

Edexcel BTEC Level 3 Certificate in Facilities Management (QCF)

Specification

BTEC specialist qualification

First teaching December 2011

Issue 2

Edexcel, a Pearson company, is the UK's largest awarding body offering academic and vocational qualifications and testing to schools, colleges, employers and other places of learning in the UK and internationally. Qualifications include GCSE, AS and A Level, NVQ and our BTEC suite of vocational qualifications from entry level to BTEC Higher National Diplomas. Edexcel and BTEC qualifications are administered by Pearson Education Ltd.

Through initiatives such as onscreen marking and administration, Edexcel is leading the way in using technology to modernise educational assessment and support teachers and learners.

This specification is Issue 2. Key changes are sidelined. We will inform centres of any changes to this issue. The latest issue can be found on the Edexcel website:
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All information in this specification is correct at time of going to publication.

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Publications Code BA031241

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BTEC Specialist qualification title covered by this specification

Edexcel BTEC Level 3 Certificate in Facilities Management (QCF)

This qualification has been accredited to the Qualifications and Credit Framework (QCF) and is eligible for public funding as determined by the Department for Education (DfE) under Section 96 of the Learning and Skills Act 2000.

The qualification title listed above features in the funding lists published annually by the DfE and the regularly updated website www.education.gov.uk/. The QCF Qualification Number (QN) should be used by centres when they wish to seek public funding for their learners. Each unit within the qualification will also have a QCF unit code.

The QCF qualification and unit codes will appear on learners' final certification documentation.

The QN for the qualification in this publication is:

Edexcel BTEC Level 3 Certificate in Facilities Management (QCF) 600/3877/9

This qualification title will appear on learners' certificates. Learners need to be made aware of this when they are recruited by the centre and registered with Edexcel.

This qualification is accredited by Ofqual as being part of the Advanced Apprenticeship Framework in Facilities Management.

Welcome to the BTEC Level 3 Certificate in Facilities Management (QCF)

We are delighted to introduce our new qualification, available for teaching from December 2011. This qualification has been revised and conforms to the requirements of the new QCF (Qualifications and Credit Framework).

Focusing on the BTEC Level 3 Certificate in Facilities Management (QCF)

This qualification is a vocationally related qualification for facilities management professionals working in a front-line capacity in the facilities management sector. The qualification is aimed at:

- people who already work in the facilities management sector and want to develop further
- people looking to specialise in an area of facilities management.

Straightforward to implement, teach and assess

Implementing BTECs couldn't be easier. They are designed to fit easily into your curriculum and can be studied independently or alongside existing qualifications, to suit the interests and aspirations of learners. The clarity of assessment makes grading learner attainment simpler.

Engaging for everyone

Learners of all abilities flourish when they can apply their knowledge, skills and enthusiasm to a subject. BTEC qualifications make explicit the link between theoretical learning and the world of work by giving learners the opportunity to apply their research, skills and knowledge to work-related contexts and case studies. These applied and practical BTEC approaches give all learners the impetus they need to achieve and the skills they require for workplace or education progression.

Recognition

BTECs are understood and recognised by a large number of organisations in a wide range of sectors. BTEC qualifications are developed with key industry representatives and Sector Skills Councils (SSC) to ensure that they meet employer and learner needs — **in this case the Asset Skills SSC.**

All you need to get started

To help you off to a flying start, we've developed an enhanced specification that gives you all the information you need to start teaching BTEC. This includes:

- information on rules of combination, structures and quality assurance, so you can deliver the qualification with confidence
- explanations of the content's relationship with the learning outcomes
- guidance on assessment and what learners must produce to achieve the unit.

Don't forget that we're always here to offer curriculum and qualification updates, local training and network opportunities, advice, guidance and support.

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What are BTEC Level 3 Specialist qualifications?

BTEC Specialist qualifications are qualifications at Entry Level to Level 3 in the Qualifications and Credit Framework and are designed to provide specialist work - related qualifications in a range of sectors. They give learners the knowledge, understanding and skills that they need to prepare for employment. The qualifications also provide career development opportunities for those already in work. Consequently they provide a course of study for full-time or part-time learners in schools, colleges and training centres.

BTEC Specialist qualifications provide much of the underpinning knowledge and understanding for the National Occupational Standards (NOS) for the sector, where these are appropriate. They are supported by the relevant Standards Setting Body or Sector Skills Council. A number of BTEC Specialist qualifications are recognised as the knowledge components of Apprenticeships Frameworks.

On successful completion of a BTEC Specialist qualification, learners, can progress to or within employment and/or continue their study in the same or related vocational area.

The QCF is a framework which awards credit for qualifications and units and aims to present qualifications in a way that is easy to understand and measure. It enables learners to gain qualifications at their own pace along flexible routes.

There are three sizes of qualification in the QCF:

- Award (1 to 12 credits)
- Certificate (13 to 36 credits)
- Diploma (37 credits and above).

Every unit and qualification in the framework will have a credit value.

The credit value of a unit specifies the number of credits that will be awarded to learners who have achieved the learning outcomes of the unit.

The credit value of a unit is based on:

- one credit for those learning outcomes achievable in 10 hours of learning
- learning time – defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria.

The credit value of the unit will remain constant in all contexts, regardless of the assessment method used for the qualification(s) to which it contributes.

Learning time should address all learning (including assessment) relevant to the learning outcomes, regardless of where, when and how the learning has taken place.

Edexcel BTEC Level 3 Certificate

The Edexcel BTEC Level 3 Certificate extends the work-related focus and covers some of the knowledge and practical skills required for a particular vocational sector.

Key features of the Edexcel BTEC Level 3 in Facilities Management (QCF)

The Edexcel BTEC Level 3 in Facilities Management (QCF) has been developed to give learners the opportunity to:

- engage in learning that is relevant to them and which will give them opportunities to develop a range of skills, techniques and attributes essential for successful performance in working life
- achieve a nationally recognised Level 3 vocationally related qualification
- progress to employment in the facilities management sector
- progress to related general and/or vocational qualifications.

National Occupational Standards

Where relevant, Edexcel BTEC Level 3 qualifications are designed to provide some of the underpinning knowledge and understanding for the National Occupational Standards, as well as developing practical skills in preparation for work and possible achievement of NVQs in due course. NOS form the basis of NVQs. Edexcel BTEC Level 3 qualifications do not purport to deliver occupational competence in the sector, which should be demonstrated in a work context.

Rules of combination

The rules of combination specify the credits that need to be achieved, through the completion of particular units, for the qualification to be awarded. All accredited qualifications within the QCF have rules of combination.

Rules of combination for the Edexcel BTEC Level 3 Certificate in Facilities Management (QCF)

When combining units for the Edexcel BTEC Level 3 Certificate in Facilities Management (QCF), it is the centre's responsibility to ensure that the following rules of combination are adhered to:

- 1 Qualification credit value: a minimum of 22 credits.
- 2 Minimum credit to be achieved at, or above, the level of the qualification: 22 credits.
- 3 All credits must be achieved from the units listed in this specification.

Edexcel BTEC Level 3 Certificate in Facilities Management (QCF)

Apprentices

To achieve this qualification learners must take all units from the mandatory units (Group A), a minimum of three units from the facilities management specific units (Group B) and a minimum of one unit from the general management units (Group C). Apprentices must also complete the additional unit (Group D). All remaining credits must be achieved from Group B and/or Group C. Learners must achieve a minimum total of 22 credits.

Non apprentices

To achieve this qualification learners must take all units from the mandatory units (Group A), a minimum of three units from the facilities management specific units (Group B) and a minimum of one unit from the general management units (Group C). All remaining credits must be taken from Group B, Group C and/or the additional unit (Group D). Learners must achieve a minimum total of 22 credits.

Edexcel BTEC Level 3 Certificate in Facilities Management (QCF)			
Unit	Group A - Mandatory units Learners must complete all units in this group.	Credit	Level
1	Understanding Facilities Management for Businesses and Organisations	3	3
2	Managing and Developing Relationships in the Workplace	2	3
3	Delivering Service in the Workplace	2	3
Unit	Group B – Facilities management specific units Learners must complete a minimum of three units from this group.	Credit	Level
4	Managing Projects	2	3
5	Managing the Efficient Use of Materials	1	3
6	Managing the Effective Use of Equipment	1	3
7	Introduction to Managing and Maintaining Property and Assets	3	3
8	Introduction to the Effective Management of Space Within Own Organisation	3	3
9	Understanding Support Services Operations	3	3
10	Managing Utility Services and Energy Efficiency in the Workplace	2	3
11	Understanding Procurement and Supplier Management in the Workplace	2	3
12	Managing Contracts and Contractors in the Workplace	2	3
13	Outsourcing Strategies in Facilities Management	3	3

Unit	Group C – General management units Learners must complete a minimum of one unit from this group.	Credit	Level
14	Managing Health and Safety at Work	3	3
15	Understanding Change in the Workplace	2	3
16	Building the Team	1	3
17	Recruiting, Selecting and Inducting New Staff in the Workplace	3	3
18	Organising and Delegating	1	3
19	Managing Performance	1	3
20	Working with Costs and Budgets	1	3
21	Managing Sustainability and Environmental Issues	3	3
22	Understanding Incident Management and Disaster Recovery in the Workplace	2	3
23	Understanding Security Measures in the Workplace	2	3
24	Introduction to Leadership and Management	2	3
25	Solving Problems and Making Decisions	2	3
26	Commercial Awareness and Improving Profits in Facilities Management	4	3
27	Continuous Business Improvement in Facilities Management	4	3
28	Generating Business Opportunities in Facilities Management	3	3
30	Managing the Performance of Teams and Individuals in a Facilities Management Workplace	2	3
Unit	Group D – Additional unit Apprentices must take this unit.	Credit	Level
29	Developing Yourself and Others	2	3

Assessment

All units within this qualification are internally assessed. The qualifications are criterion referenced, based on the achievement of all the specified learning outcomes.

To achieve a 'pass' learners must have successfully passed **all** the assessment criteria.

Guidance

The purpose of assessment is to ensure that effective learning has taken place to give learners the opportunity to:

- meet the standard determined by the assessment criteria and
- achieve the learning outcomes.

All the assignments created by centres should be reliable and fit for purpose, and should be built on the unit assessment criteria. Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the specified criteria. Centres should enable learners to produce evidence in a variety of forms, including performance observation, presentations and posters, along with projects, or time-constrained assessments.

Centres are encouraged to emphasise the practical application of the assessment criteria, providing a realistic scenario for learners to adopt, and making maximum use of practical activities. The creation of assignments that are fit for purpose is vital to achievement and their importance cannot be overemphasised.

The assessment criteria must be clearly indicated in the assignments briefs. This gives learners focus and helps with internal verification and standardisation processes. It will also help to ensure that learner feedback is specific to the assessment criteria.

When designing assignments briefs, centres are encouraged to identify common topics and themes. A central feature of vocational assessment is that it allows for assessment to be:

- current, i.e. to reflect the most recent developments and issues
- local, i.e. to reflect the employment context of the delivering centre
- flexible to reflect learners needs, i.e. at a time and in a way that matches the learner's requirements so that they can demonstrate achievement.

Qualification grade

Learners who achieve the minimum eligible credit value specified by the rule of combination will achieve the qualification at pass grade.

In Edexcel BTEC Level 3 specialist qualifications each unit has a credit value which specifies the number of credits that will be awarded to learners who have achieved the learning outcomes of the unit. This has been based on:

- one credit for those learning outcomes achievable in 10 hours of learning time
- learning time being defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria
- the credit value of the unit remaining constant regardless of the method of assessment used or the qualification to which it contributes.

Quality assurance of centres

Edexcel BTEC Level 3 qualifications provide a flexible structure for learners, enabling programmes of varying credits and combining different levels. For the purposes of quality assurance, all individual qualifications and units are considered as a whole.

Centres delivering Edexcel BTEC Level 3 qualifications must be committed to ensuring the quality of the units and qualifications they deliver, through effective standardisation of assessors and verification of assessor decisions. Centre quality assurance and assessment are monitored and guaranteed by Edexcel.

The Edexcel quality assurance processes will involve:

- centre approval for those centres not already recognised as a centre for BTEC qualifications
- approval for Edexcel BTEC Level 3 qualifications and units
- **compulsory** Edexcel-provided training and standardisation for internal verifiers and assessors, leading to the accreditation of lead internal verifiers
- quality review of the centre verification practice
- centre risk assessment by Edexcel of overarching processes and quality standards
- remedial training and/or assessment sampling for centres identified through standardisation or risk assessment activities as having inadequate quality, assessment or internal verification processes.

Approval

Centres are required to declare their commitment to ensuring the quality of the programme of learning and providing appropriate assessment opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Centres already holding BTEC approval are able to gain qualification approval online. New centres must complete a centre approval application.

Quality assurance guidance

Details of quality assurance for Edexcel BTEC Level 3 qualifications are set out in centre guidance which is published on our website (www.edexcel.com).

Programme design and delivery

Mode of delivery

Edexcel does not normally define the mode of delivery for Edexcel BTEC Entry to Level 3 qualifications. Centres are free to offer the qualifications using any mode of delivery (such as full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specification and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. The use of assessment evidence drawn from learners' work environments should be encouraged. Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to ensure a course relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- linking with company-based/workplace training programmes
- making full use of the variety of experience of work and life that learners bring to the programme.

Resources

Edexcel BTEC Level 3 qualifications are designed to give learners an understanding of the skills needed for specific vocational sectors. Physical resources need to support the delivery of the programme and the assessment of the learning outcomes, and should therefore normally be of industry standard. Staff delivering programmes and conducting the assessments should be familiar with current practice and standards in the sector concerned. Centres will need to meet any specific resource requirements to gain approval from Edexcel.

Where specific resources are required these have been indicated in individual units in the *Essential resources* sections.

Delivery approach

It is important that centres develop an approach to teaching and learning that supports the vocational nature of Edexcel BTEC Level 3 qualifications and the mode of delivery. Specifications give a balance of practical skill development and knowledge requirements, some of which can be theoretical in nature. Tutors and assessors need to ensure that appropriate links are made between theory and practical application and that the knowledge base is applied to the sector. This requires the development of relevant and up-to-date teaching materials that allow learners to apply their learning to actual events and activity within the sector. Maximum use should be made of learners' experience.

Additional and specialist learning

Additional and Specialist Learning (ASL) consists of accredited qualifications at the same level as or one level above a 14–19 Diploma course of study, which have been approved under Section 96 of the Learning and Skills Act 2000. The ASL may include BTEC qualifications which are also available to learners not following a 14–19 Diploma course of study.

