

# Professional Standards Handbook



**iwfm**  
Institute of Workplace  
and Facilities Management

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### Publisher

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### Feedback

The Professional Standards is a 'living' document that will be reviewed and updated regularly to ensure that it reflects the changing needs of industry. We welcome feedback from workplace and facilities management practitioners and organisations on ideas as to how it might be further improved.

Please send feedback to Jonathan Nobbs, Director of Membership & Partnerships, jonathan.nobbs@IWFM.org.uk

## About us

**The Institute of Workplace and Facilities Management (IWFM) is the body for workplace and facilities professionals.**

We exist to promote excellence among a worldwide community of thousands and to demonstrate the value and contribution of workplace and facilities management more widely. We empower professionals to upskill and reach their potential for a rewarding, impactful career. We do this by advancing professional standards, offering guidance and training, developing new insights and sharing best practice.

It is our vision to see workplace and facilities management as a distinct profession – recognised beyond the built environment for its ability to enable people to transform organisations and their performance. The IWFM was established in 2018. It builds on the proud heritage of 25 years of the British Institute of Facilities Management.

## Our purpose

Because workplace and facilities management transforms organisations and enhances experience

## Our vision

Where every workplace delivers

## Our mission

We empower and enable workplace and facilities professionals to expand their potential and have rewarding, impactful careers. We are a business enabler. Together we optimise the profession's impact

### WHAT DO WE MEAN BY WORKPLACE?

Workplace recognises the joint responsibility of facilities management, information technology and human resources to achieve optimal productivity between people, technology and workplaces. Not working space limited to "office" but anywhere that work happens. It captures a broader world, considering space, technology and culture. It recognises a need for skilled individuals who can interconnect between these specialisms.

## Introduction

**The Workplace and Facilities Management Professional Standards define the competences necessary to be an accomplished workplace and/or facilities management practitioner at every career stage.**

The Professional Standards handbook was created in consultation with industry to reflect the needs of a dynamic profession.

It sets out the standards and shows how they can be used as a benchmarking tool to develop a skilled workforce, and to shape tomorrow's leaders. We want the standards to be embedded as the norm for professionals and for businesses and we have designed this handbook to support their use and implementation.

- Helping workplace and facilities management professionals advance their own career through self-assessment, and personal and professional development.
- Helping training providers to spot gaps and opportunities across the piece and to tailor training provision to industry-wide specifications and standards; to inform assessment processes and use the training tools for assessment.

Helping employers educate and develop their people, by analysing skills and managing talent against objective criteria. By comparing individuals with the standards, employers will be able to:

- Snapshot an organisation's skills, strengths and areas for development and use it to identify gaps
- Plan the workforce to be able to meet future challenges
- Identify and commission targeted training that makes better use of resources
- Create a tool to manage your organisation's succession plans and individuals' careers

The handbook also explains the links between the Standards and:

- IWFM qualifications
- Continuing professional development
- IWFM membership routes, indicating the potential and requirements for progression

The Workplace and Facilities Management Professional Standards is the primary framework we use to develop high-quality, relevant professional development products and membership services to support our professionals across all specialisms, from entry to strategic level.

# Understanding the Professional Standards

The Professional Standards clearly define:

- The key functions ('functional area') performed by workplace and facilities management professionals
- The main components of each functional area ('functional area component')
- The competences necessary to be proficient in executing each functional area component

The competences are defined for each career level, from a support role through to a strategic role.

### Functional areas

The professional standards are broken down into 10 functional areas.

### Functional area components

Each functional area contains a number of functional area components.

### Competences

Under each functional area component high-level statements of competence describe the expected proficiency of an individual working at the following levels.

- Strategic
- Senior
- Manager
- Supervisor
- Support

These statements of competence are set out in more detail on pages 10-55. The glossary at Appendix 2 includes definitions of key terms associated with the standards.



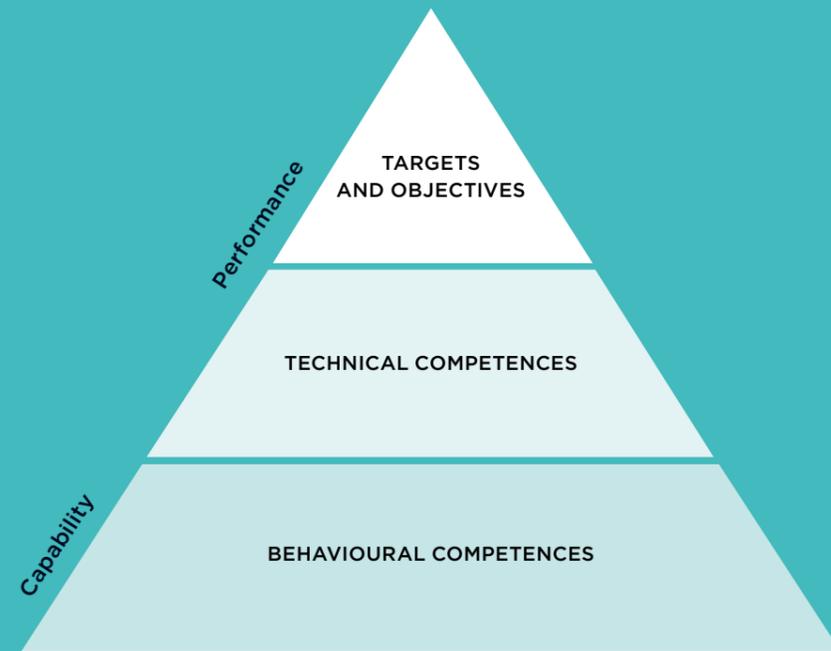
# Career levels

The role and level descriptors used in the framework are defined as follows:

DESCRIPTOR		TYPICAL JOB TITLES (may include but are not limited to)	
STRATEGIC	STRATEGIC (L6-7)	The strategic role is responsible for planning and developing courses of action that initiate and achieve substantial strategic and/or operational changes or developments, exercising broad autonomy and judgement across a significant area of work or study. This role also initiates and leads complex tasks and processes, taking responsibility and being accountable for the work and roles of others.	Chief Workplace Officer Director of Workplace Chief Wellbeing Officer Bid Director Head of Estates FM Director Business Development Manager Head of Business Operations Commercial Manager (PFI) Consultant Facilities Marketing Director
	SENIOR (L5-6)	The senior role is responsible for planning and developing courses of action that underpin substantial strategic and/or operational changes or developments. This role initiates and leads tasks and processes, taking responsibility and being accountable, where relevant, for the work and roles of others whilst exercising broad autonomy and judgement.	Head of Workplace FM Bid Manager Head of Estates Business Development Manager Head of Business Operations Commercial Manager (PFI) Facilities Manager FM Procurement Manager Facilities Account Manager Maintenance Manager FM Operations Manager Regional FM Manager Facilities Project Manager
	MANAGER (L4-5)	The manager role is responsible for planning and developing courses of action including, where relevant, responsibility for the work of others and exercising autonomy and judgement within broad parameters. This role is responsible and accountable for work conducted within their area of responsibility.	Workplace Manager Facilities Manager Procurement Manager Property Manager Facilities Account Manager Facilities Project Manager Operations Manager Maintenance Manager Contract Manager Estates Manager
	SUPERVISOR (L3-4)	The supervisory role is responsible for initiating and completing tasks and procedures, including, where relevant, responsibility for supervising or guiding others. It may also include planning and developing courses of action and exercising autonomy and judgement within agreed parameters.	Facilities Team Leader Assistant FM Manager Workplace and Facilities Management Coordinator
OPERATIONAL	SUPPORT (L2-3)	The support role is responsible for completing tasks and procedures and exercising autonomy and judgement subject to overall direction or guidance. It may also be responsible for initiating tasks and procedures within limited parameters.	FM Help Desk Assistant FM Technician FM Assistant FM Coordinator

NB L2-3 refers to the level associated to a qualification. See pages 70-75 for details.

# How to use the Professional Standards



## HR cycle



### A model of competence

This model of competence helps put the Professional Standards in context for professionals and employers alike.

Competences can be used to create management and personal development tools for human resources (HR) and personal development purposes.

### Drivers to performance

There are three drivers to performance: targets and objectives, technical competences (also known as professional standards and functional competences) and behavioural competencies. The pyramid diagram (opposite) explains the relationship between them.

Targets and objectives are usually agreed at performance appraisals and set out measurable annual expectations that will typically change over time. In addition to achieving specific goals and targets, fully rounded professionals aspire to good professional practice in what they do; that is, they identify and meet professional standards requirements. They also aspire to demonstrate certain behavioural or personal qualities.

The technical competences set out in the Professional Standards describe what people do in their jobs and the standards they should maintain continuously. The underlying behavioural competencies identify the behaviours and qualities desirable for professional accomplishment. They can also say something about the culture of an organisation in stating explicitly its values and expected behaviours.

The drivers work together. By developing relevant behavioural competencies, someone should be better placed to achieve the requirements of the technical competences. For example, if you are going to deliver successful presentations (a technical competence) it would help to develop self-confidence (a behavioural competency). If you are going to balance the books (a technical competence), it would help to be attentive to detail (a behavioural competency).

**The section “Behavioural competency framework” on page 64 contains further information.**

### HR cycle

Standards sit at the heart of the human resources (HR) cycle as shown in the diagram opposite.

By describing what an organisation expects of its people, the Professional Standards can support strategic operations including:

- Recruitment and selection
- Appraisal
- Training needs analysis
- Training syllabus design
- Career management
- Succession planning

They provide the technical competences for workplace and facilities management, at all career levels, and act as a framework around which HR cycle processes in your organisation can be based. Same with the behavioural competencies which can stand alone or provide a base for additional tailored competencies.

## Continuing professional development (CPD)

**The process of continuing professional development (CPD) helps people to assess their current skills and to identify goals and areas for future development.**

It also helps to plan how learning and growth will be managed. The focus of CPD is firmly on results and the benefits that professional growth can bring.

The Professional Standards will be used to assist professionals, including every grade of IWFM member, with their CPD by identifying current levels of skill, knowledge and experience based on competence statements provided for each functional area component. They are a valuable tool to benchmark current personal performance, identify development goals and ambitions and establish professional development plans.

As the name suggests, CPD is a continual process of working towards, achieving and renewing learning and development goals.

### **IWFM CPD programme**

CPD is key to refresh, maintain and build technical competence and to ensure that standards in workplace and facilities management are upheld across the profession.

The IWFM's CPD programme supports a self-reflective process. It is up to individual professionals to decide what they need to do and to set targets to achieve it.

### **Access to CPD**

Finding the time to carry out CPD can seem like an insurmountable challenge.

But there are plenty of easy ways to achieve tangible CPD goals with IWFM. You can attend IWFM events, do short courses, read journals, visit conferences or exhibitions and join our volunteer community, or you can do more structured learning through IWFM qualifications.

Most WFMs carry out CPD activities without even realising it.

