

WAMITAB Level 4 Diploma in Facilities Management Practice

Guided Learning Hours: 55
Total Qualification time: 165

Qualification Code: 600/0502/6
WAMITAB Code: FMP4



Version 8, September 2019

About WAMITAB and this Qualification Handbook

About WAMITAB

WAMITAB is an awarding organisation and charity that develops qualifications for those working in resource management and recycling; cleaning; street cleansing; facilities management; and parking from operative through to management level.

Since it was formed in 1989, WAMITAB has evolved in line with the convergence between the sectors with a clear focus on promoting and supporting environmental sustainability. With over 120 qualification pathways and 70 quality assured centres, WAMITAB offers an unrivalled specialist network to support staff development.

Equal Opportunities

WAMITAB supports the principles of equal opportunities and we are committed to meeting these principles in the provision of all our qualifications and assessments. We firmly believe that all learners and stakeholders are therefore entitled to receive equal treatment irrespective of age, sex, race, marital status, religion, disability or sexual orientation.

The Purpose of this Qualification Handbook

Welcome to your WAMITAB Qualification Handbook. This will help you to complete your Level 4 Diploma for Facilities Management Practice. It contains:

- The units you need to achieve to complete your qualification.
 - Information about your responsibilities as a candidate.
 - Reference information covering each learning outcome and assessment criteria.
 - Activities you can use to test your understanding.
 - Forms you can use to record and organise your evidence.
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Candidate Information

Name

WAMITAB Candidate Number

Registration Date

Enrolment Date

Centre Name

Centre Address

Centre Contact

Assessor Name

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Frequently Asked Questions

What is a qualification?

A qualification is nationally recognised, based on National Occupational Standards and gained in the workplace. Achieving your qualification demonstrates that you can work to the standards expected by employers in your industry.

What is the objective of this qualification?

Develop both the skills needed to successfully run and maintain a facility on behalf of clients. You will learn how to develop and maintain policies, procedures and projects that are vital for the implementation of facilities management services.

Who is it for?

- Senior facilities managers
 - Supervisors or line managers
 - Experienced workers seeking a formal qualification
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What are the entry requirements of this qualification?

This qualification is open entry. This means that learners interested in undertaking the WAMITAB Level 4 Diploma in Facilities Management Practice do not require any other qualifications or levels of attainment. However, learners will need to be employed in a suitable position, or have access to the working environment, as certain aspects of the qualification will be assessed 'on the job'.

What job role could this qualification lead to or support?

For many in the facilities management sector, this qualification will therefore act as a gateway to new jobs, opportunities for career progression and as an introduction to further education by building the confidence of employees and providing the workforce with the skills required to facilitate sector growth. There are currently over 207,800 people employed in the facilities management sector (ONS, 2013) and this qualification is ideal for those employed in associate professional and technical occupations in the following job roles:

- Property manager
 - Facilities manager
 - Contract manager
 - Facilities management coordinator
 - First line managers/ supervisors
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What do I need to achieve?

To achieve this qualification, you will complete all units in the Mandatory Unit group, three units from Option Group 1 and a further three units from Option

Group 2.

Mandatory Units

- Understand the contribution of facilities management services to organisations
- Manage facilities management services
- Develop productive working relationships with others when delivering facilities management services
- Implement health and safety and environmental facilities management procedures
- Manage operational performance in facilities management

Option Group 1

- Implement facilities management policies and operational plans (M/502/8153)
- Monitor and implement facilities management projects (T/502/8154)
- Support equality, diversity and individual rights in facilities management (A/502/8155)
- Manage facilities management budgets and finances (F/502/8156)
- Manage accommodation and space utilization (J/502/8157)
- Oversee works and maintenance facilities (J/502/8255)
- Contribute to sustainable best practice through facilities management (L/502/8158)

Option Group 2

- Develop and promote facilities management services (R/502/8159)
- Implement change in a facilities management environment (J/502/8160)
- Deliver facilities management through people (L/502/8161)
- Manage risks and controls to ensure facilities management business continuity (R/502/8162)
- Specify and source products and services for facilities management (Y/502/8163)
- Provide property and asset management (D/502/8164)
- Carry out energy management of facilities (H/502/8165)

What is a unit?

The units of a qualification describe what you must be able to do and understand to perform work activities competently in your job role.

- Learning outcomes: Describe what tasks you will be able to do as a result of learning.
- Assessment criteria: Describe what activities you will need to do and what you must know to complete each task.

What is an approved WAMITAB Centre?

You will gain your qualification through an approved WAMITAB Centre. It may be your place of work, a local college or training provider. Assessment of your qualification will be carried out at your place of work and the centre is responsible for the administration. Centre staff will therefore:

- Register you with WAMITAB.
- Provide a candidate registration number.
- Apply for your certificate when you have completed your qualification or units.

How long will it take?

You have two years to complete your qualification from date of registration. However, your centre may also have some requirements that they will explain to you.

Who will help me achieve my qualification?

The following people at the approved WAMITAB centre will help you to achieve your qualification.