ASL qualifications are listed in the 14–19 Diploma Catalogue which is available on the Register of Regulated Qualifications (www.ofqual.gov.uk). The catalogue will expand over time as more qualifications are accredited and approved.

Centres undertaking, or preparing to undertake, ASL should refer regularly to the Edexcel website for information regarding additions and the 14–19 Diploma Catalogue for the latest information.

Functional Skills

Edexcel Level 3 BTEC Specialist qualifications give learners opportunities to develop and apply Functional Skills. Functional Skills are, however, not required to be achieved as part of the BTEC Specialist qualification(s) rules of combination. Functional Skills are offered as stand-alone qualifications.

Access and recruitment

Edexcel's policy regarding access to its qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualifications and that the qualification will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to learners within the centre during their programme of study and any specific support that might be necessary to allow learners to access the assessment

for the qualification. Centres should consult Edexcel's policy on learners with particular requirements.

Centres will need to review the entry profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a higher-level qualification.

Restrictions on learner entry

The Edexcel BTEC Level 3 Certificate in Facilities Management (QCF) is accredited on the QCF for learners aged 16 and above.

Access arrangements and special considerations

Edexcel's policy on access arrangements and special considerations for BTEC and Edexcel NVQ qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 2010 Equality Act) without compromising the assessment of skills, knowledge, understanding or competence.

Further details are given in the policy document *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications*, which can be found on the Edexcel website (www.edexcel.com). This policy replaces the previous Edexcel policy (*Assessment of Vocationally Related Qualifications: Regulations and Guidance Relating to Learners with Special Requirements, 2002*) concerning learners with particular requirements.

Recognition of Prior Learning

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether learners can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Edexcel encourages centres to recognise learners' previous achievements and experiences, at work, at home and at leisure, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. Provided that the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Unit format

All units in the Edexcel BTEC Level 3 Specialist qualifications have a standard format. The unit format is designed to give guidance on the requirements of the qualification for learners, tutors, assessors and those responsible for monitoring national standards.

Each unit has the following sections.

Unit title

The unit title is accredited on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).

Unit code

Each unit is assigned a QCF unit code that appears with the unit title on the National Database of Accredited Qualifications.

QCF level

All units and qualifications within the QCF will have a level assigned to them, which represents the level of achievement. There are nine levels of achievement, from Entry Level to Level 8. The level of the unit has been informed by the QCF level descriptors and, where appropriate, the NOS and/or other sector/professional benchmarks.

Credit value

All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can be awarded in whole numbers only. Learners will be awarded credits for the successful completion of whole units.

Guided learning hours

Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.

Unit aim

The aim provides a clear summary of the purpose of the unit and is a succinct statement that summarises the learning outcomes of the unit.

Unit introduction

The unit introduction gives the reader an appreciation of the unit in the vocational setting of the qualification, as well as highlighting the focus of the unit. It gives the reader a snapshot of the unit and the key knowledge, skills and understanding gained while studying the unit. The unit introduction also highlights any links to the appropriate vocational sector by describing how the unit relates to that sector.

Learning outcomes

The learning outcomes of a unit set out what a learner is expected to know, understand or be able to do as the result of a process of learning.

Assessment criteria

The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or set of learning outcomes, has been achieved. The learning outcomes and assessment criteria clearly articulate the learning achievement for which the credit will be awarded at the level assigned to the unit.

Unit content

The unit content identifies the breadth of knowledge, skills and understanding needed to design and deliver a programme of learning to achieve each of the learning outcomes. This is informed by the underpinning knowledge and understanding requirements of the related NOS, where relevant. The content provides the range of subject material for the programme of learning and specifies the skills, knowledge and understanding required for achievement of the unit.

Each learning outcome is stated in full and then the key phrases or concepts related to that learning outcome are listed in italics followed by the subsequent range of related topics.

Relationship between content and assessment criteria

The learner should have the opportunity to cover all of the unit content.

It is not a requirement of the unit specification that all of the content is assessed. However, the indicative content will need to be covered in a programme of learning in order for learners to be able to meet the standard determined in the assessment criteria.

Content structure and terminology

The information below shows how the unit content is structured and gives the terminology used to explain the different components within the content.

- Learning outcome: this is shown in bold at the beginning of each section of content.
- Italicised sub-heading: it contains a key phrase or concept. This is content which must be covered in the delivery of the unit. Colons mark the end of an italicised sub-heading.
- Elements of content: the elements are in plain text and amplify the sub-heading. The elements must be covered in the delivery of the unit. Semi-colons mark the end of an element.

- Brackets contain amplification of content which must be covered in the delivery of the unit.
- 'e.g.' is a list of examples, used for indicative amplification of an element (that is, the content specified in this amplification could be covered or could be replaced by other, similar material).

Essential guidance for tutors

This section gives tutors additional guidance and amplification to aid understanding and a consistent level of delivery and assessment. It is divided into the following sections.

- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance about possible approaches to delivery. This section is based on the more usual delivery modes but is not intended to rule out alternative approaches.
- *Assessment* – gives amplification about the nature and type of evidence that learners need to produce in order to achieve the unit. This section should be read in conjunction with the assessment criteria.
- *Essential resources* – identifies any specialist resources needed to allow learners to generate the evidence required for each unit. The centre will be asked to ensure that any requirements are in place when it seeks approval from Edexcel to offer the qualification.
- *Indicative resource materials* – gives a list of learner resource material that benchmarks the level of study.

Units

Unit 1: Understanding Facilities Management for Businesses and Organisations	17
Unit 2: Managing and Developing Relationships in the Workplace	23
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Unit 1: Understanding Facilities Management for Businesses and Organisations

Unit code: R/503/6035

QCF Level: 3

Credit value: 3

Guided learning hours: 18

Unit aim

The aim of this unit is to develop understanding of facilities management within the context of an organisation.

Unit introduction

This unit gives learners the understanding required to be able to operate effectively in a facilities management business environment. The unit is core to this qualification and introduces concepts which apply to other units.

The unit examines the term 'facilities management' and the role of a facilities manager. Learners will develop an understanding of how facilities management fits within the structure of an organisation and the different ways in which facilities management services can be administered.

On completion of this unit learners will have a better general understanding of facilities management and be able to relate this knowledge to their own organisation and job role. This unit looks at the functioning of facilities management as well as the effect of facilities management on the primary activities of an organisation.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand the meaning of facilities management	1.1 define the term facilities management 1.2 explain the role of a facilities manager
2 Understand how facilities management fits within the structure of an organisation	2.1 illustrate the structure of an organisation including facilities management functions 2.2 explain how facilities management operates within an organisation 2.3 illustrate the structure of a facilities management department
3 Understand the different possible commercial arrangements for administering support services within an organisation	3.1 outline different commercial arrangements for administering support services within an organisation 3.2 describe the way in which support services are administered in own organisation 3.3 evaluate advantages and disadvantages of administering support services
4 Understand the effect of facilities management on the primary activities of an organisation	4.1 describe how good facilities management can assist an organisation in achieving its primary objectives 4.2 explain the possible consequences of poor facilities management

Unit content

1 **Understand the meaning of facilities management**

Define facilities management and explain the role of a facilities manager: interdisciplinary; support services; non-core business activities; primary activities; service provision; estate management; soft services; hard services

2 **Understand how facilities management fits within the structure of an organisation**

Organisation structure and the structure of a facilities management department: structure chart; hierarchical; matrix; lines of communication; lines of reporting; liaison links

How facilities management operates within an organisation: responsibilities; budget control; semi-autonomous; targets; service level agreements

3 **Understand the different possible commercial arrangements for administering support services within an organisation**

Different commercial arrangements for administering support services: in-house; outsourced; sub-contract; partnership; preferred supplier

Advantages and disadvantages of specific commercial arrangements: control; cost; efficiency; focus; integration; completion; tendering processes

4 **Understand the effect of facilities management on the primary activities of an organisation**

How facilities management can assist or impair the achievement of primary objectives: operational efficiency; maintenance costs; staff morale; staff turnover; public perception; customer satisfaction; budgets; targets

Essential guidance for tutors

Delivery

To achieve this unit learners need to understand the basics of facilities management. Part of this understanding should be focused on the way in which facilities management services can be administered. The unit forms one of the basic building blocks of this qualification and combines well with *Unit 26: Commercial Awareness and Improving Profits in Facilities Management*.

Workshop sessions covering this unit should deal with the basic factors influencing business operations. Learners should be encouraged to examine the structure of their own organisation and the way in which facilities management fits within it. Knowledge developed from this unit can be applied to several other units. Learners working towards an apprenticeship will find knowledge gained from this unit useful in tackling mandatory *Unit 1: Provide and Monitor Facilities for Clients* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF) qualification.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence to meet the outcomes of this unit can be used to support evidence for other units, both competence- and knowledge-based. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and, in some cases answers to written questions. Professional discussion can also be used to achieve specific outcomes, demonstrating that learners have the relevant knowledge and experience.

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbooks

Alexander K – *Facilities Management: Theory and Practice* (Taylor & Francis, 1996)
ISBN 9780419205807

Atkin B and Brooks A – *Total Facilities Management* (Wiley-Blackwell, 2009)
ISBN 9781405186599

Wiggins J – *Facilities Manager's Desk Reference* (John Wiley & Sons, 2010)
ISBN 9781405186612

Journals

Facilities Management Journal

International Journal of Facility Management

Journal of Facilities Management

Premises and Facilities Management

Websites

www.assetskills.org	Sector Skills Council for facilities management
www.bifm.org.uk	The British Institute of Facilities Management
www.businessballs.com	Career help, business training and organisational development
www.facilities.ac.uk/j	The Facilities Society
www.fm-world.co.uk	Magazine of the British Institute of Facilities Management
www.pfmonthenet.net	Premises and Facilities Management magazine
www.todaysfacilitiesmanager.com	Blogs, articles, columns and resources for facilities management

Unit 2: **Managing and Developing Relationships in the Workplace**

Unit code: D/502/0145

QCF Level: 3

Credit value: 2

Guided learning hours: 8

Unit aim

To develop knowledge and understanding of managing and developing relationships with others in the workplace.

Unit introduction

This unit is related to the development and maintenance of relationships with customers, colleagues, key stakeholders and relevant others within the facilities management field.

The unit aims to develop the knowledge needed to be able to identify the needs and expectations of customers, colleagues, key stakeholders and others, meet those needs or expectations. The unit gives learners knowledge of how to manage relationships where those needs or expectations cannot be met.

On completion of this unit the learner will understand how to identify the needs or expectations and understand the importance of being able to do so. Once these are identified, learners will be able to determine the methods of meeting those needs or expectations and then checking that they have been met. In some instances, it will not be possible to meet those needs or expectations for a variety of reasons. Learners will understand how to manage relationships where this occurs so that the working relationship is maintained.

This unit is a mandatory unit and learners should also consider its links with other units such as *Unit 4: Managing Projects* and *Unit 12: Managing Contracts and Contractors in the Workplace*. Knowledge gained from this unit applies to other units, where relationships are involved.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Examine the needs and expectations of others</p>	<p>1.1 identify and examine the needs and expectations of customers, colleagues, key stakeholders and relevant others in the workplace</p> <p>1.2 explain the importance of knowing what customers, colleagues, key stakeholders and relevant others in the workplace require</p>
<p>2 Meet the needs and expectations of others</p>	<p>2.1 determine ways of meeting the needs and expectations of customers, colleagues, key stakeholders and relevant others in the workplace within organisational constraints</p> <p>2.2 explain ways of checking that the needs and expectations of others have been met</p>
<p>3 Be able to manage relationships where it is not possible to meet the need or expectations of others</p>	<p>3.1 examine and explain ways of managing relationships where it is not possible to meet the need or expectations of others within organisational guidelines and constraints</p>

Unit content

1 **Examine the needs and expectations of others**

Identify the needs and expectations: of an individual or organisation e.g. timescale, cost, quality, quantity

Relevant others: people or organisations who may be affected directly or indirectly by the needs or expectations of others

2 **Meet the needs and expectations of others**

Ways of meeting the needs and expectations: manpower; materials; efficiency; use of space; external resources; programming; consultation; honesty

Ways of checking that the needs and expectations have been met: consultation; Key Performance Indicators; monitoring of providers; measuring; meetings

3 **Be able to manage relationships where it is not possible to meet the need or expectations of others**

Ways of managing relationships: offer alternatives; give guidance; suggest solutions; provide help and support; face-to-face; meetings

Essential guidance for tutors

Delivery

To achieve this unit learners need to demonstrate their understanding of identifying and meeting the needs and expectations of others in the workplace and why it is important. Learners will also need to understand how to check that the identified needs and expectations have been met and what to do to maintain the relationship where the needs or expectations cannot be met. This is a mandatory unit for this certificate as it is considered fundamental to facilities management.

Learners should be given opportunities to acquire the knowledge needed to build a portfolio which meets the assessment criteria. Centres may find that this unit is best delivered through workshop sessions combined with the delivery of other related knowledge units. These workshop sessions can also be used to give to learners guidance on assembling evidence for this and related units.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit, and other associated NVQ units, can be combined to form part of a single portfolio with appropriate referencing to meet the learning outcomes of all the related units. By adopting a holistic approach in this way it will be found that evidence for this unit also meets some of the criteria for other knowledge and/or competence units.

A variety of assessment methods can be used to generate the evidence needed for this unit. Learners should be encouraged to produce evidence from the workplace where possible. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies or in some cases answers to written questions. Professional discussion can be used to achieve learning outcomes after the learner has gained relevant knowledge and experience.

Assessment criteria 1.1, 1.2, 2.1 and 2.2 could be achieved by examining learners' responses to questions along with relevant workplace evidence related to an actual scenario or following workshop sessions. Assessment criterion 3.1 is best covered through an assignment, written report or statement.

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials**Textbook**

Cottrell S – *Skills for Success – The Personal Development Planning Handbook* (Palgrave Macmillan, 2010) ISBN 9780230250185

Website

www.assetskills.org	Sector Skills Council for facilities management
www.bifm.org.uk	The British Institute of Facilities Management
www.businessballs.com	Career help, business training and organisational development
www.facilities.ac.uk/j	The Facilities Society
www.fm-world.co.uk	Magazine of the British Institute of Facilities Management
www.pfmonthenet.net	Premises and Facilities Management magazine
www.todaysfacilitiesmanager.com	Blogs, articles, columns and resources for facilities management

Unit 3: Delivering Service in the Workplace

Unit code: K/502/0147

QCF Level: 3

Credit value: 2

Guided learning hours: 6

Unit aim

To develop knowledge and understanding of delivering service in the facilities management environment.