You will also have access to a wealth of development opportunities within and outside your own organisation. Activities such as company training programmes, mentoring or doing voluntary work can all help to develop skills which are valued and respected in the workplace.

### **For more information on CPD**

T +44 (0) 1279 712 650

E [qualifications@iwfm.org.uk](mailto:qualifications@iwfm.org.uk)

# The Professional Standards



## FUNCTIONAL AREA

# The Role of Workplace

**Functional area summary descriptor**

To manage workplace and facilities management knowledge to add value to an organisation.

**Functional area full descriptor**

To optimise the use of and manage workplaces to deliver the strategic objectives and operational requirements of an organisation. To identify examples of best practice, assess emerging developments in business thinking and be able to present realistic plans for the introduction of new innovative ways of working. To optimise operational effectiveness whilst ensuring compliance with key legislation and ensuring that the workplace adapts to the changing needs of an organisation.

This functional area comprises two components:

- Sector knowledge
- Organisational behaviour.

The definitions and standards for each of these functional area components are set out in the following pages.

FUNCTIONAL AREA COMPONENT

# Sector knowledge

To understand the role and scope of workplace and facilities management, the function within an organisation and the wider community. To acknowledge that workplace and/or facilities management is pivotal if organisations are to operate safely, efficiently and effectively whilst complying with relevant legislation. To understand the structure of organisations and how its functions, culture and processes affect the delivery of workplace and facilities management.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Evaluates the effectiveness of organisational structure, culture and processes in delivering the Workplace and Facilities Management strategy and compliance with legal and ethical requirements	Quantifies the contribution of Workplace and Facilities Management to an organisation's success in changing contexts and identifies new opportunities for markets and services	Characterises the scope and context of the function and its associated services within a wider workplace environment	Explains the contribution of Workplace and Facilities Management to the achievement of an organisation's business objectives	Identifies the related roles, responsibilities, accountabilities and lines of communication within an organisation
Evaluates the impact of internal and external influences on an organisation's ability to deliver the Workplace and Facilities Management strategy in a dynamic environment	Evaluates the interaction and interdependencies of functions within an organisation and the quality of service delivery to identify areas for improvement	Analyses the nature and significance of the Workplace and Facilities Management function's relationships with its stakeholders	Identifies the interface between the Workplace and Facilities Management function and other functions within an organisation	Defines a range of related services and how these can contribute to improvements in the working environment
Uses personal influence and connections to promote the role and economic value of Workplace and Facilities Management nationally and internationally	Evaluates the advantages, disadvantages, likely costs and potential savings of different models of service delivery and innovative ways of working	Analyses the features and effect of different organisational structures, cultures and processes on the delivery of services	Explains the features of different service delivery models and their importance to an organisation	Identifies career pathways within the Workplace and Facilities Management profession

FUNCTIONAL AREA COMPONENT

# Organisational behaviour

To create an environment which contributes to positive organisational behaviour to maximise productivity and efficiency in a dynamic and increasingly globalised environment through the development of individuals, their job satisfaction and their achievement of targets and objectives.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Evaluates the external influences and the nature of an organisation's structures and patterns of behaviour and its impact on the workforce and organisational performance	Assesses the interaction between individuals and organisations and the variables that exist that characterise "organisational behaviour"	Evaluates the significance of the psychological contract and the role of work in providing a sense of purpose and identity	Explains the potential impact of positive and negative organisational behaviour	Explains what is meant by "organisational behaviour"
Applies work psychology to identify the conditions and processes that contribute to the optimal functioning of people, groups and institutions	Scopes the nature and level of organisational morale and identifies ways of improving workforce motivation and satisfaction	Identifies overt and covert barriers to productivity and a high quality of working life within an organisation	Explains the features of the Peter Principle and Parkinson's Law	Describes the role of organisational behaviour in the achievement of an organisation's business objectives
Champions the implementation of new and enhanced working conditions, operational policies and processes that contribute to the development of human capital and meet the needs of the modern organisation	Evaluates the need for, and effectiveness of management's ability to integrate people and organisational processes and makes recommendations	Identifies scope for improvement to working practices, processes and structures and makes recommendations	Monitors the conduct of work and wellbeing of staff and provides training and support	Describes their responsibility to contribute positively to organisational behaviour

## FUNCTIONAL AREA

# Strategy and policy development

**Functional area summary descriptor**

Develops strategy, policy and optimises performance.

**Functional area full descriptor**

To establish a strategy for the delivery of workplace and facilities management that is aligned to the strategic objectives of an organisation. To be instrumental in controlling key aspects of an organisation's corporate social responsibility policies and its impact on the external environment. To establish and implement policies that explain and demonstrate what is expected of a workplace and/or facilities management team. Optimises performance.

This functional area comprises four components:

- Workplace and facilities management strategy
- Organisational performance
- Environmental, Social and Governance
- Workplace and facilities management policy.

The definitions and standards for each of these functional area components are set out in the following pages.

FUNCTIONAL AREA COMPONENT

# Workplace and facilities management strategy

To understand the influences and drivers within a business. To develop and implement a workplace and/or facilities management strategy, aligned with an organisation's strategic objectives which provides a detailed plan for achieving success. To understand the relationship between both an organisational and a workplace and/or facilities management strategy and how to communicate these effectively.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Evaluates the nature of internal and external influences on an organisation that may affect its strategic direction and capacity to achieve its strategy	Articulates the vision, strategy and plan	Develops and implements plans that deliver the strategy and objectives to agreed quality standards within required timescales and budgets	Monitors operational performance in line with the plan and adjusts processes and procedures to achieve optimal efficiency	Explains the use, importance and components of an organisation's strategy
Develops a strategy that maximises an organisation's strategic positioning, markets, innovation and future trends	Develops operational plans, forecasts business requirements and specifies accountabilities to achieve the strategy	Manages processes to agreed standard operating procedures and designs monitoring and evaluation processes that are capable of measuring performance, quality and efficiency	Manages the allocation of resources according to identified priorities and risks to achieve optimal performance	Explains the relationship between an organisational strategy and a Workplace and Facilities Management strategy
Aligns strategy to latest business thinking, cutting edge practice, management theory and analysis of stakeholder feedback	Designs business processes and procedures that can deliver the strategy and strategic objectives	Identifies operational strengths and successes and makes recommendations that address identified areas for improvement	Reports promptly on strengths and areas for improvement and makes practicable suggestions	Explains how their role contributes to the achievement of a strategy

FUNCTIONAL AREA COMPONENT

# Organisational performance

To manage interdependent organisational variables to optimal effect to achieve an organisation's strategy, goals and objectives. To integrate strategy, structure, systems, style, staff and skills through shared values.\*

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Devises demanding but realistic evaluation criteria and assesses the nature, strengths and areas for development of an organisation's effectiveness	Assesses the nature, strengths and weaknesses of an organisation's management development, career management and succession planning and develops inclusive plans	Applies quality-related principles, tools, criteria and techniques to analyse and improve the efficiency of processes and the organisation of work	Assesses the characteristics, benefits and requirements of being a "learning organisation"	Explains the need for organisational change to meet future business challenges
Scopes the nature of external and internal developments, influences and trends and identifies the future needs of an organisation, its responsiveness to change, its structure, workforce and management	Makes flexible and creative use of HR and training resources and operational opportunities to develop management and the workforce and implements enhanced people processes	Designs new processes that adapt to changing needs and revises workplace design, working practices and patterns to respond to changing tempos and priorities	Supports team members in their personal and professional growth, encouraging innovation that contributes to enhanced operational performance and job satisfaction	Describes the purpose and features of "lifelong learning", "continuous professional development", and "employee engagement"
Establishes a strategy for the development of the future Workplace and Facilities Management workforce and to meet future challenges, maximise profitability and enhance job satisfaction and staff motivation	Evaluates the nature, strengths and weaknesses of an organisation's Workplace and Facilities Management employee engagement and develops plans for enhancement that reward optimal performance and desired behaviours	Empowers staff to take calculated risks, act autonomously and creatively to achieve and exceed team goals	Analyses the crucial role of management in a successful organisation	Describes their own role and responsibilities for personal and professional development to meet changing business needs

FUNCTIONAL AREA COMPONENT

# Environmental, social and governance (ESG)

To incorporate ethical values and concerns (e.g. environmental concerns) into all aspects of an organization’s work including its stakeholders (employees, board members, suppliers, shareholders and customers) to ensure probity in all its policies, procedures and operations. This includes governance, the environment, finance, ethical behaviour and people.

Environmental, social and governance (ESG) is also sometimes known as Environmental, social and corporate governance (ESG).

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Defines ESG criteria that provide objective, credible ratings of an organisation’s performance in terms of ESG policies and actions	Monitors and reports on an organisation’s ESG behaviour and the efficacy of its ESG policies and procedures	Integrates ESG policies into business processes and procedures in accordance with organisational requirements	Ensures that FM suppliers and services comply with ESG policies	Explains what is meant by the term “ESG”
Assesses the robustness of an organisation’s governance mechanisms and its ability to manage its environmental and social impacts	Assesses the impact and value of ESG policies and activities on the environment and society	Promotes the benefits of socially responsible and ethical ways of working	Explains the scope of ESG policies and activities and the role of stakeholders	Explains the reasons for an organisation’s ESG policies, procedures and activities
Develops sustainable ESG corporate policies and procedures that balance ethical considerations with organisational business needs	Ensures the coherence and ethical nature of an organisation’s strategy, values, activities, policies and behaviour	Makes sustainable recommendations for improvements to ESG policies, practices and procedures	Explains the value of ESG policies and activities	Complies with ESG policies and ethical behaviour requirements

FUNCTIONAL AREA COMPONENT

# Workplace and facilities management policy

To develop, implement and review policies which set out the details and level of service for the delivery of a workplace and/or facilities management function. To ensure that policies are aligned with an organisation’s business plan. To monitor the future direction of workplace and facilities management and ensure policies are fit for purpose for a dynamic industry. To ensure that all policies reflect relevant legislation.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Develops a framework for monitoring, measuring and reporting on the effectiveness of policies	Develops policies that align with the strategy and address the future direction of Workplace and Facilities Management	Implements policies to agreed quality standards within required timescales and budgets; addresses identified risks and priorities in line with operational plans	Ensures that team members adhere to policies	Adheres to policies
Evaluates the fitness for purpose of policies and the extent to which they meet legislative requirements	Manages the implementation of policies, ensuring control of the function and its activities	Designs monitoring and evaluation processes that are capable of measuring performance, quality and efficiency	Reports on problems, inconsistencies and shortfalls in policies	Explains the purpose of policies
Ensures the coherence of policies and their reflectiveness of organisational values and strategy	Evaluates the robustness of individual policies	Identifies operational strengths and successes and makes recommendations that address identified areas for improvement	Makes suggestions for improvements to policies	Makes suggestions for improvements to policies

## FUNCTIONAL AREA

# Leadership and management

**Functional area summary descriptor**

Develops and manages a highly motivated and skilled workforce in a dynamic environment.

