



Blue-Eye Training



Level 3 Workbook

Introduction to Facilities Management

BIFM Level 3 Qualifications Tuition Workbook. Unit 3.01, Credit Value: 6

A chapter by chapter workbook devised to match the qualification specification requirements

Including practical exercises and qualification support and guidance notes



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Introductory Messages

How to Use this Workbook

The workbook consists of various sections, some with separate chapters, as below.

Distance Learners' Guidance Section

Distance learners are given a few additional instructions on the next page.

The Unit Specification

This is a section which indicates what the Awarding Organisation (the BIFM) have defined as the learning outcomes of the topic (what you will learn from the tuition) and the assessment criteria (the manner in which learners will demonstrate their topic knowledge and understanding). Learners should familiarise themselves with this as part of their studies.

The Tuition Sections and their Associated Chapters

These are devised to address one element of the study topic. Each chapter includes:

- Information that the learner must read in order to pick up a suitable level of topic knowledge.
- Exercises the learner is required to undertake. They allow learners to apply the learning in a practical way. The results and findings of these exercises often record ideas or answers which may be used in addressing the assessment paper tasks.

Learners should study each and every part of the tuition.

Each chapter has been designed to match one or more requirement of the specification. Therefore, alongside each chapter number and title, we show the assessment criteria number which we are assisting with.

Appendices

These sections are often used to provide additional reading or support information which is not directly associated with the specification but is useful, nonetheless.

The Inclusion of a Bibliography

This summarises the sources of some of the information researched and used to support some of the tuition within this workbook. Learners will need to create their own bibliographies when conducting assignments if using materials produced or written by somebody else to support their own answers.

An Important Announcement

Please be aware that throughout all of the tuition materials the position of **Facilities Manager** is used as the primary job role or position. You may be a Building Services Manager, an Estates Supervisor, a Facility Co-ordinator, Office Manager, Premises Supervisor, or similar; but for reasons of simplicity the role of **Facilities Manager** is taken to mean any of the above.

Also, whilst we acknowledge the fact that many of the best Facilities Managers in the UK are women, we refer to the Facilities Manager throughout all of the tuition materials as male (using the terms **he or him**).

Therefore, whenever we state something along the lines of “The **Facilities Manager** needs to manage **his** team...” no disrespect or inconvenience is intended to those who are not male and/or those whose job title differs somewhat.

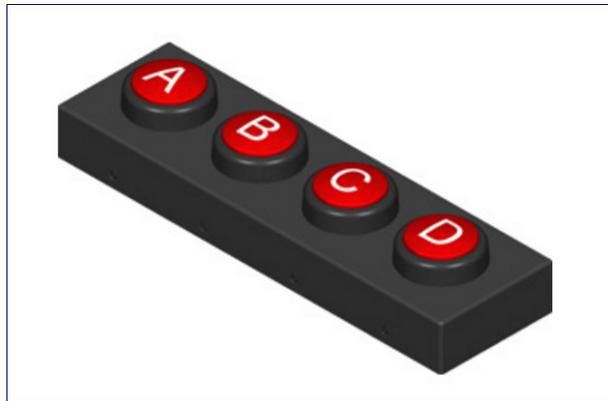
The Distance Learners’ Guidance Section

Those studying via the distance learning, self study option without attending workshops must:

- ✓ Read all sections of the workbook fully and carefully.
- ✓ Conduct all of the tuition exercises in the manner they are presented.

Once you have completed all of your studies you should:

- ✓ Undertake the multiple choice revision test questions toward the end of the workbook



- ✓ You will submit your answers to the Blue-Eye Training tutors to review, the purpose of which is to gauge whether you have learned sufficiently so as to be ready to tackle the assessment paper for the Unit.

Further instruction on how to submit the answers and for an overview on the necessary and expected pass mark, is given in **Appendix 1**.

Work for the multiple choice revision test questions should be completed at least two working days before the intended assessment issue date. You will find these dates in your personalised learning plan which was created for you by our Student Support team during the induction process.

