Facilities Manager (L4) Apprenticeship Standard

Employer Occupational Brief

Version Control

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Contents

1   Introduction

The Employer Occupational Brief (EOB) is referred to in the Assessment Plan for this standard. Its purpose is to give details about the education and training requirements of the apprenticeship programme in order to ensure that there is clarity about the standards of learning that are required and that there is uniformity in the implementation of the programme.

The delivery of this apprenticeship by employers and providers is designed so that on-programme learning and the associated evidence will dovetail to ensure that the links between apprentices' knowledge, skills and behaviours can be tracked by apprentices, employers, providers and, where applicable, assessors. Apprentices should therefore be suitably prepared to take the End Point Assessment (EPA).

This document was produced by the facilities management (FM) employer group (Trailblazer) that was established to manage the development of this standard. It is strongly advised that these recommendations are implemented by those delivering the Facilities Manager Apprenticeship i.e. both employers and providers. The employer group retains copyright of this document and will be responsible for the periodic review and revision of the document. It can be downloaded free of charge from www.bifm.org.uk.

2   Role Profile

This apprenticeship prepares an individual for the safe, secure and comfortable working environment for all properties, assets and services that must be fully compliant with health and safety and other legislation. They manage the delivery of all FM services within their area of responsibility[1], ensuring that levels of performance delivered exceed customer expectations within budget for the properties, assets and services in a sustainable way.

3   On-programme learning and assessment

On-programme work-based learning opportunities are provided by employers to support and prepare apprentices for their careers in FM. Assessment of these practical work-based learning opportunities is formative, providing feedback to help apprentices identify the skills they have acquired and areas for future development. In tandem with this formative assessment, apprentices will develop their knowledge and a wider insight into the FM industry.

The indicative content of the standard has been translated into a technical specification (detailed learning content) by the Trailblazer employer group,

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[1] e.g. for one or more contracts/services; local responsibility; specific services e.g. cleaning or maintenance; fleet services etc

covering the skills and knowledge requirements of the role. The detailed technical specifications can be found in Section 5 of this document.

Employers will need to work with training providers to develop the learning programmes which should be mapped to the technical specification to enable apprentices to demonstrate the required knowledge, skills and behaviours prior to undertaking the EPA. It is estimated that the full length of the apprenticeship will be 18 – 24 months with the EPA to take place no later than 6 months from the end of the apprenticeship.

Where appropriate, a holistic assessment plan covering two or more components of the technical specification is recommended. This will support apprentices in developing the ability to identify links between FM operations and responsibilities and between FM theory and FM practice. Assessment will also support individuals in their development of thinking skills required for study at Level 4 (equivalent level to a Higher National Diploma (HND) and the first year of a Bachelor's degree).

Qualification unit mapping

Whilst apprentices are free to choose which optional units they wish to take to achieve the L4 Diploma in Facilities Management on-programme, it would be wise to choose those that cover the requirements of the eight projects that must be carried out on-programme during the apprenticeship. It is therefore recommended that apprentices should complete the following units which map to the apprenticeship standard as follows:

Area of the standard	Qualification optional units
1 Property asset management	4.16, 4.17, 4.18, 4.22
2 Service delivery	4.13
3 Compliance	4.06, 4.19, 4.20, 4.22
4 Management systems	4.11, 4.25
5 Policy implementation and change management	4.08, 4.09, 4.12, 4.23, 4.24
6 Quality and stakeholder management	4.14, 4.15
7 People management	4.10, 4.23
8 Financial and procurement management	4.07, 4.21, 4.24

However, apprentices should bear in mind that they need to achieve a minimum of 48 credits from their choice of optional units.

Note also that some aspects of the standard are not covered by any of the qualification units. These are as follows:

Skills

Area of the standard	Aspects not covered by qualifications units
1 Property asset management	Evaluate the effectiveness of the implementation of a property management
2 Service delivery	N/A
3 Compliance	Business continuity Analyse the extent to which compliance requirements are met
4 Management systems	N/A
5 Policy implementation and change management	Develop and implement delivery plans for the management of FM services
6 Quality and stakeholder management	N/A
7 People management	Assess and plan for individuals' development needs
8 Financial and procurement management	Develop operational plan and budget Analyse the effectiveness of procurement practices

Knowledge

Area of the standard	Aspects not covered by qualifications units
1 Property asset management	N/A
2 Service delivery	Problem solving techniques Prevention measures Corrective actions
3 Compliance	Client requirements
4 Management systems	Requirements of ISO 41001 (international FM standard)
5 Policy implementation and change management	N/A
6 Quality and stakeholder management	N/A
7 People management	Capability building HR tools and techniques
8 Financial and procurement management	Accountability within delegated financial authorities Client objectives and requirements

The project developed by training providers will need to cover these missing items as above.

Where the selected qualification units do not cover all the areas of the standard, training providers will need to develop a project that covers those areas.

On successful completion of this apprenticeship, apprentices will then have achieved the Ofqual-regulated BIFM level 4 Diploma in FM which will meet the criteria for BIFM membership at Associate grade. This will also meet the academic requirement for BIFM member grade.

4 Recommendations for on-programme assessment

It is recommended that employers implement on-programme assessments, which will be formative, to enable apprentices to demonstrate that they have developed the required knowledge, skills and behaviours in the workplace under working conditions before taking the EPA.

Assessment Tool	Coverage	Assessed By	Grading
Work-based projects	Knowledge, skills & behaviours	Employers / Training Providers	N/A – formative assessment
Reflective log	Behaviours	Employers / Training Providers	
Functional Skills English & Maths*	Knowledge	Training Providers	Pass/Unclassified

*If required of an apprentice

Employers and providers should confirm in writing when they consider that apprentices are ready to take the EPA. Apprentices may not progress to the EPA until they have achieved the standard.

The assessment methods chosen are flexible and support the nature of learning across all on-programme activities. These methods are:

- work-based projects;
- reflective log.

These methods are outlined briefly in the following paragraphs.

4.1 Work-based projects

It is strongly recommended that the formative assessment includes work-based projects. This is to assure apprentices' competence across the various tasks in the workplace required in undertaking the role.