**Functional area full descriptor**

To develop, manage and lead highly motivated and skilled teams whilst simultaneously adjusting to fast-changing organisational priorities. To link individual performance to the overall strategy of an organisation, considering the impact of both culture and values and to identify different approaches to management and models of team working to maximise efficiencies.

This functional area comprises five components:

- Project management
- People management
- Culture and values
- A healthy and productive workplace
- Change management.

The definitions and standards for each of these functional area components are set out in the following pages.

## FUNCTIONAL AREA COMPONENT

# Project management

To create a clearly defined workplace and/or facilities management project brief with a purpose, aim and SMART objectives. To identify key stakeholders, assemble project teams, establish and monitor a project budget. To monitor and manage a project through to completion, sign-off and review.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Sponsors multiple programmes and manages the business case and accountabilities	Defines and plans programmes that meet the scope, strategic objectives and sponsor's requirements	Manages the delivery of projects to plan and timescale through project monitoring, resource and contractor management	Schedules tasks and activities to meet project deadlines within resource constraints	Contributes to projects in accordance with project plans
Provides strategic direction, manages relationships and interdependencies of multiple programmes	Builds programme teams that meet skills set requirements and maximise individual strengths and experience	Reports on project progress, performance, deviations, risks, problems and actions taken to project sponsors	Takes action within agreed parameters to ensure projects are kept on track	Collects project performance data
Evaluates the effectiveness, value and strategic fit of programmes to the achievement of an organisation's strategy	Uses a range of techniques to control the delivery of programmes that achieve their objectives to budget and timescale	Completes project close-out actions and assesses the project output and outcomes against project objectives and agreed evaluation criteria	Reports on project progress and problems in line with communications plans	Provides information to stakeholders

## FUNCTIONAL AREA COMPONENT

# People management

To recruit, build, empower and lead highly motivated and skilled individuals and teams. To set clear objectives which are linked to the strategic objectives of an organisation and measure performance. To identify appropriate styles of management which reflect the needs of the business. To create a learning environment which engenders a culture of innovation. To comply with relevant legislation.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Creates a systematic and comprehensive framework for the development of the workforce that complies with legislation	Forecasts and plans the workforce systematically to meet current, medium and long-term needs	Manages initial and ongoing recruitment and selection processes within legislative requirements to meet strategic objectives and operational priorities	Allocates work and responsibilities to team members fairly according to operational needs and individuals' qualifications and strengths and development needs	Contributes to team objectives through the achievement of their own targets and objectives and by fulfilling their role and responsibilities
Influences corporate culture, values and organisational behaviour to improve organisational effectiveness	Motivates the workforce using personal leadership and management styles and effective performance management processes	Creates a learning environment that rewards personal development and meets current and identified future needs for knowledge, skills and professional development	Supervises work and workflows, providing motivating support and feedback to team members and meets legislative requirements	Communicates clearly with colleagues and stakeholders, using appropriate communication channels and media
Provides inspirational leadership that empowers and motivates the workforce to achieve the vision	Communicates the vision so the workforce understands the links between the Workplace/Facilities Management and organisational strategy	Manages staff retention through effective, motivational and egalitarian leadership and management	Appraises and develops team members to achieve their targets, objectives and personal goals	Contributes to effective team working through positive and helpful behaviour which meets legislative requirements

FUNCTIONAL AREA COMPONENT

# Culture and values

To apply organisational behaviour and recognition of the social processes to create a culture where employees are seen as investors to enable an organisation to respond to changing needs. To appreciate the importance of organisational culture and climate and the successful implementation and management of organisational change.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Scopes the nature, characteristics and impact of an organisation's climate, culture and values across its people, activities, policies and processes	Analyses the influences on and role of organisational climate and culture in successful businesses	Implements organisational development plans positively, promoting the benefits of change	Explains the reasons for resistance to organisational change	Describes the features and impact of an organisation's culture and values
Adopts the characteristics of successful businesses e.g.: empowers autonomy, entrepreneurship and risk-taking and encourages customer focus*	Evaluates the need for changes to managerial styles and structures to respond to changing circumstances	Analyses the characteristics of successful organisations' culture and climate	Suggests practicable ways of overcoming resistance to organisational change	Explains the relationship between an organisation's culture and its values
Creates an organisational culture, organisational development and cultural strategy that optimize human potential, enhance employee engagement and productivity and that are responsive to change	Develops comprehensive organisational development plans that align with an organisation's desired culture and values to respond to changing requirements	Analyses the way in which an organisation's culture and values influence its policies and processes and people's behaviour	Takes a collaborative, consultative and facilitative approach to the completion of work and team supervision	Describe how an organisation communicates its values overtly and implicitly

FUNCTIONAL AREA COMPONENT

# A healthy and productive workplace

To create a workplace that promotes health, wellbeing and productivity. To understand the relationship between a building, people, organisational performance and productivity. This is not about the regulatory aspects of health and safety, but rather the qualitative aspects of an environment that promotes the wellbeing of individuals that enables them to maximise their contribution at work.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Formulates a strategy that maximises a building's design and assets to create an environment that optimises employees' health, wellbeing and productivity	Evaluates the impact of a green workplace on employee health, wellbeing and productivity	Analyses the quality of a building's design factors e.g. (indoor air quality, thermal comfort, daylighting, acoustics, interior layout, views and biophilia, amenities)	Identifies obstacles to achieving a healthy workplace and makes practicable recommendations	Explains how a green workplace design contributes to a healthy and productive workplace
Initiates sustainable policies and plans that promote employee health, wellbeing and productivity and optimise a building's design and assets which maximise ROI	Implements strategies, plans and policies that promote employee health, wellbeing and productivity, involving users and making innovative use of technology to enhance the workplace	Involves users and takes their feedback into account in the design, redesign and layout of a building and its services	Explains the link between maximising health, wellbeing and productivity outcomes with the minimisation of energy and use of resources and the impact on the environment	Explains the meaning of a "carbon footprint"
Assesses the effectiveness of technology in promoting employee health, wellbeing and productivity and develops strategies for improvement	Quantifies the cost, ROI and business benefits of a green workplace	Makes recommendations for improvements to a green building: good design, construction, behaviours and location	Ensures that all team members' workstations are as ergonomically efficient as possible	Explains how employees physical and mental health can affect an organisation

## FUNCTIONAL AREA COMPONENT

# Change management

To monitor the trends and future direction of workplace and facilities management to envision and initiate the need for change. To lead and manage key stakeholders through the process of change whilst monitoring and managing any potential impact from the proposed change on the delivery of facilities management services within an organisation.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Identifies trends, creates the vision for change and embeds a change culture and strategy into an organisation	Identifies the drivers to and need for change in strategy and/or delivery and plans organisational change	Keeps abreast of potential and planned change within an organisation and environment that may have an impact on operations	Ensures the smooth running of work during periods of change	Responds to and accepts change positively
Promotes the vision and leads strategic change with stakeholder support	Ensures coherence of planned changes with policies and processes	Implements changes to services to plan, timescale and budget, overcoming barriers to change	Monitors the effects of change and contributes constructively to continuous improvement	Carries out tasks in line with change plans
Manages the impact of change on the effective delivery of services	Evaluates the impact, effectiveness, value and fit with strategic objectives of the change	Promotes the benefits and supports the introduction of change in an organisation, providing resources and training	Reports on progress and developments and resolves issues relating to the implementation of change	Understands the reasons for and importance of change

## FUNCTIONAL AREA

# Business continuity and compliance

## Functional area summary descriptor

Builds business resilience and contains business risk.

## Functional area full descriptor

To establish risk management strategies aligned to the strategic objectives of an organisation and to build business resilience by the creation of a robust business continuity plan. To ensure that an organisation is compliant with key regulations, legislation and codes of practice to promote a safe and healthy working environment.

This functional area comprises two components:

- Risk management
- Compliance.

The definitions and standards for each of these functional area components are set out in the following pages.

FUNCTIONAL AREA COMPONENT

# Risk management

To understand the principles of corporate governance, its relationship to risk management and the importance of risk management in the context of an organisational strategy. To review the effectiveness of risk management strategies, apply risk transfer and contribute to a robust business continuity plan. To assess the risk of not being compliant with relevant legislation.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Analyses the scope and significance of business risks and their potential impact	Monitors the business environment and assesses the likelihood of business risks occurring	Develops and implements risk controls in line with business continuity strategies and plans and risk criteria	Ensures that team members comply with business continuity, disaster recovery and contingency requirements	Follows procedures relating to all forms of risks and business continuity
Develops a comprehensive and integrated risk management strategy	Develops risk and crisis management criteria, policies, systems and processes that comply with legislation	Designs and manages monitoring systems that are capable of identifying business risks and shortfalls in compliance with legislation	Monitors identified risks and areas of work that may present risks	Identifies hazards and risks in the workplace and takes action to reduce them
Evaluates the impact and effectiveness of a risk management strategy	Evaluates the relationship between business risks, business continuity and corporate governance	Reports on risk identification, and mitigation and makes recommendations to improve risk management processes	Reports on all risks identified and the actions taken to manage them	Maintains and provides accurate and up to date risk-related information

FUNCTIONAL AREA COMPONENT

# Compliance

To understand corporate governance and the scope of a workplace and/or facilities manager's role which is affected by a plethora of regulation and legislation. For example, health and safety, environmental, employment, contract, company, etc. To be responsible for ensuring that all relevant legislation is adhered to in the workplace and to create a culture of proactive compliance.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Evaluates the extent to which an organisation's policies comply with legislative, statutory and regulatory requirements	Evaluates the implications and potential consequences of non-compliance with corporate governance and legislative, statutory and regulatory requirements	Monitors the extent of ongoing compliance with legislative, statutory and regulatory requirements and reports shortfalls	Monitors team members' work to ensure they meet legislative, statutory and regulatory requirements	Carries out work in accordance with work instructions, standard operating procedures and legislative, statutory and regulatory requirements
Develops corporate governance policies, structures and processes that are coherent with an organisation's overall governance requirements	Analyses the scope, purpose, roles and responsibilities of those involved in corporate governance	Establishes processes and systems that ensure ongoing compliance with legislative, statutory and regulatory requirements	Ensures that all operational tasks and work instructions are set up and organised to comply with legislative, statutory and regulatory requirements	Explains their responsibilities and liabilities for compliance with legislative, statutory and regulatory requirements
Evaluates the impact of corporate governance, financial, ethical and social commitments and values	Develops processes and procedures that meet corporate governance and legislative, statutory and regulatory requirements and ensures their ongoing currency	Manages the implementation of policies and procedures to meet legislative, statutory and regulatory requirements	Monitors the extent to which operational tasks comply with legislative, statutory and regulatory requirements, reporting problems and shortfalls	Explains the potential consequences of non-compliance with legislative, statutory and regulatory requirements

## FUNCTIONAL AREA

# Business support services management

**FM functional area summary descriptor**

Delivers and innovates workplace and/or facilities management service solutions aligned with business objectives.