Your Assessor

The assessor is the person you will have the most contact with as you work towards your qualification. They will:

- Help you identify any training you need.
- Help you plan your workload and organise your evidence.
- Observe you carrying out your job in the workplace over a period of time.
- Ask questions about the work you do.
- Make decisions about your evidence.
- Judge when you are competent.
- Provide feedback.

Internal Quality Assurer

The internal quality assurer maintains the quality of assessment within the centre.

External Quality Assurer

An external quality assurer is employed by WAMITAB to ensure that your centre meets the required national standards for quality and assessment.

What are my responsibilities as a candidate?

As a candidate you will need to:

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- Provide your centre with your personal details so they can register you with WAMITAB.
 - Comply with health and safety law and regulations.
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What steps will I need to take to complete my qualification?

1. **Planning:** Your assessor will tell you about the mandatory units of the qualification and will help you to select relevant optional units.
 2. **Evidence:** You will gather evidence for your portfolio (see next question for types of evidence).
 3. **Feedback:** Your assessor will provide regular feedback on your progress and will arrange for additional training if needed. When your assessor confirms you are competent after an assessment, it will be recorded in your handbook.
 4. **Achievement:** Once you have completed all the units and gathered all the evidence you need, your centre will apply for your WAMITAB certificate.
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What are the evidence requirements for this qualification?

The primary sources of evidence for this qualification are:

Observation (O): Direct observation or witness testimony where direct observation is not possible. Where this evidence type has been suggested against Assessment Criteria which require the candidate to explain or describe, the assessor must hear or observe the explanation/description (directly or being delivered to others) or see it in writing. The assessor must not infer that the candidate can explain/describe based purely on observation.

Question and Answer (Q/A): candidate statements, verbal questioning, professional discussion, written questions, product evidence supported by questioning

Simulation / Realistic working environment (S/R): Should be used as a last resort where allowed. Please see the Assessment Strategy for further information.

Where do I go if I need more information about my qualification and assessments?

- your assessor
 - your qualification handbook
 - WAMITAB (01604 231950/ www.wamitab.org.uk/info.admin@wamitab.org.uk)
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Useful Words

Approved Centre

WAMITAB Centres are training organisations that have met our strict quality standards and have been approved to deliver our qualifications to learners. They include private providers, colleges of further education, employers and prisons.

Assessment Criteria

These specify the standard that you are expected to meet to demonstrate that you have achieved the Learning Outcome. Assessment criteria are detailed enough to allow judgments to be made about your competence.

Assessor

A person who works with the Approved Centre to assess your competence against the standards set within the qualification. Assessors are qualified and experienced in the subject of the qualification you are registered for, and have the skills to plan and carry out your assessments. They will make judgments of your competence, based on the evidence you provide, and give feedback.

Competence

Competence, in relation to the qualification, describes your ability to consistently be able to undertake work activities, know and understand work-related tasks as per the requirements set out in the standards.

Evidence

You need to collect evidence to prove that you are competent as required by the standards set in the units of the qualification. There are different types of evidence, ranging from an assessor observing your work, question and answers, assignments and tests. Evidence can also be presented using photographs, audio and video files. Each unit gives guidance as to what is expected and acceptable evidence. Evidence must be authentic and your own work.

External Quality Assurer

This is an expert employed by WAMITAB to monitor, review and advise Approved Centres. The External Quality Assurer regularly visits the Approved Centre to check that all assessments are carried out correctly, to the same standard, and that all paperwork is maintained accurately and consistently. External Quality Assurers are qualified and experienced in the subject of the qualification that you are registered for. They therefore have the skills to check that the Approved Centre is operating properly and has all of the systems in place to deliver the qualification.

Internal Quality Assurer

A person who works with the Approved Centre to make sure that the assessment is carried out correctly, and that all administration of the assessment is properly managed. Internal Quality Assurers are qualified and experienced in the subject of the qualification that you are registered for, and have the skills to verify the work of the assessor for accuracy, quality and consistency.

Learner

A person who is registered to work towards achievement of a qualification – i.e. you!

Learning Outcome

These set out what you will be expected to know, understand or be able to do. Each learning outcome relates to one or more assessment criteria, and together they set a clear assessment standard for each unit.

Portfolio

This is a place where you will collect evidence to demonstrate your competence. A portfolio could be either hard-copy or electronic, but this will need to be agreed with the Approved Centre in advance. The evidence held in your portfolio must be your own work, and be clearly referenced to the units of the qualification.

Unit – Mandatory and Optional

Units form the building blocks of all qualifications that are nationally regulated. Units are small chunks of learning that focus on specific aspects of knowledge, skills and understanding. Mandatory units are those that you must achieve, and Optional units offer a range of subjects that you may choose between.

Vocational

A qualification is vocational when it relates directly to the skills, knowledge and understanding required to undertake a specific or broad job role.

WAMITAB

An Awarding Organisation for a wide range of qualifications in waste management and recycling, cleaning and street cleansing, facilities management and parking. WAMITAB is responsible for ensuring the on going quality of the delivery and assessment of qualifications, and issues certificates to learners upon completion. We have over 25 years of experience developing and quality assuring qualifications, training and course materials

Unit Terms

Analyse

Look at something (for example a process) and use given classifications or principles to gain a further understanding.

Apply

Put something into action – a “doing” task which requires “real” evidence from a workplace scenario.