A work-based project may also be known as a case study. They may be used in three different scenarios:

1. Apprentices may be employed by an organization that delivers all aspects of FM and their own role gives them access to the full range of FM activities;
2. Apprentices' roles may be limited to certain aspects of FM only;
3. The organization employing an apprentice may not deliver all aspects of FM. In this situation, to complete a work-based project (or case study), apprentices are more likely to need to carry out research beyond their employing organization. No more than 30% of such projects may be demonstrated in this way.

Work-based projects or case studies should be framed around the exploration of a particular FM issue. The aim is for apprentices to develop more learner autonomy by providing opportunities to conduct research and demonstrate critical understanding of a chosen FM issue. This method of assessment is flexible in that apprentices may draw on external references to a greater or lesser degree depending upon the purpose of and outcomes of the assessment e.g. academic (knowledge) or practice (skills and behaviours).

A work-based project or case study might be grounded in practice and used to demonstrate skills and behavioural outcomes, with the completed project or case study providing evidence of achievement of specific learning outcomes.

The suitability of work-based projects/case studies should be approved by the assessor and the employer.

Apprentices should draw on a range of technical published material e.g. books, periodicals, research papers etc and use this to underpin their understanding of theories and models and how these apply to FM.

A qualified assessor[2] will confirm that the reports resulting from the work-based projects or case studies form valid and sufficient evidence. Provided that they are of suitable standard (i.e. they meet the requirements of the apprenticeship standard), it is recommended that the work-based projects or case studies are not graded during the on-programme element of the apprenticeship. However, feedback will be provided to apprentices on their work-based evidence to help them prepare for the EPA. This is described in further detail in the mentoring section.

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[2] the requirements for which are set out in the Assessment Plan

4.2 Reflective Log

The purpose of reflection is to enhance the development of key professional and practical skills that the apprentice will need to use throughout the programme and in the wider context of career development within FM. BIFM will supply guidance on the requirements of the reflective log.

Throughout the on-programme assessment, apprentices should keep a reflective log of evidence on their learning in real time. This will enable them to reflect on their experience of generating their evidence. It will allow the assessment and self-assessment of apprentices' skills, behaviours and underpinning knowledge of work activities. The reflective log will be developed by apprentices and verified by a qualified assessor to ensure the validity and sufficiency of the evidence. It is recommended that the reflective log is not graded. However, feedback is provided to learners to help them prepare for the EPA. This is described in further detail in the mentoring section.

The reflective log is designed to be a live record of the apprenticeship journey. It will be developmental, demonstrating the apprentices' progression in FM and their ability to reflect on their experiences, moving from basic reflection to critical self-reflection of their developing knowledge, skills and behaviour. Guidance will be provided to employers and providers to support apprentices in the development of their reflective skills. The reflective log may take the form of a paper document or it might be kept digitally e.g. using voice recordings and video diaries.

During the course of their degrees, university mentors and apprentices should meet at least quarterly on a one-to-one basis to review apprentices' progress and development needs. Records of these meetings should be kept in the reflective log as they may be used as evidence of apprentices' achievements against the requirements of the knowledge, skills and behaviours of the apprenticeship standard.

On completion of all on-programme learning, apprentices will progress to the EPA. The reflective log will form the basis for holistic reflection on their development over the course of the degree apprenticeship. Professional discussion will be used in the EPA so that key areas for development can be explored to assist with verification of the outcomes of apprentices' learning.

4.3 Summary Record of Achievement

It is recommended that a Summary Record of Achievement be implemented to record and track learners' achievements through the on-programme assessment. It should link to the reflective log and take into account feedback from all parties involved in the programme i.e. employers and providers. The Record of Achievement will be agreed and signed off by the employer and provider to provide an auditable record that the apprentice has met the requirements of the standard and technical specification (skills, knowledge and behaviours). This will

record the fact that the apprentice has reached a suitable standard to take the EPA.

4.4 EPA work-based projects

A further project must be carried out during the End-Point Assessment (EPA) for which apprentices must produce an 8,000 word report (see pages 10 – 12 of the assessment plan at:

https://www.instituteforapprenticeships.org/media/1760/st0484-facilities-manager-level-4-assessment-plan-for-publication.pdf

The project must cover the knowledge and skills listed in areas 1, 3, 4 and 8 of the apprenticeship standard along with the four behaviours listed on page 12 of the assessment plan. This is to prove that apprentices have retained the learning gained during the apprenticeship and can apply it synoptically at the end of the programme.

Apprentices should focus on demonstrating that they meet the higher order skills and knowledge for each of the four areas to be assessed by the project as achievement of the higher order items infers that the lower order knowledge and skills have also been achieved. See pp 10 – 12 of the assessment plan).

Apprentices are not allowed to use work that they have completed whilst on-programme. However, such work may form a "control" against which apprentices may wish to measure changes. Therefore, they may review and evaluate work that they have done on-programme and use this as source material for further developments. For example, they may wish to review a Business Continuity Plan (BCP) that they have developed previously and consider its continuing fitness for purpose. However, evidence to be submitted for the EPA must demonstrate how the plan has been redeveloped to respond to changing circumstances. The final evidence submitted for EPA purposes must be demonstrably different from what has been produced on-programme.

5 Technical Specification

This Employer Occupational Brief relates to the Apprenticeship standards i.e.:

1   Property asset management
   • Manage FM property and fixed assets and implement building maintenance plans
2   FM service delivery
   • Ensure the delivery of FM service provision to required standards and identify opportunities for improvement
3   FM compliance
   • Meet FM compliance, risk and business continuity requirements
4   FM management systems

- Use FM management systems to monitor, report and act on the performance and efficiency of properties, assets and services against FM KPIs
5   FM policy implementation and change management
- Develop and implement delivery plans for the management of FM properties, assets and services and manage change
6   Quality and stakeholder management in FM
- Establish and manage day-to-day relationships with clients and other stakeholders to agreed quality standards
7   People management in FM
- Motivate, manage and develop FM teams to deliver operational objectives
8   Change and programme management in an FM context
- Apply change and programme management techniques in an FM context
9   Financial and procurement management
- Manage FM finances and procure FM goods and services, ensuring they are delivered within agreed budgets and make recommendations for innovation

6   Mentoring in the workplace

Organizations delivering this apprenticeship should nominate suitable individuals to act as mentors to apprentices. Mentors should be:

- employed by the same organization as the apprentice (ideally) at a more senior level;
- occupationally competent in FM;
- up to date with FM trends and practices.