**FM functional area full descriptor**

To evaluate trends and developments in the market, identify future needs and use this information to innovate and promote the added value of an organisation's workplace and/or facilities management service. To identify, implement and maintain services in accordance with the standards set out in service level agreements. To assess continually the quality and value for money of services provided.

This functional area comprises two components:

- Service innovation
- Managing service delivery.

The definitions and standards for each of these functional area components are set out in the following pages.

FUNCTIONAL AREA COMPONENT

# Service innovation

To recognise the influences and drivers of workplace and/or a facilities management function and to identify trends and future developments to improve delivery. To optimise opportunities to market and promote the added value of workplace and facilities management both within and outside an organisation. To promote innovation by identifying opportunities for new or alternative services.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Forecasts trends that align with strategic objectives and priorities and evaluates their impact nationally and internationally	Analyses trends, their contexts, key drivers and their impact on the direction of Workplace and Facilities Management	Identifies areas for improvement to the delivery of services that meet strategic objectives	Collects stakeholder feedback and ideas for improvement	Reviews work practices within a team to identify areas for improvement
Evaluates the extent to which a culture of innovation is embedded within the service provision and its impact	Creates value by identifying new market opportunities and/or improving the efficiency of services	Assesses the suitability of new opportunities that are capable of adding value to operational effectiveness, service delivery and service scope	Identifies opportunities to improve services in line with customer expectations	Identifies opportunities for continuous improvement
Motivates and empowers individuals to innovate and optimise opportunities for enhancing services and relationships	Evaluates the relevance and application of latest developments to enhance service provision	Promotes enhanced services to stakeholders	Makes recommendations about areas of services and business practices that could be more efficient	Reports recommendations for improvements to services and working practices

FUNCTIONAL AREA COMPONENT

# Managing service delivery

To develop and implement strategies for the delivery of support services within an organisation. To identify the needs of an organisation, establish service level agreements and manage the delivery of a service. To embed a culture and programme of continual review in order to monitor performance and to identify opportunities for new or alternative services.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Develops service delivery strategies	Evaluates the efficiency, effectiveness and value for money of support services operations and budgets	Manages the delivery of support services	Supervises the delivery of operational performance objectives	Explains various ways of providing support services
Evaluates the effectiveness of alternative service delivery models measured against resourcing implications	Develops operational plans and service level agreements (SLAs) for the delivery of support services	Analyses the efficiency of the delivery of support services	Monitors operational performance within safe systems of work and budgetary constraints	Follows working practices and organisational procedures in the delivery of support services
Identifies opportunities for new and alternative models of service delivery that meet strategic objectives	Identifies resource requirements for the delivery of support services by different methods	Recommends actions for improvements to delivery of support services	Explains the cost-effectiveness of different methods of delivering services	Keeps to schedules, specifications and quality standards in the delivery of support services

## FUNCTIONAL AREA

# Property portfolio management

**Functional area summary descriptor**

Maximises and protects the value of property assets, ensures their fitness for purpose, and defines building safety requirements.

**Functional area full descriptor**

To influence building design, manage accessibility and inclusion, manage and maintain property and assets to meet the strategic objectives of an organisation and using building information modelling (BIM) to manage buildings efficiently. To be cognisant of legal stakeholders and to comply with key legislation. To optimise space and manage its effective use that is accessible and inclusive to all, to meet immediate and future needs of a business whilst considering environmental issues and thereby complying with the organisation's environmental, social and governance statement.

This functional competency comprises six components:

- Building maintenance
- Property and asset management
- Space management
- Managing accessibility and inclusion
- Building information modelling (BIM)
- Building safety requirements.

The definitions and standards for each of these functional area components are set out in the following pages.

FUNCTIONAL AREA COMPONENT

# Building maintenance

To analyse the maintenance implications associated with different building structures and assets contained therein. To develop, implement and review the strategies for building use, building services and control systems in a range of facilities management contexts. To manage and monitor maintenance programmes. To evaluate and use different management systems and technologies available.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Evaluates the strategic options available to maintain buildings within a portfolio against strategic objectives and priorities	Develops a maintenance strategy for a property portfolio that addresses short- and long-term needs fostering a culture of quality across the workforce	Implements systems for planning, scheduling, recording, monitoring, tracking, and controlling maintenance and costs in line with statutory and contractual requirements	Identified maintenance priorities based on condition surveys	Carries out various types of maintenance tasks in accordance with standard operative procedures/ job instructions
Anticipates developments that may affect property maintenance requirements and maintenance skills within an organisation	Plans and manages the implementation of a maintenance strategy for a property portfolio based on legislative and contractual requirements	Manages programmes of maintenance both for building and fabric for various structural and building types, identifying, and controlling risks through proactive management of both inhouse and outsourced suppliers	Supervises maintenance tasks to meet the requirements of legislation, quality, and service level agreements requirements	Gathers maintenance data to contribute to the efficiency of premises and facilities
Develops a maintenance strategy for a property portfolio that addresses short- and long-term needs fostering a culture of quality across the workforce	Evaluates the effectiveness and cost effectiveness of a maintenance strategy for a property portfolio and identifies areas for improvement	Controls costs and achieves best value from maintenance contracts through analysis of data as well as utilising technology, control systems and industry standards retaining the safety, usability, and value of properties	Reports on issues and risks identified through maintenance tasks	Reports on issues encountered through maintenance work

FUNCTIONAL AREA COMPONENT

# Property and asset management

To collect and use data to identify the size and components of an estate. To use that information to plan and manage the property portfolio, aligned to strategic objectives and is compliant with relevant legislation. To manage property costs and develop, maintain, and review asset registers. To influence building design to ensure a safe, efficient workplace is created which is inclusive to all.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Scopes the size and characteristics of an estate and the extent to which it reflects strategic objectives	Evaluates the cost effectiveness of the uses and occupancy of an estate, identifying opportunities to maximise its value and minimise costs	Manages asset registers, confirms that assets meet organisational requirements and makes viable recommendations for improvement	Explains the contractual arrangements and costs associated with the provision and management of property and other assets	Carries out tasks relating to fixed assets in accordance with standard operating procedures and legislative requirements
Influences the development of a corporate estate strategy to ensure its fitness for purpose, coherence with strategic objectives, legislative requirements, and alignment with environmental, social and governance statement	Develops an accommodation strategy that addresses how properties and other assets will be used which are inclusive to all and maintained and are in line with legislative and contractual requirements	Assesses the way in which building design affects the way in which properties and other assets are utilised efficiently and provides a space which is inclusive to all	Supervises the deployment of furniture and equipment assets	Explains the legislative, statutory and regulatory requirements relating to the use and management of property and other assets
Evaluates the impact of changes to a corporate real estate strategy including technological advances	Develops operational plans for the use and management of property and other assets, utilising technology, and industry systems	Manages the implementation of plans for the cost effective use of property and other assets including relocation considerations	Monitors and reports on fixed and current assets, carries out support services tasks with consideration to the appropriate use of resources	Explains the support services requirements relating to the use and management of property and other assets

FUNCTIONAL AREA COMPONENT

# Space management

To develop and implement a strategy for space, optimising its use while considering environmental issues and the experience of the users of the space. To prepare briefs for space layout, implement changes and assess feasibility of new developments, balancing costs versus benefits. To develop strategies for introducing alternative ways of working or the need to change the use of accommodation.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Identifies trends and leads the development of a corporate strategy for the use of internal space	Evaluate the extent to which an organisation's use of space aligns with its vision, objectives and culture	Assesses the factors to be considered in the implementation of a space management plan whilst addressing the impact on the environment	Identifies user requirements for the use of space	Explains the interrelationship between different categories of space
Ensures mechanisms are in place to evaluate the cost efficiency of the use of space	Creates a space management plan for a corporate estate, balancing investment costs against forecasted benefits	Implements a space management plan for a building or group of buildings in consultation with stakeholders and prepares briefs for space layouts	Supervises space management tasks in accordance with legislative, statutory and regulatory requirements	Carries out space management tasks in accordance with legislative, statutory, and regulatory requirements
Analyses the impact of changes in the use of internal space and their implications	Optimises available space by innovative approaches to building design and occupancy	Reviews the implementation of a space management plan and the use of space, identifying areas for improvement	Suggests improvements to the efficiency of space utilisation	Explains the impact on the amount of space needed for different ways of working

FUNCTIONAL AREA COMPONENT

# Managing accessibility and inclusion

To understand the principles of inclusive design and management and how people's diverse needs should influence the design, use and management of workplaces and facilities; the ethical, legal and organisational imperatives for inclusive facilities including the range of disabled people's needs.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Champions good practice and the benefits of an inclusive approach to facilities management	Develops inclusive policies, processes and procedures and embeds inclusivity good practice in management decisions	Manages the implementation of inclusivity policies and procedures	Monitors the performance of facilities and services in meeting users' access needs	Follows accessibility management procedures
Develops corporate governance policies and structures that embrace the fundamental principles of inclusivity and ethical requirements	Influences the design of facilities and services to ensure inclusion	Analyses the efficacy of inclusivity processes and procedures	Ensures that all tasks are carried out in accordance with legal, statutory, regulatory and ethical requirements	Offers suggestions to improve inclusive services
Evaluates the extent to which an organisation's strategy and management objectives meet legal, statutory and regulatory requirements for accessibility and disability equality	Motivates and empowers individuals to achieve and enhance inclusive practice	Adapts facilities and services to meet users' access requirements	Reports on problems and issues of access	Explains the impact of inaccessible facilities and not providing an inclusive service

## FUNCTIONAL AREA COMPONENT

## Building information modelling (BIM)

To generate and manage digital representations of physical and functional characteristics of buildings to support decision-making and efficient running in the planning, design, construction, operation and maintenance of physical assets throughout their lifecycle.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Influences national developments and toolkits in BIM	Evaluates the scope of BIM and its strategic implications	Analyses the characteristics, uses, users and benefits of BIM throughout the project life cycle	Understands the BIM process	Understands the purpose and benefits of BIM
Anticipates developments in BIM and how benefits might be harnessed	Assesses the strategic dimensions of BIM for facilities management implementation	Appraises the roles of national standards, BIM software, Soft Landings and toolkits	Understands the application of BIM in different contexts	Understands how BIM models are developed
Evaluates the costs and benefits of BIM for a portfolio of assets	Evaluates the implications of BIM for other aspects of work and the impact of unmanaged risks	Analyses the requirements of BIM implementation and its value	Appreciates the requirements of BIM	Understands the role of a BIM manager

## FUNCTIONAL AREA COMPONENT

## Building safety requirements

To understand the legislative and contractual requirements as well as the ethical responsibility to ensure the safety of building users. To implement a strategy for managing these requirements across the estate, ensuring that monitoring and performance measurements are in place. To review and manage existing procedures in line with legislation and financial considerations, ensuring that appropriate suppliers are selected, and stakeholder needs are identified and met. To manage and monitor building assets, emergency procedures and life safety utilising technology.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Develops a strategy for building safety across the building portfolio considering the impact of changes to buildings and building design	Manages the safety of buildings and people including emergency procedures and life safety as well as asset maintenance and selecting appropriate suppliers in accordance with organisational strategies, policies, and procedures	Review and update the emergency procedures as well as asset maintenance, monitor performance of suppliers	N/A	N/A
Motivates and empowers individuals to implement and manage compliance with the building safety strategy	Ensures compliance with relevant legislative and statutory requirements to ensure the safety of building users whilst considering financial implications	Understand ramifications of non-compliance with relevant legislative, statutory, and regulatory requirements and know escalation criteria	N/A	N/A
Designs control systems that enable the safety of building users	Analyses the needs of stakeholders and monitors, reviews, and reports on building safety with the assistance of technologies	Monitors and reviews the needs of stakeholders, inputs into reports on building safety with the assistance of technologies	N/A	N/A

## FUNCTIONAL AREA

# Quality management and customer service

**Functional area summary descriptor**

To fulfil customer expectations and quality requirements.

