The processes for monitoring progress, identifying and reporting variances from plan and change management should be described.)</i></p>
<p>3. Be able to manage a facilities management project budget</p>	<p>3.1 Develop a budget which reflects the facilities management project brief <i>(see below)</i></p> <p>3.2 Monitor and control expenditure <i>(see below)</i></p> <p>3.3 Produce financial status reports for the project sponsor and other interested parties <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by the same exercise used for the previous and subsequent learning outcomes. The processes for monitoring and controlling project expenditure, such as approval for staged payments, budget variances,</i></p>

	<p><i>financial reporting, should be described. The financial status report should include present and forecast cost, budget variances, risks to cash flow, and opportunities (eg, economies of scale, cost mitigation).)</i></p>
<p>4. Be able to assemble and manage facilities management project teams</p>	<p>4.1 Identify the skill set required to deliver the project <i>(see below)</i></p> <p>4.2 Assemble the team to deliver the project showing how they meet the skill set required <i>(see below)</i></p> <p>4.3 Explain the role of specialists in project management and evaluate what additional or different perspectives they contribute <i>(see below)</i></p> <p>4.4 Describe the implications of using cross-functional teams in project management <i>(see below)</i></p> <p>4.5 Describe the methods of successful team building and the ongoing management of the project team <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by the same exercise used for the previous and subsequent learning outcomes. The explanation of the role of specialists should include examples, such as Construction Design Management consultants. The benefits and limitations of using cross-functional teams should be compared with other possible team structures. The methods of successful team building should be related to current team-building theory.)</i></p>
<p>5. Be able to manage project completion, sign-off and review</p>	<p>5.1 Evaluate the success of the project for all parties in terms of completion and client sign-off <i>(see below)</i></p> <p>5.2 Describe and evaluate the scope and outcomes of post project reviews and describe what actions they will trigger <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by the same exercise used for the previous learning outcomes. The evaluation of success should include acceptance criteria for completion and handover, as well as evaluation of the</i></p>

	<i>project's performance in terms of time, cost and quality (ie conformance to specification). The post-project reviews could refer to issues such as post-occupancy evaluation (POE), quality of project documentation and management structure, actual performance (time/cost/quality) against plan, risk management, and change management.)</i>
Unit expiry date	31st October 2017
Unit reference number	T/601/1820
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 5: Project Management

Resources:

Identifying and Managing Project Risk: Essential Tools for Failure-Proofing Your Project by Tom Kendrick

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 (Financial Times Series) 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: Communicating, Deadlines, Budgeting, Planning, Troubleshooting (Essential Managers) by peter hobbs

Project Management: A Systems Approach to Planning, Scheduling, and Controlling by Harold Kerzner

Fast Track to Success: Project Management by Patrick Harper-Smith and Simon Derry

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

<http://www.businessballs.com/project.htm>

<http://www.pmi.org.uk/>

www.bifm.org.uk

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

Facilities Management Journal - www.mpp.co.uk

Facilities Management Excellence - www.fmxmagazine.co.uk

Unit FM5.12 Managing negotiations 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to lead meetings, evaluate their effectiveness and employ a range of strategies to manage complex negotiations and conflict resolution in a facilities management context.

Title:	Managing negotiations in facilities management	
Level:	5	
Credit value:	3	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Understand how to set strategy and objectives for facilities management negotiation	1.1 Analyse the types of situations in which consultation and negotiation skills are important for and used by facilities managers <i>(including consultation and negotiation with contractors and suppliers, trade union and/or staff representatives, and senior managers)</i> 1.2 Develop a range of negotiation strategies to achieve objectives <i>(using an exercise based on practice at an organisation where the learner currently works or has worked in the past, and including negotiations with both individuals and teams)</i>	
2. Be able to negotiate effectively: individually and in	2.1 Employ a range of strategies in individual and team negotiations in order to achieve objectives and manage conflict resolution	

<p>a team</p>	<p><i>(see below)</i></p> <p>2.2 Describe the roles played by self and team members and evaluate how these roles contributed to the achievement of objectives and conflict resolution <i>(see below)</i></p> <p>2.3 Explain how the negotiations were managed and evaluate the impact on service delivery and financial objectives <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past.)</i></p>
<p>3. Be able to successfully manage complex negotiations</p>	<p>3.1 Plan and manage complex negotiations <i>(see below)</i></p> <p>3.2 Evaluate the extent to which the negotiations were successfully managed to achieve the objective <i>(see below)</i></p> <p>3.3 Explain the potential financial impact on an organisation <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The planning of the negotiation, its evaluation and potential financial impact should also be related to business strategy.)</i></p>
<p>Unit expiry date</p>	<p>31st October 2017</p>
<p>Unit reference number</p>	<p>L/601/1824</p>
<p>Details of the relationship between the unit and other standards or curricula (if appropriate)</p>	<p>BIFM Competence 7: Human Resources Management</p>

Resources:

Negotiation: Your Mentor and Guide to Doing Business Effectively (Harvard Business Essentials) by Harvard Business Essentials

Effective Negotiation: From Research to Results by Ray Fells

Successful Negotiating (Business Partners) by Ken Lawson

The Essence of Negotiation (Prentice Hall Essence of Management Series) by Jean-Marie Hiltrop, and Sheila Udall

Instant Negotiation: Reaching Agreement with Others NOW! by Brian Clegg

Unit FM5.13 Managing 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to assess how relationships with suppliers and specialists impact on the effectiveness of facilities management in a range of scenarios. The unit enables a learner to develop new relationships with suppliers and evaluate their effectiveness.