The responsibilities of mentors is as follows:

- ensuring that the apprentice complies with organizational policies and guidelines;
- providing encouragement and constructive feedback on their performance;
- identifying and enabling access to suitable learning opportunities;
- helping apprentices to develop their skills;
- acknowledging new achievements positively;
- advising on skills development;
- ensuring that apprentices keep to schedule with projects and other work that needs to be completed for their apprenticeship;
- liaising with other assessors and mentors (where appropriate) to discuss the apprentice's progress;
- completing any necessary documentation as agreed with the employer and/or training provider e.g. records of mentoring sessions;
- reporting on an apprentice's conduct and progress to the apprentice's line manager.

Mentors and apprentices should meet at least quarterly on a one-to-one basis to review apprentices' progress and development needs. Records of these meetings should be kept in the reflective log as they may be used as evidence of apprentices' achievements against the requirements of the knowledge, skills and behaviours of the apprenticeship standard.

Mentors should be briefed on their responsibilities and sufficient time made available to them to enable them to facilitate the development of an apprentice.

Apprentices should have a formal review of their development and progress at least annually with a nominated individual within their organization. This should include confirmation that apprentices have developed both their skills and knowledge to an appropriate standard within expected timeframes. The meeting and its outcomes should be recorded and made available to apprentices' line managers.

7   Explanation of tables

On the pages that follow, the following codes are used:

Key

E	Employer	P	Provider
OP	On programme	EPA	End Point Assessment
WBP	Work-based project	Ex	Examination
PD	Professional discussion	Pres	Presentation

In the following tables, for each skill and knowledge outcome against which apprentices will be assessed, there is a column that indicates who will be responsible for delivering the outcome (either the employer (E) or a provider (P)).

The point at which the outcome is assessed is specified by either OP (On-Programme) or through the End Point Assessment (EPA).

For each outcome, a column indicates the method(s) of assessment that would be suitable i.e. work-based project (WBP), professional discussion (PD) or presentation (Pres).

8   Employer Occupational Brief (skills & knowledge)

The detailed requirements for each aspect of the knowledge and skills of the standard are set out in section 8 (pp 11 – 33).

9   Employer Occupational Brief (behaviours)

The detailed requirements for each aspect of the behaviours of the standard are set out in section 9.

1   Property asset management

Apprentices will develop their skills, knowledge and understanding of managing property and fixed assets and implementing building maintenance plans

Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:				
		Delivery	Asst	Method			Delivery	Asst	Method
1	Monitor and control premises through fabric and building services maintenance plans that are consistent with the strategy	E	OP	WBP	1	The principles of property asset management and the use of registers	P	OP	WBP
2	Evaluate the effectiveness of the implementation of a property management plan and make recommendations for improvement	E	OP EPA	OP WBP EPA WBP	2	The implications of property ownership	P	OP	WBP
3	Ensure property and fixed asset registers are accurate and up to date	E	OP	WBP	3	The principles of building design affecting property and energy management and building maintenance	P	OP	WBP
4	Ensure the efficient and sustainable use of energy	E	OP	WBP	4	Workplace planning techniques	P	OP	WBP
5	Reduce and dispose of waste in accordance with organizational policies and procedures	E	OP	WBP	5	The factors involved in relocation	P	OP	WBP
					6	The features of a building's whole life cycle and their implications e.g. cost, resource and maintenance requirements	P	OP EPA	OP WBP EPA WBP
					7	The principles of and emerging practice in waste minimization, environmental, energy and sustainability management	P	OP	WBP

Indicative content

	Skills		Knowledge
1		1	Work space design principles, ergonomics and space requirements eg storage, circulation to usable areas, inter-relationship with other departments, recreational space
			Tools and techniques to assess the use of space (eg surveys, electronic sensors, footprint counters, BIM etc)
			Types of maintenance strategy: periodic, reactive, preventive, conditioned-based, risk-based
			The use of registers for property and fixed assets
2	Optimization of the use of space to deliver strategic objectives and priorities Smart/flexible/agile working (all skills & knowledge) Including access and inclusion requirements	2	Real estate footprint and any special requirements eg constraints, neighbouring properties/people, limitations of use, noise, emissions, ownership, impact on the environment
			Types of leases and other contractual arrangements i.e. leases: general; finance; true; skip; deferred; pre-paid purchase; sub; their administration and costs
3		3	The features of building, fabric, structures and components and their maintenance implications
			Inc. load-bearing masonry, timber frame and steel frames, cladding systems, use of steel, brick, concrete, wood & glass; their advantages and limitations
			Range of building services inc. utilities, sewage, heating & ventilating, communications
			Aspects of a building services maintenance programme: risk analysis; maintenance plan; tracking progress, safe systems of work; record keeping; compliance; monitoring and reporting; processes for mechanical, electrical, HVAC & lift maintenance
			Use of technology (spreadsheets – CAFM packages), their functionality and cost
4	ISO 15001 Energy Management Establishing and using targets to manage energy consumption Developing and using an energy management plan	4	Inc. space to perform tasks, adequate through routes, clear exit routes, adequate light & ventilation, reflecting/rewarding rank; helping or hindering occupational synergies, efficient working & organizational aspiration

			Emerging patterns of working & their implications for FM
			The requirements of property and equipment eg space, temperature, humidity, sustainability and their implications for maintenance and profitability
			Range of building types; their uses, advantages and limitations (e.g. structural strength, resistance to weather)
			Access and inclusion requirements
			Principles of inclusive design in the built environment
			Influence of service and building design on access to services by disabled people
5		5	Inc. handover, space planning, change of use, cost reduction, consolidation, novation of contracts, sustainability, reasons for relocation and their sensitivities etc
		6	
		7	