We will contact you to acknowledge receipt of submitted work, will contact you within 3 days as part of reviewing your work and issue the assessment paper(s) if we feel you are ready to tackle them.

Learners who have not demonstrated enough learning by having scored less than a target figure, will be asked to re-study and re-submit their answers until a suitable understanding is being demonstrated.

Awarding Organisation Specification Information

The Unit Specification

Introduction

As an awarding organisation, the British Institute of Facilities Management (BIFM), offers guidance on what the topic inclusions for each subject area, or unit, should be. Along with the aims of the unit, this will be broken down into three other main areas:

1. Learning outcomes (What will be learned)
2. Assessment criteria (How learning may be demonstrated)
3. Indicative content (Associated subjects or topics the tutors may wish to include in order to further develop knowledge)

These are defined below and the actual specification requirements for this unit are given on the next page.

1. Learning Outcomes

This refers to a set of learning intentions that will have been achieved including the knowledge, skills, and abilities that learners will also have attained as a result of their involvement in a particular set of educational experiences.

The tuition materials will have been produced in such a way as to give the learner everything required to learn the topic.

2. Assessment Criteria

The purpose of assessment criteria is so that learners can demonstrate that they have been adequately taught the subject and that they can apply the new knowledge in a worthwhile manner.

The assessment criteria link to each of the learning outcomes and the manner in which knowledge may be demonstrated is indicated to the learner, also. Therefore, learners should study these very carefully so they are ready to demonstrate their learning when called upon to do so in an assessment.

Learners will work with their studies, in conjunction with the assessment criteria, and by utilising their assignment work will subsequently conduct their assessment(s).

3. Indicative Content

This is a phrase given to associated subject areas or content that should be included due to its relevance. Tuition providers (eg. Blue-Eye Training) use these and indeed other associated subject matter to ensure all tuition materials are pertinent and associations are made with other related topics where appropriate.

Additional Note Regarding Learning Outcomes and Assessment Criteria for this Unit

The learning outcomes and associated assessment criteria are provided on a chapter by chapter basis in accordance with the relevant tuition materials. On the next page, a table is included that indicates the aims of the unit, the learning outcomes and the assessment criteria for each learning outcome.

Learning Outcomes and Assessment Criteria for this Unit

The aims of this unit are provided below along with an indication of the learning that will be achieved by studying this workbook. Learners will be assessed in such a way as to satisfy the assessment criteria, which are also clearly indicated below.

Aims	
This unit addresses the definition of facilities management, its role within organisations, and how it can be set up in ways that will help the organisation to function more effectively. The unit addresses the potential impact of an organisation's arrangements for facilities management on the organisation's internal environment.	
Learning Outcomes (the learner will)	Assessment Criteria (the learner can)
1. Understand the nature of facilities management	1.1 Define facilities management 1.2 Distinguish between: <ul style="list-style-type: none"> • facilities management • other support services • core business activities 1.3 Explain the role of facilities management in: <ul style="list-style-type: none"> • meeting end-user requirements • reducing costs • maintaining business continuity • ensuring legal and regulatory compliance • supporting corporate social responsibility
2. Understand responsibilities commonly delegated to facilities management	2.1. Describe typical mechanical and electrical assets for which facilities management will be responsible, and outline the different assets' maintenance requirements 2.2. Describe typical support services for which facilities management will be responsible 2.3. Identify typical risks to the provision of facilities, and outline arrangements that can be made to maintain business continuity
3. Understand different service delivery models for facilities management	3.1 Outline different service delivery models for facilities management, including in-house, partially outsourced, wholly outsourced, total facilities management (TFM), and private finance initiatives (PFI) 3.2 Describe the advantages and disadvantages of each of these models, including cost, quality, compliance and user satisfaction
4. Understand the range of facilities management roles	4.1. Explain the key management functions within facilities management 4.2. Describe the various roles that a facilities manager could take, and the associated responsibilities
5. Understand the benefits of good communication	5.1. Describe the principles of effective communication 5.2. Describe the various methods of communication a manager can use, and when each method may be appropriate or inappropriate 5.3. Describe the nature and benefit of active listening

Tuition Section 1:

Introducing Facilities Management

Chapter:

1a

The Definition and Nature of Facilities Management

(relates to A/C 1.1)

Introduction

This chapter introduces the term facilities management and explains the main expectations made of the function by any typical organisation.

