



Blue-Eye Training



Overview of Facilities Management- Sample Tuition Workbook

BIFM Level 4 Qualifications Tuition Workbook. Unit 4.01, 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.

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.

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.

Distance Learners' Guidance

Distance learners are directed towards an additional section toward the rear of the workbook. Please read this section. Check the table of contents to help you find this.

Tutors' Review Checks

Tutors offer an insight into what learners' answers should include for each of the topics being assessed. These are devised around the type of information assessors are looking for in an answer and form the basis of the tutors' reviews of assignment work. Learners should use these as checklists of inclusions into your answers as they are prepared.

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.

Awarding Organisation Specification Information

The Unit Specification

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)

Each of the three aspects above are explained in the full tuition workbook.

So as to help learners to the best of our ability: We structure the workbook chapters to match each individual part of the specification, thus facilitating learning against the qualification requirements and expectations.

Learning Outcomes and Assessment Criteria for this Unit

The learning outcomes and associated assessment criteria are provided to learners in the full tuition workbook. Given below is a brief, but edited version of the specification for this study unit.

<p>Aims:</p> <p>This unit enables learners to develop an understanding of the scope and extent of the facilities management function and the range of associated services, the roles and responsibilities in different organisations and contexts as well as the importance of the contribution of facilities management in both societal and economic contexts.</p>	
Learning Outcomes	Assessment Criteria
1. Understand the scope and extent of the facilities management function	1.1 Explain the scope and extent of the facilities management function 1.2 Describe the range and diversity of contexts in which facilities management services are provided 1.3 Explain the relationship between the facilities management function and other business functions
2. Understand the range of services offered by facilities management	2.1 Explain what is meant by support services 2.2 Explain what is meant by building services 2.3 Explain what is meant by office and building space and its effective management 2.4 Explain the ways that properties and fixed assets are managed and maintained

The full tuition workbook provides the full specification chart.

Section 1: Facilities Management Supporting Business

Chapter 1a: Support Services: Hard and Soft Services (Relates to A/C 2.1)

Support Services- An Introduction

Facilities management is about organisational effectiveness. It is a discipline, or business function, adopted by an organisation or business to help facilitate the attainment of its objectives and goals. Facilities management is an extension of the property management role, to the extent that its scope often covers all non-core business activities associated with managing the property and with supporting the business unit occupying the facility.

The BIFM

The BIFM (British Institute of Facilities Management) have provided a definition of Facilities Management on their web site. Visit www.bifm.org.uk to explore the plethora of useful information they provide.

"Facilities management is the integration of processes within an organisation to maintain and develop the agreed services which support and improve the effectiveness of its primary activities".

They also imply that facilities management encompasses multi-disciplinary activities within the built environment and the management of their impact upon people and the workplace. It is vital to the success of any organisation. At a corporate level, it contributes to the delivery of strategic objectives. Also taken from their website, they introduce themselves thus:

"The British Institute of Facilities Management (BIFM) is the professional body for facilities management (FM). Founded in 1993, we promote excellence in facilities management for the benefit of practitioners, the economy and society. Supporting and representing over 14,000 members around the world, both individual FM professionals and organisations, and thousands more through qualifications and training."

On a day-to-day or operational level, effective facilities management provides a safe and efficient working environment within which businesses can operate and the people and workforce can carry out their duties; which is essential to the performance of any business - whatever its size and scope.

Scope: This is the term we will be using to address the following question:
How can facilities management be of help to a business?

Extent: This is the term we will be using to address the following question:
How much help will we be able to provide?

Though only briefly given above, both phrases will be explored in more detail in **Section 5** of the workbook.

Core Business Function

Organisations exist in order to carry out their **core business function**, whether this is the selling of products, or the provision of services; perhaps the organisation provides advice or non-chargeable services.



Picture source: BMC Manufacturing

Whatever their purpose, **core business** is the reason an organisation exists, and regardless of this purpose all businesses need the type of support that facilities management can help to provide.

Imagine this: You are the Managing Director of an expanding car manufacturer, a business you started several years ago as little more than a hobby in a large garage in your own back yard.

At the time, people liked what you did and started buying your cars, so you made more and had to hire some help. Because of this growth, and seemingly before you knew it, you occupied a very impressive centrally located manufacturing plant with plush offices for the sales and administration teams, hi-tech production facilities, a bright and welcoming reception area and a building to be proud of.

You brought into the business all of your design and engineering knowledge and expertise, but as business growth was under way you had to employ lots of other people to help you with the expansion. To name but a few, these included a Marketing Manager, Sales Director, Distribution Coordinator, Production Manager and other people who made sure the development and manufacture of the cars continued in a positive and purposeful manner.

However, no matter how well the core business of car production was going, all of a sudden you had the added demand of managing a building and all of the supporting functions that your business requires.

You hired a Facilities Manager who looked after the building, made sure the office workers had a safe, clean and comfortable work environment, the manufacturing plant had well managed work space with sufficient lighting, power and utilities supply as well as other services such as waste and recycling, IT provision, mail room facilities and portering. And then there's catering for the workforce, cleaning of the whole premises, security, maintenance, and so much more.