Unit introduction

Within facilities management, learners will be expected to identify services provided to a client within the workplace. They will be expected to plan for the delivery of the recognised services, including the monitoring systems used to ensure effective delivery. Learners may be required to observe an individual service, plan its delivery, communicate their planned delivery to others, gain and evaluate feedback regarding the identified service and monitor that service regularly. Learners will also need to ensure continuous improvement of the service provided through the monitoring process.

This unit aims to develop the knowledge required to identify, plan, communicate, evaluate feedback concerning their plan and monitor the recognised service delivery in the workplace. Learners will acquire knowledge of each of these aspects.

On completion of this unit, learners will know how to identify a workplace service, plan its delivery, communicate the plan to others and monitor the service to ensure effective delivery. The unit deals with identifying a service, planning its delivery and communicating this plan to others including the underlying information required for this process. It also deals with gaining and using feedback from others regarding the service delivery plan that learners have produced. The unit deals with monitoring the service provided and showing continuous improvement.

This unit is a mandatory unit and as such links well to many of the units in optional groups B and C such as *Unit 4: Managing Projects*, *Unit 10: Managing Utility Services and Energy Efficiency in the Workplace*, *Unit 12: Managing Contracts and Contractors in the Workplace*, *Unit 16: Building the Team* and *Unit 27: Continuous Business Improvement in Facilities Management*. Knowledge gained from this unit applies to other units where the provision of services are involved.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Be able to deliver service in the workplace</p>	<p>1.1 identify a facilities management service that must be delivered in the workplace</p> <p>1.2 plan the delivery of the facilities management service identified including all resource requirements</p> <p>1.3 explain how the delivery of the facilities management service identified will be communicated to others</p>
<p>2 Understand how to collect feedback and evaluate service delivery in the workplace</p>	<p>2.1 explain how they would collect and evaluate feedback from relevant others about the facilities management service identified and planned</p>
<p>3 Understand how to monitor the service delivery activity to ensure continuous improvement</p>	<p>3.1 explain what tools they would use to continually monitor the effective delivery of facilities management services to ensure continuous improvement</p>

Unit content

1 **Be able to deliver service in the workplace**

Service that must be delivered in the workplace: cleaning; guarding; catering; portering; electrical and mechanical engineering; landscaping; reception and office services; call centres; retail

Plan the delivery: resources; cost; frequency; timescales; quality standards

Communication to others: client; managers; oral; electronic; written; presentations; slideshow; meetings; email

2 **Understand how to collect feedback and evaluate service delivery in the workplace**

Collection of feedback: written; oral; electronic; forms; customer steering group; client meetings; surveys

Relevant others: client; customer; line manager

Evaluate: comparison to specification; meeting customer needs; cost effectiveness; quality

3 **Understand how to monitor the service delivery activity to ensure continuous improvement**

Tools used to monitor: audits; inspections; complaints log; customer surveys; data analysis; observations

Continuous improvement: efficiency; effectiveness; flexibility; cost; quality; customer satisfaction

Essential guidance for tutors

Delivery

To achieve this unit learners will need to demonstrate their understanding of the tools and techniques used in providing services to clients and customers and the monitoring of the services identified. It is expected that apprentices will normally undertake this unit in conjunction with *Unit 4: Managing Projects*. The two units are closely linked.

Learners should be encouraged to select a service and produce a plan for its delivery, including resources. It may be possible to present this plan in a workplace environment via a short presentation or professional discussion with the tutor. The understanding of the unit would best be covered through a series of workshop sessions or tutorials. Tutors should check the suitability of the service chosen as the subject of the plan.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learners' progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for this unit, and the associated competence units, can be combined with appropriate referencing to meet the learning outcomes of a number of combinations. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion and observation can be used to achieve specific outcomes after learners have gained relevant knowledge and experience.

Assessment criteria 1.1, 1.2 and 1.3 could be achieved through using the learner's written service delivery plan and either, written explanation of the communication methods or an observed presentation. Criteria 2.1 and 3.1 could be achieved through learner workplace records.

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbooks

Atkin B and Brooks A – *Total Facilities Management* (Wiley-Blackwell, 2009)
ISBN 9781405186599

Booty F – *Facilities Management Handbook* (Butterworth-Heinemann, 2008)
ISBN 9780750689779

Reuvid J and Hinks J – *Managing Business Support Services: Strategies for Outsourcing and Facilities Management* (Kogan Page Ltd, 2001)
ISBN 9780749430610

Website

www.assetskills.org	Sector Skills Council for facilities management
www.bifm.org.uk	The British Institute of Facilities Management
www.businessballs.com	Career help, business training and organisational development
www.facilities.ac.uk/j	The Facilities Society
www.fm-world.co.uk	Magazine of the British Institute of Facilities Management
www.pfmthenet.net	Premises and Facilities Management magazine
www.todaysfacilitiesmanager.com	Blogs, articles, columns and resources for facilities management

Unit 4: Managing Projects

Unit code: T/501/3816

QCF Level: 3

Credit value: 2

Guided learning hours: 7

Unit aim

To develop knowledge and understanding of managing projects as required by a practising or potential first line manager.

Unit introduction

Learners working in a facilities management environment will frequently be involved in the planning, implementation and evaluation of projects. A project may be a one-off exercise to achieve a specific goal, such as the installation of new equipment or the construction of a new facility. Projects are also an effective way to trial ideas for operational improvements and changes in working methods.

This unit aims to develop the knowledge required to identify potential projects, to determine their financial viability, to utilise established project planning techniques, effectively manage to achieve objectives and to evaluate the final results. For apprentices it is recommended that this unit is combined with *Unit 14: Manage Facilities Management Projects* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF). It provides the underpinning knowledge for involvement in the management of an actual project in the workplace.

On completion of this unit learners will learn how to identify potential projects and implement them successfully. Knowledge will also be gained in evaluating project results. The unit links well with *Unit 3: Delivering Service in the Workplace*, *Unit 15: Understanding Change in the Workplace*, *Unit 20: Working with Costs and Budgets* and *Unit 27: Continuous Business Improvement in Facilities Management*. Some of the techniques used in project management are also relevant to *Unit 12: Managing Contracts and Contractors in the Workplace*.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Know how to manage a simple workplace project	1.1 identify a simple workplace project 1.2 use one simple tool for determining the financial viability of the project 1.3 plan the project using one appropriate project planning technique 1.4 set objectives and targets/milestones to monitor performance and review plans 1.5 use one project evaluation technique
2 Understand the costs and benefits resulting from a workplace project	2.1 list areas where net savings could be achieved as a result of the workplace project 2.2 identify wider non financial implications that could result from the workplace project

Unit content

1 Know how to manage a simple workplace project

Identify a project: scope; duration; budget; labour; materials; equipment; consumables; project purpose/objective; planned outcomes

Tools for determining financial viability: return on investment; breakeven point; debt-service coverage ratio; debt-equity ratio; estimated completion value; cost-benefit analysis; loss leaders; tolerances; variables

Project planning techniques: Gantt charts; flowcharts; critical path analysis; workflow; resource levelling; project-planning software

Setting objectives and monitoring performance: cost tracking; scheduling; setting milestones; progress reviews

Project evaluation techniques: efficiency; effectiveness; impact; questionnaires; focus groups; rating scales; cost improvement; profit margins; customer satisfaction

2 Understand the costs and benefits resulting from a workplace project

List net savings: labour costs; materials; efficiency; use of space; external resources; staff turnover; time; energy consumption

Non-financial implications: environmental; workforce morale; social impact; company ethos; culture; customer and public perception; public relations; community responsibility

Essential guidance for tutors

Delivery

To achieve this unit learners need to understand the tools and techniques needed to effectively plan and manage a project. It is expected that apprentices will normally undertake this unit in conjunction with *Unit 3: Delivering Service in the Workplace*. The two units are closely linked. Learners working towards an apprenticeship in facilities management will normally undertake this unit in conjunction with the equivalent competence-based *Unit 14: Manage Facilities Management Projects* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF). Before learners select a project (assessment criteria 1.1, 1.2 and 1.3) it is recommended that training is given on the techniques of project planning, implementation and evaluation.

Learners should be encouraged to write a report on their chosen project outlining the reasons for selection, the project objectives, planning methods to be employed, monitoring techniques to be used and methods for evaluating project outcomes. The unit is probably best delivered through workshop sessions followed by tutorials after a project has been selected for study. Tutors should check learners' project plans to judge their appropriateness and give guidance and feedback accordingly.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for this unit, and the associated competence units, can be usefully combined with appropriate referencing to meet the learning outcomes of both. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can be used to achieve learning outcomes after learners have gained relevant knowledge and experience.

To achieve assessment criteria 1.2 to 1.5 learners need to produce evidence of involvement with an actual project in the workplace. This may be in the form of a case study, records of discussions, project-planning documents, evaluation conclusions and/or management reports. Assessment criteria 2.1 and 2.1 can be achieved using learners, written cost-benefit analysis of their chosen project.

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the facilities and equipment forming the components of the chosen project.

Indicative resource materials**Textbooks**

Barker S – *Brilliant Project Management* (Prentice Hall, 2009)
ISBN 9780273722328

Kerzner H – *Project Management: Best Practices* (John Wiley and Sons, 2010)
ISBN 9780470528297

Journals

International Journal of Project Management

Project Manager Today

Website

www.businessballs.com	Career help, business training and organisational development
www.facilities.ac.uk/j	The Facilities Society
www.fm-world.co.uk	Magazine of the British Institute of Facilities Management
www.pfmonthenet.net	Premises and Facilities Management magazine
www.todaysfacilitiesmanager.com	Blogs, articles, columns and resources for facilities management

Unit 5: Managing the Efficient Use of Materials

Unit code: J/501/3822

QCF Level: 3

Credit value: 1

Guided learning hours: 6

Unit aim

To develop knowledge and understanding of using materials efficiently as required by a practising or potential first line manager.

Unit introduction

Learners working in a facilities management environment may have responsibility for ordering, controlling and monitoring stocks of materials used in their area of activity. Materials may be perishable, requiring special attention to stock control and storage to maintain quality. All materials used by an organisation are a potential source of waste and loss of efficiency and learners need to be aware of the need to minimise waste.

This unit aims to develop the knowledge and understanding required to determine material stock requirements and successfully implement an effective stock-control system in the workplace. The unit links well with *Unit 6: Managing the Effective Use of Equipment*. Materials may be either used as consumables or be processed by equipment.

On completion of this unit learners will know how to control material stocks and reduce waste in the workplace. The unit deals with the determination of stock requirements and the procedures for controlling stock levels. It also deals with the identification and subsequent reduction of waste.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand how material stocks are acquired, controlled and recorded in an organisation</p>	<p>1.1 describe how to determine stock requirements in the workplace</p> <p>1.2 explain two consequences of not maintaining optimum stocks in the workplace</p> <p>1.3 identify organisational stores/stock control principles and procedures</p> <p>1.4 outline the organisation's procedures for recording, receipt and issue of supplies</p> <p>1.5 briefly describe why quality standards need to be maintained in the organisation</p>
<p>2 Know how to minimise waste in an organisation</p>	<p>2.1 identify potential waste in the organisation</p> <p>2.2 outline the techniques and/or methods for measuring and monitoring waste in the organisation</p> <p>2.3 compile a simple action plan to minimise waste in the workplace</p>

Unit content

1 **Understand how material stocks are acquired, controlled and recorded in an organisation**

How to determine stock requirements: stock control; Kanban systems; Just-In-Time (JIT); barcodes; opportunity cost; storage cost; risk of damage

Consequences of not maintaining optimum stocks: waste; inefficiency; space management; shelf life; stock-out; obsolescence; deterioration; customer dissatisfaction; increased costs

Stock-control principles and procedures: inventory software; reorder levels; preferred suppliers; brand loyalty; components

Procedures for recording, receipt and issue of supplies: request note; despatch note; consumables; stock take; material requisition note; bill of materials

Reasons for maintaining quality standards: health and safety; defects; quality assurance; reliability; maintainability; Total Quality Management (TQM)

2 **Know how to minimise waste in an organisation**

Areas of potential waste: oversupply; under-usage; scrap; product durability; environmental impact

Techniques for measuring and/or monitoring waste: life-cycle analysis; resource optimisation; environmental management systems; site waste-management plans; carbon footprint

Action plan to minimise waste: recycling; source separation; biological reprocessing; disposable products; reuse; waste to energy; waste review

Essential guidance for tutors

Delivery

To achieve this unit learners need to understand the techniques and procedures available to efficiently control material stocks and minimise waste. Learners will normally undertake this unit where their job role includes responsibility for the ordering, recording, receipt and issue of materials. Materials used may be perishable or durable and stocks could be held either on the premises or elsewhere.

Workshop sessions covering this unit should focus on the range of materials in actual use by the learners attending. Practical examples should be selected. Learning outcome 2 links well with learning outcome 1 from *Unit 27: Continuous Business Improvement in Facilities Management* and the two units could be delivered in conjunction. Learners should be encouraged to develop stock-control systems and plans to reduce waste in their own area of responsibility. For learners working towards an apprenticeship, delivery of learning outcome 2 could also be combined with the delivery of learning outcome 3 from the competence-based *Unit 16: Understanding Sustainability and Environmental Issues and the Impact on Facilities Management* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for this unit, and associated competence units, can be usefully combined with appropriate referencing to meet the learning outcomes of both. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can be used to achieve specific outcomes demonstrating that learners have the relevant knowledge and experience.

To achieve assessment criterion 2.3, learners need to produce a simple action plan to minimise waste in the workplace. Learners also undertaking *Unit 28: Continuous Business Improvement in Facilities Management* could use this action plan as evidence towards the learning outcomes of that unit. Learners working towards an apprenticeship who select competence-based *Unit 19: Implement Change in Own Area of Responsibility* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF) could submit the same plan as part of the evidence for that unit.

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials**Textbooks**

Bailey P and Tavernier G – *Stock Control Systems and Records* (Ashgate, 1984)
ISBN 9780566023637

Emmet S and Granville D – *Excellence in Inventory Management: How to Minimise Costs and Maximise Service* (Cambridge Academic, 2007) ISBN 9781903499337

Waste Reduction Policy and Practice (Executive Enterprises, 1990)
ISBN 9781558402720

Wild T – *Improving Inventory Record Accuracy: Getting your stock information right* (Elsevier Butterworth-Heinemann, 2004) ISBN 9780750659009

Journals

Maintenance and Asset Management Journal

Maintenance and Engineering Magazine

Websites

www.blue-logic.co.uk	Stock control software
www.companydynamics.co.uk	Bespoke software
www.vision-software.co.uk	Software solutions

Unit 6: Managing the Effective Use of Equipment

Unit code: R/501/3824

QCF Level: 3

Credit value: 1

Guided learning hours: 6

Unit aim

To develop knowledge and understanding of managing the use of equipment as required by a practising or potential first line manager.