Compare

Look at the characteristics of an item or activity and note the similarities and differences. This is more often used at level 1 and 2.

Critically Compare

Look at the characteristics of an item or situation, note the similarities and differences and their respective positive and negative aspects. In some cases, this can include the use of the comparison in context as the basis for decision making. This is generally used at level 3 and above.

Demonstrate

A doing verb which requires you to actually do what the assessment criteria requires. You will have to provide evidence of which clearly shows you applying your knowledge and skills to meet the requirements of the assessment criteria. The evidence for this can involve getting someone to take a picture of you completing the task or discussing the task with an assessor and recording the discussion using documentation, video, etc. Remember that it is not enough to just write about it unless the task requires this type of written evidence.

Describe

Provide a vivid picture of what it is by using imagery, adjectives and adverbs to make the subject easy to understand. It may also convey an idea or fact.

Determine

To find out or decide. This may involve research, following a set of procedures or carrying out a series of calculations to find a solution.

Develop

Build a process or activity or understanding either from scratch or using an existing product to create something workable.

Differentiate/ Distinguish

Look at the characteristics of an item or situation/ activity and explain the differences.

Evaluate/Justify

You must look at whatever the required content/process is and suggest other relevant, significant or possible outcomes. It is the process of exploring, checking and suggesting a likely outcome with reasons.

Explain

Provide a comprehensible answer that shows an understanding of the content/process mentioned. Your answer should include: what it is, how it works, what it looks like, what it does, how it happens, why it happens and any relevant reasons.

Identify

For most assessment criteria this requires the learner to list and describe what is required or relevant to produce an outcome, or requires the learner to make choices to achieve a particular aspect of their job. At levels 4, 5 and 6 this would require the learner to say what is available, make the choice and then to explain or justify why the choice was made.

Implement

Putting something into practice after the development process has taken place. This ensures that the product/process is actually employed and/or used by self and others during work activities.

List

Produce a number of relevant items which apply to the question. Further description is not required.

Manage

After a development process ensure that the product/process works using relevant management techniques.

Recognise

Be aware of, familiar with and able to identify an activity or product.

Mandatory Units

FM401: Understand the contribution of facilities management services to organisations

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
Understand how facilities management services meet the needs of clients	1.1. Describe the client organisation's culture, operating market and business objectives			
	1.2. Explain how facilities management services contribute directly to the client organisation's core business			
	1.3. Explain the importance of complying with the organisation's systems, policies, procedures and resource constraints when undertaking facilities management			
	1.4. Establish the organisation's understanding of facilities management and how it interprets service delivery			
Be able to deliver facilities management services in a way that responds to the needs of clients	2.1. Perform activities in a way that reflects the ways of working of the client organisation			
	2.2. Deliver services which meet the client organisation's objectives			
	2.3. Comply with the organisation's, policies and procedures			
	2.4. Carry out facilities management within the resource constraints of the client organisation			
	2.5. Ensure that those delivering facilities management services comply with the client organisation's policies and procedures			
	2.6. Ensure facilities management activities are delivered in a lawful and ethical manner following best practice			
Be able to provide information and advice on the nature of facilities management services	3.1. Explain the range of facilities management services available to the client organisation			
	3.2. Indicate the contribution facilities management services will make to the client's core business			
	3.3. Ensure that facilities management information and advice is consistent with the organisation's policy, procedures and resource constraints			

	3.4. Confirm the client's understanding of the facilities management information and advice given			
	3.5. Support the client organisation to identify the facilities management services it requires and how they will be delivered			

FM403: Manage facilities management services

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1. Understand the delivery requirements of the facilities management services being provided to the client	1.1. Describe how to identify the resources required to deliver facilities management services and their costs			
	1.2. Describe ways of planning, organising and managing a number of different services in combination, including those outside own area of expertise or knowledge			
2. Be able to carry out the operational plan	2.1. Quantify the resources available against the required services			
	2.2. Identify and delegate tasks and responsibilities for the delivery of facilities management services			
	2.3. Ensure that those delivering the facilities management services understand the plan, their responsibilities and the limits of their authority			
	2.4. Oversee any specialist or technical services and expertise required to assist in delivery of services			
	2.5. Monitor service delivery against agreed requirements			
	2.6. Monitor and manage costs of service delivery			
	2.7. Obtain and make use of feedback from those delivering the services in order to ensure effective delivery			
	2.8. Deal with problems in the delivery of facilities management services			

FM408: Develop productive working relationships with others when delivering facilities management services

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand how to develop and maintain productive working relationships when delivering facilities management services	1.1. Describe the needs of the organisation and its core business and how they impact on the delivery of facilities management services			
	1.2. Identify the factors to take into consideration regarding the allocation of roles and responsibilities			
	1.3. Identify the communication procedures needed between stakeholders			
	1.4. Explain how to consult with others and the most appropriate methods for different stakeholders			
	1.5. Describe how to deal with conflict and seek resolution to problems			
2 Be able to work with others when delivering facilities management services	2.1. Identify roles and responsibilities of clients, colleagues and other stakeholders involved in the provision of facilities management services			
	2.2. Agree communication procedures and timings with relevant stakeholders			
	2.3. Ensure that relevant stakeholders are provided with full and accurate information and consulted with as appropriate on key decisions			
	2.4. Negotiate with relevant stakeholders to ensure that the needs of the organisation are met			
	2.5. Manage conflicts, misunderstandings and disagreements in ways which maintain existing relationships			
	2.6. Identify how you would deal with situations where conflicts cannot be resolved			
	2.7. Review the effectiveness of relationships and identify where improvements can be made			