**Functional area full descriptor**

To embed a quality management approach into the development and delivery of a customer service-oriented workplace and/or facilities management function.

To identify key stakeholders and to build, manage and maintain relationships both internally and externally to improve continually on services delivered and encourage innovation.

This functional area comprises three components:

- Customer service
- Stakeholder relationships
- Quality management.

The definitions and standards for each of these functional area components are set out in the following pages.

FUNCTIONAL AREA COMPONENT

# Customer service

To embed a customer-centric culture by developing, implementing and reviewing strategies to improve customer service engagement and build relationships. To motivate, engage and empower staff to optimise opportunities to enhance relationships and improve customer satisfaction both internally and externally across an organisation. To gather and analyse data and present findings in support of a programme of continual improvement.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Co-creates with clients a shared customer service strategy which aligns with the client's strategic objectives	Evaluates the extent to which customers' expectations are met or exceeded in consultation with stakeholders	Evaluates performance against agreed criteria and clients' quality standards	Assesses the scope and features of a customer-focused service and how this contributes to the achievement of business objectives	Meets agreed standards in activities
Leads the development of a customer-focused organisation through the design of systematic customer-centric business processes	Manages the implementation of a customer service strategy with stakeholder support	Analyses processes and procedures and identifies areas for improvement in customer service	Motivates staff and supervises the delivery of customer-centric services	Explains what is meant by 'customer service' and the behaviours that support it
Develops strategies for improving and measuring customer service and customer relationships	Evaluates the effectiveness of customer service feedback processes and how these inform areas for improvement	Encourages a customer-focused culture and identifies ways of improving client and customer relationships	Establishes clients' requirements and levels of satisfaction	Meets or exceeds customers' expectations and builds relationships with customers

FUNCTIONAL AREA COMPONENT

# Stakeholder relationships

To employ a range of techniques to ensure relationships with stakeholders contribute in a positive way towards meeting targets. To develop, build and maintain productive relationships with stakeholders, consult on key issues and activities, manage complex negotiations and understand the wider context that affects these relationships. To monitor and review the effectiveness of the relationships with stakeholders.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Builds influential and productive relationships with stakeholders	Influences relationships with stakeholders to mutual benefit	Identifies with whom to build relationships and establishes objectives that align with strategic goals	Identifies the needs of customers and colleagues	Maintains productive working relationships with colleagues and/or customers
Negotiates mutually favourable relationships and reduces the potential for conflict	Consults stakeholders and takes their views into account in the decision making process.	Manages relationships with stakeholders and their expectations	Monitors and maintains productive working relationships with customers and colleagues	Meets the expectations of colleagues and/or customers, communicating helpful information and offering support
Evaluates the effectiveness of the management and nature of stakeholder relationships	Analyses the context of stakeholder relationships to optimise their value	Analyses the value of relationships with stakeholders	Recommends actions to resolve issues that affect customers' levels of satisfaction	Behaves in a way that promotes confidence amongst colleagues and/or customers

## FUNCTIONAL AREA COMPONENT

# Quality management

To embed a culture of quality by implementing the following quality management principles: customer focus, demonstrate leadership, involve key stakeholders, develop and review processes and systems, integrate a programme of continual improvement in the pursuit of quality, gather data and facts to inform decision making and develop beneficial relationships.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Evaluates the scope for integrating quality principles	Establishes a measurement framework for the evaluation of the effectiveness and cost of quality-driven changes in Workplace and Facilities Management	Monitors operational performance to ensure that quality standards and targets are met within budget	Supervises the delivery of services that meet or exceed performance requirements and quality standards	Follows working practices and develops effective working relationships with colleagues and/or customers
Embeds quality practices into processes	Evaluates the effectiveness of quality systems and identifies where quality approaches could be adopted in operational activities and working practices	Evaluates the extent to which improvements could be made to delivery and makes viable recommendations	Promotes the concepts of quality and performance measurement to team members and provides practical interpretations of their requirements	Meets quality standards in their area of work
Fosters a culture of quality across the workforce	Integrates quality principles into a delivery strategy	Encourages innovation and continuous improvements	Explains to staff the requirements of quality standards, accreditation schemes and continuous improvement	Suggests improvements and reports issues and shortfalls in meeting quality standards

## FUNCTIONAL AREA

# Finance and Technology

## Functional area summary descriptor

To develop information flow to connect people, processes and places and technology to optimise the efficiency of organisations.

## Functional area full descriptor

To set out how organisations will use and manage data and its interaction with humans. To design an organisation's IT systems to optimise its facilities and assets. To develop a maturity roadmap to facilitate an organisation's direction and ability to expand its continuous improvement processes. To integrate different aspects of workplaces and their assets to optimise sustainability, social, economic, experience and wellbeing. To harmonise the workplace and facility management digital tools to deliver a unified organisational best value approach to the develop and system needs.

This Functional Competency comprises seven components:

- Financial management
- Data naming and structure
- Information security and management
- Information exchange
- Data-driven approach
- FM bionics
- FM technologies.

The definitions and standards for each of these functional area components are set out in the following pages.

FUNCTIONAL AREA COMPONENT

# Financial management

To recognise how income is generated within workplace and facilities management, the legal obligations and to evaluate financial performance. To understand the principles of management accounting, balance sheets, the use of capital and revenue budgets. To identify trends and variances and prepare financial cases. To develop and manage budgets, understand the impact of depreciating asset values, whole-life costing and discounted cash flow.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Ensures that policies meet financial probity requirements and legal, ethical and social responsibilities of an organisation	Drafts business plans that optimise revenue streams and meet legal requirements	Monitors the achievement of objectives against cash flow requirements and budget limitations	Controls costs whilst delivering targets and objectives	Carries out financial tasks to the required standard
Identifies planning priorities that inform business planning and budget preparation to optimise performance	Writes financial cases that support applications for financial investment	Prepares financial reports on the business performance and financial health of the FM function	Monitors budgets and investigates variances	Maintains complete and accurate financial information
Identifies financing requirements and evaluates investment, cost reduction and/or income-generating opportunities	Appraises budgetary control processes and evaluates performance against budgets	Prepares business cases and budgets for activities	Reports on variances and makes realistic recommendations to address them	Provides financial information within the required timescale to authorised people

FUNCTIONAL AREA COMPONENT

# Data naming and structure

To understand the elements of an organisation's workplace and facilities and to bring consistency and standardisation in a computer readable fashion and to align how the data is structured. To understand the various systems working with and using the workplace and facility data and how the different organisational needs will consume digital resources and ongoing work with the data (other parts of the organisations, other organisational systems or supply chain and their systems/environments) and that where these systems need contract, compliance or operational requirements to share data, there is a framework that supports a full life information model.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Creates policies that influence protocols and compliance with legislative obligations that align with organisational needs using national and international approaches and regulations	Develops a strategy for common organisational naming approach to assets, services, meta data and functions	Articulates the approach to the lifecycle of assets, service and function naming and accounts for any variations across the lifecycle	Monitors the correct usage of naming and schema/structures across relevant life cycle stages	Explains how organisational naming aligns with all elements across an organisation, relating the specific naming approach and the hierarchy of how the naming is approached
Develops policies that lead to the creation and development of schemas and data structures	Develops a common organisational approach to schemas and data structures that align the workplace and FM functions with place and space to align with organisational needs using national and international approaches, regulations	Articulates the approach to organisational schema and data structure, supporting ongoing evolution and change across the data schemas and structure to maintain operational functionality and best practice	Explains the interaction between different parts of an organisation's systems that support a full life cycle	Explains how an organisation has structured its data and schemas and how this aligns with the delivery of operations
Ensures organisational naming and schemas can be mapped to all contracts, regulations and operational specific needs	Analyses the nature and needs of operations, the supply chain and partners to support the delivery of day-to-day information management to function with all organisational needs	Articulates operational information needs to deliver the contracts and meet regulations	Monitors the efficiency of the flow of information across an organisation	Explains operational information needs to deliver contracts and meet regulatory requirements

FUNCTIONAL AREA COMPONENT

# Information security and management

To understand how to manage information across all environments, systems, people and processes at all points to keep the information both true and secure. Understanding by extension also where data goes out and comes into the organisation from either other functional areas or external streams to the core operation.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Creates a whole life information model across people, places, processes and technology including policies and protocols for risk, business continuity and compliance	Implements an information model to align with schemas and data structures	Articulates organisational information models and how to support them across the whole life operational integrity of the information model, delivering tools to operate, interpret and feedback data input/output	Monitors information management systems in an organisation (systems, people and processes)	Explains organisational needs in handling data and information from systems ensuring security and risk protocols are followed
Adapts an information model in response to internal/external practices and technological change	Implements system changes to incorporate internal/external practices and operational feedback	Validates the effectiveness of the information model for self-delivery and information partners/supply chain to maintain information integrity and trust	Identifies and reports on issues, inconsistencies and shortfalls in information security	Explains changes to an information model for self-delivery and information partners/supply chain to maintain information integrity and trust
Designs a demanding and realistic approach to test, audit and verify that processes are secure, reliable and to maintain data integrity	Implements testing and process audits to ensure security and system integrity	Performs testing and audits to confirm security and system integrity	Makes practicable recommendations for improvements to information security systems	Explains the requirement to test an information model to maintain security and integrity