Title:	Managing relationships with suppliers and specialists in facilities management	
Level:	5	
Credit value:	6	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Be able to analyse the advantages and disadvantages of involving specialists	1.1 Evaluate the functions and roles of specialists in facilities management <i>(by reference to different areas of specialism, such as hard and soft facilities management, professional services, total outsourcing)</i> 1.2 Analyse the advantages and disadvantages of using specialists in facilities management <i>(using the same examples as for the previous assessment criterion)</i>	
2. Be able to build and manage multi-disciplined teams	2.1 Explain why it is necessary to build and develop multi-functional teams in order to achieve facilities management objectives	

	<p><i>(including the business benefits of multi-functional teams, such as specialist industry expertise (outsourced suppliers), understanding of the business culture, objectives and strategic drivers (in-house FM), mitigation of risks associated with totally outsourced solutions)</i></p> <p>2.2 Explain the techniques used to manage multi-functional teams and evaluate which techniques have yielded optimum advantage. <i>(including examples, such as defining performance requirements (customer-supplier chain), promoting the concept of a single team with shared objectives, understanding each other's role and business drivers in delivering a service for mutual benefit, valuing the contribution of all individuals)</i></p> <p>2.3 Apply principles of managing and developing teams and evaluate the extent to which they have been successful <i>(using example/s from the learner's own experience and/or case studies, and relating them to the techniques explained for the previous assessment criterion)</i></p>
<p>3. Be able to select and appoint suppliers and specialists to achieve objectives</p>	<p>3.1 Describe tendering and bid processes for selecting suppliers and specialists <i>(see below)</i></p> <p>3.2 Use due process in the selection and appointment of the supplier and/or specialist <i>(see below)</i></p> <p>3.3 Prepare appointment briefs, agree reporting arrangements and deliverables <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The process for selection should use appropriate methods for objective assessment, such as weighted scorecards.)</i></p>
<p>4. Be able to manage and monitor supplier performance</p>	<p>4.1 Research the scope and extent of current control mechanisms used to monitor supplier performance and evaluate their effectiveness <i>(see below)</i></p> <p>4.2 Use the evaluation to develop contracts or</p>

	<p>service specifications using relevant processes, including objective setting, contract reviews and remedial plans (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past.)</i></p>
5. Be able to manage the close-down of supplier relationships	<p>5.1 Undertake an evaluation of the factors and difficulties which were considered at the end of a project or contract with a supplier (<i>see below</i>)</p> <p>5.2 Undertake an evaluation of the processes which should be considered at the end of a project or contract with a supplier (<i>see below</i>)</p> <p><i>(Both of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past.)</i></p>
6. Be able to evaluate, develop and review relationships with suppliers	<p>6.1 Investigate different types of facilities management relationships with suppliers and evaluate how the relationships can be developed (<i>including examples such as the use of principal contractors, a manager of service providers, supplier partnership agreements, special purpose vehicles, risk transfers, linking risk and reward</i>)</p> <p>6.2 Develop new types of relationships with suppliers and review their effectiveness (<i>using example/s from the learner's own experience or case studies</i>)</p>
Unit expiry date	31st October 2017
Unit reference number	Y/601/1826
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 8: Relationships with Suppliers and Specialists

Resources:

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 Blokdijsk and Ivanka Menken
Service Level Agreement 100 Success Secrets: SLA, Service Level Agreements, Service Level Management and Much More by Gerard Blokdijsk
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 - www.mpp.co.uk
Facilities Management Excellence - www.fmxmagazine.co.uk

Unit FM5.14 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should mostly relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to apply the principles of quality management, in order to improve and evaluate the quality of facilities management and develop a quality management system.

Title:	Quality management in facilities management
Level:	5
Credit value:	6
Learning outcomes	Assessment criteria
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>
1. Be able to apply principles of quality management to improve the facilities management function	<p>1.1 Evaluate an organisation's quality strategy in relation to the facilities management strategy (<i>see below</i>)</p> <p>1.2 Evaluate the benefits that quality management brings and the extent to which these contribute to own and team performance (<i>see below</i>)</p> <p>1.3 Apply knowledge of the principles of quality management to identify improvements (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be related to compliance with the eight core principles of quality management as they are applied in the context of facilities management.)</i></p>