Management Questions (Application of Learning)

After having studied this topic, learners will be able to **answer questions** or **respond to demands** that they may face, perhaps from their own manager, when discussing topics in a meeting, or when working with their own staff, such as:

- a What four main areas of responsibility are addressed by an efficient facilities management function?
- b Where can I find BIFM's own definition of facilities management online?

At the end of the chapter you will be presented with an exercise to see how well you can apply the learning to the questions above.

The Big Question

One particular question those of us who work in the industry often get asked is:

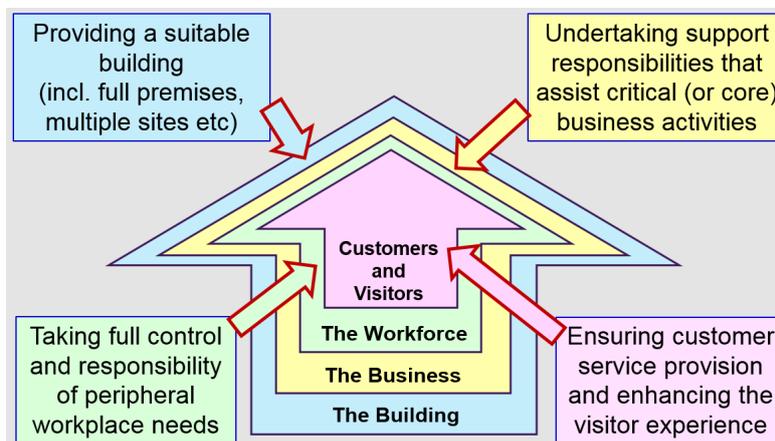
What is facilities management?

And we think it's fair to say, that few people seem to know for sure how to answer this. Yet we intend to show, by reading the chapter, that the answer to the question is:

Facilities management is a requirement made upon somebody (maybe who may have a team of staff):

- i. to provide a suitable building from within which the business may operate;
- ii. to support the business as they undertake their core (or critical) activities;
- iii. to take control of peripheral (or non-critical) workplace activities; and
- iv. to offer a suitable service and support to visitors or customers when using our building(s) / premises.

The diagram below, which we will explore in its four component parts shortly, helps convey the same messages.



The BIFM's Definition of Facilities Management

The British Institute of Facilities Management (BIFM) has formally adopted the definition of FM provided by ISO 41011:2017.

Organisational function which integrates people, place and process within the built environment with the purpose of improving the quality of life of people and the productivity of the core business.

Facilities management encompasses multi-disciplinary activities within the built environment and the management of their impact upon people and the workplace.

We can find this from accessing their website and following the links as shown:



We are now going to re-visit each of the four requirements listed on the previous page and will explain each in turn.

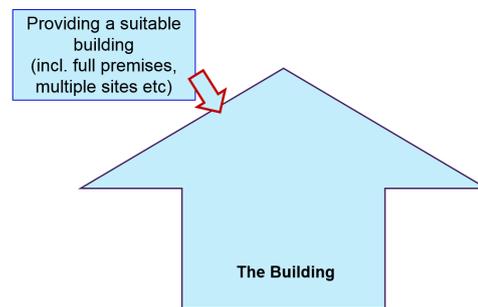
1 Building / Premises Suitability

In four stages, we will be developing a diagram that shows how the Facilities Manager's role integrates with the working environment.

Stage one is for us to consider the building (or business premises).

But, how did the building become so important?

We need to look at a brief history of facilities management to find out why.



In the 1960s, H. Ross Perot (of Electronic Data Systems (EDS), Texas) claimed Information Technology systems and management were necessary to *support* the *management* of the working *facility*. This was the first time the term *facility management* and *facility support* is reported to have been used.