FUNCTIONAL AREA COMPONENT

# Information exchange

To ensure the trust and reliability of data that is exchanged from one environment to another and the integrity of the underlying information models. This involves understanding where data goes out and comes into an organisation from either other functional areas or external streams to the core operation. This ensures that, at all points of the process and at all stages of the lifecycle, across any system or supplier, information is unified and reliable and can support organisational needs.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Creates schemas that identify data which is exchanged between internal/external systems	Implements project management protocols that facilitate data exchange between systems identified in schemas	Analyses the information fields of data needed at each transaction point across an organisation's lifecycle, providing analysis and feedback of results of information exchanges	Articulates the way in which the information exchange life cycle works and where internal and external functions and practice connect with an organisation's information model	Explains information fields of data needed at each transaction point across the lifecycle
Aligns schemas with contracts, regulations, compliance and operational needs	Devises monitoring and auditing methods to align operational functions to new operational needs (internal & external) across an information model	Implements monitoring and audit methods to operational tasks	Monitors the efficiency of information exchange protocols	Explains that information exchange evolves with new contracts, regulations and compliance
Creates a strategy to deal with an ecosystem of information requirements that aligns with an organisation's needs and builds an information model, considering the ongoing digital maturity of the functions and practices across the information journey	Devises processes and policies that deal with changes to information needs whilst aligning with operational practices	Develops partnerships and skills that support information exchange needs	Makes practicable recommendations for improvement to information exchange protocols and procedures	Complies with organisational protocols in information exchange

FUNCTIONAL AREA COMPONENT

# Data-driven approach

To understand the information model at both organisational and functional levels, integrating the correct checks and measures to allow real-time delivery of automated services and data-driven human services along with medium- and long-term strategy, planning and management of the operation to align and best promote the long-term value to the organisation.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Evaluates internal and external data needs across new and existing data sources, in an information model, identifying the drivers that integrate strategic planning, system design and control, compliance and governance across a functional model	Manages system development from information and functional models to operational functions, analysing how the results of operational functions will drive data	Monitors and optimises the performance of operational functions	Explains the role of monitoring in data-driven operations	Uses IT resources efficiently
Designs a maturity roadmap that describes milestones for all functional areas and stakeholders	Integrates a maturity roadmap with information and functional models to allow data-driven change management whilst supporting risk management and compliance during the digital transformation process	Optimises resources during digital and functional transformations	Reports on progress and issues during digital and functional changes	Adheres to organisational protocols and procedures when working with data
Designs policies and flexible processes that align data-driven awareness and knowledge management systems that support operations	Specifies key performance indicators to align with information and functional models and to enable integration with an organisation's knowledge management system and operational functions	Monitors and optimises the performance of operational functions	Explains the role of data-driven operations in contributing to an organisation's strategy	Explains the implications of data breaches to an organisation

FUNCTIONAL AREA COMPONENT

# FM bionics

To use technology in conjunction with humans to increase both the effectiveness of the workplace and facilities management strategy as well as its ability to influence the performance of an organisation.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Analyses an information model and schemas to design processes that optimise delivery methods and which integrate with data-driven operations	Links data from analyses of an information model and schemas to assess the results of delivery methods	Monitors sensor output and checks that the resultant processes offer enhanced or improved service	Contributes to the knowledge management system	Installs/manages sensors that provide raw data output that is processed by data-driven systems
Supports the design of a digital toolkit that aligns with the information model	Manages the integration of a digital toolkit and plans the skillset needed for its delivery including possible integration with a knowledge management system	Supplies feedback to senior management on operational results of a toolkit	Monitors the usage of digital toolkits	Contributes feedback on the day-to-day use of the digital toolkit
Analyses a maturity roadmap to select an option for an FM operating model that will have an impact on the level of adoption of FM bionics	Reports at a tactical level across the various types of FM bionics systems and analyses the differences between them	Provides holistic organisational support and integration across the traditional and digital resource elements	Makes practicable recommendations for improvements to integrated operations	Explain what is meant by an FM operating model and providing holistic organisational support and integration

FUNCTIONAL AREA COMPONENT

# FM technologies

To be aware of fast-changing technological trends and to maximise any opportunities for improvement.  
 To use technology to plan maintenance, maximise the lifespan of assets, analyse financial data and forecast future requirements based on changing business needs.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Designs an organisational technology strategy, sustainability planning and business continuity plans	Creates operational procedures that implement technological solutions, using an organisation's technology strategy, sustainability planning and business continuity plans	Monitors the use of technology and provides feedback, adhering to an organisation's technology strategy, sustainability planning and business continuity plans	Explains the scope and role of technology in different aspects of an organisation's operations	Installs, tests and maintains technologies according to operational procedures
Aligns an organisational technology strategy with legislative, statutory, regulatory and contractual requirements	Plans the implementation of tactical and operational tasks in delivering the organisational technology strategy	Delivers the operational components of an organisational technology plan to analyse financial data or forecast future requirements	Monitors the use of technology to achieve efficiency in service delivery	Uses the operational technology to deliver services, manage the workplace, plan maintenance, maximise the lifespan of assets
Influences developments and thinking in the industry	Develops professional network, Continuous personal CPD and supervises Member CPD	Maintains a training matrix, delivers training, supervises Associates CPD	Ensures the fulfilment of team members' CPD plans	Participates in CPD

FUNCTIONAL AREA

# Procurement and contract management

**Functional area summary descriptor**

To create value through procurement and contract management.

**Functional area full descriptor**

To develop a procurement strategy that is aligned to an organisation's strategic objectives. To develop specifications to use and manage contracts in accordance with business requirements whilst ensuring compliance with relevant legislation. To identify suppliers, manage and review on-going supplier relationships. To establish clear selection criteria and manage performance against stated criteria, creating value for the organisation.

This functional area comprises two components:

- Procurement
- Contract management.

The definitions and standards for each of these functional area components are set out in the following pages.

## FUNCTIONAL AREA COMPONENT

## Procurement

To develop and implement a procurement strategy. To identify and select suppliers following robust and transparent selection criteria. To acquire products or services and understand and manage the whole supply chain. To ensure alignment with an organisation's corporate objectives by measuring quality versus price versus risk so that best value for the company is achieved.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Keeps abreast of developments and maintains networks that may enhance procurement strategies and activities	Leads bidding and tendering processes	Develops technical specifications for the procurement of suppliers, products and services	Raises purchase orders for products, services and supplies	Raises purchase orders for products, services and supplies
Sets objectives and evaluation criteria and develops a procurement strategy and policies	Negotiates optimum arrangements in contracts for suppliers and services in accordance with procurement policies	Sources suppliers and services in accordance with procurement policies	Researches potential suppliers of products or services	Explains the importance of procurement policies and procedures
Evaluates the effectiveness and ethical value of a procurement strategy and policies and their alignment with an organisation's corporate social responsibilities	Appraises procurement processes and contractual arrangements and recommends improvements	Appoints suppliers and procures services in accordance with FM that offer best value within procurement policies and within agreed budgets	Explains the requirements of different forms of procurement and contractual arrangements	Explains the meaning and importance of a "supply chain"

## FUNCTIONAL AREA COMPONENT

## Contract management

To identify, use and manage different types of contracts. To develop specifications and terms and conditions for the procurement of goods and/or services and to manage the costs of the contract. To gather data and analyse feedback to monitor performance of the contract. To comply with relevant legislation and manage stakeholder relationships.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Develops a contract management policy that is capable of providing synergy, the opportunity for innovation and mutual advantage	Mobilises and develops contracts	Agrees requirements with clients that are mutually beneficial	Monitors contractor performance and the progress of work in line with agreed criteria	Carries out contract management tasks as directed
Develops a robust and transparent supplier management framework	Evaluates the effectiveness of suppliers against agreed criteria	Manages contracts and stakeholder relationships	Collects and analyses information on supplier performance	Collects information on supplier performance and customer feedback
Evaluates the effectiveness of contractual arrangements for the delivery of the procurement strategy and objectives	Ensures value for money from contracts	Identifies and reports on developments, recommending actions to address problems	Reports on developments, making recommendations to address issues	Reports on contract management issues and opportunities

## FUNCTIONAL AREA

# Sustainability

**Functional area summary descriptor**

To minimise the impact on the environment through sustainable practices and the efficient use of resources.

**Functional area full descriptor**

To recognise and address the importance of sustainability and environmental issues and how workplace and facilities management has an impact on these issues. To develop and implement policies that protect the environment and improve awareness. To review policies to reflect changes in legislation. To analyse and improve energy and utility efficiency.

This functional competency comprises four components:

- Energy and carbon management
- Environmental management
- Responsible business
- Social value.

The definitions and standards for each of these functional area components are set out in the following pages.

FUNCTIONAL AREA COMPONENT

# Energy and carbon management

To develop, implement and review an organisation’s energy management policy based on optimising building energy performance, applicable legislation and reporting. To collect and analyse data on energy consumption and greenhouse gas (GHG) emissions against targets to reduce cost, increase efficiency and support the corporate vision.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Leads the development of an energy and water management strategy and policies in line with best practice, frameworks and standards such as ISO5001, including decarbonisation	Advocates energy efficiency and the use of renewable sources as a means of reducing carbon emissions and implements decarbonisation strategies, including collaboration with suppliers to minimise carbon emissions along the value chain	Controls and conserves energy, seeking to decarbonise energy sources wherever possible	Monitors the consumption of energy and water	Complies with energy management policies and procedures
Applies the insights from verified energy and carbon data to inform strategy and drive stakeholder engagement	Evaluates the effectiveness of energy management, providing verified data to support reporting and decision-making	Audits energy use and prioritises data quality	Reports on the consumption of energy and water	Collects data on energy usage
Evaluates the energy and carbon impact of projects, ensuring that both energy performance and embodied carbon are optimised as part of the business case	Manages operational expenditure on energy reduction initiatives, balancing capital costs with long-term operational benefits	Optimises building performance by balancing user comfort with energy efficiency, differentiating between embodied carbon and operational energy usage	Explains the principles of energy and utilities management and controlling greenhouse gas emissions	Explains what is meant by the terms “climate change”, “carbon emissions” and “renewable sources”

FUNCTIONAL AREA COMPONENT

# Environmental management

To manage an organisation’s environmental affairs so as to minimise any negative impact whilst still achieving maximum operational efficiency. To identify and escalate environmental issues associated with workplace and facilities management activities and projects.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Leads the development of a sustainable environmental strategy and policies on resources, waste, water and biodiversity in line with best practice, frameworks and standards such as ISO14001 and harmonising the approach across the whole organisation	Manages the implementation of a sustainable environmental strategy and policies that use Workplace and Facilities Management activities to drive continuous improvement in environmental performance across the organisation	Manages systems and uses technology to ensure that environmental targets and legislative requirements are met, reported and evidenced	Collects and analyses information on environmental performance and waste management issues	Complies with organisational environmental policies and procedures and conserves water, maximises recycling and minimises waste
Applies the insights from verified environmental performance data to inform strategy and drive stakeholder engagement	Evaluates the effectiveness of environmental management, providing verified data to support reporting and decision-making	Responds promptly to any potential breaches of policy or emerging risks to the building or its occupants	Identifies and reports on sustainability issues associated with workplace and facilities management activities and projects	Follows systems and processes used to collect data on environmental impacts
Evaluates the impact of environmental strategy and policies, ensuring that stakeholder priorities are understood and focusing on the most material impacts	Adopts a partnership approach with suppliers and other stakeholders to find synergies in water conservation, waste reduction and resource efficiency along the value chain	Ensures that people understand and fulfil their responsibilities and liabilities for meeting environmental legislative requirements	Ensures that people understand and fulfil their responsibilities for contributing to environmental goals and targets	Explains the importance of good environmental practice and why it is important in workplace and facilities management