FM411: Implement health and safety and environmental facilities management procedures

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand the health, safety and environmental standards which govern the delivery of facilities management services	1.1. Identify and explain the current health, safety and environmental legislation relevant to specific facilities management services			
	1.2. Explain the roles and responsibilities of the organisation and individuals in relation to health, safety and environmental protection			
	1.3. Describe the information that the organisation's health, safety and environmental policy should contain and how to access it and communicate it to others			
	1.4. Identify ways of ensuring compliance with legislative requirements			
	1.5. Describe ways of implementing, monitoring and reviewing health, safety and environmental policies and practices			
	1.6. Describe procedures for the identification, assessment and mitigation of risks			
	1.7. Describe what constitutes a breach in health, safety and environmental policy and how to record and report such breaches			
	1.8. Explain the consequences of failing to comply with relevant legislation and how this impacts on the reputation of the organisation			
2 Be able to set up systems to ensure health, safety, and environmental standards are met when delivering facilities management services	2.1. Review health, safety, environmental and quality responsibilities to ensure they are consistent with legal and organisational policies, requirements and expectations			
	2.2. Ensure relevant personnel understand their responsibilities and liabilities for meeting legal, regulatory and internal requirements for health, safety and environmental impact			
	2.3. Identify the processes for ensuring that the organisation			

	has written health, safety and environmental policies that aim to minimise risks to others and the environment			
3 Be able to implement and monitor health, safety, environmental and quality systems when delivering facilities management services	3.1. Demonstrate that your own actions reinforce the messages in the organisation's health, safety and environmental policy statements			
	3.2. Conduct regular reviews of health, safety and environmental procedures			
	3.3. Ensure that any breaches in health, safety, and environmental requirements are accurately recorded and reported			
	3.4. Identify where improvements can be made to health, safety, environmental and quality practices and recommend changes			

FM413: Manage operational performance in facilities management

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand the facilities management delivery model, the components of operational performance and how to implement them	1.1. Explain the techniques available for identifying and defining functional, quality and performance requirements in facilities management			
	1.2. Identify and describe the range of contract models and service level agreements that can be employed and how to identify the most appropriate to facilities management service delivery			
	1.3. Explain ways of determining achievable objectives, timescales and key performance indicators and how to monitor them relevant to the organisation's business objectives			
	1.4. Identify how to use benchmarking to identify best practice as an aid to performance monitoring			
	1.5. Describe methods of gathering and analysing performance data and using it to make objective evaluations of performance			
2 Be able to define the performance requirements of facilities management services	2.1. Understand the level of service, performance and quality required and expected in the delivery of facilities management services			
	2.2. Assess the service requirements for delivering facilities management services			
	2.3. Understand appropriate best practice benchmarks relevant to current service delivery			
3 Be able to manage the delivery of facilities management to meet requirements	3.1. Ensure that objectives for facilities management delivery are achievable and measurable			
	3.2. Agree the level of service to be delivered with relevant stakeholders			
	3.3. Record service level agreements in a contract or other appropriate format			
	3.4. Agree a system that allows the measurement of			

	performance against agreements and specifications			
	3.5. Identify areas for remedial action and improvement			
4 Be able to evaluate operational performance of facilities management services	4.1. Review the delivery of facilities management services against the requirements of the agreement or specification to identify opportunities for reducing costs and enhancing value			
	4.2. Record evaluation of service performance and present suggestions for improvement to relevant stakeholders			

Optional Unit Group 1

FM402: Implement facilities management policies and operational plans

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand the nature of facilities management policies and operational plans	1.1. Describe the core business and objectives of the client organisation			
	1.2. Identify how the effective delivery of facilities management can contribute to the client organisation's overall business objectives			
	1.3. Describe the content of facilities management policies and operational plans			
	1.4. Identify the key stakeholders responsible for agreeing and implementing facilities management policies and their roles and responsibilities			
	1.5. Describe the procedures for implementing and reviewing facilities management policies and operational plans			
2 Be able to implement facilities management policies and operational plans	2.1. Gain support from relevant stakeholders for the implementation of the facilities management policies and operational plans			
	2.2. Specify the key roles and responsibilities for implementing facilities management processes and procedures			
	2.3. Agree and allocate resources to ensure processes and procedures are implemented			
	2.4. Identify priorities and risks and assign objectives to ensure that these are managed within the identified resources			
	2.5. Monitor and report on the effectiveness of facilities management processes and procedures			
	2.6. Recommend changes to policies, processes and procedures			

