

# **Apprenticeship Standard for Senior/Head of Facilities Management (FM) Degree (Level 6)**

## **Employer Occupational Brief**

### **Version Control**

<b>Date</b>	<b>Version</b>	<b>Comments</b>
March 2017	Final	Final Published Version

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## **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 FM Degree 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](http://www.bifm.org.uk).

## **2 Role Profile**

This apprenticeship prepares an individual for the delivery of a variety of integrated FM operational services across multiple sites or a portfolio of assets and services nationally or regionally<sup>1</sup>. These people are responsible for planning, developing and delivering courses of action that meet organizations' FM requirements; managing internal and external client relationships, enhancing workplace productivity, driving innovation and enabling business growth and controlling costs 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. They will also develop through academic learning, culminating in summative assessment that will lead to a Bachelor's degree.

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<sup>1</sup> i.e. as distinct from the scope of responsibilities at level 4

The indicative content of the standard has been translated into a technical specification (detailed learning content) by the Trailblazer employer group, 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 end point assessment (EPA). It is estimated that the full length of the apprenticeship will be 42 to 48 months with the EPA to take place no later than 6 - 12 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 higher level thinking skills required for study at Level 6 (equivalent to Bachelor’s degrees).

On successful completion of this apprenticeship, apprentices will have achieved a Bachelor’s degree and the Ofqual-regulated BIFM level 6 Extended Diploma in FM which will meet the academic requirement for Certified BIFM membership.

#### **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.

<b>Assessment method</b>	<b>Coverage</b>	<b>Assessed by</b>	<b>Grading</b>
Work-based projects	Knowledge, skills & behaviours	Employers / Training Providers	N/A – formative assessment
Reflective log	Knowledge, skills & behaviours	Employers / Training Providers	
HEIs’ qualitative assessment of progress toward a degree	Knowledge, skills & behaviours	HEIs	

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;
- feedback from HEIs on apprentices' academic progress.

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<sup>2</sup> 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.

## **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.

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<sup>2</sup> the requirements for which are set out in the Assessment Plan

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 Progress toward completion of a degree**

Apprentices must work toward the completion of a degree which will include a variety of assessment methods. Feedback should be provided from HEIs periodically at intervals agreed between HEIs and employers on apprentices' academic progress. The formal achievement of a degree will be dependent on successful completion of the EPA.

### **4.4 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 HEIs. 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.

## **5 Technical Specification**

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

- 1 Strategic property asset management
  - Manage FM property assets strategically within their area of responsibility
- 2 FM service management
  - Lead on FM service delivery within their area of responsibility and identify opportunities for innovation that create value
- 3 FM compliance
  - Scope and evaluate the extent and nature of FM compliance requirements and recommend actions that address the shortfalls within their area of responsibility
- 4 FM management systems
  - Evaluate FM management information systems to develop FM knowledge and enable quality management
- 5 Development and implementation of FM strategy and policy
  - Develop and implement FM strategy and policy for a portfolio of FM services
- 6 Change and programme management in an FM context
  - Apply change and programme management techniques in an FM context
- 7 Business continuity in an FM context

- Develop and evaluate FM business continuity plans within their area of responsibility
- 8 Operational and technical leadership in FM
  - Lead and develop the FM workforce to manage assets and deliver services
- 9 Finance and commerce
  - Develop and implement FM operational business plans and budgets within their area of responsibility
- 10 Procurement and contract management
  - Procure FM-related goods and services within their area of responsibility and manage FM supplier and/or contract performance, driving through efficiency and VFM<sup>3</sup> in the supply chain
- 11 Social responsibility
  - Develop and evaluate a CSR plan within their area of responsibility aligned with the corporate FM strategy

## 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;
- 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

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<sup>3</sup> Value for money



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		

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 examination (Ex).

## 8 Employer Occupational Brief

The detailed requirements for each aspect of the standard (knowledge, skills and behaviours) are set out on the following pages.