2   FM service delivery

Apprentices will develop their skills, knowledge and understanding of ensuring the delivery of FM service provision to required standards and identifying opportunities for improvement

Skills: the apprentice will be able to:		Delivery	Asst	Method	Knowledge: the apprentice will need to know and understand:		Delivery	Asst	Method
1	Identify FM organizational, client and customer service requirements and any tensions between them	E	OP	WBP	1	Trends in FM services and delivery models	P	OP	WBP
2	Ensure the delivery of FM services in accordance with organizational requirements	E	OP EPA	OP WBP EPA PD	2	The principles of contract management	P	OP	WBP
3	Identify opportunities for improvement in FM service delivery	E	OP	WBP	3	Composition and roles within the supply chain	P	OP	WBP
4	Monitor and report on the performance and behaviour of contractors and contract performance against agreed contract terms	E	OP	WBP	4	Requirements of the management of sub-contractors	P	OP	WBP
5	Identify problems in FM service delivery and make recommendations for corrective action	E	OP	WBP	5	Organizational, client and customer service requirements in FM service delivery	P	OP EPA	OP WBP EPA PD
					6	How to collect data to identify areas for improvement in FM service delivery	P	OP	WBP

Indicative content

	Skills		Knowledge
1		1	e.g. in house, outsourced, sourcing strategies, partnering, bundled, total FM contract etc
			Cost-effectiveness of different delivery options
			e.g. practice for dealing with customers, clients and end users & good practice in FM customer service
			External sources of information e.g. industry norms, from clients, from competitors and technological developments in FM, BIFM guidance documents, academic documents and reference tools
2	Inc. the management of revenue/operational budgets in the provision of support services	2	Transparent objective setting, review mechanisms and timetable
			Reviews of actual performance against SLAs; formal contract review meetings; informal discussion; escalation procedures; customer satisfaction surveys and feedback
			Encouragement for continuous improvement: benchmarking potential for additional business, client references for future contracts
			Remedial plans if performance falls short of requirements inc. agreed improvement plans, increased frequency of review meetings, actions by the client to support the supplier, penalties for non-compliance, recognition for improvements made
			Ending relationships with specialists or suppliers inc. confirming reasons for termination, substantiating any failures cited, addressing contractual termination requirements (notice period etc), review meetings, exit management plans, termination dates, plans for replacement of service
			Potential risks of ending contractual obligations inc. worsening performance, negative brand image, skills transfer, intellectual property rights, claims for unreasonable termination, costs of setting up replacement contracts, discouraging contractors from applying for future contracts
3	e.g. different delivery methods, new technology or savings	3	Organizational data collection and management processes and systems

4		4	Systems to manage staff, contractors & specialists e.g. security & access; performance management; H&S briefings; introduction to CDM etc
5		5	Including health and safety, environmental, ethical and sustainability requirements
		6	

3   FM compliance

Apprentices will develop their skills, knowledge and understanding of meeting FM compliance, risk and business continuity requirements

Skills: the apprentice will be able to:		Delivery	Asst	Method	Knowledge: the apprentice will need to know and understand:		Delivery	Asst	Method
1	Analyse the way in which FM regulatory, organizational and other compliance requirements affect their responsibilities	E	OP	WBP	1	The scope and requirements of current legislation relating to FM	P	OP	WBP
2	Carry out a risk assessment in accordance with best practice	E	OP	WBP	2	The tools and techniques of risk assessment in an FM context	P	OP	WBP
3	Communicate individual accountabilities, roles and responsibilities in meeting FM compliance requirements	E	OP	WBP	3	FM compliance-related costs including the costs associated with the recommendations that address shortfalls in FM compliance	P	OP EPA	OP WBP EPA WBP
4	Monitor and report the extent to which FM compliance requirements are met	E	OP EPA	OP WBP EPA WBP	4	The features of effective monitoring arrangements to reduce the negative impact on the environment	P	OP	WBP
5	Monitor the extent to which organizational Corporate Social Responsibility, ethical and sustainability requirements are met	E	OP	WBP	5	The principles and features of Corporate Social Responsibility (CSR)	P	OP	WBP
6	Develop a business continuity plan (BCP) in accordance with best practice	E	OP	WBP	6	The principles of Business Continuity Planning (BCP)	P	OP	WBP
					7	Different levels of responsibility and accountability in relation to compliance	P	OP	WBP

Indicative content

	Skills		Knowledge
1	Compliance requirements: eg legal, contractual and codes of practice Implications of compliance and non-compliance eg cost, resource investment, training, disruption to FM service, reputational/brand impact The purpose of a Business Continuity Plan (BCP) The implications of non compliance in context of a BCP	1	Current applicable legislation (UK and/or other relevant legislation), regulations and external codes of practice Scope: ie with virtual and physical assets Environmental Protection Act 1990 Scope of health & safety regulations; H&S measures of the workplace e.g. RIDDOR, Regulatory Reform Order (for fire safety) Compliance requirements and penalties for corporate manslaughter Reporting requirements
2	Five steps of carrying out a risk assessment	2	The scope of risk planning and management Examples of non-compliance eg loss of FM contract, prosecution, termination of operations, impact on operations, corporate manslaughter/negligence, health and safety (eg asbestos, Legionnaire's disease, vermin) Principles of risk analysis How risks are managed ('4 Ts' – Tolerate, Treat, Transfer, Terminate) Risk matrices and risk registers
3	Roles & responsibilities for H&S within organizational safety policies inc. personal responsibilities How to increase the awareness of staff, contractors and suppliers in relation to environmental, energy and sustainability policies	3	Importance of H&S in the workplace (inc. welfare, motivational value of proactive H&S management, business & regulatory penalties of non-compliance)
4		4	
5		5	Scope and typical contents of a BCP plan How to monitor and update the effectiveness of the BCP