<p>2. Be able to evaluate the impact of quality standards and accreditation schemes</p>	<p>2.1 Review the quality standards and accreditation schemes which can apply to facilities management <i>(no additional guidance)</i></p> <p>2.2 Choose an appropriate standard/scheme and detail how it impacts on facilities management <i>(using example/s from the learner's own experience and/or case studies)</i></p>
<p>3. Be able to develop and design a quality management system</p>	<p>3.1 Evaluate business requirements and design systems and procedures for a quality management system <i>(see below)</i></p> <p>3.2 Communicate the system and updates across an organisation and to relevant stakeholders <i>(see below)</i></p> <p>3.3 Review and monitor the success of the quality management system and recommend improvements <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The systems and procedures should include detailed proposals for enhancements. The communications plan should include stakeholder sign off, staff and supplier communications, and ongoing measurement and management procedures. The systems review should include the use of tools such as SLAs.)</i></p>
<p>4. Be able to develop and manage a programme of continuous improvement</p>	<p>4.1 Explain what is meant by continuous improvement <i>(no additional guidance)</i></p> <p>4.2 Describe its importance to the facilities management function <i>(no additional guidance)</i></p> <p>4.3 Describe the principles, tools and techniques used to evaluate performance <i>(including a range of tools, such as Deming's four-step model , six sigma, lean and TQM)</i></p> <p>4.4 Demonstrate the methods of collecting and assessing information on performance <i>(using example/s from the learner's own experience and/or case studies, and including methods</i></p>

	<p><i>such as SLAs, questionnaires, benchmarking, balanced scorecard & data collection)</i></p> <p>4.5 Use the findings to identify areas for continuous improvement (<i>using the same example/s and/or case studies as for the previous assessment criterion</i>)</p>
Unit expiry date	31st October 2017
Unit reference number	D/601/1827
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 9: 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:

International Edition by Dr. 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

http://www.ogc.gov.uk/documentation_and_templates_quality_management_strategy.asp

<http://www.businesslink.gov.uk/bdotg/action/detail?itemId=1074432115&type=RESOURCES>

<http://www.thecqi.org/>

www.bifm.org.uk

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

Facilities Management Journal - www.mpp.co.uk

Facilities Management Excellence - www.fmxmagazine.co.uk

Unit FM5.15 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to review the management of customer services, implement changes, deliver a customer focused culture and monitor customer satisfaction levels in a facilities management context.

Title:	Customer service in facilities management	
Level:	5	
Credit value:	3	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Be able to manage and improve customer relationships	1.1 Analyse and review the ways in which customer relationships are appropriately managed, including individual and organisational sensitivities <i>(see below)</i> 1.2 Use review findings to identify and implement changes to improve customer relationships and individual customer perceptions, in order to keep existing customers and attract new customers <i>(see below)</i> <i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The analysis should include existing structures, such as operational and strategic customer</i>	

	<i>review meetings, formal surveys, customers' and own business objectives, and performance against SLAs and KPI's.)</i>
2. Be able to deliver a customer focused culture	<p>2.1 Undertake a review of the methods used to communicate with and listen to internal and external customers within an organisation and explain the importance of good communications (<i>see below</i>)</p> <p>2.2 Implement changes to improve the delivery of a customer focused facilities management service (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The review can be of the methods that provided information for the analysis related to the previous learning outcome. The importance of good communications should include customers' needs for efficiency and for honesty.)</i></p>
3. Be able to assess, improve and monitor customer requirements and satisfaction levels	<p>3.1 Undertake a review and evaluation of the techniques used to assess customer requirements (<i>see below</i>)</p> <p>3.2 Undertake a review and evaluation of customer satisfaction levels (<i>see below</i>)</p> <p>3.3 Use review findings to make detailed proposals about how customer focused services can be enhanced, improved and monitored to improve customer satisfaction (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The reviews should be referenced to industry best practice and could use methods such as, contract reviews, KPI, audits, measurement surveys, analysis of help-desk responses, and interviews.)</i></p>
4. Be able to develop and evaluate service level	4.1 Develop service level agreements (<i>see below</i>)

agreements	<p>4.2 Evaluate the tools that are used to measure the performance of a service level agreement (<i>see below</i>)</p> <p>4.3 Evaluate the management of service level agreements against whether all stakeholders understand expectations, responsibilities and priorities (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The service level agreements should be referenced to industry best practice. The evaluation of tools to measure performance (such as KPIs, audit methods and customer feedback) should include how the data is analysed and reported. The evaluation of the service level agreements should relate expectations to satisfaction levels.)</i></p>
Unit expiry date	31st October 2017
Unit reference number	K/601/1829
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 10: 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
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
<http://www.instituteofcustomerservice.com/>
Facilities Management Journal - www.mpp.co.uk
Facilities Management Excellence - www.fmxmagazine.co.uk

Unit FM5.16 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to implement strategies for managing property portfolios, property costs and asset registers, influence building design and undertake property relocations in a facilities management context.