## 1 Strategic property asset management

Apprentices will develop their skills, knowledge and understanding of managing FM assets strategically within their area of responsibility

Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:				
		Delivery	Asst	Method			Delivery	Asst	Method
1	Develop a property management strategy for a portfolio of properties	E	OP EPA	OP WBP EPA WBP	1	The requirements and scope of strategic property asset management, property ownership, legal requirements and clients' needs	P	OP EPA	OP WBP EPA WBP
2	Evaluate the effectiveness of the implementation of a property management strategy for a portfolio of properties	E	OP	WBP	2	The features of a building's whole life cycle and their implications eg cost, strategy, resource requirements	P	OP	WBP
3	Develop and evaluate premises, fabric and building services maintenance strategies	E	OP	WBP	3	The principles of effective property management eg the impact of a building's structure, design and fabric on its use and management	P	OP	WBP
4	Monitor and control premises, fabric and building services maintenance programmes	E	OP	WBP	4	Evaluation and appraisal tools and techniques	P	OP	WBP
5	Identify opportunities for adding value to a business and making cost-reductions through a review of the cost-effectiveness of property occupancy	E	OP	WBP	5	The nature of other FM-related specialist professionals (eg architects, legal, structural and technical specialists)	P	OP	WBP

## Indicative content

	Skills		Knowledge
1		1	Economic drivers to property management strategy and their impact The principles of ergonomics and their application to FM
2		2	Real estate footprint and any special requirements eg constraints, neighbouring properties/people, limitations of use, noise, emissions, ownership, impact on the environment
3		3	Work space design principles and space requirements eg storage, circulation to usable areas, inter-relationship with other departments, recreational space
4		4	The requirements of property and equipment eg space, temperature, humidity
5	Smart/flexible working (all skills & knowledge)	5	

## 2 FM service management

Apprentices will develop their skills, knowledge and understanding of FM service management within their area of responsibility and identifying opportunities for innovation that create value

Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:				
		Delivery	Asst	Method			Delivery	Asst	Method
1	Evaluate the scope and effectiveness of FM service delivery strategies and plans	E	OP EPA	OP WBP EPA WBP	1	Trends in FM services and delivery models and their potential impact	P	OP	WBP
2	Ensure the delivery of FM services in accordance with organizational requirements	E	OP	WBP	2	Organizational, client and customer service requirements in FM service delivery	P	OP	WBP
3	Identify the potential for innovation in FM service delivery that offers added value and set objectives	E	OP EPA	OP WBP EPA WBP	3	How to analyse quantitative and qualitative data and organizational processes to identify areas for improvement in FM service delivery	P	OP	WBP
4	Determine the feasibility and financial viability of the innovation in FM service delivery according to agreed criteria	E	OP	WBP	4	The principles of FM service design, planning and implementation and good practice in customer service	P	OP	WBP
5	Evaluate and report the effectiveness/benefits of FM service delivery and innovation, taking feedback into account	E	OP	WBP	5	Challenges of FM service delivery and their potential impact eg legal, people-related, environmental, cost, lack of infrastructure	P	OP EPA	OP WBP EPA WBP

## Indicative content

	Skills		Knowledge
1	e.g. in house, outsourced, sourcing strategies, partnering etc	1	e.g. culture and practice for dealing with customers, clients and end users External sources of information e.g. industry norms, from clients, from competitors, setting benchmarks and technological developments in FM, BIFM guidance documents, academic documents and reference tools FM service delivery models e.g. total FM, integrated FM
2		2	e.g. client requirements for environmentally-friendly FM practices/services such as national/international agreements
3	e.g. Customer satisfaction levels and energy usage rates	3	The use of quantitative and qualitative FM data in FM support services management Analysis of management reports and KPIs in relation to Service Level Agreements (SLAs) e.g. histograms, binomial distribution, charts & graphs
4		4	Methods of capturing feedback e.g. statistical, focus groups, surveys etc and their suitability for evaluation purposes e.g. SRM and CRM processes
5		5	Planning & implementation: the resource requirements of embedding the innovation into mainstream business practice eg finance, people, equipment, systems, contractual models e.g. SLAs etc

### 3 FM compliance

Apprentices will develop their skills, knowledge and understanding of scoping and evaluating the extent and nature of FM compliance requirements and recommending actions that address shortfalls within their area of responsibility

Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:				
		Delivery	Asst	Method			Delivery	Asst	Method
1	Identify FM regulatory, organizational and other compliance requirements	E	OP	WBP	1	The scope and requirements of current applicable legislation, regulations and internal and external codes of practice and other FM compliance-related requirements	P	OP	Ex
2	Assess the risk of non-compliance with FM requirements	E	OP	WBP	2	The principles of risk assessment in an FM context	P	OP	Ex
3	Analyse the implications of compliance for an FM area of responsibility and clients	E	OP EPA	OP WBP EPA WBP	3	FM compliance-related costs (financial and non-financial) including the costs associated with the recommendations that address shortfalls in FM compliance	P	OP EPA	OP Ex EPA WBP
4	Generate recommendations and a plan that addresses shortfalls in FM compliance	E	OP	WBP	4	The features of effective monitoring arrangements to audit continuing compliance with FM requirements	P	OP	Ex
5	Differentiate accountabilities, roles and responsibilities in meeting FM compliance requirements	E	OP	WBP	5	Organizational risk governance requirements and arrangements	P	OP	WBP
6	Monitor and report the extent to which FM compliance requirements are met	E	OP	WBP					

## Indicative content

	Skills		Knowledge
1	Compliance requirements: eg legal, contractual and codes of practice	1	Current applicable legislation, regulations and external codes of practice and other requirements eg contractual, quality, client-driven, health, safety and environmental, ethical and sustainability requirements; liability insurance eg tenants  Scope: ie with virtual and physical assets eg data protection, biometrics, data entry systems, alarm systems, access by emergency services, with client requirements etc
2	Impact 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)	2	The scope of risk planning and management
3	Implications of compliance eg cost, resource investment, training, disruption to FM service, reputational/brand impact	3	
4		4	
5		5	
6		6	

## 4 FM management systems

Apprentices will develop their skills, knowledge and understanding of evaluating FM management information systems to develop FM knowledge and enable quality management

Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:				
		Delivery	Asst	Method			Delivery	Asst	Method
1	Evaluate the effectiveness and impact of an organization's FM information management and quality systems against agreed criteria	E	OP	WBP	1	The role and uses of information within FM decision-making and performance management	P	OP	WBP
2	Make viable recommendations for improvements to an FM information management system	E	OP	WBP	2	The characteristics, functionality and limitations of FM management information systems to collect, process, communicate and store information	P	OP	OP WBP EPA WBP
3	Generate and interpret information generated by FM information management systems to develop FM knowledge and enable decision-making and reporting	E	OP	WBP	3	Sources of information relevant to FM and validation criteria	P	OP	WBP
4	Validate information from data sources for FM decision-making purposes	E	OP	WBP	4	The implications of relevant external governance standards	P	OP	WBP
5	Develop an FM quality management strategy and associated policies that align with organizational strategy and objectives	E	OP EPA	OP WBP EPA WBP	5	Current and emerging technologies e.g. Smart building data analytics	P	OP	WBP



6	Develop FM quality management operational plans and procedures that align with the FM quality management strategy and policies	E	OP	WBP	6	The principles and theories of quality management in relation to an organization's FM quality strategy, quality assurance and control	P	OP	WBP
					7	The tools and techniques of quality management that contribute to individual, team and organizational performance	P	OP	WBP

### Indicative content

	Skills		Knowledge
1	Uses of management information: performance management, business decision-making and reporting	1	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
2	Locate, validate and interpret quality system-related information Cost considerations to be taken into account in calculating the viability of recommendations	2	Relevance of current and anticipated systems, their functionality and capacity to support an organization's plans for knowledge and information management
3	e.g. pie charts, histograms, use of pivot tables	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
4	Validation criteria eg data currency, accuracy, relevance, understandability; reliability of data sources	4	Implications of relevant external governance standards e.g. ISO 41001 FM Management Systems, ISO 15001 Energy Management
5	e.g. TQM, Lean, Deming, Six Sigma, and Investors In People, ISO	5	

	The relationship between quality management, customer service and stakeholder management		
6		6	
7		7	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

## 5 Development and implementation of facilities management strategy and policy

Apprentices will develop their skills, knowledge and understanding of developing and implementing FM strategy and policy for a portfolio of FM services

Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:				
		Delivery	Asst	Method			Delivery	Asst	Method
1	Carry out an analysis of the factors affecting FM in the internal and external environment	E	OP	WBP	1	The principles of strategic management and an organization's strategic process	P	OP EPA	OP WBP EPA WBP
2	Evaluate the outcomes of the environmental analysis and their implications for FM in an organization	E	OP	WBP	2	The contribution of FM to the success of an organization and the economy	P	OP	WBP
3	Develop an FM strategy that is responsive to change, consistent with organizational culture and values and is capable of delivering an organization's objectives	E	OP EPA	OP WBP EPA WBP	3	The purpose of the organization, its culture and values and the role of FM in delivering that purpose	P	OP	WBP
4	Develop FM policies that align with the FM strategy and which are ethical and sustainable	E	OP	WBP	4	The scope of FM: the range of services offered and the definition of FM within your own context	E	OP	WBP
5	Communicate the FM strategy and policies in a way that raises the profile of FM internally and externally	E	OP	WBP	5	Trends and developments in FM and the FM profession nationally and globally and how these may influence an organization	P	OP	WBP
6	Evaluate the effectiveness of FM stakeholder arrangements and develop a plan that meets the needs of an organization	E	OP	WBP	6	Environmental analysis and strategic planning techniques	P	OP	WBP
7	Analyse the power and influence of	E	OP	WBP	7	The distinction between internal	P	OP	WBP

	different FM stakeholders					and external FM stakeholders (suppliers, clients, colleagues) and their implications			
8	Consult appropriate FM stakeholders on issues, decisions and intentions	E	OP	WBP	8	The process of policy development and its implications for service delivery	P	OP	WBP
9	Conduct negotiations (e.g. property acquisition, FM contract variation or outsourcing) in accordance with good negotiating practice	E	OP	WBP	9	Stakeholder mapping theories and best practice in stakeholder consultation	P	OP	WBP
10	Manage FM conflicts of interests in a way that minimizes damage to stakeholders, the organization and individuals	E	OP	WBP	10	The stages of negotiation and negotiation techniques	P	OP	WBP

### Indicative content

	Skills		Knowledge
1	Factors affecting FM e.g. service delivery model, needs and interests of different stakeholders	1	Principles of strategic management: vision, mission, strategy & objectives etc e.g. Johnson & Scholes, Porter, Grant, Drucker The importance of iterative strategy
2		2	
3		3	How FM is delivered in a way that is consistent with an organization's culture and values e.g. matching delivery with client's ethos such as healthy food, reducing waste, environmentally friendly, charitable status, gender equality etc
4		4	
5		5	
6		6	

7		7	Environmental analytical techniques Eg. SWOT, PESTLE, Porter's Five Forces analysis, competitor analysis, Delphi Model, scenario planning, Growth-Share Matrix, balanced scorecards, McKinsey's capability maturity model
8		8	
9		9	
10		10	

## 6 Change and programme management in an FM context

Apprentices will develop their skills, knowledge and understanding of applying change and programme management techniques in an FM context

Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:				
		Delivery	Asst	Method			Delivery	Asst	Method
1	Scope the need for and nature of change in FM	E	OP	WBP	1	The principles of change management and current theories and techniques of programme management in relation to FM	P	OP EPA	OP WBP EPA PD
2	Assess the impact of an FM-related change	E	OP	WBP	2	The difference and relationship between project, programme and change management	P	OP	WBP
3	Develop change management plans that address the issue and which allocate resources and responsibilities	E	OP EPA	OP WBP EPA PD	3	The project life cycle and its implications	P	OP	WBP
4	Apply programme management techniques to the delivery of FM programme/change projects	E	OP	WBP	4	The potential impact of change on organizations, people and FM and FM as a driver and enabler of change	P	OP	WBP
5	Engage the active participation of those affected by change	E	OP	WBP	5	The suitability of different leadership styles to a range of situations, issues and people	P	OP	WBP
6	Provide support mechanisms for those involved in change	E	OP	WBP	6				
7	Evaluate the effectiveness of the programme/change against agreed success criteria	E or P	OP EPA	OP WBP EPA PD	7				