FUNCTIONAL AREA COMPONENT

# Responsible business

To recognise both the moral and commercial imperatives for being a responsible business. To champion best practice in line with global standards and emerging social, legislative and commercial drivers and to influence others to maintain the highest standards.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Sets high standards for intellectual property rights, appropriate compensation, payment of fair prices, prompt payment, the fair and safe treatment of workplace occupiers, prioritising health and safety, accessibility and security that go beyond minimum legal requirements, adopting a transparent approach to drive forward improved performance whilst taking a zero tolerance stance on illegal practices	Adopts a partnership approach to customers, suppliers and contractors to create mutually beneficial relationships based on trust and improve workplace users' experience	Ensures team members fulfil their responsibilities for human rights including upholding support for whistle blowers and escalates suspected issues	Monitors the extent to which staff and suppliers comply with corporate responsibility standards and reports on issues, problems and shortfalls	Complies with policies that support corporate responsibility standards including human rights at all times
Leads a strategy that emphasises continuous improvement in human rights at all points in the supply chain and influences high industry standards including rigorous due diligence	Works collaboratively to improve human rights throughout the supply chain, championing best practice and acting promptly and decisively in case of violations	Responds promptly and decisively to cases of human rights violations	Explains the scope of corporate responsibility policies and activities	Explains the obligation to contribute to a healthy and mutually supportive workplace
Fosters a culture that prioritises equality, diversity and inclusion and ensures the wellbeing of all employees and contract workers, both through physical and mental health and safety both in the workplace and when working remotely	Creates a culture where people thrive and ensures that they feel supported both inside and outside the workplace	Supports a healthy and mutually supportive workplace where people thrive and feel supported	Explains the importance and role of corporate responsibility policies and activities and the potential impact of poor practice	Reports bad practice

FUNCTIONAL AREA COMPONENT

# Social value

To develop, implement and review social value policies in line with an organisation's goals and best practice as well as all applicable legislation. To improve awareness of social value amongst stakeholders and embed the creation of social value into policy and practice. To contribute to the development of a workplace and supplier strategy where social value creation, measurement and data validation is seen as a key strategic outcome.

STRATEGIC	MANAGEMENT		OPERATIONAL	
STRATEGIC	SENIOR	MANAGER	SUPERVISOR	SUPPORT
Leads the development of a social value strategy and policies that focus on the most material impacts in line with best practice and public procurement standards	Manages the implementation of a social value strategy and policies and makes recommendations for continuous improvement	Manages data collection systems that ensure that social value activities and outcomes are monitored, reported and evidenced	Works cooperatively with suppliers to align social value contribution through service delivery and supports the delivery of social value programmes as an integral part of service delivery	Complies with social value policies
Evaluates the social value effectiveness of activities, focusing on outcomes and using the insights to inform strategy and drive stakeholder engagement and support decision-making	Develops supplier engagement programmes that embed social value creation along the supply chain	Promotes social value creation to staff, contractors and suppliers to drive behaviour change and foster innovation	Monitors the extent to which staff, contractors and suppliers comply with social value policies	Follows systems and processes that are used to monitor social value activities and provide data on outcomes
Fosters a culture that encourages social value creation across all workplace and facilities management operations, focusing on the issues most material to the operation, its customers and communities	Develops workplace and facilities management social value programmes that are harmonised across the organisation and which are aligned with corporate values and stakeholder priorities	Adopts a partnership approach with suppliers and contractors to find synergies in social value creation along the supply chain including goods and services procured	Reports on issues, problems and shortfalls in social value-related policies and activities	Explains the principles and importance of social value in workplace and facilities management

# Behavioural competency framework

The development of certain personal qualities (also known as behavioural competencies) is likely to help people reach the standards set out in this handbook. The earlier section in this handbook entitled “A model of competence” sets this in context.

The examples below are intended to illustrate what a behavioural competency might look like.

## Customer focus

Exceeding customer expectations and adding value to their performance.

### A person with this quality:

- Identifies and understands customer needs, expectations and motivations and how to satisfy them
- Identifies the current needs and anticipates the changing needs of different kinds of internal and external customers
- Devises ideas that demonstrably meet customers' needs
- Establishes a rapport with customers by adopting a friendly, helpful and knowledgeable attitude
- Is confident and clear about their ability to help
- Does not promise what they cannot deliver
- Makes every effort to ensure that customers receive a quality service
- Follows up to ensure that customers receive what they need
- Keeps customers informed of progress and developments
- Makes customers feel that nothing is too much trouble

### A person without this quality:

- Does not take the trouble to identify the customer's needs accurately
- Does not pick up “buying signals”
- Misunderstands or misinterprets customer needs
- Uses jargon or communicates in a way that customers cannot readily understand
- Does not put themselves in the customer's place and describes features instead of benefits
- Makes minimum effort to meet customers' stated needs or gives wrong or inappropriate information
- Ignores customer complaints and does not act on customer feedback
- Raises false expectations or gives inappropriate advice
- Does not understand the need to make every effort possible to help customers

## Integrity

Not sacrificing high standards for immediate gains.

### A person with this quality:

- Understands the implications of commercial imperatives
- Maintains consistently high standards of work, loyalty, honesty and commitment
- Never cuts corners nor jeopardises the safety of others by taking “the soft option”
- Stands by his or her decisions and principles even in the face of strong opposition or threats
- Has the courage and strength to admit mistakes and weaknesses and to act on them
- Pursues work diligently to the end to ensure the optimum service to internal and external customers

### Commitment to continuous improvement

Aiming for a higher level of excellence in everything we do.

### A person with this quality:

- Evaluates and analyses processes, procedures and outcomes to look for improvements
- Adapts positively and effectively to change
- Seeks and exploits opportunities to develop their own skills and abilities
- Proposes practical suggestions and ideas for improvements
- Uses technical systems efficiently and keeps up to date with changes
- Encourages others to seek opportunities for improvement and adopts others' ideas

## Leadership

Inspiring others to exceed objectives by acting as a role model of personal integrity and by persistently working toward goals with enthusiasm.

### A person with this quality:

- Motivates others and provides direction and support to achieve or exceed objectives
- Provides regular guidance and constructive feedback sensitively on colleagues' performance
- Assumes command but remains open to ideas and suggestions for improvement
- Is approachable and open with information
- Encourages others to offer suggestions without fear of rejection
- Challenges accepted wisdom in seeking better ways of delivering services
- Fulfils their own responsibilities to the highest professional and ethical standards

# Achieving professional excellence

Following industry research, IWFM has designed, developed and awards FM qualifications that are recognised nationally and internationally. The grades of membership relate to the professional standards and qualifications as follows:

	CAREER LEVEL	QUALIFICATION LEVELS	MEMBERSHIP GRADES
STRATEGIC	STRATEGIC	6, 7	CIWFM/FIWFM
MANAGEMENT	SENIOR	5, 6	MIWFM/CIWFM
	MANAGER	4, 5	MIWFM
OPERATIONAL	SUPERVISOR	3, 4	AIWFM
	SUPPORT	2, 3	AIWFM

### Attaining professional standards

#### IWFM qualifications

IWFM qualifications in facilities management are awarded by IWFM, the professional body for workplace and facilities management.

Developed following extensive research with key stakeholders, they are a flexible and fit-for-purpose suite of awards created to meet the needs of a dynamic workplace and facilities management profession.

IWFM qualifications have been designed to work globally. Country specific information can be applied in the delivery of the qualifications but they are underpinned by a worldwide set of standards and units.

- IWFM qualifications are regulated and, like any external qualification, they provide independent confirmation that an individual has mastered the relevant subject matter.
- IWFM qualifications form part of the system managed by the Qualification Regulators (e.g. Ofqual), which reports directly to government. This recognition affirms them as external measures of achievement.

IWFM qualifications have been designed by practitioners to cover the knowledge and skills required at different career stages in workplace and facilities management, from new entrant to director level.

Opposite is a table showing the range of qualifications available.

The level (e.g. 'level 3') depicts the degree of challenge of the qualification. Example: a level 3 qualification is comparable to the level of challenge of an A level.

Qualifications are made up from a combination of units, with a credit value assigned to each one. The 'size' of qualification (e.g. certificate) awarded is determined by a number of completed credits. Example: successful completion of 28 credits at level 3 would result in the achievement of an IWFM Level 3 Certificate in Facilities Management.

#### For more information

T +44 (0) 1279 712 651  
 E [qualifications@iwfm.org.uk](mailto:qualifications@iwfm.org.uk)  
[iwfm.org.uk/professional-development/qualifications](http://iwfm.org.uk/professional-development/qualifications)

#### SIZE OPTIONS

##### Award

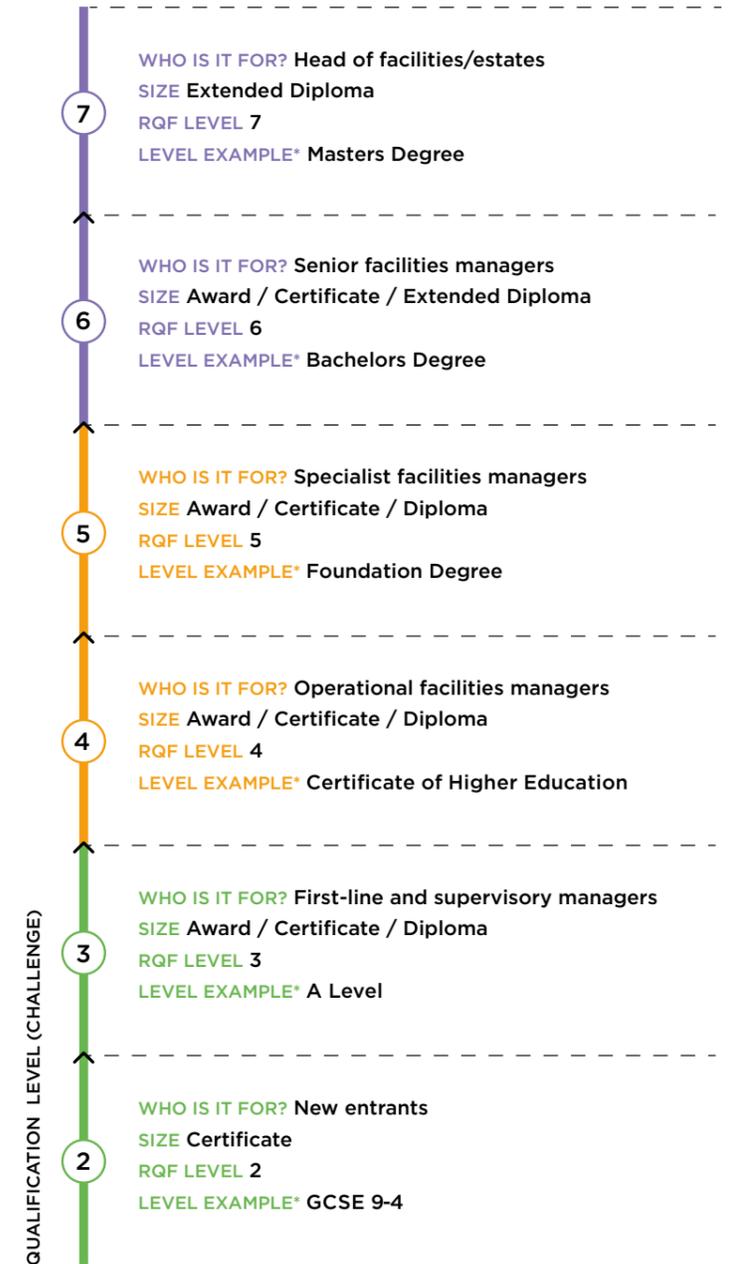
Gives you a succinct overview of the basic skills and knowledge needed at this level

##### Certificate

Provides you with a more comprehensive coverage of the subject

##### Diploma/Extended Diploma

Provides the full package of skills, knowledge and understanding at this level



\*The level examples are purely for guidance purposes - they are not a reflection of the qualification that will be awarded upon successful completion of an IWFM Qualification: for example, achieving a IWFM Level 5 Qualification in facilities management would not constitute being awarded a Foundation degree. These are included as an indication of the level of challenge.