Unit introduction

Learners working in a facilities management environment may have responsibility for the operation and maintenance of equipment. Equipment in this context could be anything from small appliances to complex machines needing trained operators. All equipment needs to be systematically maintained and effectively operated for it to provide safe and efficient service.

This unit aims to develop the knowledge required to determine the appropriate procedures to effectively and safely operate and maintain equipment in the workplace. The unit links well with *Unit 5: Managing the Efficient Use of Materials*. This link is particularly apparent where the use of equipment in a facilities management environment involves the management of consumables or materials processed by the equipment. The unit also links well with *Unit 11: Understanding Procurement and Supplier Management in the Workplace*.

On completion of this unit learners will know how to control and maintain equipment safely and effectively. Knowledge will be gained in the risk assessment associated with equipment operation and the relevant legislation. For learners working towards an apprenticeship the unit also develops underpinning knowledge, which can be applied to *Unit 1: Provide and Monitor Facilities for Clients* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand the need for effective and efficient use of equipment</p>	<p>1.1 explain why equipment should be used effectively and efficiently</p> <p>1.2 describe how the use of equipment is monitored and controlled in the workplace</p> <p>1.3 explain why it is important to have a scheduled maintenance programme for equipment in the workplace</p> <p>1.4 compile a simple maintenance programme for equipment in the workplace</p> <p>1.5 conduct a simple risk assessment of equipment security in the workplace, and explain how these risks could be reduced</p>

Unit content

1 Understand the need for effective and efficient use of equipment

Reasons for using equipment effectively and efficiently: safety; fit for purpose; economy; reliability; performance; carbon footprint; risk reduction; return on investment; fuel cost; wear and tear

Monitoring and controlling equipment: worksheets; plant allocation; operator training; equipment inventory; consumables; job costing; depreciation; equipment asset management; fleet sizing

Reasons for scheduled maintenance for equipment: down time; warranty conditions; performance; equipment asset management; repair or replace; utilisation; Portable Appliance Testing (PAT); reduction of wear and tear; safety

Compiling a maintenance programme: manufacturers' recommendations; working conditions; equipment asset management; warranty tracking; service level agreements; contract requirements

Risk assessment and reducing risks: risks and hazards; health and safety legislation; method statement; risk statistics; accident data; training

Essential guidance for tutors

Delivery

To achieve this unit learners need to understand the techniques and procedures available to manage the use of equipment efficiently and effectively. Learners working towards an apprenticeship in facilities management will normally undertake this unit where their job role includes responsibility for the use and maintenance of equipment. Equipment in this context could mean anything from small appliances to large, complex machines needing trained operators.

Workplace sessions covering this unit should focus on the range of equipment in actual use by the learners attending. Practical examples should be selected. Information and guidance on use, operator training and maintenance could be obtained from equipment manufacturers. Learners should be encouraged to develop worksheets and maintenance schedules for equipment within their own area of responsibility. Risk assessment forms an important part of this unit and for apprenticeships could be covered in conjunction with *Unit 3: Develop and Implement a Risk Assessment Plan in Own Area of Responsibility* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. For example evidence for assessment criterion 1.5 can be usefully combined with evidence for *Unit 3: Develop and Implement a Risk Assessment Plan in Own Area of Responsibility* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF), with appropriate referencing to meet the learning outcomes of both. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence may be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can also usefully be employed to achieve specific outcomes demonstrating that learners have the relevant knowledge and experience.

To achieve assessment criterion 1.4, learners need to produce a simple maintenance programme for equipment in the workplace. Learners could produce this with support from equipment manufacturers, taking into account the environment in which the equipment is used (dust, heat, vibration, accessibility etc).

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials**Textbooks**

Gill P – *Electrical Power Equipment Maintenance and Testing* (CRC Press, 2009)
ISBN 9781574446562

Gross J M – *Fundamentals of Preventive Maintenance* (Amacom, 2002)
ISBN 9780814407363

Health and Safety Executive – *Safe Use of Work Equipment: Approved Code of Practice and Guidance* (HSE, 2008) ISBN 9780717616268

Scaddon B – *PAT: Portable Appliance Testing* (Elsevier, 2008)
ISBN 9780750687362

Journals

Maintenance and Asset Management Journal

Maintenance and Engineering Magazine

Websites

www.contractorshire.co.uk	Plant and tool hire
www.deltacleaning.co.uk	Cleaning supplies
www.maintenanceonline.co.uk	Maintenance and asset management
www.res-eng.co.uk	Electrical and mechanical maintenance

Unit 7: Introduction to Managing and Maintaining Property and Assets

Unit code: J/502/0138

QCF Level: 3

Credit value: 3

Guided learning hours: 12

Unit aim

To develop knowledge and understanding of managing and maintaining property and assets.

Unit introduction

The maintenance of property and related assets could be regarded as one of the core functions of facilities management. Learners having this responsibility will require some knowledge of property law and an understanding of the need to keep registers and be able to plan and monitor maintenance.

This unit aims to develop learners' understanding of the estate-management function and the factors involved in the maintenance of property and assets. The unit links well with several other units in particular *Unit 5: Managing the Efficient Use of Materials* and *Unit 6: Managing the Effective Use of Equipment*. For learners working towards an apprenticeship the unit provides the underpinning knowledge for the competence-based *Unit 10: Maintain Property and Assets* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

On completion of this unit learners will know how to keep records of property and assets within their area of responsibility. Knowledge will be gained in the development and application of maintenance schedules. The unit also develops underpinning knowledge, which can be applied to mandatory competence-based *Unit 1: Provide and Monitor Facilities for Clients* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand the estate management function	1.1 describe the property portfolio of their employing organisation 1.2 explain the benefits and disadvantages of being a tenant and an owner-occupier 1.3 describe the basics of the property law 1.4 describe the purpose of having a property register
2 Understand premises and building services maintenance	2.1 list the building services and fabric components within their organisation's estate 2.2 explain the purpose of a building asset register 2.3 identify the ongoing maintenance activities that are carried out and give the resources they or others may need for one of these typical maintenance tasks 2.4 describe the types of maintenance regimes 2.5 explain what factors they should consider when developing maintenance plans and schedules 2.6 explain how a computerised maintenance management systems can enhance performance of recording and tracking maintenance activities

Unit content

1 Understand the estate management function

Property portfolio: asset location; asset identification; asset description; date of acquisition; purchased assets; leased assets; non-capital assets; buildings; services; equipment

Tenant or owner-occupier: tenancy agreement; covenants; easements; asset life; tenant liability; balance sheets; liabilities

Basics of property law: title; leasehold; freehold; ground rent; conveyancing; Landlord and Tenant Act 1995; planning law; zoning; common law rights; chattels

Property register: building type; building location; building condition; covenants; rights of way; easements; capitalisation threshold; operating leases

2 Understand premises and building services maintenance

Building services and fabric components: heating; lighting; lifts; air conditioning; fire prevention; fire escapes

Building asset register: asset description; asset location; asset condition; building services; maintenance requirements; fixed asset register; capital assets; non-capital assets; depreciated assets

Ongoing maintenance activities and resources needed: repairs and renewals, redecorating, access equipment, ladders, work platforms; personal protective equipment (PPE); temporary lighting; cleaning

Types of maintenance regimes: planned preventive maintenance; fix on fail; use and replace; extended warranty; life-cycle maintenance

Maintenance plans and schedules factors to consider: frequency; access; downtime; performance; expertise; warranty; legislation; replacement cost; depreciation; cost of ownership

Computerised maintenance systems: frequency identification; bar-coding; maintenance alerts; inventory control

Essential guidance for tutors

Delivery

To achieve this unit learners need to understand the estate-management function and the factors involved in the maintenance of buildings and related assets. Learners working towards an apprenticeship in facilities management will normally undertake this unit where their job role includes responsibility for the maintenance of property and assets.

Workshop sessions covering this unit should focus on the actual assets to be managed by the learners attending. Practical examples should be selected. Learners should be encouraged to develop registers and maintenance schedules for property and assets within their own area of responsibility. For learners working towards an apprenticeship, this unit should be delivered in conjunction with competence-based *Unit 10: Maintain Property and Assets* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for this unit, and associated competence units, can be usefully combined with appropriate referencing to meet the learning outcomes of both. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Responses to oral questioning and/or professional discussion can also usefully be employed to achieve specific outcomes demonstrating that learners have the relevant knowledge and experience.

The bulk of evidence for learning outcome 2 could be readily obtained during workshop delivery, using material submitted by learners in response to set tasks. Remaining assessment criteria for this unit should be met by learners after research and private study.

Essential resources

No special resources are needed for this unit but it is assumed that learners will have access to asset registers and maintenance schedules in the workplace.

Indicative resource materials

Textbooks

Brady W – *Managing Fixed Assets in the Public Sector: Managing for Service Excellence* (Universal Publishers, 2001) ISBN 9781581126846

Bragg S – *Fixed Asset Accounting* (Accounting Tools LLC, 2011)
ISBN 9780980069921

Kelly A – *Maintenance Strategy* (Butterworth-Heinemann, 1997)
ISBN 9780750624176

Journals

Property Law Journal

Websites

www.kzsoftware.com	Database tracking software for businesses
www.propertylawuk.net	Property law updating service and research tool
www.realassetmgt.co.uk	Real Asset Management (RAM) UK
www.swg.com	Service Works Group

Unit 8: Introduction to the Effective Management of Space Within Own Organisation

Unit code: L/502/0139

QCF Level: 3

Credit value: 3

Guided learning hours: 10

Unit aim

To develop knowledge and understanding of the effective management of space in own organisation.

Unit introduction

The management of space is an important facet of facilities management. Inefficient use of space can add to an organisation's cost overheads and have an adverse impact on profitability. This unit aims to develop learners' understanding of space planning and to acquire knowledge of the tools and techniques available to assist with effective and efficient space management.

On completion of this unit learners will know how to devise and implement a space planning project. Knowledge will be gained of the legislation that impacts on the planning and management of space. Learners will be able to effectively interpret a space layout drawing and develop proposals for the optimisation of space utilisation. The unit also develops underpinning knowledge, which can be applied to mandatory competence-based *Unit 1: Provide and Monitor Facilities for Clients* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

The unit links well with several other units, in particular *Unit 7: Introduction to Managing and Maintaining Property and Assets*. Other units that relate well to this unit are *Unit 10: Managing Utility Services and Energy Efficiency in the Workplace* and *Unit 21: Managing Sustainability and Environmental Issues*. For learners working towards an apprenticeship the unit provides the underpinning knowledge for the competence-based *Unit 12: Manage Space* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand the principles that guide and the legislation that impacts on the planning and management of space	1.1 briefly explain the key concepts and principles of space planning and management 1.2 state the relevant legislation that impacts on space management activities in own organisation
2 Understand how to plan accommodation changes	2.1 describe the management and implementation of a space management project 2.2 effectively interpret a space layout drawing 2.3 list attributes that have to be updated on completion of a space management project
3 Understand optimisation of space utilisation	3.1 list examples of ways that space is used in own organisation and briefly explain how it could be better utilized 3.2 describe how to encourage responsible space occupancy

Unit content

1 **Understand the principles that guide and the legislation that impacts on the planning and management of space**

Principles of space planning management: working space; walkway space; services; data requirements; lighting; heating; ventilation; usable/gross space ratio

Legislation impacting on space management: Workplace (Health, Safety and Welfare) Regulations 1992; Equality Act 2010; Regulatory Reform (Fire Safety) Order 2005; Town and Country Planning Act 1968; Building Control Regulations; Offices, Shops and Railway Premises Act 1963; Factories Act 1961 (Repeals and Modifications) Regulations 2009; current legislation

2 **Understand how to plan accommodation changes**

Implementation of a space-management project: floor plans; scenario planning; hot desking; co-location; privacy; lighting; space norms; space costs; space needs profiles; usage tracking

Interpreting space layout drawings: furniture; services; circulation space; storage; fire routes; lifts and stairs

Attributes to be updated: name labels; fire evacuation procedures; location information; company literature; stationery

3 **Understand optimisation of space utilisation**

Space utilisation: storage; meetings; corridors; training facilities; workstations; maintenance; preparation; production

Responsible space occupancy: shared facilities; reduced storage; home working; split shifts; numbers waiting; numbers through

Essential guidance for tutors

Delivery

To achieve this unit learners need to understand the principles of space planning and the factors involved in the management of space together with an understanding of the optimisation of space utilisation. Learners working towards an apprenticeship in facilities management will normally undertake this unit where their job role includes responsibility for the planning and management of space within their own organisation.

Workshop sessions covering this unit should focus on the type of space (office, storage, production, training etc) to be managed by the learners attending. Practical examples should be selected. Learners should be encouraged to develop a space management project within their own area of responsibility. For learners working towards an apprenticeship this unit should be delivered in conjunction with competence-based *Unit 12: Manage Space* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for learning outcome 1 can be usefully combined with evidence for learning outcome 1 of competence-based *Unit 12: Manage Space* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF) and referenced to meet the assessment criteria of both. Evidence for learning outcomes 2 and 3 of this unit can also contribute to evidence for learning outcomes 2 and 3 of *Unit 12: Manage Space* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF) with appropriate referencing. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Response to oral questioning and/or professional discussion can also be used to achieve learning outcomes, demonstrating that learners have the relevant knowledge and experience.

The bulk of evidence for learning outcome 2 of this unit could be readily obtained during workplace delivery using material submitted by learners in response to set tasks. Remaining assessment criteria for this unit could be met through written submissions from learners after a small amount of research and private study.

Essential resources

No special resources are needed for this unit but access to computer-aided design facilities would be useful.

Indicative resource materials

Textbooks

Becker F – *Offices at Work: Uncommon Workspace Strategies That Add Value and Improve Performance* (Jossey-Bass, 2004) ISBN 9780787973308

Groves K and Knight W – *I Wish I Worked There* (John Wiley and Sons, 2010) ISBN 9780470713839

Marmot A F and Eley J – *Office Space Planning* (McGraw-Hill, 2000) ISBN 9780071341998

Myerson J and Ross P – *Space to Work: New Office Design* (Laurence King, 2006) ISBN 9781856694568

Schlenger S and Roesch R – *How to be Organised in Spite of Yourself* (Signet, 1999) ISBN 9780451197467

Vidiella A S – *Atlas for Office Interiors* (Rockport, 2008) ISBN 9781592534319

Journal

FM World

Websites

www.cafmexplorer.com

Software house

www.cubic.co.uk

Space management site

www.officespacemodel.com

Office space calculator

www.radicals.com

Self storage

Unit 9: Understanding Support Services Operations

Unit code: F/502/0140

QCF Level: 3

Credit value: 3

Guided learning hours: 10

Unit aim

To develop an understanding of support services operations.