## Indicative content

	Skills		Knowledge
1	Change e.g. different FM delivery model, variations to FM contractual arrangements, adaptations to a property/asset portfolio etc	1	<p>Theories and techniques of programme management in relation to FM:</p> <ul style="list-style-type: none"> <li>• Schedule management</li> <li>• Scope management</li> <li>• Contract management</li> <li>• Financial management</li> <li>• Risk management</li> <li>• Time/cost/quality management</li> <li>• Resource management</li> <li>• Integrative management</li> </ul> <p>Critical path analysis, critical interdependencies and contingency planning</p>
2	Impact of a change e.g. people, systems, service delivery, wider organizational change etc	2	The difference between a single project with a tangible outcome and programme management which is about major change in culture and attitude
3		3	
4	e.g. critical path analysis, GANTT charts, cost-benefit analysis, resource planning, applications/packages e.g. MS Project, Primavera, Meisterworks	4	
5		5	
6	Support: e.g. communication, training, procedures, recognize achievements, reassurance etc	6	<p>Project governance</p> <p>Changes to the brief through orders/requests (scope creep)</p>
7	e.g. post occupancy evaluation, restructuring, behavioural/cultural change etc	7	

## 7 Business continuity in an FM context

Apprentices will develop their skills, knowledge and understanding of developing and evaluating FM business continuity plans within their area of responsibility

Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:				
		Delivery	Asst	Method			Delivery	Asst	Method
1	Determine the scope and extent of the role of FM in business continuity and vice versa	E	OP	WBP	1	The components and use of an effective business continuity plans and critical incident management within operational FM services	P	OP EPA	OP WPB EPA PD
2	Develop business continuity plans for FM that align with organizational business continuity plans	E	OP	WPB	2	Responsible, Accountable, Consulted and Informed (RACI) model (internal and external)	P	OP	WPB
3	Test the FM business continuity plan in accordance with organizational requirements	E	OP	WPB	3	What may affect business continuity in the short, medium, and long term	P	OP	WPB
4	Evaluate the effectiveness of the FM business continuity plan against agreed criteria and make practicable recommendations	E	OP EPA	OP WPB EPA PD	4	The business continuity lifecycle and associated requirements and actions	P	OP	WPB
5	Report on the implementation and evaluation of an FM business continuity plan	E	OP	WPB	5	The relationship between business continuity, organizational risk management and compliance	P	OP	WPB



## Indicative content

	<b>Skills</b>		<b>Knowledge</b>
1	Differentiate accountabilities, roles and responsibilities of internal and external stakeholders including their own	1	Who are stakeholders and decision-makers; training and communications
2	Tests: simulations, table top exercise, real life events	2	How to carry out an impact analysis e.g. consequential disruption, cross contamination
3	Action planning in a dynamic environment	3	Building operational systems (power supply, water systems, fire protection systems), IT
4	Responding to developing events, priorities and imperatives e.g. delegation and redeployment of resources	4	What constitutes a practicable recommendation e.g. financial, sustainable viability
5	Influencing skills e.g. making a business case to run a test, implementing actions and recommendations	5	The importance of maintaining the currency of knowledge and best practice in business continuity planning Review timescales

## 8 Operational and technical leadership in FM

Apprentices will develop their skills, knowledge and understanding of leading and developing the FM workforce to manage assets and deliver services

Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:				
		Delivery	Asst	Method			Delivery	Asst	Method
1	Manage individuals and teams to achieve their FM objectives	E	OP	WBP	1	Management theories and models	P	OP	WBP
2	Lead, influence and motivate individuals and teams within FM	E	OP EPA	OP WBP EPA WBP	2	Theories of leadership and motivation of individuals and teams in the delivery of FM	P	OP EPA	OP WBP EPA WBP
3	Identify the current capability and performance and the future development needs of FM individuals and teams	E	OP EPA	OP WBP EPA WBP	3	The characteristics of different leadership styles	P	OP	WBP
4	Evaluate their own leadership strengths, areas for development and the impact of their leadership style through reflective practice	E	OP EPA	OP WBP EPA WBP	4	The purpose, role and derivation of HR policies and procedures and the way in which they apply to FM	P	OP	WBP
5	Comply with HR policies and procedures that are applicable to FM	E	OP	WBP	5	Employment lifecycle and succession planning tools and techniques	P	OP	WBP
6	Plan and resource FM teams to meet organizational objectives and encourage innovation	E	OP	WBP	6	Principles of reflective practice and emotional intelligence	P	OP	WBP