The Facilities Manager is seen by most organisations as the person who manages all of the essential support functions of any business and allows the core business to concentrate on the reasons they exist.

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A reflection on the exercise on the previous page

This exercise was, quite clearly, merely an opportunity to highlight the variety of support services that the different organisations require. As with the car manufacturer scenario, the business has its core function- services that they wish to concentrate on without having the distraction of managing other essential activities.

The Facilities Manager is likely to manage bedroom facilities, hygiene service, linen and laundry, a meet and greet front of house customer service, catering in well fitted out kitchens, dining facilities for guests, food handling and sanitary waste disposal, pest control, car parking, some level of security for members of the public (guests) and a plethora of other services as well which may include:

- Continual re-decorating and repairs to ensure image is protected
- Events planning
- Conference facilities provision, booking and reservations
- Healthcare, spa, swimming pool and other leisure facilities provision.

The examples given above are not exclusive to the hotel industry and some may well be required for our car manufacturer scenario, too yet the message is a clear one:

Facilities management provides the support a business needs to function properly.

This requires a full understanding of the business within which facilities management operates.

An FM service can assist in the achievement of corporate objectives by enabling effort and energy within business centres to be concentrated on core business activities.

Support Services- BIFM Level 4 Qualification Assessment Assistance

Assessment criteria 2.1 from the qualification specification requires us to look at the principle of defining **support services**, categorising them so as to identify the various types and a little later on, within **Chapter 1b** we will address the needs of Assessment Criteria 2.2 which wishes learners to concentrate on a different category altogether, **building services**, and how these differ to hard soft services.

The principle of support is so that the core business may undertake their business activities with the minimum of fuss and distraction; the staff being able to undertake their essential duties knowing there is support for whatever it is that is required to help them carry out their job functions.

Support Services- The Challenge

Providing the support services sounds like an easy job until all of the requirements have been fully identified and analysed; and even having done so, it would turn out to be even more complex than was initially thought.

Not only would there be a considerable amount to look after and organise, but the needs will be wide and varied. For instance, an organisation needs a clean, tidy efficient building that is safe, is warm, well ventilated, with working lifts, plant, toilets, water, waste and suchlike; yet in so working towards this aim the building should appear to the bystander to be a well organised establishment. Indeed, the building has to operate rather like a well oiled machine and be considered to be an efficient place into which a workforce can be integrated. And in so doing the Facilities Manager needs to look at two main areas, or categories; those known by the following terms:

- Hard services
- Soft services

These are defined and described on the next two pages along with examples given.

Hard Services

The Facilities Manager needs to ensure that the **hard services** needed to run and maintain a business are in place.

Not to be confused with **building services** which put very briefly are the workings of a building (see **Chapter 1b** for a full definition), **hard services** is the term given to those services and activities which are instrumental in helping to make the premises become a suitable vehicle for the conducting of business. Examples will include, for instance (the relevance of each example will depend on the nature of the business):

- Security and access control systems
- Providing and managing equipment used in production/manufacturing (if relevant to the industry/company)
- Storage and archiving systems
- Stock control systems
- Providing suitable IT and communications systems
- Accommodation provision and management
- Construction work or re-configuring of existing place of occupancy
- Installation work
- Waste management
- Providing and maintaining portable fire fighting equipment
- Providing a helpdesk service (sometimes seen as a soft service)
- Managing the building services
(see next chapter for a full insight as to what building services are, but given below are just a few)
 - Heating systems
 - Ventilation systems
 - Lifts
 - Fire detection and sprinkler systems...and many others besides (as stated above, see next chapter)

Sometimes the necessary building services become very specific to certain buildings, such as:

- X-ray machines for hospitals
- Fume filtration and extraction systems in laboratories
- Disposal of waste effluent for manufacturing plants
- Provision of conveyor equipment for distribution depots

These particular building services fall under a slightly new banner; namely those called **technical services**. But because they are so instrumental in the carrying out of the core function they continue to fall under the banner of **hard services**.

Soft Services

Once a workforce is occupying the premises (a building that operates well and a place they want to be in) the Facilities Manager needs to look at the services required by the workforce that allows for efficient working practices to be undertaken and those which create a comfortable working environment. These additional support services, known to be **soft services** may include for instance:

- Cleaning
- Catering
- Reprographics
- Car park control
- Creche facility
- Reception
- Conference room organisation
- Mailroom services
- Meet and greet reception service
- IT
- Storage
- Archiving
- Laundry services
- Gym and sports leisure service

Some of the services as given may not be evident in your own organisation, and this just goes to further demonstrate the need to have a full understanding of the specific business and their core function.