Title:	Property and asset management for facilities managers
Level:	5
Credit value:	6
Learning outcomes	Assessment criteria
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>
1. Be able to implement a property portfolio strategy	<p>1.1 Describe the principal aspects of a property portfolio strategy and the implications for a facilities manager. <i>(including reference to issues such as lease vs own, building type & use, age & condition, strategic direction vs fit and financial planning)</i></p> <p>1.2 Explain why specialists may be needed in the management of property portfolio and the criteria for selection and appointment <i>(including examples, such as specialists to address requirements related to listed sites, planning, financial/tax matters)</i></p> <p>1.3 Explain how to implement a property portfolio strategy <i>(including data capture & verification and business planning objectives)</i></p>

	<p>1.4 Explain how to maintain the value of the portfolio to ensure consistency with the facilities management strategy <i>(including issues such as condition surveys, maintenance regimes, replacement plans)</i></p>
<p>2. Be able to manage property costs</p>	<p>2.1 Undertake an analysis of the costs, taxes and charges associated with occupying or owning property <i>(see below)</i></p> <p>2.2 Explain how these might be influenced by the facilities management strategy <i>(see below)</i></p> <p>2.3 Evaluate methods to reduce occupational costs <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The initial analysis should include items such as utilities, local & central taxes, maintenance spend, capital refurbishments, dilapidations, yield analysis and balance sheet/profit & loss effects. The relevant facilities management strategies could include the use of processes such as asset & plant registers, maintenance regimes, occupancy surveys and business strategy. The methods to reduce costs could include examples such as better utilisation, energy management, maintenance schemes, predictive maintenance, life cycle analysis and capital replacement.)</i></p>
<p>3. Be able to manage property and related asset registers</p>	<p>3.1 Evaluate the effectiveness of the register(s) <i>(see below)</i></p> <p>3.2 Analyse the tools and methodologies to enhance the effectiveness of the register(s) <i>(see below)</i></p> <p><i>(Both of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The evaluation could include consideration of issues such as accuracy, conformance, accident rates, failure rates, costs and asset utilisation. The tools could include the use of budgets, energy surveys and asset</i></p>

<p>4. Be able to evaluate how building design impacts on facilities management and property strategies</p>	<p><i>tracking.)</i></p> <p>4.1 Evaluate the effect of building design on the operational use of properties (<i>see below</i>)</p> <p>4.2 Analyse the way in which building design influences and dictates the way in which properties are managed (<i>see below</i>)</p> <p>4.3 Research ways in which Facilities Managers can influence building designs to enhance the future use of properties and improve the facilities management services (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by the same example from the learner's own experience or a case study. The evaluation of the effects of building design could include issues such as functionality, service provision, low initial cost building, flexibility, energy and assets. The design's influence on property management could include issues such as space utilisation, costs, legal compliance, support services, energy usage & carbon footprint. The ways in which Facilities Managers can influence building designs by early involvement might include the use of soft landings style contracts, and bench marking and trend analysis of in situ services to inform future designs.)</i></p>
<p>5. Be able to undertake property relocations</p>	<p>5.1 Analyse the planning processes and procedures required for successful property relocation (<i>see below</i>)</p> <p>5.2 Analyse and select resources required to support property relocation (<i>see below</i>)</p> <p>5.3 Outline a review process which would ensure that a property relocation achieved its objectives (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by the same example from the learner's own experience or a case study. The planning process should include consideration of factors such as the moving or transfer of assets, handover procedures, dilapidations, space planning, change of use, cost reduction, consolidation, novation of contracts, TUPE, sustainability, green</i></p>

	<i>agenda, corporate & social responsibility, employee relocation, redundancy, morale, motivation. The resourcing could include forming a multi-discipline project team, consultation and communication, and use of specialist contractors. The review should include a formal post-implementation review.)</i>
Unit expiry date	31st October 2017
Unit reference number	H/601/1831
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 11: Management of Property

Resources:

Value and Risk Management: A Guide to Best Practice by Michael F Dallas
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
A-Z of Facilities and Property Management by David M. Martin
Property Management by Robert Kyle, Floyd Baird, and Marie Spodek
Property Asset Management by Douglas Scarrett
GIS in Land and Property Management by Dr Martin P Ralphs, Martin P. Ralphs, and Peter Wyatt
Economics of Property Management: The Building as a Means of Production by Herman Tempelmans Plat
Corporate Property Management: Aligning Real Estate with Business Strategy by Victoria Edwards and Louise Ellison
Business Occupier's Handbook: A Practical Guide to Acquiring, Occupying and Disposing of Business Premises by Clifford Chance and Vicky Rubin
BIFM Good Practice Guides - www.bifm.org.uk
FM World - www.fm-world.co.uk
Facilities Management Journal - www.mpp.co.uk
Facilities Management Excellence - www.fmxmagazine.co.uk
Removals & Storage - www.bar.co.uk

Unit FM5.17 Managing 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to analyse the maintenance implications associated with building structures and compare, develop and analyse strategies for building use, building services and control systems in a range of facilities management contexts. The unit enables a learner to manage maintenance programmes and evaluate different management systems.