FM405: Monitor and implement facilities management projects

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand how to monitor and implement facilities management projects	1.1. Describe the legislative and regulatory requirements in relation to particular facilities management projects			
	1.2. Identify ways of establishing the purpose, scope and components of facilities management project plans			
	1.3. Explain the role of facilities management projects in meeting the needs and expectations of the organisation			
	1.4. Describe how to develop a timeline or schedule for facilities management projects and how this can be monitored			
	1.5. Describe ways of establishing roles and responsibilities and reporting lines in order to monitor facilities management projects			
	1.6. Explain how to establish key deliverables and milestones in facilities management projects			
	1.7. Identify techniques for monitoring project progress and dealing with deviations and contingencies			
2 Be able to plan facilities management projects	2.1. Identify the purpose and scope of the facilities management project			
	2.2. Identify the needs and interests of the key stakeholders involved in the facilities management project			
	2.3. Confirm the organisation's needs and expectations in relation to the facilities management project			
	2.4. Identify any legislative and regulatory obligations which must be met in relation to the project			
	2.5. Ensure a common and shared understanding of the facilities management project requirements			
3 Be able to develop a facilities management project plan	3.1. Develop a project plan timeline			
	3.2. Identify risks associated with the project and prepare contingency arrangements			

	3.3. Establish roles and responsibilities for all those involved in the project including own responsibilities			
	3.4. Ensure that specific tasks within the project are achievable and measurable			
	3.5. Identify the skills required to deliver the project and select required staff			
4 Be able to monitor and control facilities management projects	4.1. Establish clear lines of control and reporting			
	4.2. Identify practical and cost effective methods of obtaining and managing physical resources			
	4.3. Set key deliverables or milestones in project delivery			
	4.4. Set up and operate effective financial control systems			
	4.5. Monitor progress to ensure that any deviations from the project plan are identified			
	4.6. Identify and agree corrective actions with the client in case of deviations			
	4.7. Keep all relevant people, including clients where appropriate, informed of project progress at agreed intervals			
	4.8. Make changes to projects once implemented in the light of feedback			
	4.9. Evaluate the effectiveness of the project at completion and identify lessons to be learnt for future projects			

FM407: Support equality, diversity and individual rights in facilities management

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand the issues involved in promoting equality, diversity and individual rights and responsibilities when delivering facilities management services	1.1. Describe own organisation's equality, diversity, rights and responsibilities policies, and their impact on facilities management service delivery			
	1.2. Describe own role and limits of responsibility in supporting equality, diversity and the rights and responsibilities of individuals			
	1.3. Identify the behaviours which may be expressions of stereotyping, prejudice and labelling, and their effect on people			
	1.4. Identify appropriate ways of handling the tensions that may arise between people with different values and beliefs from those of the people with whom they work			
2 Be able to support people's equality and individual rights in a facilities management environment	2.1. Ensure own actions in interpreting rights and responsibilities comply with legislative requirements and organisation's policies			
	2.2. Provide information on equality and diversity issues to others which is accurate and current			
	2.3. Communicate to others the importance of providing and maintaining equality of access and usability of facilities to all			

FM410: Manage facilities management budgets and finances

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand the processes for setting, managing and monitoring budgets and finance	1.1. Identify the organisational requirements governing finance and budgets and for maintaining financial records			
	1.2. Explain ways of maintaining control of budgets and techniques for doing this			
	1.3. Identify different types of costs and ways of managing them			
	1.4. Identify ways of allocating budgets to facilities management			
	1.5. Identify the limits of personal authority over authorising of expenditure and control of budgets			
	1.6. Interpret financial information including profit and loss			
2 Be able to work with established financial processes for the delivery of facilities management services	2.1. Obtain complete, accurate and up to date information on the budgets and finances available for delivering facilities management services, including fixed amounts for projects, contracts and contingencies			
	2.2. Operate agreed system for managing budgets and costs			
	2.3. Follow procedures to detect errors, unauthorised use of assets, crime and changes in circumstances and notify the appropriate person			
3 Be able to monitor budgets and finances when delivering facilities management services	3.1. Allocate realistic and achievable budgets based on cash flow calculations and total costs			
	3.2. Manage capital and revenue budgets applying appropriate financial management techniques			
	3.3. Review cash flow projections against actual income and revenue expenditure at agreed periods, identify any problems and take corrective action			
	3.4. Authorise expenditure within the limits of own authority			
	3.5. Make a business case for changes to budgets based on a			

	cost-benefit analysis			
	3.6. Ensure facilities management services operate within budget, providing a justification for any expenditure which exceeds the agreed budget			
	3.7. Collate and store financial records securely in line with regulatory and organisational requirements			

FM416: Manage accommodation and space utilisation

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand the process of managing the use of space	1.1. Describe ways of identifying the latest industry practices and trends in space management			
	1.2. Identify the relationship between the intended use of the building or facility and the space management needs of the organisation			
	1.3. Describe how to establish the characteristics of the building or facility and any restrictions on space usage or alteration			
	1.4. Explain how available space can be adapted to meet the needs of the organisation and users			
	1.5. Identify the factors to take into account when allocating space and facilities			
	1.6. Explain the types of specialist expertise available on space management and where it can be obtained			
	1.7. Describe methods and techniques for monitoring, measuring, implementing, testing and reporting space management performance			
2 Be able to develop a plan for space utilisation	2.1. Ensure that the space needs of users and other stakeholders are identified accurately, prioritised and updated regularly			
	2.2. Design and develop a plan for space and facility allocation and usage that is based on accurate information on user needs and priorities and is compliant with relevant legislation			
	2.3. Ensure space and facility allocation is compatible with the characteristics of the building or facility, any restrictions on space usage or alteration, adjacent uses and relevant legislation			
	2.4. Identify necessary approvals required for planned allocation of space and facilities to owners and users as appropriate			