			The features of a disaster recovery plan
			Systems and processes to manage incidents, emergencies and disasters
6	Showing how FM services can be restored to ensure that the business can continue to operate	6	Scope within FM for CSR eg waste management & minimization (The Waste Hierarchy – reduce, reuse, recycle)
			Relevant agreements eg Kyoto, Paris
			Certifications eg ISO 14001, Carbon Trust
			Impact of FM on the environment eg greenhouse gases, pollution, resource depletion, biodiversity & possible mitigations
			New and emerging developments in environmental management
			Legal and organizational requirements
			Impact of a sustainability plan within FM
			Benefits of sustainable and corporately responsible behaviour and policies
		7	

4 FM management systems

Apprentices will develop their skills, knowledge and understanding of using FM management systems to monitor, report and act on the performance and efficiency of properties, assets and services against FM KPIs

Skills: the apprentice will be able to:		Delivery	Asst	Method	Knowledge: the apprentice will need to know and understand:		Delivery	Asst	Method
1	Collate data that is capable of providing an accurate analysis of FM operations	E	OP	WBP	1	The role and uses of information within FM performance management	P	OP	WBP
2	Use statistical methods to analyse the data	E	OP	WBP	2	The features of FM information management and quality systems	P	OP	WBP
3	Make viable recommendations for improvements to the use of information within an organization against Key Performance Indicators (KPIs)	E	OP EPA	OP WBP EPA WBP	3	The characteristics of FM management information systems to collect, process, communicate and store information	P	OP EPA	OP WBP EPA WBP
4	Maintain the security of information	E	OP	WBP	4	Features and benefits of current and emerging technologies e.g. Smart building data analytics	P	OP	WBP
5	Report the findings of the data analysis in a format that is appropriate to the reader	E	OP	WBP					

Indicative content

	Skills		Knowledge
1	Uses of management information: performance management, business decision-making and reporting	1	Use of different types of FM data system e.g. CAFM, computerized maintenance management systems, BIM, security management systems, compliance data, compliance regulation (eg Data Protection Act)
			The importance of information and knowledge within an organization
			Sources of information inc. risk assessments. Legal compliance, building & engineering data, property & asset registers, financial & CSR, contractual, SLA & KPI and customer service, manuals, maintenance schedules, contracts, P&P, local authorities, compliance bodies, professional bodies, internet
			The use of data to support decision-making
			Techniques for the management of information and knowledge flow inc. factors such as sharing, remote working, immediacy information, data accuracy & consistency
2	Inc. the interpretation of quality system-related information Inc. means, probability, bell curves and scatter diagrams	2	Relevance of current and anticipated systems, their functionality and capacity to support an organization's plans for knowledge and information management
			Data collection methods inc. surveys, focus groups, electronic & paper reporting systems, help desk calls
			Real Asset Management (RAM) software
3	Validation criteria eg data currency, accuracy, relevance, understandability; reliability of data sources Use of KPIs to inform recommendations	3	e.g. intranet, internet, BIFM & other FM bodies, customer surveys, client business plan
			The characteristics and functioning of building management data management systems
			Measurement against baseline and against agreed criteria e.g. quality of goods/services, enhanced impact, cost-effectiveness, cost-reduction, increased client satisfaction
			Technologies to control building services inc. access control systems, CCTV, equipment performance monitors, energy consumption monitors

			Use of technologies to deliver sustainability
4	Data security, limited access, periodic back up and data validity, ensuring compliance with the Data Protection Act	4	Relevant external governance standards e.g. ISO 41001 FM Management Systems
5	Use of graphical illustrations to report data inc. pie charts and graphs		

5   FM policy implementation and change management

Apprentices will develop their skills, knowledge and understanding of developing and implementing delivery plans for the management of FM properties, assets and services and managing change

Skills: the apprentice will be able to:		Delivery	Asst	Method	Knowledge: the apprentice will need to know and understand:		Delivery	Asst	Method
1	Develop and monitor an FM delivery plan for properties, assets and/or services that supports an organizational FM strategy and which mitigates potential negative impacts	E	OP EPA	OP WBP EPA PD	1	Principles and techniques of project management	P	OP	WBP
2	Deliver those aspects of the FM strategy for which they are responsible to time and budget	E	OP	WBP	2	FM targets and performance measures	P	OP	WBP
3	Identify the operational impact of changes (e.g. to service delivery or infrastructure) and their likely consequences	E	OP	WBP	3	An organization's strategy, business plan, objectives and purpose, its culture and values and the role of FM in delivering that purpose	P	OP EPA	OP WBP EPA PD
4	Implement change project plans ethically and in a sustainable manner within budget and timescale to meet agreed requirements	E	OP	WBP	4	The requirements of ethical and sustainable behaviour	E	OP	WBP
5	Respond to changing circumstances in accordance with the plan	E	OP	WBP	5	The principles of change management	E	OP	WBP
6	Manage expectations and resolve issues during change management activity	E	OP	WBP	6	The factors to be taken into account in resolving issues	E	OP	WBP

Indicative content

	Skills		Knowledge
1	Using a range of monitoring tools inc. the use of KPIs, SLAs, balanced scorecards, customer feedback, benchmarking and RAG analysis	1	Project management disciplines and techniques (e.g. agile v waterfall)
			Principles of change management: vision, mission, strategy & objectives etc e.g. Johnson & Scholes, Porter, Grant, Drucker
			Roles and responsibilities within a project team
			Tools and methods for planning, monitoring & managing an FM project inc. Critical Path Analysis, Gantt charts, software (eg Microsoft Project) and process-based methodologies eg PRINCE
			Stages of a project: developing the brief, aims & objectives; planning; budgeting; delivery (work packages & allocation, teams & individuals); monitoring; reporting; close-out
			Distinction between project and programme management
2		2	Use of FM KPIs inc. performance management, compliance with legislation and codes of conduct, SLAs, KPIs, SMART targets, monitoring processes, regular reviews and customer & peer feedback
3	Short, medium and long term	3	How FM services are developed and delivered in a way that is consistent with an organization's objectives, culture and values e.g. matching delivery with client's ethos such as healthy food, reducing waste, environmentally friendly, charitable status, gender equality etc
			Impact of an organization's risk profile on the FM strategy
			The way in which the results of monitoring inform changes to the FM strategy
4		4	
5	Identify potential barriers to change e.g. employee attitudes, available resource and its capability, legal and regulatory requirements, available space, cost, contractual obligations	5	Change management techniques e.g. Schein, Lewin, Kotter
			How to develop new work processes, procedures, systems, structures and roles to achieve the vision behind the change
6	Issue resolution techniques	6	