Title:	Managing property, fabric and building services maintenance for facilities managers	
Level:	5	
Credit value:	6	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Be able to evaluate the maintenance implications of building structures	1.1 Compare the fabric maintenance implications of a wide range of differing building structures including fabric and components <i>(including load bearing masonry, timber frame and steel frame constructions, cladding systems and the use of steel, brick, concrete, wood, glass)</i> 1.2 Compare and analyse the benefits and drawbacks of old and new buildings when considering fabric maintenance <i>(including the relative cost and complexity of maintenance, environmental performance and presence of hazardous materials such as</i>	

	<p><i>asbestos)</i></p> <p>1.3 Research and evaluate how differing construction designs, methods and material can affect fabric maintenance. <i>(No additional guidance)</i></p>
<p>2. Be able to develop a fabric maintenance strategy</p>	<p>2.1 Develop a fabric maintenance strategy with the objective of keeping the building safe and usable and retaining its value <i>(see below)</i></p> <p>2.2 Analyse the advantages and disadvantages of corrective, preventative and predictive maintenance strategies. <i>(see below)</i></p> <p>2.3 Develop the most appropriate strategy and prepare an implementation plan <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on a building at an organisation where the learner currently works or has worked in the past. The fabric maintenance strategy should be specific to the building, and should include a risks and benefits analysis.)</i></p>
<p>3. Be able to deliver and monitor effective fabric maintenance service</p>	<p>3.1 Compare and evaluate different approaches to delivering building maintenance <i>(using examples from the learner's own experience and/or case studies, including comparison of in-house versus outsourced resource models)</i></p> <p>3.2 Develop an appropriate building fabric maintenance programme to implement <i>(using an example from the learner's own experience or case study, and including all of the stages from developing the specification through to mobilising the service and its ongoing review)</i></p> <p>3.3 Compare and analyse a variety of strategies which the facilities manager can utilise to monitor a building fabric maintenance programme including the use of specialists <i>(including condition surveys, occupant feedback and forward maintenance plans)</i></p> <p>3.4 Evaluate how an appropriate monitoring strategy could be used to monitor a building fabric maintenance programme <i>(including contract progress meetings, inspection, audit</i></p>

	<p><i>of maintenance regimes and continuous improvement)</i></p>
<p>4. Understand building services and control systems and their effect on building use</p>	<p>4.1 Analyse the range of building services which could be incorporated into differing types of building structures <i>(including utilities, sewage, heating and ventilating, lifts, fire and emergency lighting, communications (telephone and data))</i></p> <p>4.2 Analyse the ways in which differing services have been incorporated into building structures and explain the effects on building use and layout <i>(including the use of ceiling voids, raised floors and service ducts)</i></p> <p>4.3 Analyse and evaluate mechanical and electrical building services, public health and building control systems <i>(including legal and regulatory compliance, and occupier satisfaction levels)</i></p> <p>4.4 Analyse and evaluate structured cabling and IT services distribution <i>(including primary, secondary and tertiary distribution, flexibility of design to facilitate change of building layout and/or additional equipment)</i></p>
<p>5 Be able to develop and manage a maintenance strategy for building services</p>	<p>5.1 Compare and evaluate different approaches to maintenance strategy for building services and determine which is the most appropriate <i>(see below)</i></p> <p>5.2 Develop a maintenance strategy for building services <i>(see below)</i></p> <p>5.3 Analyse the constituent parts of a building services maintenance programme <i>(see below)</i></p> <p>5.4 Evaluate the effectiveness of a maintenance strategy for building services <i>(see below)</i></p> <p>5.5 Make relevant proposals about how to improve management of the strategy <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The different approaches considered should include reactive and planned maintenance.</i></p>

	<i>The analysis of the programme should include all of the steps from developing the specification and appointing suppliers through to evaluating performance. The evaluation of effectiveness should include key performance indicators, conformance to service level agreements, contract progress meetings, audit/inspection reports, and occupant feedback.)</i>
6. Be able to use building management systems and control technology to manage building services	6.1 Compare and evaluate the range of different management systems <i>(including current systems for remote and on-site monitoring)</i> 6.2 Research the other technologies that are available to control and manage services <i>(including recent innovations)</i>
Unit expiry date	31st October 2017
Unit reference number	A/601/1835
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 12: Property and Building Services Maintenance

Resources:

BIM and Construction Management: Proven Tools, Methods, and Workflows by Brad Hardin
 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 - www.mpp.co.uk
 Facilities Management Excellence - www.fmxmagazine.co.uk

Unit FM5.18 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to develop a strategy for space allocation and accommodation, prepare briefs for space layout, implement changes and assess feasibility of new developments in the use of space.

Title:	Space management for facilities managers
Level:	5
Credit value:	3
Learning outcomes	Assessment criteria
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>
1. Be able to develop a strategy for space allocation in offices and buildings	1.1 Evaluate and review space allocation strategies <i>(see below)</i> 1.2 Review the principles of space allocation <i>(see below)</i> 1.3 Evaluate compliance of space allocation with the relevant legislation <i>(see below)</i> 1.4 Develop space allocation strategy <i>(see below)</i> <i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The evaluation of the current strategy should take into account best practice factors such as space efficiency in building design, space</i>