	2.5. Record and report on the use of space and facilities as part of performance management			
	2.6. Review the use of space, identifying any improvements that can be made or any changes that are necessary to optimise performance and remain compliant			
3 Be able to consult with stakeholders on the use of space	3.1. Identify own responsibilities and liabilities under organisational space management statements and policies			
	3.2. Ensure that relevant parties are advised when there are problems with the allocation of space, that the circumstances are clearly explained and that realistic options are developed and proposed			
	3.3. Ensure that space and facility allocation are confirmed with property owners, users, clients and other interested parties			
	3.4. Seek regular feedback from space users on the effectiveness of space utilisation			
	3.5. Make suggestions for changes in space utilisation based on feedback			

FM417: Oversee works and maintenance facilities

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand how to maintain facilities through maintenance activities	1.1. Identify the organisation's business objectives and priorities and how these impact on the maintenance of facilities			
	1.2. Describe how to calculate life-cycle costs and the impact they have on works and maintenance			
	1.3. Explain the difference between reactive and planned maintenance			
	1.4. Identify the factors to be taken into account when developing and monitoring a maintenance schedule including risk assessment			
	1.5. Describe how to assess the cost-benefit of implementing planned preventative maintenance			
	1.6. Explain how to control costs and identify what is considered best value			
	1.7. Describe how to monitor the maintenance schedule in line with service level agreement			
2 Be able to implement and review works and maintenance procedures	2.1. Implement a system of planning, recording, monitoring, tracking and controlling facility maintenance			
	2.2. Follow a schedule for planned preventative maintenance that minimises disruption to facility users			
	2.3. Identify and assess risks associated with works and maintenance and record outcomes in an appropriate format according to set procedures			
	2.4. Implement controls to manage risks in the provision of facilities			
	2.5. Implement procedures to undertake reactive maintenance and deal with contingencies			
	2.6. Monitor and control works following agreed procedures including the updating of records			

	2.7. Control costs of works and maintenance to achieve best value within own area of responsibility and within given parameters			
	2.8. Audit service requirements to ensure the organisation's needs can continue to be met by the maintenance schedule			

FM419: Contribute to sustainable best practice through facilities management

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand how facilities management practices can contribute to the sustainability of the environment and communities	1.1. List the legal requirements regarding environmental protection and how to comply with them			
	1.2. Demonstrate an understanding of the contribution of sustainable practices on climate change			
	1.3. Identify ways of assessing and mitigating the environmental impact of facilities management activities			
	1.4. Describe ways of minimising demand for energy and water by conserving and renewing resources			
	1.5. Describe ways of minimising, re-using, recovering and disposing of waste			
	1.6. Identify the role of sustainable practice in meeting corporate social responsibility obligations			
	1.7. Identify ways of communicating sustainability issues to others and promoting the economic benefits of adopting sustainable practices			
	1.8. Describe how to make best use of environmentally friendly materials and consumables			
2 Be able to adopt facilities management practices that contribute to sustainability	2.1. Implement practices which minimise demands on water and energy			
	2.2. Implement practices which minimise the environmental impact of facilities management services by reducing pollution and minimising the carbon footprint			
	2.3. Make the most efficient use of materials, equipment and consumables			
	2.4. Reduce, re-use, recycle and recover waste in the most efficient manner			
	2.5. Ensure that suppliers and contractors adopt sustainable practices wherever possible			

3 Promote and monitor sustainable facilities management practices	3.1. Communicate and promote best sustainable practice to others in the organisation, among clients, contractors and suppliers, as appropriate			
	3.2. Monitor and evaluate facilities management practices to ensure conformity to sustainability principles			
	3.3. Contribute to the review and revision of sustainability policies and practices			

Optional Unit Group 2

FM404: Develop and promote facilities management services

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand how to develop and promote facilities management services	1.1. Describe the market in which the organisation operates			
	1.2. Identify the organisation's business objectives, policies and procedures			
	1.3. Describe how the culture of the organisation influences the delivery of facilities management services			
	1.4. Describe current and emerging trends and developments in facilities management			
	1.5. Explain ways of consulting within the organisation to identify facilities management needs and expectations			
	1.6. Describe ways of identifying where value can be added to existing and planned services			
2 Be able to identify an organisation's future facilities management needs	2.1. Identify the organisation's core business and method of operating in its chosen market			
	2.2. Identify and confirm the organisation's future facilities management needs and direction			
	2.3. Identify opportunities to improve and expand facilities management services in line with market developments			
3 Be able to recommend ways of improving facilities management services	3.1. Consult with the organisation to identify facilities management needs and expectations			
	3.2. Match the organisation's needs with current and planned facilities management services			
	3.3. Present recommendations and indicate how they will better meet the organisation's current and future needs			
4 Be able to promote facilities management services	4.1. Agree with senior management and relevant stakeholders plans for promoting new facilities management services			
	4.2. Communicate the added value of new facilities management services to relevant others			
	4.3. Assess the current and future resources required to meet changing demand for facilities management services			