6   Quality and stakeholder management in FM

Apprentices will develop their skills, knowledge and understanding of establishing and managing day-to-day relationships with clients and other stakeholders to agreed quality standards

Skills: the apprentice will be able to:		Delivery	Asst	Method	Knowledge: the apprentice will need to know and understand:		Delivery	Asst	Method
1	Develop and implement FM quality management operational plans and procedures that align with the FM strategy and policies	E	OP EPA	OP WBP EPA Pres	1	Quality management principles and standards in FM	P	OP	WBP
2	Identify stakeholders and the nature of their interest	E	OP	WBP	2	Quality measurement techniques	P	OP	WBP
3	Select and use stakeholder management media that are appropriate to the nature of the stakeholder	E	OP	WBP	3	How FM quality policies contribute to the delivery of organisational strategy	P	OP EPA	OP WBP EPA Pres
4	Use a range of feedback collection methods on FM services that is appropriate to the nature of the stakeholder	E	OP	WBP	4	How to use feedback and data to drive continuous improvement	P	OP	WBP
5	Make practicable recommendations for continuous improvement to the quality of FM service provision based on an analysis of feedback and data	E	OP	WBP	5	The distinction between internal and external FM stakeholders	P	OP	WBP
					6	The influence and power levels of stakeholders and their potential impact	P	OP	WBP
					7	Influencing and relationship management techniques	P	OP	WBP

Indicative content

	Skills		Knowledge
1		1	The principles underpinning quality management and their application to operational performance and service delivery
			Role of quality standards and accreditation schemes inc. Investors In People, ISO, European Foundation for Quality Management, International Organization for Standardization
			How to implement a quality standard inc. reviewing the requirements of the standard; assessing the requirements against the business operation; documenting work flows or process maps for all activities; identifying any gaps in current processes or management; taking steps to mitigate risk; improving processes and closing gaps; monitoring on-going performance against the standard
			Monitoring the implementation of a quality standard inc. performance measurement, process audits, stakeholder meetings, corrective action plans and process updates
			The relationship between quality management, customer service and stakeholder management
2	e.g. clients, customers, partners, suppliers, colleagues, funders, government & how their agenda influence their decisions	2	The quality management cycle and tools and techniques e.g. balanced scorecard, the role of people in operational delivery and quality management, training implications, customer satisfaction, SLAs, benchmarking, surveys
	inc. the role of suppliers and specialists (e.g. transfer of risk, industry expertise, economies of scale, efficiency, scalability)		How SLAs can be managed to optimum effect inc. communication tools such as review meetings, publication of customer feedback, P&P, transparency of contract content
	Techniques to determine customer requirements inc. customer needs analysis, customer mapping, customer surveys, focus groups, feedback forms etc		
3		3	Links between quality strategy and business performance Competitiveness
			The meaning and implications of a 'customer-focused' service
4	e.g Customer surveys, questionnaires, mystery shoppers	4	
	Use & integration of different types of FM data system e.g. CAFM,		

	computerized maintenance management systems, BIM, security management systems, compliance data		
	The importance of information and knowledge within an organization		
5	Cost-benefit analysis	5	Stakeholder mapping, power & influence grid
	Criteria for what constitutes 'practicable'		The role of consultation in managing stakeholder relationships
	Scope for improvement to FM services e.g. procedures, SLAs, KPIs and improvement plans		The role of customer relationship management (CRM) within context of FM
	Action planning		Sensitive areas of CRM inc. data protection, HR issues, intellectual property issues
		6	
		7	Managing expectations; principles of collaborative working and emotional intelligence in difficult situations; the medium and the message
			CRM cycle

7 People management in FM

Apprentices will develop their skills, knowledge and understanding of motivating, managing and developing FM teams to deliver objectives

	Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:			
		Delivery	Asst	Method			Delivery	Asst	Method
1	Manage and develop individuals and teams to achieve their FM objectives and delivery goals	E	OP	WBP	1	The characteristics and scope of leadership and people management and the distinctions between them	P	OP EPA	OP WBP EPA PD
2	Motivate individuals and teams and provide support in times of change and stress	E	OP	WBP	2	The impact of change on individuals	P	OP	WBP
3	Assess their own and team personal development plans, identifying capability strengths and gaps	E	OP	WBP	3	How to identify their own and their team's development needs	P	OP	WBP
4	Develop plans to address a team's future development needs	E	OP EPA	OP WBP EPA PD	4	How to procure/source appropriate learning and development activities	P	OP	WBP
5	Comply with HR policies and procedures applicable to FM	E	OP	WBP	5	Workforce/resource planning techniques	P	OP EPA	OP WBP EPA PD
6	Deploy resources to maximize efficiency	E	OP	WBP	6	The way in which HR policies and procedures apply to FM	P	OP	WBP

Indicative content

	Skills		Knowledge
1		1	Creating and communicating the FM team's vision
			Team management and collaborative working (Forming-Storming-Norming-Performing (Tuckman), Action-centred (Adair), Team Roles model (Belbin)
			The HR cycle and processes within it:
			• recruitment and selection • training and development • performance management • reward and recognition • release
			Inc. disciplinary and grievance processes
			The impact of management styles
2	Inc. managing workplace stress (primary, secondary and tertiary methods for the prevention & management of stress) Inc. use of techniques to empower individuals to make an effective & positive impact (supporting explanations with examples, clear objectives, terms of reference, positive 'can do' culture, 'open door' culture, constructive feedback, training & development, team-building, reward, recognition, thanks and praise Motivational theories e.g. concept of intrinsic and extrinsic motivation; Maslow; Herzberg	2	Practical e.g. the need to change organizational/team structures; changes to job roles; need to learn new skills; additional responsibilities Emotional impact of change
3		3	e.g. required by legislation, organizational requirements, impact of change on individuals How to conduct a TNA; the use of standards, competences and qualifications for personal development purposes The use of reflective practice How to develop a Personal Development Plan
4	Use of mentoring, coaching, job shadowing, to inform development needs	4	70:20:10 concept Learning styles