Unit introduction

Facilities management by its very nature is based on the provision of services which, although important, are not part of an organisation's core business. Learners employed in a facilities management role may well be responsible for the management of services supporting the function of their own department. Understanding the role of the support service provider is important both from the viewpoint of the client and from that of the provider.

On completion of this unit the learner will understand support service operations and the factors involved in providing these services to meet organisational requirements. Learners will also gain an understanding of the role of service level agreements and the ways in which support services can be effectively monitored. For learners working towards an apprenticeship the unit develops underpinning knowledge which can be applied directly to mandatory competence-based *Unit 1: Provide and Monitor Facilities for Clients* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

The unit aims to develop knowledge and understanding of this key aspect of facilities management and underpins many other units in the qualification. It is important for learners to appreciate the factors involved in support service operations in order to be able to work effectively in a facilities management environment. The unit links well to *Unit 11: Understanding Procurement and Supplier Management in the Workplace*, *Unit 12: Managing Contracts and Contractors in the Workplace* and *Unit 13: Outsourcing Strategies in Facilities Management*.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand the range of support services required by the organisation and the legislation that impacts on these services	1.1 describe the range of support services that is required by own organisation and identify the legislation that impacts on these services
2 Know what support services are and how they are currently being provided and delivered	2.1 describe the role of service level agreements, their structure and format and how they are used with both customers and suppliers in own organisation 2.2 briefly describe what support services are currently being provided by the facilities management department and how these are delivered
3 Understand the options of delivering support services	3.1 explain various ways of providing support services to meet organisational requirements 3.2 explain how the quality of support services is measured and monitored

Unit content

1 **Understand the range of support services required by the organisation and the legislation that impacts on these services**

Range of support services and related legislation: building maintenance; catering; cleaning; security; event management; equipment maintenance; health; leisure facilities; contract law; public liability insurance; Sale of Goods Act 1979; Workplace (Health, Safety and Welfare) Regulations 1992; Equality Act 2010; Regulatory Reform (Fire Safety) Order 2005; Offices, Shops and Railway Premises Act 1963; Factories Act (Repeals and Modifications) Regulations 2009; current legislation

2 **Know what support services are and how they are currently being provided and delivered**

Service level agreements: definition of responsibilities; terms and conditions; period of service; payment terms; arbitration; escalation; lines of communication

Support service delivery: maintenance; catering; cleaning; security; on call 24/7; defined working hours; reporting structure

3 **Understand the options of delivering support services**

Ways of providing support services: outsourcing; fixed-term contract; rolling contract; franchising; partnership agreements; sub-contracting; target payments; decision sharing

Measuring and monitoring support services: progress meetings; quality audit; reporting structure; change orders; warranty period; progress milestones; cost control

Essential guidance for tutors

Delivery

In order to achieve this unit learners need to understand support services operations and the various ways of delivering and monitoring these services. Learners working towards an apprenticeship will normally undertake this unit in conjunction with mandatory competence-based *Unit 1: Provide and Monitor Facilities for Clients* from the *Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF)*. The two units are closely linked.

Workshop sessions covering this unit should examine the range of support services being provided within learners' organisations and the ways in which these services can be specified and monitored. The unit provides the basic understanding for several other units dealing with specific support services. The unit links particularly well with *Unit 11: Understanding Procurement and Supplier Management in the Workplace*, *Unit 12: Managing Contracts and Contractors in the Workplace* and *Unit 13: Outsourcing Strategies*.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. For example evidence to meet the learning outcomes of this unit can be usefully combined with evidence for mandatory competence based *Unit 1: Provide and Monitor Facilities for Clients* from the *Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF)* with appropriate referencing to meet the learning outcomes of both. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can also usefully be employed to achieve specific outcomes demonstrating that learners have the relevant knowledge, understanding and experience.

Evidence submitted to achieve the assessment criteria of this unit could be combined with evidence to achieve assessment criteria of other units dealing with specific support services. The unit could be assessed in combination with units dealing with support services for which learners have responsibility where there are areas of commonality.

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials**Textbooks**

Blokdijk G – *Service Level Agreement 100 Success Secrets* (Emero, 2008)
ISBN 9780980471618

Reuvid J – *Managing Business Support Services* (Kogan Page, 2002)
ISBN 9780749439002

Sturn R and Morris W – *Foundations of Service Level Management* (Sams, 2000)
ISBN 9780672317439

Journal

Journal of Services Marketing

Websites

www.ecgroup.co.uk	Handling and delivery solutions
www.emeraldinsight.com	Publisher of journals and books in business and management
www.hemscott.com	Internet, software, and print-based products and services
www.tailormadesupport.com	Operational support

Unit 10: Managing Utility Services and Energy Efficiency in the Workplace

Unit code: L/502/0142

QCF Level: 3

Credit value: 2

Guided learning hours: 8

Unit aim

To develop knowledge and understanding of managing utility services and energy efficiency.

Unit introduction

With the continuing escalation of energy prices it is important to seek out the most cost-effective provision, while at the same time matching supply with demand. Effective management of utility services can lead to reduced consumption and help towards meeting government energy targets. This unit aims to develop learners' understanding of utility services management and to acquire knowledge of possible ways of improving energy efficiency within their own organisation.

On completion of this unit learners will know how to manage utility services effectively in order to match supply with demand and to obtain the most cost-effective service provision. Learners will also gain a better understanding of the importance of energy efficiency and of ways to improve it within their own organisation. For learners working towards an apprenticeship the unit also develops underpinning knowledge which can be applied directly to mandatory competence-based *Unit 1: Provide and Monitor Facilities for Clients* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

The unit links well with *Unit 7: Introduction to Managing and Maintaining Property and Assets* and *Unit 21: Managing Sustainability and Environmental Issues*. For learners working towards an apprenticeship the unit provides the underpinning knowledge for the competence-based *Unit 13: Carry Out Energy Management* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand own organisation's utility services requirements	1.1 explain what utility services are required by own organisation and examine what is actually provided 1.2 explain the options of acquiring utility services to bridge the gap between own organisation's requirements and actual provision
2 Understand the efficiency of own organisation's energy consumption	2.1 explain the importance of energy management for own organisation 2.2 examine how own organisation measures energy requirements and actual consumption to determine efficiency 2.3 identify ways of improving own organisation's energy efficiency

Unit content

1 Understand own organisation's utility services requirements

Utility services requirements compared with actual provision: electricity; single phase; three phase; gas; water; oil; solid fuel; departmental energy demand; metered supply; energy bills

Options for matching provision with requirements: energy efficiency; changing suppliers; combined tariffs; alternative energy sources; renewable energy; energy conservation

2 Understand the efficiency of own organisation's energy consumption

The importance of energy management: energy cost increases; carbon footprint; alternative sources; sustainability; fossil fuel depletion

Measuring energy requirements and consumption: energy meters; data loggers; departmental demand; energy needs analysis; consumption data

Ways of improving energy efficiency: energy targets; energy awareness; responsible use; modern equipment; load limiting; presence detectors; insulation; fluorescent lighting

Essential guidance for tutors

Delivery

To achieve this unit learners need to know the utilities services requirements of their own organisation and the options available to match supply with demand in a cost-effective way. A basic understanding of energy efficiency is also required, together with ways of improving and measuring efficiency. Learners working towards an apprenticeship in facilities management will normally undertake this unit where their job role includes responsibility for the management of utilities services within their own organisation.

Workshop sessions covering this unit should focus on the range of utilities (electricity, water, gas, oil etc) in use by the learners' organisations employing. Practical examples should be selected. Learners should be encouraged to develop proposals to reduce energy consumption within their own area of responsibility. For learners working towards an apprenticeship this unit should be delivered in conjunction with competence-based *Unit 13: Carry Out Energy Management* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. For example, evidence for outcome 2 of this unit can be usefully combined with evidence for the outcomes of competence-based *Unit 13: Carry Out Energy Management* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF) and referenced to meet the assessment criteria of both. Assessors will find that adopting a holistic approach in this way reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Response to oral questioning and/or professional discussion can also usefully be employed to achieve specific outcomes demonstrating that learners have the relevant knowledge and experience.

The bulk of evidence for learning outcome 1 of this unit could be readily obtained during workplace delivery, using material submitted by learners in response to set tasks. Remaining assessment criteria for this unit could be met by written submissions from learners after a small amount of research and private study.

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials**Textbooks**

Doty S – *Commercial Energy Auditing Reference Handbook* (Fairmont Press, 2008)
ISBN 9781420061116

Robson C – *Utility Regulation and Competition Policy* (Institute of Economic Affairs, 2002) ISBN 9780255365239

Trumann A, Younger W J and Niehus T – *Handbook of Energy Audits*
(CRC Press, 2009) ISBN 9781439821459

Wulfinghoff D R – *Energy Efficiency Manual* (Energy Institute Press, 2000)
ISBN 9780965792677

Journals

Energy Efficiency

Energy Journal

Websites

www.buildingsdatabook.eren.doe.gov	Statistics on residential and commercial building energy consumption
www.energysavingtrust.org.uk	Energy Saving Trust
Epa.gov/reg5rcra/wptdiv/p2pages/energy.pdf	Energy conservation and pollution prevention

Unit 11: Understanding Procurement and Supplier Management in the Workplace

Unit code: R/502/0143

QCF Level: 3

Credit value: 2

Guided learning hours: 8

Unit aim

To develop knowledge and understanding of procurement and supplier management.

Unit introduction

Learners working in a facilities management environment may have responsibility for procuring the supplies and services needed in their area of activity. Where this is the case procedures and documentation will normally already be in place to facilitate the procurement process. Learners can be given the opportunity through this unit to examine a range of procurement procedures beyond those in use in their own workplace.

On completion of this unit learners will know how to control the procurement process and use appropriate documentation and procedures. The unit deals with the identification and validation of procurement requirements as well as with the selection of specialist suppliers and the techniques available for monitoring performance.

This unit aims to develop the knowledge and understanding required to identify procurement requirements and successfully implement appropriate control documentation and procedures in the workplace. The procurement process forms the starting point for many facilities management activities and the unit links well with *Unit 5: Managing the Effective Use of Materials*. Procurement can also initiate the awarding of contracts and could usefully link to *Unit 12: Managing Contracts and Contractors in the Workplace*.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand procurement in own organisation</p>	<p>1.1 examine and explain relevant procurement procedures in own organisation</p> <p>1.2 describe how procurement requirements can be identified and validated</p> <p>1.3 give an example of typical purchases in own area of responsibility</p> <p>1.4 give an example of a supply chain in own organisation</p> <p>1.5 describe types of specifications used in the organisation</p>
<p>2 Understand how specialists and suppliers are identified and managed in own organisation</p>	<p>2.1 list specialists and suppliers used by own organisation and explain how these specialists and suppliers are selected</p> <p>2.2 briefly explain how the performance of specialists and suppliers is monitored and how continuous improvement is encouraged</p>

Unit content

1 Understand procurement in own organisation

Procurement procedures: purchase orders; requisitions; specifications; authority levels; payment terms; terms and conditions; specifications; e-procurement

Identifying and validating procurement requirements: demand analysis; make or buy, lease or rent; re-use/recycle; price fluctuations; exchange rates; cost of ownership

Typical purchases: raw materials; consumables; capital items; services; direct and indirect

Supply chain: point of origin to point of consumption; synchronising supply with demand

Types of specification: standard terms; conditions of contract; special conditions; fixed-term contract; bill of quantities

2 Understand how specialists and suppliers are identified and managed in own organisation

Selection of specialists and suppliers: prequalification; invitation to tender; resources availability; lead time; preferred suppliers

Monitoring performance of specialists and suppliers: progress reviews; interim payments; penalty clauses; quality testing; SLAs; Key Performance Indicators

Essential guidance for tutors

Delivery

In order to achieve this unit learners need to understand the techniques and procedures available to procure goods and services and to effectively manage suppliers. Learners working towards an apprenticeship will normally undertake this unit in conjunction with competence based *Unit 7: Procure Supplies* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF). The two units are very closely linked.

Workshop sessions covering this unit should examine the relationship between procurement and the activities which follow. Successful procurement meets the operating needs of an organisation. Learning outcome 1 of the unit links well with learning outcome 1 of *Unit 6: Managing the Effective Use of Materials* and the two units could be delivered in conjunction. Learning outcomes for the unit also link well with those of *Unit 12: Managing Contracts and Contractors in the Workplace*.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. For example, evidence to meet the outcomes of this unit can be usefully combined with evidence for *Unit 7: Procure Supplies* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF) with appropriate referencing to meet the learning outcomes of both. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can also usefully be employed to achieve specific outcomes demonstrating that learners have the relevant knowledge and experience.

Evidence submitted to achieve assessment criterion 1.1 of this unit could go towards assessment criterion 1.4 of *Unit 5: Managing the Effective Use of Materials*. Learners undertaking *Unit 12: Managing Contracts and Contractors in the Workplace* could also find areas of commonality.

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbooks

Baily P – *Procurement Principles and Management* (Prentice Hall, 2008)
ISBN 9780273713791

Buchanan M – *Profitable Buying Strategies* (Kogan Page, 2008)
ISBN 9780749452384

Dr Lysons K and Dr Farrington B – *Purchasing and Supply Chain Management*
(Prentice Hall, 2005) ISBN 9780273694380

Journal

Supply Management

Websites

www.globalprocure.com

Global Procurement Council

www.sapphiresystems.com

Financial management software, accounting software and business management software

Unit 12: Managing Contracts and Contractors in the Workplace

Unit code: H/502/0146

QCF Level: 3

Credit value: 2

Guided learning hours: 8

Unit aim

To develop knowledge and understanding of managing contracts and contractors in the workplace.

Unit introduction

Facilities management frequently involves the management of external contracts and contractors. Learners working in a facilities management role could be called upon to assist with the award and monitoring of contracts to bring them to a successful conclusion. These contracts could be for the construction of new facilities or for the supply of goods and services.

This unit aims to develop the knowledge required to contribute to the successful framing and implementation of contracts in the workplace. Learners will acquire knowledge of the contract management tools and procedures used to maintain contract progress and quality avoiding time and cost overruns. Knowledge will also be gained on how to cope with unforeseen contract circumstances and how to deal with them in the correct manner.