## Indicative content

	Skills		Knowledge
1		1	How people learn and develop & the suitability of different approaches To include Taylor, Drucker, Handy and other 20 <sup>th</sup> /21 <sup>st</sup> century management theorists Succession planning Performance management
2	Influencing skills Scope of influence beyond the FM function	2	To include Herzberg, Theory X/Theory Y, links between effort, performance and outcomes, intrinsic/extrinsic value
3		3	Types of leadership styles e.g. autocratic, participative, bureaucratic
4	Use of mentoring outcomes to inform development needs	4	e.g. required by legislation, TUPE, removal of compulsory retirement age, organizational requirements Scope of HR policies and procedures across the HR cycle
5		5	e.g. appraisals, PDPs, use of competences and qualifications, HR life cycle (role descriptors, recruitment, selection, induction)
6	Succession planning	6	e.g. Kolb cycle, Tuckman Goleman

## 9 Finance and commerce

Apprentices will develop their skills, knowledge and understanding of developing and implementing FM operational business plans and budgets within their area of responsibility, driving through efficiency and VFM<sup>4</sup> in the supply chain

Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:				
		Delivery	Asst	Method			Delivery	Asst	Method
1	Evaluate the commercial impact of business decisions on FM	E	OP	WBP	1	The relevance of accounting principles to FM	P	OP	WBP
2	Analyse the financial and legal implications of proposals for improvements to financial performance within FM	E	OP	WBP	2	Financial legislative requirements for FM	P	OP	WBP
3	Develop financial cases for improvements to financial performance in FM, taking account of an organization's attitude to risk and financial appraisals	E	OP EPA	OP WBP EPA WBP	3	The process of developing and presenting business and financial cases for FM investment or expenditure	P	OP EPA	OP WBP EPA WBP
4	Develop and agree a realistic operational plan and associated budget for the FM function	E	OP EPA	OP WBP EPA WBP	4	The relationship between operational business plans, cash flow management and budgets	P	OP	WBP
5	Manage a budget for the FM function in accordance with the agreed monitoring system	E	OP	WBP	5	The principles of financial reporting	P	OP	WBP
6	Address variances within their own and delegated budgets within the FM function	E	OP	WBP	6	The factors to be taken into account when setting and managing budgets	P	OP	WBP

<sup>4</sup> Value for money

## Indicative content

	Skills		Knowledge
1		1	e.g. revenue streams and cost centres; identification & management of costs e.g. the application of different forms of budgeting e.g. zero budget, income-based How effective and ineffective financial management can affect a business
2		2	e.g. the implications of working in the public, private or third sector and different legal entities
3	i.e. a business case	3	e.g. internal cross-charging, internal rents Including internal revenue streams that are or could be used to finance the FM function e.g. identification and calculation of variances How to analyse a set of accounts The use of capital and revenue budgets
4		4	The concept of life cycle costing methodologies as applied to FM
5		5	The difference between financial and management accounting
6		6	

## 10 Procurement and contract management

Apprentices will develop their skills, knowledge and understanding of procuring FM-related goods and services within their area of responsibility and managing FM supplier and/or contract performance

Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:				
		Delivery	Asst	Method			Delivery	Asst	Method
1	Evaluate the effectiveness of current FM procurement policies, practices and arrangements against agreed criteria and make practicable recommendations	E	OP EPA	OP WBP EPA PD	1	Organizational procurement policies and procedures	P	OP	WBP
2	Implement procurement practices and policies with core organizational objectives and business growth plans	E	OP	WBP	2	Principles and best practice of FM procurement	P	OP	WBP
3	Justify the provision of technical advice given in support of FM procurement specifications and decisions	E	OP	WBP	3	Legal and statutory requirements relating to FM procurement and forms of contract for FM delivery	P	OP	WBP
4	Evaluate supplier proposals for the procurement of FM goods and services in accordance with organizational policies and standards	E	OP	WBP	4	The relevance of organization's business strategy and growth targets to FM procurement and contracting	P	OP EPA	OP WBP EPA PD
5	Agree the contractual arrangements for the procurement of FM goods and services in accordance with organizational guidelines and good practice	E	OP	WBP	5	Contract monitoring and performance management techniques	P	OP	WBP