			Internal and outsourced training
			Different routes to development e.g. graduate schemes & apprenticeships as vehicle to develop the workforce
			Range of L&D activities e.g. coaching and mentoring; reading; skills practice; distance learning; shadowing etc
5	Including performance & attendance management policies	5	Legal requirements for skills, human resource planning and deployment (e.g. licence requirements)
			Use of tools and techniques to record, track and deploy human resource capabilities e.g. competence frameworks, standards, qualifications, software packages
			Role of HR planning in effective FM inc. function analysis and optimum resource levels, managing HR overheads, skills acquisition and maintenance, career progression and people motivation
6	Inc. allocating workloads Deploying the right number of people with the right skills to different pieces of work	6	e.g. to recruitment practices Potential effects of TUPE Identifying and dealing with welfare-related issues

8 Financial and procurement management

Apprentices will develop their skills, knowledge and understanding of managing FM finances and procuring FM goods and services, ensuring they are delivered within agreed budgets and make recommendations for innovation

	Skills: the apprentice will be able to:	Delivery	Asst	Method		Knowledge: the apprentice will need to know and understand:	Delivery	Asst	Method
1	Analyse financial reports relevant to the FM function	E	OP	WBP	1	The relevance of financial reports to FM	P	OP	WBP
2	Develop a realistic operational plan and associated budget for an FM service	E	OP	WBP	2	The factors to be taken into account when establishing a budget and procuring goods and services	P	OP EPA	OP WBP EPA WBP
3	Develop proposals for improvements to financial performance in FM	E	OP EPA	OP WBP EPA WBP	3	Budget management, variance analysis and reporting	P	OP	WBP
4	Manage a budget for an FM service in accordance with the agreed monitoring system	E	OP	WBP	4	Organizational procurement policies, processes and procedures	P	OP	WBP
5	Address variances within service delivery budgets	E	OP	WBP	5	Principles of contract costing, forms of contract	P	OP	WBP
6	Analyse the effectiveness of current procurement policies, practices and arrangements for an FM service	E	OP	WBP	6	Techniques for evaluating procurement proposals	P	OP	WBP
7	Comply with current organizational procurement practices and policies	E	OP	WBP					
8	Provide FM technical contributions to procurement tender specifications	E	OP	WBP					
9	Make recommendations based on an evaluation of the quality of	E	OP	WBP					

proposals for the procurement of FM goods or an FM service in accordance with organizational policies, ethical practices and standards									

Indicative content

	Skills		Knowledge
1		1	Characteristics of organizational financial reporting systems and processes (management of budgets & finance; management reporting; cost centres & devolved budgets)
2	Budget management and budget approval cycle and process	2	e.g. the implications of working in the public, private or third sector and different legal entities
			Characteristics and use of capital and revenue budgets in FM inc. relevance to capital budgets of asset values; whole life costing; discounted cash flow (DCF), net present value (NPV) and balance sheet values
3		3	e.g. identification and calculation of variances
4	Use of cash flow projections to manage a budget inc. raising and processing purchase orders, authorizing payments, managing stocks of materials, flexing people resources and budgets, revenue protection	4	Principles, stages and features of procurement inc. agreeing requirements defining specifications, agreeing adjudication criteria, sourcing suppliers, issuing tenders (Expressions of Interest, pre-qualification), receiving and adjudicating tenders (criteria inc. cost, reliability, capacity, reputation, time, quality, compliance), short-listing, negotiating, awarding contracts and declining other bids, initiating contracts, monitoring provision
			Including ethical and corporate social responsibility requirements of organizational procurement policies
5	Variance analysis and proposals for action	5	Inc. suppliers and specialists
			Forms of contract and service delivery management, their advantages and disadvantages e.g. verbal, purchase orders, call of contracts (enabling or framework contracts), industry standard forms e.g. JCT forms 2005, PPI/PPP, NEC3

			Influence of factors such as the types of goods or services to be purchased, commodities or bespoke, input or output specification, value and duration of contract, lease or buy, purchase order, call off contract, JCT forms 2005 and NEC3 for building contracts
			Management of the procurement process & definition of roles (specifier, user, buyer, budget holder); separation of powers; levels of authority; keeping records
			Best practice in writing specifications of requirements and the potential consequences of inadequately written contract specifications
6		6	Ending relationships with specialists or suppliers inc. confirming reasons for termination, substantiating any failures cited, addressing contractual termination requirements (notice period etc), review meetings, exit management plans, termination dates, plans for replacement of service
			Potential risks of ending contractual obligations inc. worsening performance, negative brand image, skills transfer, intellectual property rights, claims for unreasonable termination, costs of setting up replacement contracts, discouraging contractors from applying for future contracts
7		7	
8			
9			

9   Behaviours

Customer focus

Exceeding customer expectations and adding value

A person with this quality …

- takes trouble to find out customers' needs, expectations and motivations and to discover what the organization could provide
- identifies current needs and anticipates the changing needs of different kinds of internal and external customers
- devises solutions that demonstrably meet customers' needs
- makes every effort to ensure that customers receive a quality service
- establishes a rapport with customers by adopting a professional and knowledgeable attitude
- does not promise what they cannot deliver
- manages customers' expectations positively and quickly by providing alternative solutions
- follows up to ensure that customers receive what they need
- keeps customers informed of progress and developments

A person without this quality …

- does not take the trouble to identify the customer's needs accurately
- misunderstands or misinterprets customer needs
- 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

Influencing

Anticipating and responding to others' needs and influencing them to enhance performance

A person with this quality …

- listens to all stakeholders and interprets messages accurately
- confirms their understanding of speakers' meaning
- plans what they will say before speaking or writing
- provides timely and constructive feedback to stakeholders

- chooses words and expressions that are appropriate to the audience/readership
- uses communication channels that are appropriate to the situation
- uses correct grammar and syntax
- uses their understanding of others to enhance their style of communication
- captures others' interest and influences them by using tone, pitch, a convincing, persuasive style and body language to enhance their message