On completion of this unit learners will understand how to operate effectively in a contract environment. The unit deals with the tools used in contract management as well as the methods used for managing contractors in the workplace. The unit provides a good grounding of contract knowledge. Apprentices are advised to undertake this unit in conjunction with *Unit 20: Specify, Commission and Manage External Contracts and Agreements* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF). Knowledge gained from this unit is also applicable to other units where external suppliers are involved.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand how contracts are managed in the workplace	1.1 briefly outline contract management procedures and tools used in own workplace 1.2 give an example of a contract that they assist in managing and explain how they do this
2 Understand how contractors can be managed in the workplace	2.1 explain how to communicate all relevant information to contractor(s) in the workplace 2.2 give an example of a contractor that they manage and explain what information the contractor will require to perform their function safely 2.3 using the example they have provided explain a control tool that they could use to monitor the contractors work 2.4 using the example they have provided explain how they could stop a contractor working if the work were unsafe, unauthorised or causing business disruption

Unit content

1 Understand how contracts are managed in the workplace

Contract management procedures and tools: letter of intent; notice to proceed; progress meetings; progress payments; change orders; final account; warrantee period; contracts; service level agreements

Contract management methods employed: site supervision; health and safety; interim payments; compliance with specifications; conditions of contract; progress checking; substantial completion; exceptions list

2 Understand how contractors can be managed in the workplace

Communicating relevant information: site instructions; conditions of contract; change orders; permit to work

Contract information required: working hours limit; noise restrictions; height restrictions; access restrictions; emergency arrangements; contractor's site compound; working space; site clearance requirements; security arrangements; confidentiality

Tools for monitoring contractors' work: progress scheduling; progress meetings; progress milestones; quality checks; quality tests; inspections; audits

Order to stop work: termination notice; closure order; breach of contract; contract time and cost overruns; unsafe working; lack of progress; failed targets

Essential guidance for tutors

Delivery

In order to achieve this unit learners will need to demonstrate their understanding of the tools and procedures used in the management of contracts and contractors. It is expected that apprentices will normally undertake this unit in conjunction with the equivalent competence based *Unit 20: Specify, Commission and Manage External Contracts and Agreements* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF). The two units are closely linked.

Learners should be given opportunities to acquire the knowledge needed in order to build a portfolio which meets the assessment criteria. Centres may find that this unit is best delivered through workshop sessions combined with the delivery of other related knowledge units. Suggested related units are *Unit 4: Managing Projects*, *Unit 11: Understanding Procurement and Supplier Management in the Workplace* and *Unit 13: Outsourcing Strategies in Facilities Management*. These workshop sessions can also be used to provide guidance to learners on assembling evidence for this and related competence based units.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit and the associated units can be combined to form part of a single portfolio with appropriate referencing to meet the learning outcomes of both qualifications. By adopting a holistic approach in this way it will be found that evidence for this unit also meets some of the criteria for other competence- and/or knowledge-based units.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies or in some cases answers to written questions. Professional discussion can also usefully be employed to achieve specific outcomes demonstrating that learners have the relevant knowledge and experience.

Assessment criteria 1.2, 2.2, 2.3 and 2.4 require reference to an actual example of a contract with which learners are involved. The evidence could be in the form of a case study but can also be represented by working documents: site instructions, contract correspondence, minutes of progress meetings, progress charts and contract termination documents. Some of the evidence submitted for competence-based *Unit 20: Specify, Commission and Manage External Contracts and Agreements* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF) can also meet the assessment criteria for this unit and vice versa.

Essential resources

No special resources are needed for this unit but learners will need access to any resources forming an essential part of their selected example contract.

Indicative resource materials

Textbooks

Lupton S, Cox S, Clamp H – *Which Contract – Choosing the Appropriate Building Contract* (RIBA Publishing, 2007) ISBN 9781859462379

Pathak – *Contract Management* (Macmillan India Ltd, 2008) ISBN 9780230635500

Spedding A – *CIOB Facilities Management* (Longman, 1994) ISBN 9780582257429

Journals

Contract Management Magazine

National Contract Management Journal

Websites

www.ogc.gov.uk

The Office of Government Commerce (OGC)

www.opensourceinc.com

Contract management

www.symfact.com

Compliance solutions

Unit 13: Outsourcing Strategies in Facilities Management

Unit code: Y/503/6036

QCF Level: 3

Credit value: 3

Guided learning hours: 19

Unit aim

The aim of this unit is to develop learners understanding of outsourcing within the context of facilities management.

Unit introduction

Facilities management, by its very nature, is often subject to outsourcing. Understanding the role of the external service provider is an important part of facilities management, both from the viewpoint of the client organisation and from that of an external service provider.

The unit aims to develop knowledge and understanding of this key aspect of facilities management. It is important for learners to appreciate the factors involved in outsourcing in order to be able to work effectively in a facilities management environment, either as client or as contractor. The unit links well to *Unit 12: Managing Contracts and Contractors in the Workplace*.

On completion of this unit learners will understand the implications of outsourcing and the factors involved in working in an environment where outsourcing is commonly used. The unit introduces the concept of outsourcing and the various aspects of its implementation as well as outsourcing from the point of view of the client organisation. It also explores outsourcing from the point of view of the external service provider.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand the concept of outsourcing in facilities management</p>	<p>1.1 describe types of outsourcing arrangements found in facilities management</p> <p>1.2 explain why outsourcing is used in facilities management</p> <p>1.3 explain the terms of a typical service level agreement used in facilities management</p>
<p>2 Understand how outsourcing can affect the operation of a client facilities management organisation</p>	<p>2.1 explain why an organisation would consider outsourcing</p> <p>2.2 analyse possible implications of outsourcing to a client organisation</p>
<p>3 Understand outsourcing in facilities management from the service provider's viewpoint</p>	<p>3.1 explain the role of the service provider under an outsourcing agreement in facilities management</p> <p>3.2 analyse implications of outsourcing to a facilities management service provider</p>

Unit content

1 Understand the concept of outsourcing in facilities management

Outsourcing arrangements: external service provider; in-house service provider; core business; supply contract; partnership; decision sharing; offshoring; co-sourcing; on-demand arrangements

Use of outsourcing in facilities management: reasons to include: support services; cost of provision; external expertise; external resources; business focus

Service level agreements: definition of service level agreement e.g. terms and conditions, lines of communication, progress monitoring, compliance, targets, incentives, sanctions and penalties, performance reviews, apportioning costs, revision of terms, applicable legislation, termination

2 Understand how outsourcing can affect the operation of a client facilities management organisation

Outsourcing considerations: cost savings; business focus; cost restructuring; quality; knowledge; operational expertise; capacity management; scalability; standardisation; security; new technology; staff insecurity; outside expertise; quality control; management control; flexibility; return on investment

Implications of outsourcing: management change; lines of communication; security of employment; business culture; change in work patterns; client–supplier relationship

3 Understand outsourcing in facilities management from the service provider's viewpoint

The role of service provider: contractor or partner; service definition; customer service

Service provider implications: definition of responsibilities; level of service; cost and budget; expertise

Essential guidance for tutors

Delivery

It is important that learners can demonstrate their understanding of outsourcing from both the client and the supplier perspective. Learners need to understand how to perform their role effectively either as a client or within the constraints of an outsourcing agreement. The unit links well with the knowledge-based unit *Unit 12: Managing Contracts and Contractors in the Workplace*. Apprentices undertaking this unit will find that it links well with *Unit 20: Specify, Commission and Manage External Contracts and Agreements* from the Edexcel Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learners should be given opportunities to acquire the knowledge needed to build a portfolio which meets the assessment criteria. The unit is probably best delivered through workshop sessions supplemented by individual study. It would be useful for learners to have access to, and to study, actual service level agreements. The workshop sessions can also be used to provide guidance to learners on assembling evidence for this and related competence- and knowledge-based units.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

The unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Appropriate referencing will be needed to meet the learning outcomes of both. Adopting a holistic approach in this way will reduce the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can also be used to achieve learning outcomes after learners have gained the relevant knowledge and experience.

Where learners are employed by an external supplier, actual work products relating to the outsourcing environment can be used as evidence, provided that learner involvement can be demonstrated. Where learners are employed by the client, but involved with monitoring supplier deliverables, evidence can also be derived from the workplace.

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbooks

Brown D and Wilson S – *The Black Book of Outsourcing* (Wiley and Sons, 2005)
ISBN 0471718890

Greaver M F – *Strategic Outsourcing* (Amacon, 1999) ISBN 9780814404348

Journals

Outsourcing Journal

Outsource Xpress Weekly

Websites

www.ventureoutsource.com

Sample outsourcing contracts, outsourcing calculators and information on how to evaluate electronics contract manufacturers

Unit 14: Managing Health and Safety at Work

Unit code: A/501/3817

QCF Level: 3

Credit value: 3

Guided learning hours: 10

Unit aim

To develop knowledge and understanding of health and safety in the workplace. This will include health and safety law, risk assessment, accident prevention and environmental responsibility.

Unit introduction

Managing health and safety in the workplace is a crucial aspect of facilities management to ensure both the wellbeing of operatives and individuals who may be affected by the operations being carried out, and the protection of the organisation and employer. Learners working in a facilities management environment will be expected to understand the relevant legislation, processes and procedures surrounding the management of health and safety in the workplace. Learners will need to be able to identify and explain current legislation and the terminology surrounding health and safety management as well as carry out a simple risk assessment in the workplace and identify aspects of environmental responsibility in their own organisation.

This unit aims to develop the understanding required to identify current health and safety legislation and understand its implications as well as identify individuals responsibilities relating to health and safety legislation. Learners will also gain the knowledge to identify ways to provide information, training and instruction opportunities to the team and also identify possible sources of guidance for managers on health and safety issues. Understanding of the risk assessment and accident prevention processes will also be gained along with knowledge on environmental responsibility.

This unit can be combined with *Unit 22: Understanding Incident Management and Disaster Recovery in the Workplace*. Evidence used in this unit may, with suitable cross-referencing, satisfy some of the requirements of this unit.

On completion of this unit learners will know how to identify current health and safety legislation and understand its implications as well as being able to identify and describe individuals responsibilities relating to health and safety legislation. Learners will also be able to identify ways to provide information, training and instruction opportunities to the team and also identify sources of guidance for managers on health and safety issues. Learners will be able to conduct a simple risk assessment and identify accident prevention processes as well as have an understanding of environmental responsibility.

This unit deals with health and safety at work, legislation, duties and the provision of training, information, guidance and instruction as well as risk assessment, accident prevention and control. It also covers the environmental responsibilities within an organisation.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understanding health and safety at work</p>	<p>1.1 identify two pieces of legislation relating to health, safety and welfare at work</p> <p>1.2 explain two duties statute law imposes on both the manager and the team</p> <p>1.3 outline the manager’s responsibilities contained within the organisation’s health and safety policy</p> <p>1.4 explain the meaning of a competent person</p> <p>1.5 identify two ways to provide health and safety information, instruction and training to the team</p> <p>1.6 identify expertise available in the organisation to help and advise the manager on health and safety issues</p>
<p>2 Understand risk assessment and accident prevention in the workplace</p>	<p>2.1 conduct a simple risk assessment in the workplace</p> <p>2.2 explain one practical accident prevention and control measure that could be implemented in the workplace</p>
<p>3 Understand the organisation’s environmental responsibility</p>	<p>3.1 explain the importance of environmental responsibility for own organisation</p> <p>3.2 describe what action the first line manager could take to enable the organisation to fulfil its environmental responsibility</p>

Unit content

1 Understand health and safety at work

Legislation relating to health and safety: Health and Safety at Work Act 1974; Factories Act 1961; HSE notification of a Project (F10) – Construction (Design and Management) Regulations 2007; The Control of Substances Hazardous to Health Regulations 2002 (COSHH); Reporting of Injuries, Diseases & Dangerous Occurrences Regulations (RIDDOR)

Statute law: written law made by Parliament

Responsibilities: three main types i.e. absolute duties, duties qualified by the term 'practicable', duties qualified by the term 'reasonably practicable'

Duties affect the following: provision and maintenance of plant and systems; ensuring safe use; handling; transport and storage of articles and substances; provision of information and training as necessary; maintaining a safe place of work and safe access and egress; maintaining a safe working environment; welfare facilities; reporting accidents, incidents and near misses

Competence: skill; knowledge; training; practical experience

Provision of information instructions and training: induction; briefing; toolbox talk; presentation; pamphlets; leaflets; posters; external specialists; qualifications

Available expertise: specialist department; trained person; intranet; Health and Safety Executive; industry watchdogs; representative bodies; other external organisations

2 Understand risk assessment and accident prevention in the workplace

Assessment of risk: minimisation of an effect or outcome; measures to minimise risk, inform and educate; consideration of alternative methods; materials or processes

Prevention and control: inspections, risk assessments; method statements; audits external or internal; meetings; training; raising awareness

3 Understand the organisation's environmental responsibility

Organisation's environmental responsibility: a legal responsibility for the impact the business has on the environment e.g. disposal of waste, pollution, conservation; policies; procedures; strategies; resources

Action that could be taken: environmental plan; monitoring; allocate responsibilities

Essential guidance for tutors

Delivery

To achieve this unit, learners need to effectively recognise the legislation surrounding the workplace and the responsibilities that are placed on people and organisations. Learners will need to understand how training and information are provided. They will need to be able to carry out a simple risk assessment and understand the principles of accident prevention and control measures. Learners will also need to be aware of the systems in place in their own organisation to ensure compliance with environmental responsibilities.

Learners should be encouraged to produce evidence based on their workplace, demonstrating the identification of relevant legislation, the duties it places on people and organisations, risks, hazards, and methods of management of them along with their organisation's environmental responsibilities and how they fulfil them. The unit is probably best delivered through workshop sessions followed by tutorials on legislation, responsibilities, risk identification, assessment and management procedures, along with environmental responsibilities within organisations.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for this unit can be usefully combined with appropriate referencing to meet the learning outcomes of other units, particularly *Unit 22: Understanding Incident Management and Disaster Recovery in the Workplace*. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can also usefully be employed to achieve specific outcomes after learners have gained relevant knowledge and experience.