FM406: Implement change in a facilities management environment

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1. Be able to establish the drivers for change in the facilities management environment	1.1. Keep up to date with the environment in which the organisation operates			
	1.2. Assess the impact of external policy and market changes on the organisation			
	1.3. Assess the impact of internal drivers for change within the organisation and their impact on facilities management services			
2. Be able to plan the implementation of changes to facilities management strategy and delivery	2.1. Identify improvements that could be made to facilities management services to ensure the organisation can respond to changes in its operating environment			
	2.2. Identify ways of evaluating the impact of change on others			
	2.3. Consult with stakeholders, including clients and service users on proposed changes to facilities management planning and delivery			
	2.4. Review consultation findings and review plans for the implementation of changes to facilities management services			
	2.5. Take into consideration the needs of the client and/or service user when planning changes to facilities management services			
3. Be able to implement changes to facilities management services	3.1. Communicate changes and their implications to own staff and clients			
	3.2. Identify barriers to change and overcome problems in implementing new strategies, involving others as necessary			
	3.3. Implement any new ways of working which meet the requirements of the agreed changes			
	3.4. Identify any training needs as an outcome of change and ensure that these are addressed			

FM409: Deliver facilities management through people

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1. Understand how to deliver facilities management through people	1.1. Describe own organisation's procedures for employing staff including recruitment, selection and appointment			
	1.2. Identify ways of assessing skills needs and the competence of individuals to deliver facilities management and how to identify training needs			
	1.3. Explain how to monitor staff performance, conduct a staff review and report on outcomes			
	1.4. Describe the key components of a contract of employment and the responsibilities contained within it			
	1.5. Explain how to ensure that individuals are eligible to work			
	1.6. Explain ways of encouraging open communication between individuals and the limits of confidentiality			
	1.7. Describe when to delegate tasks to people according to their expertise, knowledge, skills and attributes and the work requirement			
2. Be able to manage people to deliver facilities management services	2.1. Identify the expertise, knowledge, skills and attributes required of staff to deliver facilities management services			
	2.2. Ensure that all staff are eligible to work and have full information regarding their work roles and responsibilities			
	2.3. Encourage staff to communicate openly and honestly within the limits of client and organisational confidentiality			
	2.4. Monitor staff performance and ensure training and development opportunities are provided			
	2.5. Provide induction and on-going support to staff			
	2.6. Review staffing requirements in order to meet economic, technical and organisational requirements			
	2.7. Deal with any conflicts and staff problems including absence, sickness, grievance, dismissal and redundancy according to the organisation's relevant employment policies			

FM412: Manage risks and controls to ensure facilities management business continuity

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1. Understand the principles and techniques of risk management	1.1. Describe techniques for the identification, assessment, management and reporting of risks to the organisation in the delivery of facilities management services			
	1.2. Describe the purpose and key components of a business continuity plan, how it impacts on the organisation and how to implement and monitor it			
2. Be able to develop a system to manage risks as part of a business continuity strategy	2.1 Identify and assess risks relevant to facilities management operation			
	2.2. Identify ways of mitigating risks and the required controls to ensure business continuity			
	2.3. Identify the facilities management resources required to implement a risk management system			
	2.4. Advise the organisation on the impact of mitigating or accepting identified risks including factors such as cost-benefit			
	2.5. Operate within the limits of own authority and responsibility when giving risk management and business continuity advice to others			
	2.6. Ensure that effective measures are in place to control risks to the organisation and to the delivery of facilities management services			
	2.7. Ensure that the risk management plan is developed and tested to respond to the occurrence of risk events to maintain business continuity			
3. Be able to monitor and control risks in the delivery of facilities management services	3.1. Implement and review systems for monitoring, reporting on risks and make recommendations relevant to facilities management			
	3.2. Communicate the content of the business continuity plan to appropriate others, such as clients and colleagues within own area of responsibility			
	3.3. Develop and advise on procedures for the activation of the facilities management business continuity plan			
	3.4. Implement the system and ensure that it is being followed within own area of responsibility			

	3.5. Evaluate the effectiveness of the risk management and facilities management business continuity plan and make recommendations for modifications in the light of experience and feedback			
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FM414: Specify and source products and services for facilities management

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand the procurement process in relation to facilities management	1.1. Explain the organisation's approach to acquisition and procurement and how these support business objectives and maintain productive working relationships with suppliers			
	1.2. Describe the supply chain process involved in the procurement of facilities management services			
	1.3. Describe the information needed from other individuals, departments and organisations to inform the procurement process in facilities management			
	1.4. Explain how to develop costed specifications which clearly state the required products and services			
	1.5. Identify the range of possible contract models that can be entered into and how to use the most appropriate one for the product or service			
	1.6. Describe ways of developing and maintaining productive working relationships with suppliers			
2 Be able to manage the procurement of products and services for facilities management	2.1. Produce a specification for the procurement process which clearly states the organisation's requirements and expectations			
	2.2. Compare different suppliers in terms of the advantages and disadvantages of procuring from each of them			
	2.3. Balance the implications of cost and quality when procuring services and products to support facilities services			
	2.4. Select suppliers which best meet the requirements of the specification and provide best value			
3 Be able to review and alter procurement processes and suppliers	3.1. Evaluate the delivery of products and services from suppliers in terms of quality, cost and reliability			
	3.2. Re-negotiate or terminate contracts with suppliers based on objective evaluation of performance and cost			
	3.3. Contribute to the continual review of procurement strategy for goods and services			