A person without this quality …

- does not pick up on or ignores speakers'/readers' cues, verbal or non-verbal signals
- engages their mouth before their brain
- confuses people by using jargon or slang, giving too much or too little information or communicates in a way that others cannot readily understand
- uses inappropriate or condescending language
- fails to provide timely or constructive feedback
- keeps information to themselves
- bores people with a flat, uninspiring delivery
- produces informal, muddled or rambling written work
- does not make their meaning crystal clear

Collaboration

Working in partnership with others for the common good

A person with this quality …

- contributes actively to meetings and group activities
- takes others' opinions and advice into account when making decisions
- seeks to understand people's agenda, interests and concerns
- encourages a culture of collective responsibility and shares resources, ideas and experiences
- forges internal and external partnerships likely to lead to business improvements
- builds consensus and seeks to find common ground
- negotiates compromises and takes action to reduce friction and conflict
- acts as a diplomatic ambassador of their organization

A person without this quality …

- is openly hostile or inconsiderate of others' position and/or ideas
- is not "present in the moment"
- fails to consult others
- approaches work in isolation
- proposes solutions that would benefit themselves only
- is unwilling to reach agreement and make commitments to joint endeavours
- fails to share information and does not respond to others' communications
- causes ambiguity and leaves people wondering

Innovation and quality

Aiming for a higher level of excellence

A person with this quality …

- sees problems and challenges as opportunities
- takes a holistic view continuously to business improvement and spots trends and connections from disparate areas of business
- seeks inspiration for improvement from strengths and weaknesses alike
- adopts an agile approach to adapting to changing environments
- responds positively to imposed change
- reflects on experiences and events to learn lessons for improvement
- is willing to listen to and try out new ideas
- challenges the status quo and does not accept mediocrity
- encourages a solution-oriented customer focus in the facilities management function
- spots opportunities to create innovative enhancements to business

A person without this quality …

- is inflexible, unwilling to take risks, accept faults or learn lessons
- focuses on individual aspects of work on an intermittent basis
- says "no" without looking at the options
- resists change and denigrates or discourages others' suggestions
- sees problems as insurmountable obstacles
- attempts to maintain the status quo
- accepts the "good enough"
- fails to analyse lessons to be learned from successes and failures

Strategic thinking

Seeing the "bigger picture" to enable an organization to meet or exceed its strategic intentions

A person with this quality …

- anticipates market trends
- maintains awareness of developments within facilities management that may influence business strategy
- aligns business needs with market expectations
- balances their knowledge of the facilities management industry and internal policy to assess the wider implications of business decisions
- assesses the medium- to long-term impact of business decisions
- weighs up the implications of commercial imperatives
- looks to the long-term
- is willing to take calculated risks and order their priorities

A person without this quality …

- is focused on "the here and now"
- fails to consider the wider implication of decisions
- works in a "silo" and fails to make connections between different strands of work
- rarely initiates ideas and waits to be told what to do
- fears to challenge the status quo and sticks to their own path
- finds uncertainty difficult and fails to make decisions without full information
- treats tasks individually and does not prioritize them

Ethics and integrity

Working for the greater good and not sacrificing high standards for immediate gain or personal benefit

A person with this quality …

- encourages high standards of socially responsible and sustainable activity
- takes decisions and actions that maintain standards of financial probity
- exemplifies BIFM professional standards of conduct
- reflects on their behaviour and adapts it to suit the situation

- manages the impact of their behaviour to positive effect
- does not cut corners or jeopardize the wellbeing of others
- maintains consistently high standards of loyalty, honesty and commitment
- does the right thing rather than what is convenient or popular
- takes pride in their work
- stands by their decisions and principles even in the face of opposition or threats
- admits mistakes and weaknesses and acts of them
- follows work through to the end and fulfils their responsibilities and promises

A person without this quality …

- fails to accept responsibility for their actions and decisions
- behaves in a reckless, irresponsible or unsustainable way
- covers up mistakes, blames others for problems and passes the buck
- is inflexible in their behaviour and dealings with others
- fails to reflect on their behaviour
- is too busy defending their own actions to consider the impact of their behaviour on others
- changes the message when challenged
- allows their personal opinions or interests to colour their judgment
- seeks personal gain at the expense of others
- takes shortcuts and unacceptable risks

Leading people

Fostering the growth of themselves and others, inspiring them to exceed their personal and professional goals

A person with this quality …

- seeks and acts upon regular feedback
- adopts a supportive approach to others
- sets clear expectations and direction
- leads by example and inspires others to follow eagerly
- works continuously on their personal development
- displays enthusiasm in their work, constantly seeking improvement
- is confident and clear about their ability to deliver
- celebrates others' success and builds a shared understanding of business needs
- adapts their leadership style to get the most out of people
- adopts a diversity policy that maximizes the collective talents of the team

A person without this quality …

- undermines others' success and fails to give praise
- cannot see the point in their own or others' development
- lacks focus and direction
- ignores others' needs
- expects others to do what they would not
- fails to give feedback, guidance or support to others
- uses the same leadership style whatever the situation
- takes credit for others' ideas and achievements

Systematic approach

Approaching work in an orderly way

A person with this quality …

- approaches work methodically and analytically
- breaks work down into manageable chunks
- plans their work logically and sequentially, identifying problems and interdependencies
- attends to detail and checks their work
- balances competing priorities
- organizes their time to optimum effect
- substantiates conclusions and recommendations with evidence

A person without this quality …

- produces sketchy and slapdash work
- fails to think things through or make connections
- presents work or ideas in an illogical way or incorrectly sequenced
- squanders their time
- fails to produce evidence to back up their stance

Behaviour	L4	L6	L7
Customer focus	✓	✓	✓
Influencing	✓	✓	✓
Collaboration	✓	✓	✓
Innovation & quality	✓	✓	✓
Strategic thinking			✓
Ethics & integrity	✓	✓	✓
Leading people	✓	✓	✓
Systematic approach	✓	✓	✓