Other Topics Included in this Chapter

- Specific Needs and Adapting to Change
- Managing Support at all Levels
- Typical, common, or everyday FM department support services and activities
- Higher management level support services and activities
- Technical activities and technical support

Other Chapters in this Section of the Workbook:

Chapter 1b: Building Services
(Relates to A/C 2.2)

Chapter 1c: Options for Providing Building Services and Support Services
(Relates to A/C 2.1/2.2)

Section 2: Occupational Roles and Responsibilities

Chapter 2a: Key Management Functions (Relates to A/C 3.1)

Introduction

A good Facilities Manager will know and understand the business in which he works. He should know their visions, goals and aims, know something of their business plans and will be able to respond to these accordingly. He will anticipate the many influencing factors that will affect his own work activities, devising goals, objectives and strategies accordingly. He will advise all levels of the organisation on a seemingly continual basis.

A Facilities Manager's job role, his job description and range of actual contracted duties will vary from one organisation to another but in essence the key activities any Facilities Manager will undertake includes the need to work in the following key management functions (and others in addition, but it is difficult to be definitive about what each and every Facilities Manager is responsible for).

- | | | |
|---|---|---|
| – Contract Management | – Quality management | – Leadership and Management |
| – Property and Asset Management | – Strategic planning and development | – Financial Management |
| – Providing and managing support services | – Sustainability and Environmental issues as it relates to FM | – Procurement |
| – Workload management and allocation | – Change management | – Utilising external support |
| – Property, Fabric and Building services maintenance | – Customer services | – Dealing with suppliers and specialists relating to FM |
| – Customer support | – Working alongside core business | – Space management and optimisation |
| – Information and specialist knowledge relating to FM | – Risk Management | – People Management |
| – Project management | – Management reporting | – Health and Safety |
| | – Support Service operations | |

Description of Some Examples

Given below are some descriptions of choice examples from the lists above.

Learners should, when writing their answer to the associated A/C task, ideally choose a different combination of examples. We are not denying learners the opportunity to choose examples such as ours, but they should try not choose all of the same examples; and if they do choose examples similar to ours, they must demonstrate their own topic understanding by putting everything into their own words.

Managing Workloads

The Facilities Manager will need to assess organizational development, departmental demands and individuals workloads in order to ensure the right levels of resources are set aside in an endeavour to manage the workload requirements put upon the FM function. The Facilities Manager will need to manage the human resources available, schedule events, set objectives, organize and delegate duties and coordinate the functions to satisfactorily achieve the workload demands.

Monitoring and Evaluating Performance

In all work activities, whether managing people, contractors, contracts, supply, projects and suchlike the Facilities Manager needs to ensure performance is monitored during its undertaking and evaluated afterwards to ensure targets are achieved, deadlines met, standards maintained and budgets adhered to. Any shortfall in these areas must lead to identifying ways to make improvements for the future.

Seeking Help and Utilising External Support

The Facilities Manager, whilst not expected to be able to undertake every activity required to support the business may need to utilise the advice, help and/or skills of those who specialize in their field, typically activities in which a Facilities Manager may not be knowledgeable, competent or trained. In essence he will need to locate, choose, select, advise, work with and monitor their activities in order to ensure value for money is ensured.

Managing Contracts

In situations where the skills, knowledge or experience is not possessed by the Facilities Manager or held in-house the Facilities Manager may need to negotiate with specialists, set up contracts thereafter monitoring them for their usefulness, value and worth, ensuring quality is provided at all times and contracts are terminated or closed down properly when finished.

Arranging and Upholding Customer Support

The Facilities Manager should know who the customers are (or at least to know how to identify who the customers are), both internal and external. He should be able to discover what it is they need in order to be provided with what they need, know how best to achieve this and develop a plan to do so in the most efficient way possible. This may need a lot of co-ordination, task prioritisation, activity monitoring, reviewing and acting upon findings where necessary to ensure a rationale of continuous improvement exists at all times.

Co-ordinating Change Management

The FM function is undergoing continual change which should be anticipated where possible, dealt with proactively and any associated actions identified in good time, assessed for their intended effectiveness and implemented in a fit and appropriate manner. All actions should be monitored to ensure objectives are achieved and for their effectiveness. The Facilities Manager should manage change by being aware of the factors that could create change situations.

Other Chapters in this Section of the Workbook:

Chapter 2b: Range and Diversity of Contexts
(Relates to A/C 1.2)

Chapter 2c: Roles and Responsibilities
(Relates to A/C 3.2)

Section 3: Property Needs- Space and Asset Management

Chapters in this Section of the Workbook:

Chapter 3a: Managing Office and Building Space
(Relates to A/C 2.3)

Chapter 3b: Introduction to Asset Registers and Property Records
(Relates to A/C 2.4)

Section 4: Responsible Contribution

Chapters in this Section of the Workbook:

Chapter 4a: Sustainability and Corporate Responsibility
(Relates to A/C 4.1)

Chapter 4b: Techniques for Operational Achievement
(Relates to A/C 4.2)

Section 5: Performing to Needs and Expectations

Chapters in this Section of the Workbook:

Chapter 5a: Scope and Extent of Facilities Management Support
(Relates to A/C 1.1)

Chapter 5b: Business Function Relationships
(Relates to A/C 1.3)

Chapter 5c: Effective Communication
(Relates to A/C 5.1)

Other Sections of the Workbook:

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Assessment Support and Technique

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