In the early 1970s, two factors further contributed to the concept of facilities management.

Firstly, was an energy crisis that occurred at the time (availability and cost to produce it) which caused businesses to take a genuine look at how energy efficient their facility (business buildings) were and how they may be better managed.

Secondly, some business furniture manufacturers realised that buildings were poorly designed to support operational efficiency. This led to the suggestion that this was an opportunity for businesses to think more proactively about how the internal layouts were planned and organised.

Both challenges influenced organisations to set up the role of Facilities Manager* and create a set of responsibilities relating to building management and office efficiency.

*Note: For simplification purposes, this workbook will use the term Facilities Manager to mean any position responsible for the facility.

Companies started to realise the need for a dedicated role to exist within their teams and so the Facilities Manager's role evolved.

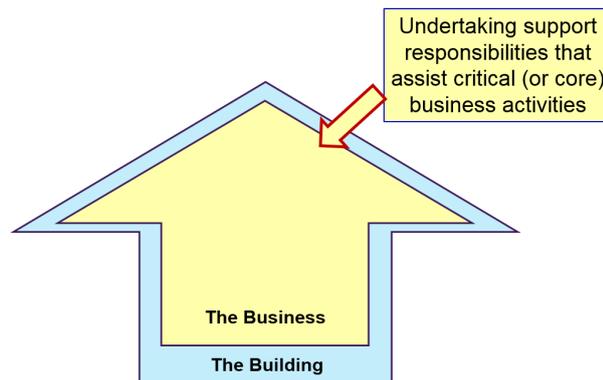
And so, in managing the building, the role of the Facilities Manager became one requiring us to look after:

- The building fabric (the main building shell and construction materials)- Although we do not have a dedicated chapter in this workbook regarding the building fabric, we do cover certain other topics in some detail, as you'll see below.
- The building services (the mechanical and electrical assets that help the building function- See **Chapter 1b** for a full overview).
- How the building's internal organisation is handled- We will cover various aspects of this within the workbook.

2 Business Support

Within the building(s), the business will need to operate; as is conveyed by the adding of the second layer to the diagram.

This therefore, is the next aspect to look at because businesses soon realised that facilities management had the ability to contribute to business efficiency.



It was noted in the 1980s and 1990s that organisations which embraced facilities management as a concept, became more efficient and their core business benefitted as a result. Put simply, they came to realise a well run building resulted in a well run business.

Facilities Managers proved they were capable of contributing to critical business activities by working as key management team members and by demonstrating how to undertake support responsibilities and activities that helped to make the core business function more effective.

In addition to business efficiencies, businesses and organisations also noticed that the cost of business operations reduced as a consequence of effective building management. Cost savings included (but were not limited to) the costs of running a building, the protection of the value of the assets therein, and financial aspects of contract management; as well as procurement savings and a reduction in HR costs (staff welfare and retention levels being the two main measures of this).

Based upon this level of importance, these are responsibilities that if are not suitably addressed, the business would probably suffer.

In **Chapter 2a**, we explain the concept of **core business** more than we can cover here. Please have a read of this if you wish to develop your knowledge and understanding of this concept in more detail. It will also demonstrate why the support requirements for one business will invariably differ to the support requirements of another.

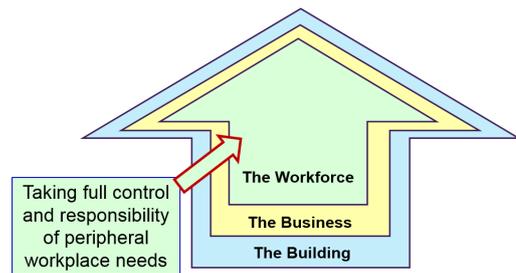
Consequently, we can claim that although the Facilities Manager knew his **primary** interest was to organise the building and manage the building services within it; his **secondary** interest was to undertake any responsibility that supports the critical business function, with these responsibilities being referred to as hard services- See **Chapter 1c** for a full overview of hard services and the associated duties these require us to perform.