# Demonstrating professional standards

There are four graded membership opportunities:

- Fellow (FIWFM)
- Member (MIWFM)
- Certified (CIWFM)
- Associate (AIWFM)

The eligibility requirements for each grade of membership are set out below.

GRADE	POST-NOMINAL LETTERS	ENTRY ROUTES	ENTRY REQUIREMENTS	EXPERIENCE REQUIREMENTS			
				YEARS			MGMT LEVEL
				TOTAL	IN FM	IN MGMT	
FELLOW	FIWFM		Significant FM experience and can clearly demonstrate a sustained or significant contribution to the FM profession or wider industry	N/A	N/A	N/A	Strategic
CERTIFIED	CIWFM	a)	IWFM Level 6 Diploma or above	3	3	2	Senior
		b)	FM or FM related qualification at level 6 or above OR Chartered status of a relevant professional body	3	3	2	Senior
MEMBER	MIWFM	a)	IWFM Level 4 Diploma or above Or An FM related qualification at Level 4 or above	2	2	2	Middle
		b)	Experience	5	5	3	Middle
ASSOCIATE	AIWFM	a)	Experience	2	2	0	Non
		b)	An FM related qualification at Level 2 or above	1	1	0	Non
AFFILIATE	N/A		Open to all with an interest in FM (No demonstration of experience required)				

## IWFM membership applications

The Workplace and Facilities Management Professional Standards will be incorporated into the IWFM membership application process.

When professionals apply for IWFM membership we'll use this framework to assess their knowledge and experience to determine eligibility for membership. Our assessments are conducted by external assessors.

Depending on the grade and entry route of the application, we'll assess their credentials against the functional area requirements for the membership grade they are seeking.

Professionals awarded an assessed grade of membership will be entitled to use the IWFM post-nominal letters.

For further information on the IWFM membership application process or the supporting materials required for entry, please contact the Membership, customer engagement Team.

T +44 (0) 1279 712 650  
E engagement@iwfm.org.uk

# Appendix

# Appendix 1: Units

LEVEL 2 UNITS		
Ref	Unit Title	Credits
FS2.01	Reduce risks to health and safety in the workplace	3
FS2.02	Promote and maintain service delivery	4
FS2.03	Develop customer relationships	6
FS2.04	Contribute to the effectiveness and efficiency of premises and facilities	4
FS2.05	Support the work of a team and develop yourself	3
FS2.06	Control the use of resources in a property, caretaking and facilities services environment	3
FS2.07	Maintain grounds of premises and facilities	3
FS2.08	Maintain site security and safety	3
FS2.09	Control the use of premises and facilities	4
FS2.10	Work safely at heights	3
FS2.11	Monitor and maintain electrical and plumbing services	4
FS2.12	Carry out maintenance and minor repairs	3
FS2.13	Operate plant to maintain the quality of pool water	4
FS2.14	Deal with routine waste	3
FS2.15	Deal with non-routine waste	3
FS2.16	Deep clean equipment in premises and facilities	6
FS2.17	Support the co-ordination of an event	3
FS2.18	Moving and transporting individuals within a healthcare environment	4
FS2.19	Transport physical resources within the work area	2
FS2.20	Clean and maintain internal surfaces and areas	4
FS2.21	Introduction to equality & inclusion in health, social care or children's & young people's settings	2
FS2.22	Provide reception services	3
FS2.23	Handle mail	3
FS2.24	Communicate effectively in the workplace	2
FSP2.01	Working in facilities services	3
FSP2.02	Health and safety for facilities services	4
FSP2.03	Working with customers and others in facilities services	2
FSP2.04	Sustainability and environmental issues for facilities services	4

LEVEL 3 UNITS		
Ref	Unit Title	Credits
FM3.01	Introduction to FM	6
FM3.02	Corporate social responsibility and sustainability in FM	4
FM3.03	Customer and stakeholder relations in FM	5
FM3.04	Specification and procurement of facilities supplies and services	6
FM3.05	Health and safety responsibilities in FM	5
FMP413	Manage operational performance in FM	4
FM3.06	Project management within FM operations	5
FM3.07	Budget management of FM operations	4
FM3.08	Understanding FM within context of an organisation	4
FM3.09	Understanding support services operations in an organisation	3
FM3.10	Space allocation in current facilities	4
FM3.11	Building maintenance in FM	5
FM3.12	Understand the estate management function	4
FM3.13	Contribute to disaster recovery and contingency planning	5
FM3.14	Understanding access management and inclusion	5
FM3.15	Leadership, management and personal development	9

## Units continued

LEVEL 4 UNITS		
Ref	Unit Title	Credits
FM4.01	Overview of FM	6
FM4.02	Understanding FM strategy	3
FM4.03	Understanding people management in FM	8
FM4.04	Understanding FM support services operations	6
FM4.05	Managing health and safety in own areas of FM	6
FM4.06	Understanding risk management in FM	6
FM4.07	Understanding financial management in FM	6
FM4.08	Understanding the business organisation and its impact on FM	6
FM4.09	Understanding performance measurement in FM	3
FM4.10	Understanding leadership and management in FM	6
FM4.11	Understanding the management of information and knowledge in FM	3
FM4.12	Understanding FM projects	6
FM4.13	Developing relationships with suppliers and specialists in FM	3
FM4.14	Understanding quality management in FM	4
FM4.15	Managing customer service in FM	4
FM4.16	Understanding property and asset management for facilities managers	4
FM4.17	Understanding property, fabric and building services maintenance for facilities managers	8
FM4.18	Understanding space management for facilities managers	3
FM4.19	Understanding sustainability and environmental issues and their impact on FM	3
FM4.20	Understanding energy and utilities management and the impact on FM	3
FM4.21	Understanding procurement and contract management in FM	3
FM4.22	Managing accessibility and inclusion and its impact on FM	6
FM4.23	Supporting change initiatives in an organisation and manage the impact on FM	6
FM4.24	Innovation in FM	5
FM4.25	Building Information Modelling for FM	5

LEVEL 5 UNITS		
Ref	Unit Title	Credits
FM5.01	FM development and trends	6
FM5.02	Organisational and FM Strategy	8
FM5.03	Managing people in FM	6
FM5.04	Risk management in FM	6
FM5.05	Financial management in FM	6
FM5.06	FM support services operations	6
FM5.07	Managing health and safety in FM	6
FM5.08	Performance measurement in FM	3
FM5.09	Providing leadership and management in FM	4
FM5.10	Managing information and knowledge in FM	3
FM5.11	Managing FM projects	6
FM5.12	Managing negotiations in FM	3
FM5.13	Managing relationships with suppliers and specialists in FM	6
FM5.14	Quality management in FM	6
FM5.15	Customer service in FM	3
FM5.16	Property and asset management for facilities managers	6
FM5.17	Property, fabric and building services maintenance for facilities managers	6
FM5.18	Space management for facilities managers	3
FM5.19	Sustainability and environmental management and the impact on FM	4
FM5.20	Energy and utilities management and the impact on FM	3
FM5.21	Managing procurement and contracts in FM	4
FM5.22	Implementing change in an organisation and managing the impact on FM	4
FM5.23	Reflective facilities management practice	6
FM5.24	Strategic building information modelling for facilities management	6
FMP502	Manage and implement policies in facilities management	4
FMP503	Expand the provision of facilities management services	5
FMP505	Manage working relationships in facilities management	5
FMP509	Co-ordinate work control in major facilities management projects	9
FMP510	Manage compliance with regulation and legislation in facilities management	7
FMP514	Plan estates in facilities management	10
FMP516	Develop and mobilise facilities management contracts	8

## Units continued

LEVEL 6 UNITS		
Ref	Unit Title	Credits
FM6.01	Strategic FM	10
FM6.02	FM governance and risk	8
FM6.03	Quality management and customer service in FM	6
FM6.04	Financial management in FM	6
FM6.05	Strategic FM support services operations	4
FM6.06	Compliance with organisational health and safety and the impact on FM	6
FM6.07	Strategic leadership and management in FM	8
FM6.08	Human resource management in FM	6
FM6.09	Developing strategic relationships in FM	6
FM6.10	Strategic management of information and knowledge in FM	4
FM6.11	Corporate responsibility and sustainable FM	6
FM6.12	Procurement strategy for FM	6
FM6.13	Property management and maintenance strategy for FM	8
FM6.14	Introducing and leading change in an organisation and managing the impact on FM	6

LEVEL 7 UNITS		
Ref	Unit Title	Credits
FM7.01	Strategic FM and business	10
FM7.02	Knowledge, information and change management for FM	10
FM7.03	Managing staff and customers in FM	20
FM7.04	Legislation, finance and risk in FM	20
FM7.01	Strategic FM and business	10
FM7.05	Procurement and measurement in FM	5
FM7.07	Managing facilities management projects and contracts	15
FM7.09	Leadership, partnership and change within FM	15
FM7.10	Strategic property asset management	15

## Appendix 2: Glossary

activity	the work of a group or organisation to achieve an aim
application	the determination to work hard over a period of time in order to succeed at something
competence	the ability to do something
component	a part that combines with other parts to form something bigger
descriptor	something that tells you what something is like
element	a part of something
framework	a supporting structure around which something can be built
function	the natural purpose (of something) or the duty (of a person)
knowledge	understanding of or information about a subject that you get by experience or study, either known by one person or by people generally
professional	involves a high level of education and training
skill	an ability to do an activity or job well, especially because you have practised it
standard	a level of quality
understanding	knowledge about a subject, situation, etc. or about how something works

You can find an extensive glossary of terms on our website at [iwfm.org.uk/glossary](http://iwfm.org.uk/glossary)

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