6	Monitor the FM contract against agreed contract terms	E	OP	WBP	6	Ethical considerations in relation to the procurement of FM goods and services	P	OP	WBP
7	Manage FM supplier performance in accordance with the terms of the contract or SLA and good practice in contract management	E	OP	WBP	7	How to translate an FM technical requirement into a procurement specification	P	OP	WBP

### Indicative content

	Skills		Knowledge
1		1	e.g. the implications of working in the public (e.g. Official Journal of the European Union (OJEU), private or third sector and different legal entities Best practice in the way in which proposals are evaluated and scored Provision of constructive feedback to unsuccessful tenderers
2		2	Alignment with client requirements FM procurement evaluation criteria e.g. value, cost, efficiency, quality, for specific goods or services, type of contract Different methods of procurement (open tender, closed tender, preferred suppliers, OJEU)
3		3	The advantages, limitations and use of different specifications, contracts and other contractual documents for both parties in the supply / demand relationship e.g. Joint Contracts Tribunal (JCT), (Next Generation Estate Contracts (NGEC) and New Engineering Contract (NEC3)
4	e.g. goods or preferred and suitable suppliers Sustainability of the supply chain	4	

5	E.g. contract or Service Level Agreement (SLA) performance management frameworks	5	e.g. SLAs, KPIs, dispute resolution, mediation The terms of the FM contract or SLA including any variances, deviations and additions
6		6	e.g. banned building products (asbestos, certain timbers), banned refrigerants etc
7	e.g. review and feedback processes	7	



## 11 Social responsibility

Apprentices will develop their skills, knowledge and understanding of developing and evaluating a Corporate Social Responsibility (CSR) plan within their area of responsibility, aligned with the corporate FM strategy

Skills: the apprentice will be able to:					Knowledge: the apprentice will need to know and understand:				
		Delivery	Asst	Method			Delivery	Asst	Method
1	Evaluate social, economic, environmental and ethical responsibilities within FM activities	E	OP	WBP	1	The nature and value of corporate responsibility within the facilities management industry and their impact	P	OP EPA	OP WBP EPA PD
2	Develop a CSR plan within your area of FM responsibility that is aligned with the corporate CSR strategy	E	OP EPA	OP WBP EPA PD	2	The framework of accountability for FM corporate responsibilities within an organization	P	OP	WBP
3	Implement a CSR plan within your area of responsibility within agreed budgets and timescales	E	OP	WBP	3	The relationship between CSR and FM business objectives and client expectations	P	OP	WBP
4	Evaluate the extent to which an organization's CSR strategy meets the needs of internal / external FM clients and other stakeholders	E	OP	WBP	4	Initiatives, products and services that may improve corporate responsibility in the FM function	P	OP	WBP
5	Promote an organization's corporate FM activities and successes internally and externally and influence decisions	E	OP	WBP					
6	Encourage innovative improvements to corporate responsibility in the FM function	E	OP	WBP					

## Indicative content

	Skills		Knowledge
1		1	<p>e.g. compliance requirements for legislation that is associated with corporate responsibility (e.g. The Social Value Act), sustainability and environmental issues in FM e.g. international agreements e.g. Paris agreement (22 April 2016)</p> <p>The impact of non-ethical FM practices on the local and global environment</p> <p>The energy footprint across a portfolio of properties</p> <p>The use of alternative energy sources and related government funding</p> <p>The scope of sustainable and ethical organizational responsibilities through all operational and commissioning activities</p>
2		2	e.g. financial and information transparency, ethical business considerations
3		3	
4		4	Contemporary thinking, initiatives and products
5		5	
6		6	

## 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	✓	✓	✓