3 Control of Peripheral Support

Within both the building and the business, the workforce has to operate suitably and effectively.

We can now integrate the third layer into our working environment diagram, as shown adjacent.

Facilities management is a major efficiency contributor to the workforce, as we'll see below.



From the early part of the 1980s, businesses developed a fuller understanding of the value of the workforce and this comprehension grew in momentum through the 1990s and has continued at a pace thereafter. They came to recognise the need for working efficiencies, enhanced comfort levels, the ability to meet personal preferences and above all else they realised the value of a well managed working environment to motivation and efficiency levels.

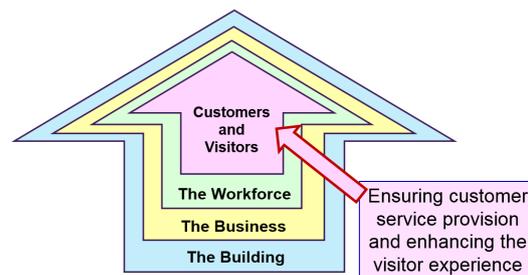
Businesses realised that asking core business staff to undertake the necessary support responsibilities proved to be a distraction from their main reason for being employed, and if attempting to do so, they were not able to fully dedicate themselves to undertaking their main job roles and personal responsibilities.

Unsurprisingly, the Facilities Manager was able to take full control of these needs and these support responsibilities became the remit of the facilities management function.

Taking full control of peripheral workplace support is known as being responsible for soft services- See **Chapter 1c** for a full overview of soft services and the responsibilities these require us to take charge of.

4 Visitor Experience and Customer Support

Because visitors and customers of all sorts may visit our site (including members of the public, suppliers, partners, inspectors, etc), the final aspect of the scope of facilities management is the need to ensure the visitor experience is as good as it may be. Customer support also needs to be provided (for both internal and external customers who may use the premises).



We now add the final layer into our working environment diagram.

Some facilities management activities are known as **front of house** as they are the first thing anybody would see if walking through the door, and we all know the value of first impressions. It is for the Facilities Manager to ensure the full duration of the visit or interaction is as good as it needs to be. From the building quality, to the level of communication and personal service, the Facilities Manager is responsible for ensuring the building-related aspects and the support staff aspects of the visitor and customer experience is as well organised as it can be.

Apply the Learning

Conduct the exercise below to **develop your management skills**.

On the first page of this topic section, we claimed that after having studied the tuition, you should be in a position to **answer questions** that could be asked by managers and colleagues (reminded to you below).



The **type of response** you will be able to develop will resemble the examples as given in the exercise below.

Learners' exercise 1a1

Consider what phrases, sentences, short passages, or sometimes just individual words, could be used to fill in the spaces marked [.....].

- a What four main areas of responsibility are addressed by an efficient facilities management function?
- >>> *Facilities management is a business support function that all organisations require which helps to ensure they will have*
- *a building which [.....];*
 - *support for their critical [.....];*
 - *somebody to take control over, and responsibility for, non-critical [.....]; and*
 - *a way to look after customers who visit our [.....].*

Your notes for the missing spaces:

- b Where can I find BIFM's own definition of facilities management online?
- >>> *If I access their website [www.] I can find this from the About Us link at the very top of the [.....], and then from the drop-down menus, I would choose the [.....].*

Your notes for the missing spaces:

Chapter

1b:

Building Services (Mechanical and Electrical Assets)

(relates to A/C 2.1)

Introduction

Part of making sure that building is suitable requires us to ensure the mechanical and electrical assets which the building relies upon are managed.

In this chapter, we introduce the following terms and their associated concepts:

- Building services
- Mechanical and Electrical (M&E) Assets

Management Questions (Application of Learning)

After having studied this topic, learners will be able to **answer questions** or **respond to demands** that they may face, perhaps from their own manager, when discussing topics in a meeting, or when working with their own staff, such as:

- a What is meant by the term building services?
- b Give some examples of building services.
- c Who are CIBSE?

At the end of the chapter you will be presented with an exercise to see how well you can apply the learning to the questions above.