	<p><i>utilisation, space norms in different sectors, and financial benchmarking for space provision. The principles of space allocation could include principles such as the optimal use of assets, employee retention, cost reduction, environmental impact, flexibility, innovation, space reflecting/rewarding rank or status, company vision, space to perform tasks, adequate through routes, clear exit routes, adequate light & ventilation, inter-relationships between individuals and/or departments. The developed strategy should take into account factors such as philosophy of space utilisation, flexibility to business strategy, benchmarking and KPI targets, space utilisation rates, space cost.)</i></p>
<p>2. Be able to assess the impact of building structure and building services on space management.</p>	<p>2.1 Analyse the implications of building structure and building services on space use and layout <i>(using example/s from the learner's own experience and/or case studies, and making reference to factors such as the ability to use space effectively and within legislation)</i></p>
<p>3. Be able to prepare briefs for space layouts</p>	<p>3.1 Review the technologies available to assist in planning and managing space. <i>(including technologies such as computer aided design, computer aided facilities management, and access control systems)</i></p> <p>3.2 Prepare a space layout brief to meet customer requirements <i>(using example/s from the learner's own experience and/or case studies, and providing a rationale for the layout)</i></p>
<p>4. Be able to programme and manage changes in accommodation.</p>	<p>4.1 Implement the processes that Facilities Managers should follow when managing accommodation changes <i>(see below)</i></p> <p>4.2 Undertake a review to ensure that the processes followed to manage the change in accommodation is successful <i>(see below)</i></p> <p><i>(Both of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The processes used should be based on standard project management techniques and should include a post-implementation review.)</i></p>

5. Be able to introduce new developments in the use of space	5.1 Research current and emerging innovative ways of using space in buildings and what that means for facilities management (<i>using current, cited sources</i>) 5.2 Compare and contrast potential options and their feasibility (<i>identifying the similarities and differences between options identified for the previous assessment criterion, including considerations such as their potential returns on capital invested, and their potential benefits to the business and its main stakeholders</i>)
Unit expiry date	31st October 2017
Unit reference number	J/601/1837
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 13: Space Management

Resources:

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

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

BIFM Good Practice Guides

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

www.bifm.org.uk

Facilities Management Journal - www.mpp.co.uk

Facilities Management Excellence - www.fmxmagazine.co.uk

Unit FM5.19 Sustainability and environmental 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to develop and manage sustainability and environmental policies which support corporate responsibility. To also review and influence the impact of the facilities management functions, to manage waste and promote wider engagement and awareness.

Title:	Sustainability and environmental management and the impact on facilities management	
Level:	5	
Credit value:	4	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Be able to develop and manage a policy that protects the environment and supports corporate responsibility	1.1 Identify the relevant legislation associated with sustainability and environmental issues <i>(see below)</i> 1.2 Undertake a review of the environmental hazards created by the operation of a business and the management systems used to control them <i>(see below)</i> 1.3 Develop a policy to improve and protect the working environment <i>(see below)</i> 1.4 Explain how the policy will be managed <i>(see below)</i>	

	<p>1.5 Analyse how the environmental policy contributes to an organisation's corporate responsibility (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The policy should be a high-level document. The analysis of its contribution to corporate responsibility should include specifics such as its contribution to legal compliance, staff awareness of environmental responsibilities, reduction of waste, improvement of work processes, and minimisation of the impact on local community and the environment.)</i></p>
<p>2. Understand the impact of the facilities management function on the environment.</p>	<p>2.1 Undertake a review of the impact of the facilities management function on the environment (<i>see below</i>)</p> <p>2.2 Explain how the Facilities Manager will manage the outcome of the review (<i>see below</i>)</p> <p>2.3 Research new and innovative developments in environmental management and make recommendations for an organisation (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The explanation of how the Facilities Manager will manage the outcomes should include a consideration of risks, benefits and costs. The research on new and innovative developments should draw on resources such as the Environment Agency, and the recommendations should be related to the organisations environmental policy.)</i></p>
<p>3. Be able to improve environmental awareness and corporate responsibility in facilities management</p>	<p>3.1 Investigate ways to increase the engagement of all stakeholders (<i>see below</i>)</p> <p>3.2 Undertake a range of strategies to increase awareness and involvement of key stakeholders in relation to environmental practices and sustainability (<i>see below</i>)</p> <p>3.3 Evaluate the degree of success of the</p>

	<p>strategies (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past.)</i></p>
4. Be able to manage waste	<p>4.1 Undertake a review of the methods and systems used to manage waste and evaluate to what extent these comply with legislation and best practice (<i>see below</i>)</p> <p>4.2 Make recommendations to improve the management of waste (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The recommendations, which should refer to best practice, should take into account risks, benefits and costs).</i></p>
Unit expiry date	31st October 2017
Unit reference number	R/601/1839
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 15: Sustainability and Environmental Issues

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

BIFM Good Practice Guide

www.bifm.org.uk

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

Facilities Management Journal - www.mpp.co.uk

Facilities Management Excellence - www.fmxmagazine.co.uk

Unit FM5.20 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to apply the principles of energy and utilities management, analyse and improve energy and utility efficiency and develop and implement policy.