To achieve assessment criteria 1.1, 1.2, 1.3 and 1.4 learners need to produce evidence of knowledge and understanding of the legislation surrounding health and safety at work and the responsibilities placed on individuals by this legislation. This evidence may be in the form of research notes, evaluation conclusions, questions and answers and/or reports, identifying risks and hazards and the potential outcomes if the identified risks and hazards are not managed correctly. Assessment criteria 1.5 and 1.6 can be achieved using research notes and reports based on learners' workplace and organisation. Assessment criteria 2.1 and 2.2 involve learners producing evidence relating to the reduction of risks and hazards in the form of a simple risk assessment and the identification of an accident prevention or control measure that could be implemented in the workplace. This evidence can be in the form of a simple risk assessment, research notes, evaluation conclusions, questions and answers and/or reports gained from the workplace.

Assessment criteria 3.1 and 3.2 can be achieved using learners' workplace research notes involving their own organisation and a written report or statement on environmental responsibility linked to this.

Essential resources

No special resources in the form of equipment or facilities are required for this unit. It is expected that the learner will have access to the relevant workplace information relating to safety measures.

Indicative resource materials

Textbooks

Atkins B and Brooks A – *Total Facilities Management* (Wiley-Blackwell, 2009)
ISBN 9781405186599

Booty F – *Facilities Management Handbook* (Butterworth-Heinemann, 2008)
ISBN 9780750689779

Journal

International Journal of Project Management

Websites

www.businesslink.gov.uk	Online resource for businesses
www.hse.gov.uk	Health and Safety Executive
www.todaysfacilitymanager.com	Blogs, articles, columns and resources for facilities management

Unit 15: Understanding Change in the Workplace

Unit code: M/501/3796

QCF Level: 3

Credit value: 2

Guided learning hours: 11

Unit aim

To develop knowledge and understanding of change in an organisation and the effects that change may have on people and finance in an organisation.

Unit introduction

Change and innovation within the workplace is a necessity to allow organisations to adapt to market trends and forces. Learners working in a facilities management environment will frequently be involved in change and innovation in both the services that they provide and their own organisation.

This unit aims to develop the knowledge required to identify change and innovation opportunities for the organisation, investigate and explain the benefits of the identified opportunities and identify barriers to change and suggest ways to overcome the identified barriers. Learners should also be able to identify possible effects of change on people and organisations. Evidence used in this unit may, with suitable cross-referencing, satisfy some of the requirements of other units.

On completion of this unit learners will know how to identify change and innovation opportunities for the organisation, investigate and explain the benefits of the identified opportunities, identify barriers to change and suggest ways to overcome the identified barriers. Learners will also be able to identify possible effects of change on people and organisations. The unit deals with the identification of opportunities for change, overcoming barriers to the changes identified and communicating the change to people effectively. It also deals with the effects of change on individuals, departments and organisations.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand change in an organisation	1.1 explain the benefits of innovation and change for the organisation 1.2 identify the barriers to change and innovation in the workplace and explain practical ways of overcoming these barriers 1.3 explain why communication is important in successful implementation of change
2 Understand the effects of change on people and finance in an organisation	2.1 explain possible human and financial effects of change upon people, departments and the organisation

Unit content

1 **Understand change in an organisation**

Change: new processes or procedures; expansion; restructure; downsizing; new markets or products; deviation into a new field

Barriers to change: individuals; cost; understanding; technology; culture; tradition; personality conflict; loss of status; self-interest; habit; fear

Communication: oral; written; electronic; visual; body language

2 **Understand the effects of change on people and finance in an organisation**

Effects: personal circumstances; progression; regression; relocation; profit; loss; redundancies; restructuring; share prices; mistrust; resistance; instability; concern; short-term; long-term

Essential guidance for tutors

Delivery

In order to achieve this unit learners need to understand change and innovation in the workplace, barriers to change and the effects of change on individuals, departments and organisations.

Learners should be encouraged to produce evidence based on their own workplace or organisation. The unit is probably best delivered through workplace sessions, followed by tutorials. Tutors should check that learners' workplaces or organisations can provide evidence in relation to this unit prior to commencement. Alternatively, tutors could set a series of scenarios or assignments to cover the requirements.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for this unit can be combined with appropriate referencing to meet the learning outcomes of other units. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of knowledge is probably best achieved through examination of written evidence. This evidence can be in the form of assignments, reports, case studies and, in some cases answers to written questions. Professional discussion can also be used to achieve learning outcomes after learners have gained the relevant knowledge and experience.

To achieve assessment criteria 1.1, 1.2, 1.3 and 2.1 learners need to produce evidence of understanding change within an organisation and its possible effects on individuals and the organisation. This can be in the form of a case study, research notes, evaluation conclusions and/or reports.

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials**Textbooks**

Booty F – *Facilities Management Handbook* (Butterworth-Heinemann, 2008)
ISBN 9780750689779

Institute of Leadership – *Understanding Change in the Workplace*
(Pergamon Flexible Learning, 2007) ISBN 0080464246

Websites

www.businessballs.com/changemanagement.htm	Rules for management of change
www.kotterinternational.com	Change leadership
www.strategies-for-managing-change.com/managing-change-in-the-workplace.html	Managing change in the workplace
www.todaysfacilitiesmanager.com	Blogs, articles, columns and resources for facilities management

Unit 16: Building the Team

Unit code: J/501/3805

QCF Level: 3

Credit value: 1

Guided learning hours: 5

Unit aim

To develop knowledge and understanding of building the team in the facilities management environment.

Unit introduction

Within facilities management, learners will be expected to identify the best available team to deliver the requirements of the client, assemble the team and provide the necessary support and guidance to allow the team to perform effectively. They will be expected to be able to identify and explain behaviours that can develop and maintain trust with the team at work, understand the importance of confidentiality and the part that it can play in the team structure, understand the differences between groups and teams in the workplace and know how to benefit from knowing the team members' strengths and weaknesses.

This unit aims to develop the knowledge required to understand the dynamics of forming and maintaining a team which will lead to effective performance in the workplace. The learner will acquire knowledge of each of these aspects.

This unit deals with building trust and maintaining confidentiality and the reasons and benefits to be gained by this knowledge. It also deals with the difference between a team and group, the formation of them and the considerations that should be paid to the team members' strengths and weaknesses when determining roles.

This unit can be linked to other units, such as *Unit 19: Managing Performance*. Knowledge gained from this unit is also applicable to other units where teams are involved.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand how to develop and maintain trust at work	1.1 explain behaviours which could develop and maintain trust at work 1.2 explain why confidentiality is important in building and maintaining trust in the team
2 Know how to build the team	2.1 give one example of a group and one example of a team within the workplace. Justify the classification of examples given 2.2 briefly describe the stages of an established model of group formation 2.3 explain how a manager could benefit from team members' preferred team roles

Unit content

1 **Understand how to develop and maintain trust at work**

Behaviours: honesty; openness; being supportive; understanding; being flexible; accommodating

Confidentiality: personal issues; work issues

2 **Know how to build the team**

Group or team: a team is generally formed to achieve something that individuals could not achieve alone e.g. a football or netball team is formed of members with differing roles for the purpose of the greater goal of winning; a group could be people doing the same thing as each other with no larger goal in mind e.g. a group of supporters is made of individuals all doing the same thing with no greater goal

Group formation: task; expectations of the group; attitude of the group; learner selection; possible conflicts; agreement on methods; cooperation; communication

Benefits of knowing roles: performance of individuals in their preferred roles is generally better; lack of conflict; respect for each other's input; no need for additional training; hierarchy easier to determine

Essential guidance for tutors

Delivery

To achieve this unit learners will need to demonstrate their understanding of the tools and techniques used in team building and maintenance. It is expected that apprentices will normally undertake this unit in conjunction with units such as *Unit 18: Managing Performance* as the units hold common elements.

Learners should be encouraged to draw on their own workplace experience for evidence relating to this unit. The unit is probably best delivered through workshop sessions followed by tutorials on the dynamics of teams and group formation within organisations.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learners' progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for this unit and other associated units can be usefully combined with appropriate referencing to meet the learning outcomes of a number of combinations. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved through examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion and observation can also usefully be employed to achieve specific outcomes after learners have gained relevant knowledge and experience.

Assessment criteria 1.1 and 1.2 can be achieved by using learners' written explanations of the ways in which trust can be developed and the importance of confidentiality, with examples from the workplace included or observed class discussions. Assessment criteria 2.1, 2.2 and 2.3 can be achieved through learners' written responses to questions, case studies or perhaps a workplace-based project or discussion. Where possible, workplace examples could be used to support other forms of evidence.

Essential resources

No special resources are required for this unit. It is expected that learners will have access to the relevant workplace information relating to teams and groups.

Indicative resource materials

Textbook

Mackin D – *The Team Building Toolkit* (Amacom, Second Edition 2007)
ISBN 0814474396

Websites

http://1000ventures.com/business_guide/crosscuttings/team_vs_group.html Information on team building

www.lancs.ac.uk/palatine/AGP/resource_11.htm Information on forming groups

Unit 17: Recruiting, Selecting and Inducting New Staff in the Workplace

Unit code: Y/501/3811

QCF Level: 3

Credit value: 3

Guided learning hours: 10

Unit aim

To develop knowledge and understanding of the processes involved in recruiting, selecting and inducting new staff in the workplace.

Unit introduction

Facilities management frequently involves the recruiting of new members of staff or contractors to carry out the services required by the client or the individual's company. Learners will be expected to assist in the preparation of job descriptions and person specifications for a particular post or contract, follow through the interview process and appointment and arrange and carry out induction of the operative or contractor to the workplace.

This unit aims to develop the knowledge required to contribute to the preparation of an accurate job description, interview processes and appointment of a member of staff or contractor and the formulation and delivery of an appropriate induction relevant to the place of work.

On completion of this unit, learners will understand the process of recruiting, selecting and inducting new staff members within the policies and procedures of their company. This unit deals with investigating the company procedures and policies and producing an accurate job description for the vacancy in question as well as with the preparation and implementation of an interview procedure appropriate for selecting the most suitable learner. The unit also deals with the process of inducting the successful applicant into the workplace, meeting legal and practical requirements. Knowledge gained from this unit is also applicable to other units where staff and contractors are involved.

This unit links well with competence-based *Unit 17: Recruit Staff in Own Area of Responsibility* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Know how to plan to recruit	1.1 identify the organisation’s policies and procedures that could guide a first line manager in recruitment, selection and induction 1.2 conduct a job analysis and prepare a job description and person specification for a post within own area of responsibility
2 Know how to select the right person	2.1 explain how they could prepare for selection interviews to ensure impartiality and optimum decision making in selecting the most suitable applicant 2.2 explain a recognised technique that could be used during interviews
3 Understand the induction process	3.1 explain the importance of effective induction 3.2 describe the phases of induction in the organisation 3.3 describe which legal and practical aspects of health and safety should be included in the organisation’s induction process 3.4 explain one method that could be used to record an individual’s progress during induction 3.5 explain how an induction process could be evaluated

Unit content

1 Know how to plan to recruit

Identify the organisation's policies and procedures: company recruitment procedure/guidance notes; company advertising policy/procedure/guidance notes; company induction policy/procedure/guidance; company procedure manual

Conduct a job analysis: type of work; location, experience required; certification required; reporting lines of communication; subordinates; managers; post duration; temporary/permanent; internal recruitment possibility; promotional opportunity

Prepare a job description: role; responsibilities; lines of reporting; location; hours of work; special conditions; essential criteria and desirable criteria; certification requirements; experience

2 Know how to select the right person

Preparation for selection interviews: learner list; application forms; resumes; standard questions; scoring strategy; job and person description; scoring sheet; progress sheet; background checks; sifting i.e. often done to reduce the number of applicants invited to interview

Selection techniques: scoring strategy; evaluation forms; assessment; references

3 Understand the induction process

Effective induction: fit for purpose; legally compliant; informative; specific

Phases of induction: visitor induction on first visit; full office induction; site induction

Legal and practical aspects: health and safety; equality and diversity; working hours; minimum wages; human rights; industry/sector standards; regulatory bodies

Record individuals progress: written questioning; on screen testing; subject's signature confirming understanding

Evaluation of induction: question and answer session; expert attendance; health and safety department guidance

Essential guidance for tutors

Delivery

In order to achieve this unit learners will need to demonstrate their understanding of the tools and procedures used in recruiting, selecting and inducting new staff in the workplace. This could include new company employees or new contractors for an element of work or operation.

Learners should be provided with the opportunity to investigate the policies and procedures currently in place within their company in order to build a portfolio of work which meets the requirements of the unit. They should be encouraged to produce accurate job and person descriptions for an actual post within the company along with a suitable induction for the post. This unit would probably best be delivered by a series of classroom sessions or tutorials. Workshop staged interview and induction sessions could be used to cover the relevant sections of this unit, with professional discussions and observations used as evidence of competence.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learners progress. Learners should be allowed to compare notes and findings and encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for this unit can be combined with appropriate referencing to meet the learning outcomes of other units or assessment criteria. Assessors will find that adopting a holistic approach reduces the amount of evidence needed. Observations are recommended for the interview and induction delivery aspects of this unit.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion and assessor observations can also usefully be employed to achieve learning outcomes after learners have gained relevant knowledge and experience.

Assessment criteria 1.1, 1.2, 2.1 and 3.3 can be achieved by using learners' written job descriptions, person specifications, interview preparation notes and induction notes. Criteria 2.2, 3.1, 3.2, 3.4 and 3.5 can be achieved through assessors, observations and records of professional discussions following the workshop interview and induction sessions.

Essential resources

No special resources are required for this unit. It is expected that the learner will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Websites

www.hse.gov.uk

Health and Safety Executive

Unit 18: Organising and Delegating

Unit code: M/501/3815

QCF Level: 3

Credit value: 1

Guided learning hours: 6

Unit aim

To develop knowledge and understanding of organising and delegating as required by a practising or potential first line manager.

Unit introduction

This unit provides learners with the basic knowledge and understanding of how to organise a workforce and delegate powers to facilitate the achievement of objectives.

The unit looks at the importance of making the best use of team members' knowledge and skills and explores how human resource planning can be used effectively to achieve workplace objectives. Learners will develop an understanding of empowerment and the ways in which delegation can be monitored to review its effectiveness.