FM415: Provide property and asset management

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand the processes for managing property and assets	1.1. Explain how to establish the intended function of the property and how this affects the organisation's operation			
	1.2. Identify ways of establishing the goals for the inspection system and related criteria			
	1.3. Explain the content of an inventory and how it is conducted, outcomes recorded and updated			
	1.4. Explain how to develop an inspection schedule			
	1.5. Identify hazards and deficiencies during an inspection and describe what action should be taken			
	1.6. Identify procedures for completing handover of facilities and roles and responsibilities in the process			
2 Be able to ensure that facilities are fit for purpose	2.1. Monitor property and assets following agreed policies and operation procedures			
	2.2. Develop and implement an inspection schedule for the conduct of planned, regular and ad-hoc inspections			
	2.3. Maintain a detailed inventory of all assets and components to enable the effective monitoring of facilities			
	2.4. Collect and collate all relevant information to inform the monitoring process, including user feedback where relevant			
	2.5. Develop plans for the conduct of planned, preventative and life-cycle maintenance			
3 Be able to manage property and assets	3.1. Verify that assets, components and facilities function as intended. and that deficiencies and hazards are identified			
	3.2. Authorise appropriate action to remedy deficiencies and hazards in order to meet agreed organisational and legislative requirements			
	3.3. Agree with relevant stakeholders that facilities are fit for purpose and obtain a formal record in an appropriate format			
	3.4. Ensure that all necessary documentation relevant to the monitoring			

	of facilities is complete, accurate and up to date within the limits of own authority			
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FM418: Carry out energy management of facilities

Level: 4		Evidence Type	Portfolio Ref Number	Comments
Learning outcomes	Assessment criteria			
1 Understand the contribution of energy management to the efficient and cost-effective operation of facilities	1.1. List the relevant regulatory requirements for energy management			
	1.2. Identify ways of measuring the energy requirements of the organisation/building			
	1.3. Explain how to relate energy management activities to the energy requirements of the organisation/building			
	1.4. Identify methods of managing energy use in relation to sources of renewable and alternative energy			
2 Develop and communicate a strategy for energy management of facilities	2.1. Identify own responsibilities and liabilities within energy management policies and practices			
	2.2. Carry out an accurate audit of the energy requirements of the organisation/building as the basis for energy management policies and practices			
	2.3. Ensure that the strategy for energy management is sustained and takes account of best practice			
	2.4. Communicate to key stakeholders the long-term benefits of improving the energy efficiency of buildings and facilities			
3 Support the effective use of energy	3.1. Ensure that the sources of energy used are renewable and sustainable taking into account cost-effectiveness and regulatory and legal requirements			
	3.2. Review buildings and facilities to identify where improvements can be made to energy efficiency			
	3.3. Ensure that those responsible for procurement consider energy efficiency and sustainability as a priority with particular reference to building fabric and insulation			
	3.4. Ensure that issues of energy efficiency and environmental impact are taken into account when assessing the viability and sustainability of new and existing facilities			

Appendix 1: Qualification Structure

Learners must complete all units in the Mandatory Unit group, three units from Option Group 1 and a further three units from Option Group 2.

Mandatory Units

Ofqual Code	Unit Title	Level	WAMITAB Code
H/502/8148	Understand the contribution of facilities management services to organisations	4	FM401
K/502/8149	Manage facilities management services	4	FM403
D/502/8150	Develop productive working relationships with others when delivering facilities management services	4	FM408
H/502/8151	Implement health and safety and environmental facilities management procedures	4	FM411
K/502/8152	Manage operational performance in facilities management	4	FM413

Optional Group 1

Ofqual Code	Unit Title	Level	WAMITAB Code
M/502/8153	Implement facilities management policies and operational plans	4	FM402
T/502/8154	Monitor and implement facilities management projects	4	FM405
A/502/8155	Support equality, diversity and individual rights in facilities management	4	FM407
F/502/8156	Manage facilities management budgets and finances	4	FM410
J/502/8157	Manage accommodation and space utilisation	4	FM416
J/502/8255	Oversee works and maintenance facilities	4	FM417
L/502/8158	Contribute to sustainable best practice through facilities management	4	FM419

Optional Group 2

Ofqual Code	Unit Title	Level	WAMITAB Code
R/502/8159	Develop and promote facilities management services	4	FM404
J/502/8160	Implement change in a facilities management environment	4	FM406
L/502/8161	Deliver facilities management through people	4	FM409
R/502/8162	Manage risks and controls to ensure facilities management business continuity	4	FM412
Y/502/8163	Specify and source products and services for facilities management	4	FM414
D/502/8164	Provide property and asset management	4	FM415
H/502/8165	Carry out energy management of facilities	4	FM418



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