Title:	Energy and utilities management and the impact on facilities management	
Level:	5	
Credit value:	3	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Be able to understand the principles of energy and utilities management	1.1 Review the principles of energy and utility management <i>(including drivers for management policies (such as compliance, environmental impact, cost efficiency) and the methods used to evaluate effectiveness (such as monitoring, measurement, analysis of usage))</i> 1.2 Analyse the appropriateness of sustainable building design and its impact on energy efficiency of building performance <i>(by reference to considerations such as the use of renewable energy sources, BREEAM ratings, architectural design, use of natural light and ventilation, reductions in solar gain,</i>	

	<p><i>use of energy efficient plant and fixtures)</i></p> <p>1.3 Outline the relevant legislation affecting energy & utilities efficiency in buildings (<i>no additional guidance</i>)</p>
2. Be able to develop and implement an energy and utility management policy	<p>2.1 Develop an energy and utilities management policy in line with current legislation (<i>see below</i>)</p> <p><i>(The assessment criterion for this learning outcome and all of the assessment criteria for the remaining learning outcomes in this unit can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The policy development should include an analysis of present usage together with improvement targets and how these can be achieved.)</i></p>
3. Be able to manage energy and utilities efficiency	<p>3.1 Review the use of utilities and their impact on energy efficiency (<i>see below</i>)</p> <p>3.2 Recommend improved energy efficiencies in the operation of a building and highlight the impact on facilities management (<i>see below</i>)</p> <p>3.3 Identify the options for the generation of power from renewable resources within an organisation (<i>see below</i>)</p> <p>3.4 Identify the options for better utilisation of water supplies within an organisation (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by the same exercise used for the previous and subsequent learning outcome. The recommendations should take into account risks, benefits and costs. The options for use renewable resources should include different possible resources. The options for better utilisation of water supplies should relate to industry best practice.)</i></p>
4. Be able to measure energy and utility efficiency	<p>4.1 Analyse energy and utility consumption against targets (<i>see below</i>)</p> <p>4.2 Analyse the results of targets and consumption, setting new targets and making recommendations for continual</p>

	<p>improvement(<i>see below</i>)</p> <p>4.3 Evaluate developments in energy and utility measurement technologies(<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by the same exercise used for the previous learning outcome. The evaluation of developments should include reference to external sources of best practice, such as the Carbon Trust.)</i></p>
Unit expiry date	31st October 2017
Unit reference number	R/601/1842
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 16: Energy and Utility Management

Resources:

Energy Management Principles and Practice. A Companion to BS EN 16001 by Vilnis Vesma

Energy Management Handbook, Seventh 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 - www.mpp.co.uk

Facilities Management Excellence - www.fmxmagazine.co.uk

Unit FM5.21 Managing procurement and contracts 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit enables a learner to apply the principles of procurement, contracts and contract management in various facilities management scenarios and evaluate decisions made. It enables them to use and manage different types of contracts, develop specifications and terms and conditions for the procurement of goods and services and manage costs.

Title:	Managing procurement and contracts in facilities management	
Level:	5	
Credit value:	4	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Be able to understand the principles of procurement to facilities management function	1.1 Explain the basic principles of procurement <i>(including: general principles such as the five rights (quality, quantity, time place, price) and the need for probity, ethics and transparency; and company-specific requirements such as policies relating to ethics, sustainability, business critical supplies, competitive advantage and impact on bottom line)</i> 1.2 Review the processes and stages of the procurement of goods and services <i>(including specification, sourcing, tender evaluation, adjudication, negotiation, terms and conditions, monitoring, review and exit)</i> 1.3 Review compliance with relevant legislation	

	<p><i>(including EU procurement process, OJEU, open competition, Office of Government Commerce (OGC), collusion, bribery, fraud, 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)</i></p> <p>1.4 Review the effectiveness of tendering and bid processes <i>(including processes such as spend analysis, supplier/market analysis, expressions of interest, pre-qualification, approved tenderer lists, time-scales, adjudication criteria, invitation of tenders, answering of questions, supplier open days, e-auctions, return and opening of tenders, adjudication processes, short listing, presentations and negotiations)</i></p>
<p>2. Be able to use and manage different types of contract</p>	<p>2.1 Analyse and compare the different types of contracts. <i>(see below)</i></p> <p>2.2 Select the most appropriate procurement option that suits the contract type <i>(see below)</i></p> <p>2.3 Select the most appropriate contract type that suits the procurement of a particular good or service <i>(see below)</i></p> <p>2.4 Review contract management procedures and identify improvements <i>(see below)</i></p> <p>2.5 Evaluate start up and close down processes and procedures of contract <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The contract types considered should include verbal contracts, purchase orders, call-off contracts (enabling or framework contracts), and industry-standard forms (such as JCT forms 2005, PPI/PPP). The contract management procedures should include examples such as key performance indicators, customer-supplier meetings, continuous improvement, flexibility, dispute resolution, sharing of benefits and demand fluctuation work. The start up and close down processes should deal with issues such</i></p>

	<i>as contract mobilisation, early termination, exit processes, liability, ownership & title, acceptance and record keeping.)</i>
3. Be able to develop specifications and terms and conditions in the procurement of goods and services	<p>3.1 Develop and use specifications for procurement of goods and services (<i>see below</i>)</p> <p>3.2 Compare and contrast the principal types of specifications (<i>see below</i>)</p> <p>3.3 Evaluate the standard terms and conditions that are used in the procurement of goods and services (<i>see below</i>)</p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by an exercise based on practice at an organisation where the learner currently works or has worked in the past. The principal types of specifications should include input and outcome specifications. The standard terms and conditions should be evaluated with regard to factors such as reduction of risk, clarity, common meaning, time saved in not drafting own terms and conditions, and international standards.)</i></p>
4. Be able to manage procurement costs	<p>4.1 Analyse the elements which may make up the cost of goods or services. (<i>by reference to practice at an organisation where the learner currently works or has worked in the past, and including elements such as raw material, labour, manufacture, packaging, transport, consumables, cost of sales, excise duty, insurance, overheads, profit</i>)</p> <p>4.2 Analyse the factors which should be taken into account when making a procurement decision (<i>including factors such as cost, reliability, capacity, reputation, cost, time, quality, compliance</i>)</p>
Unit expiry date	31st October 2017
Unit reference number	H/601/1845
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 18: Procurement, Contracts and Contract Management

Resources:

SUPPLY CHAIN MANAGEMENT: CONCEPTS, TECHNIQUES AND PRACTICES:
ENHANCING THE VALUE THROUGH COLLABORATION: Enhancing Value Through
Collaboration by LI LING
Supply Chain Strategies: Customer Driven and Customer Focused by Tony Hines
Lean Supply Chain Management: A Handbook for Strategic Procurement by Jeffrey P.
Wincel
Profitable Buying Strategies: How to Cut Procurement Costs and Buy Your Way to
Higher Profits by Mike Buchanan
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
<http://www.cips.org/>
<http://www.ogc.gov.uk/procurement.asp>
<http://www.businesslink.gov.uk/bdotg/action/detail?itemId=1073792572&type=RESOURCES>

Unit FM5.22 Implementing change in an organisation and managing 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.

(At level 5, the evidence provided by learners to confirm that they meet the assessment criteria should relate to organisations where they have worked or where they are working.)

Aim of the unit:

This unit helps a learner to put in place plans, processes, procedures and make the change a reality as well as supporting others through the change process.

Title:	Implementing change in an organisation and managing the impact on facilities management	
Level:	5	
Credit value:	4	
Learning outcomes	Assessment criteria	
<i>A learner when awarded credit for this unit will:</i>	<i>Assessment of this learning outcome will require a learner to demonstrate that they can:</i>	
1. Develop plans, processes and procedures to implement the 'vision' for change in an organisation	1.1 Develop a plan and design new work processes, procedures, systems, structures and roles to achieve the 'vision' behind the change (<i>see below</i>) 1.2 Describe the process to implement the plan of change (<i>see below</i>) <i>(All of the assessment criteria for this learning outcome and for the remaining learning outcomes in the same unit can be addressed by the development of an organisational plan, together with a communications plan, based on practice at an organisation where the learner currently works or has worked in the past.)</i>	

<p>2. Be able to translate the 'vision' into a practical reality</p>	<p>2.1 Monitor, document and communicate progress to key stakeholders involved in the change <i>(see below)</i></p> <p>2.2 Manage change to maintain momentum <i>(see below)</i></p> <p>2.3 Adjust plans and activities according to changes in circumstances and available resources <i>(see below)</i></p> <p>2.4 Evaluate the changes effected against the requirements of an organisation and the impact on facilities management. <i>(no additional guidance)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by the same exercise used for the previous and subsequent learning outcomes. The change management process should use standard project management techniques, including post project review.)</i></p>
<p>3. Be able to support others through the change process</p>	<p>3.1 Outline the change cycle <i>(see below)</i></p> <p>3.2 Identify development and other support needs and ways in which they can be met <i>(see below)</i></p> <p>3.3 Review expectations during change and clearly agree what is expected of others <i>(see below)</i></p> <p>3.4 Present information clearly, concisely, accurately and in ways that promote understanding <i>(see below)</i></p> <p>3.5 Develop systems to reward the achievements and success of others <i>(see below)</i></p> <p><i>(All of the assessment criteria for this learning outcome can be addressed by the same exercise used for the previous and subsequent learning outcome. The outline of the change cycle should relate to a model defining different stages, such as loss, doubt, discomfort, discovery, understanding & integration. The evidence relating to the remaining assessment criteria should show how support, structure and guidance was provided, and should highlight the importance of communication.)</i></p>

4. Be able to evaluate the impact of change	<p>4.1 Evaluate the impact of change upon an organisation (<i>see below</i>)</p> <p>4.2 Evaluate the impact of the change on the facilities management function. (<i>see below</i>)</p> <p><i>(Both of the assessment criteria for this learning outcome can be addressed by the same exercise used for the previous learning outcomes. The evaluations should acknowledge that change is inevitable, and the importance of analysing consequences. Possible examples of situations that produce change could include factors relating to survival, legislation, or commercial opportunity.)</i></p>
Unit expiry date	31st October 2017
Unit reference number	T/601/1848
Details of the relationship between the unit and relevant national occupational standards (if appropriate)	Management Standards C6 Implement change
Details of the relationship between the unit and other standards or curricula (if appropriate)	BIFM Competence 1: The Business Organisation

Resources:

Facilities Change Management by Edward Finch
Change Management: Concepts and Practice (Technical Manager's Survival Guides) by Marcus Goncalves
Leadership and Change Management by Annabel Beerel
Financial Times Briefing: Change Management (Financial Times Series) by Richard Newton
Managing Change in Organizations by Colin Carnall
Managing Change: A Strategic Approach to Organisational Dynamics by Prof Bernard Burnes
Facilities Change Management in Context by Professor Edward Finch