On completion of this unit learners will have the knowledge required to be able to organise an efficient team and to improve retention by appropriate delegation of powers. The unit links well with several other general management units, in particular *Unit 24: Introduction to Leadership and Management*. The unit gives learners sound underpinning knowledge and understanding that can be applied to many facilities management operations.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Know how to organise people to achieve objectives	1.1 explain the importance of making effective and efficient use of people's knowledge and skills while planning the team's work to achieve objectives 1.2 use one technique to identify the appropriate person for an activity 1.3 explain how human resource planning can be used to assure output and quality
2 Know how to delegate to achieve workplace objectives	2.1 give one example of delegation and one example of empowerment in the workplace 2.2 identify one barrier to delegation and one mechanism to support delegation 2.3 explain one technique that could be used to monitor the outcomes of delegation in the workplace 2.4 review the effectiveness of feedback, recognition and reward techniques in the workplace

Unit content

1 **Know how to organise people to achieve objectives**

The importance of knowledge and skills: work efficiency; output; health and safety; team coherence

Techniques for appropriate staff selection: CV; interpersonal skills; product knowledge; reliability; aptitude tests; appearance

Human resource planning: skills matrix; training needs analysis; employee records; qualifications update; resource optimisation

2 **Know how to delegate to achieve workplace objectives**

Delegation and empowerment: division of work; workforce flexibility; continuity; succession management

Barriers to delegation: autocratic management; overspecialisation; union rules; work permits

Support mechanisms for delegation: task sharing; common objectives; team recognition

Monitoring the outcomes of delegation: employee feedback; decision reviews; progress meetings

Effectiveness of feedback, recognition and reward: employee satisfaction; output monitoring; performance audits; target reviews

Essential guidance for tutors

Delivery

It is important for learners to know how to organise people and delegate powers in order to achieve workplace objectives. Learners should understand how to make the best use of people's knowledge and skills and know how to allocate tasks accordingly. The unit contributes to learners' basic knowledge, understanding and skill sets. It combines well with *Unit 24: Introduction to Leadership and Management*. This and other general management units are best delivered at an early stage in the course, where they could influence learners' approach to subsequent units dealing with specific operational knowledge.

Workshop sessions addressing this unit should cover the identification of required skills and knowledge to enable the appropriate person to be allocated to a facilities management activity. An understanding of the effects of delegation and ways in which these effects can be monitored is important. Learners should be encouraged to examine the effects of organising and delegating within their own organisation. Knowledge and understanding developed from this unit can be applied to learners' normal job roles.

Learners should be given a copy of the unit standards and have them explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence to meet the outcomes of this unit can be used to support evidence for other units, both competence- and knowledge-based. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can also be used to achieve learning outcomes demonstrating that learners have the relevant knowledge and experience.

Essential resources

No special resources are required for this unit. It is expected that the learner will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbooks

Brown C L – *Essential Delegation Skills* (Gower Publishing, 1997)
ISBN 9780566079443

Smart J K – *Real Delegation* (Prentice Hall, 2002) ISBN 9780273663225

Watson T – *Organising and Managing Work* (Financial Times/Prentice Hall, 2006)
ISBN 9780273704805

Journals

Business Week

Harvard Business Review

Websites

www.i-l-m.com

Institute of Leadership and Management

Unit 19: Managing Performance

Unit code: A/501/3820

QCF Level: 3

Credit value: 1

Guided learning hours: 6

Unit aim

To develop knowledge and understanding of managing performance of the team in the workplace.

Unit introduction

It is important that learners working in a facilities management environment understand the principles of effective management in the workplace as a means to providing an effective cost-efficient service to the client.

This unit aims to develop the knowledge required to set and monitor achievable objectives and standards for the team, and identify and address areas of underperformance that could affect outcomes.

This unit can be combined with a number of other units notably *Unit 4: Managing Projects* and *Unit 12: Managing Contracts and Contractors in the Workplace*. Evidence used in this unit may, with suitable cross-referencing, satisfy some of the requirements of other units.

On completion of this unit learners will know the role of the first line manager in performance management. Learners will also be able to set SMART objectives and performance standards for the team and be able to measure the performance achieved against the standards set. Learners will also be able to identify areas of underperformance and have suitable knowledge of the techniques available to address the underperformance identified.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Know how to manage performance	1.1 briefly explain the role of the first line manager in performance management 1.2 set SMART objectives for the team 1.3 set performance standards for the team 1.4 explain how they would measure the performance against agreed standards 1.5 select an example of underperformance in the workplace and explain a performance improvement technique available to address this underperformance

Unit content

1 Know how to manage performance

Role of the first line manager: gaining commitment of the front-line staff; meeting the needs of the client or customer; meeting the needs of middle and higher management; setting objectives; setting standards; motivating; checking performance; identifying improvements; identifying underperformance; providing support to front-line staff; providing support to middle/higher management

SMART objectives: Specific (objectives should specify what you want to achieve); Measurable (you should be able to measure whether you are meeting the objectives or not); Achievable (are the objectives that you set achievable and attainable?); Realistic (can you realistically achieve the objectives with the resources that you have?); Time (when do you want to achieve the objectives that you have set?)

Performance standards: performance standards provide the employee with specific performance expectations for each major duty e.g. observable behaviours and actions which explain how the job is to be done, results that are expected for satisfactory job performance; determining performance standards e.g. what does a good job look like?, how many or how much is needed?, how long should it take?, when are the results needed?, how accurate or how good is acceptable?, are there budget considerations?, are there safety considerations?, are there any legislative or regulatory requirements? what is the difference between good and poor performance?

Measure performance: timesheets; quality check sheets; diaries; against programme; progress reports; progress meetings

Underperformance: capability or conduct; lack of progress; lack of quality; lack of leadership; timekeeping; dress code; cleanliness; interaction with the team

Techniques to address underperformance: investigate and gather evidence

Meeting to: set objectives; give feedback; support; agree a course of action; monitor progress

Essential guidance for tutors

Delivery

To achieve this unit learners need to understand how to effectively manage teams and individuals, set objectives clearly defining the performance standards, measure the performance against the agreed standards and identify and address underperformance.

Learners should be encouraged to produce evidence based around their current workplace. They should ensure that confidentiality restrictions within their organisation are adhered to in producing evidence for this unit. The unit is probably best delivered through workplace sessions incorporating tutorials on managing performance. Tutors should give guidance and feedback accordingly during the process of producing the portfolio of evidence.

Learners should be given a copy of the unit standards and have them explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for this unit can be usefully combined with appropriate referencing to meet the learning outcomes of other units. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can also usefully be employed to achieve specific outcomes after learners have gained relevant knowledge and experience.

To achieve assessment criteria 1.1 to 1.5 learners need to produce evidence of understanding the role of a first line manager in relation to managing performance, identification of SMART objectives and performance standards related to those objectives, measurement of performance against the objectives. The evidence can be in the form of a workplace scenario or series of events learners have been involved in, case study, research notes, evaluation conclusions and/or reports.

Essential resources

No special resources in the form of equipment or facilities are required for this unit. It is expected that the learner will have access to the relevant workplace information relating to security measures.

Indicative resource materials**Textbooks**

Atkins B and Brooks A – *Total Facilities Management* (Wiley-Blackwell, 2009)
ISBN 1405186593

Booty F – *Facilities Management Handbook* (Butterworth-Heinemann, 2008)
ISBN 9780750689779

Reuvid J and Hinks J - *Managing Business Support Services: Strategies for Outsourcing and Facilities Management* (Kogan Page Ltd, 2001) ISBN 0749430613

Journal

International Journal of Project Management

Websites

www.businessballs.com/performance_management.htm	Career help, business training and organisational development
www.managers.org.uk/management_problems/managing-performance	Chartered Management Institute
www.todaysfacilitymanager.com	Blogs, articles, columns and resources for facilities management

Unit 20: Working with Costs and Budgets

Unit code: F/501/3821

QCF Level: 3

Credit value: 1

Guided learning hours: 7

Unit aim

To develop knowledge and understanding of working with costs and budgets in the facilities management environment.

Unit introduction

Within facilities management learners will be expected to work with defined budgets for the provision of goods and services to a client. Costs associated with the budget will need to be monitored and acknowledgement of costs outside the budget will need to be recognised and reported on. Learners may be required to assist in the preparation of a budget, observe actual costs against the budget and be familiar with variations to the budget and their cost implications.

This unit aims to develop the knowledge required to contribute to the preparation and agreement of budgets, work within budgets and recognition of variations to the budget. Learners will acquire knowledge of costings and the cost recording and reporting systems to control and monitor the costs.

On completion of this unit learners will understand the process of budgeting effectively and monitoring cost against the budget. The unit deals with producing budgets and the underlying information required for this process as well as the costs involved in providing goods or services and the control and monitoring of those costs. This unit links closely with *Unit 4: Managing Projects*. It also links with *Unit 18: Manage a Budget for Own Area of Work* from the *Edexcel Level 3 Award, Certificate and Diploma in Facilities Management (QCF)*. Knowledge gained from this unit is also applicable to other units where costs and budgets are involved.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Know how to work to a budget	1.1 explain the importance of agreeing a budget and operating within it 1.2 describe a method to monitor variance between actual performance and budget 1.3 explain how information used in determining and/or revising budgets is gathered
2 Understand costs within an organisation	2.1 explain fixed and variable costs; and the concept of break even in relation to the organisation 2.2 explain the purpose and nature of basic cost statements 2.3 explain the value of standard costing and its role as a control mechanism 2.4 briefly describe mechanisms in the organisation to maintain control of costs

Unit content

1 Know how to work to a budget

Agreeing a budget and operating within it: costings; estimates; budget; client meeting minutes; progress meetings; cost forecasts

Monitoring variance between actual performance and budget: cost report; progress report; programme update

Information used in determining and/or revising budgets: costings; estimates; quotations; additional works orders; materials costs, plant costs; labour costs, cost fluctuations; timescales; programmes

2 Understand costs within an organisation

Fixed/variable costs: costs that remain basically fixed during a contract e.g. rent, rates, salaries; costs liable to fluctuate during a contract generally linked to output e.g. materials

Breakeven: point of no profit or loss

Cost statements: profit and loss; income and expenditure; monthly statement; annual statement

Standard costing: predetermined costs for an operation; goods or service; derived from historical data; used as targets

Mechanisms to maintain control of costs: inspections; progress checking; progress meetings; cost reports; valuations; cost comparisons; supplier negotiations

Essential guidance for tutors

Delivery

In order to achieve this unit learners will need to demonstrate their understanding of the tools and techniques used in budgeting and the control of costs related to their company. It is expected that apprentices will normally undertake this unit in conjunction with *Unit 4: Managing Projects*. The two units are closely linked.

Learners should be encouraged to produce a budget for a chosen project or service provision and show the methods and techniques used to monitor the budget produced against actual performance. Justification of the costs making up the budget should be included. The understanding of costs element of the unit would best be covered by a series of short statements or professional discussions following workshop sessions or tutorials.

This unit is probably best delivered through a series of workshop sessions followed by tutorials due to the detailed nature of the content. Tutors should check the suitability of the chosen project or service as the subject of the report.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learners' progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for this unit and the associated competence units can be usefully combined, with appropriate referencing to meet the learning outcomes of both. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can be used to achieve learning outcomes after learners have gained the relevant knowledge and experience.

Assessment criteria 1.1, 1.2 and 1.3 can be achieved by using learners' written budgets and monitoring plan and cost justifications. Criteria 2.1, 2.2, 2.3 and 2.4 can be achieved through learner statements or records of professional discussions.

Essential resources

No special resources are required for this unit. It is expected that the learner will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbook

Atkin B and Brooks A – *Total Facilities Management* (Wiley-Blackwell, 2009)
ISBN 9781405186599

Website

www.todaysfacilitymanager.com Blogs, articles, columns and resources for facilities management

Unit 21: Managing Sustainability and Environmental Issues

Unit code: J/502/0141

QCF level: 3

Credit value: 3

Guided learning hours: 12

Unit aim

To develop knowledge and understanding of managing sustainability and environmental issues.

Unit introduction

Concern for the environment is important. To avoid further depletion of our planet's natural resources we need to manage them responsibly. This unit aims to develop learners' understanding of sustainability and to acquire knowledge of possible ways of improving environmental awareness within their own organisation.

The unit links well with *Unit 7: Introduction to Managing and Maintaining Property and Assets* and *Unit 10: Managing Utility Services and Energy Efficiency*. For learners working towards an apprenticeship the unit provides the underpinning knowledge for the competence-based *Unit 16: Understanding Sustainability and Environmental Issues and the Impact on Facilities Management* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

On completion of this unit learners will assess the environmental issues affecting their own organisation and know ways in which these issues can be managed. Learners will also gain a better understanding of the constraints and opportunities in making the buildings of their own organisation more environmentally friendly. For learners working towards an apprenticeship the unit also develops underpinning knowledge which can be applied directly to mandatory competence-based *Unit 1: Provide and Monitor Facilities for Clients* from the Edexcel level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand sustainability and corporate social responsibility	1.1 explain the terms sustainability and corporate social responsibility and the legislation associated with these concepts
2 Understand environmental issues affecting the organisation and how these issues can be managed	2.1 list the environmental standards required in own organisation 2.2 explain the environmental issues affecting own organisation 2.3 describe ways to manage issues affecting own organisation in an environmentally friendly way
3 Understand the constraints and opportunities of an organisation's building(s) in being environmentally friendly	3.1 explain the constraints of own organisation's building(s) on environmentally friendly procedures and practices 3.2 explain the opportunities to enhance own organisation's building(s) environmentally friendly performance

Unit content

1 **Understand sustainability and corporate social responsibility**

Sustainability, corporate social responsibility and associated legislation: green technologies; conservation biology; natural assets; European Citizens Organisation for Standardisation (ECOS); European Environmental Bureau; Green Dragon Environmental Management Standard; European Union Eco-Management and Audit Scheme; ISO 14001

2 **Understand environmental issues affecting the organisation and how these issues can be managed**

Environmental standards: carbon emissions; waste recycling; ecology; European RES Directive; European Eco-label

Environmental issues: environmental impact; pollution; renewable energy targets; land fill; noise abatement; energy reduction

Environmental management: waste reduction; alternative energy sources; green products; micro-generation strategy; energy awareness

3 **Understand the constraints and opportunities of an organisation's building(s) in being environmentally friendly**

Environmental building constraints: building structure; solar gain; thermal efficiency; fossil fuels; high carbon construction; Building Regulations Part L; planning control

Environmental building opportunities: energy performance certificates; renewable energy; natural ventilation; heat-pump technology; feed-in tariffs; Community Energy Saving Programme (CESP)

Essential guidance for tutors

Delivery

In order to achieve this unit learners' need to know the environmental standards required by their own organisation and the constraints and opportunities presented to improve environmental performance in a cost-effective way. A basic understanding of sustainability is required, together with knowledge of the associated legislation.

Workshop sessions covering this unit should focus on the environmental issues affecting the organisations employing the learners attending. Practical examples should be selected. Learners should be encouraged to develop environmental awareness within their own area of responsibility. Learners should also be made to consider the environmental constraints of the building(s) in which they work and possible ways of enhancing their environmental performance. For learners working towards an apprenticeship, this unit should be delivered in conjunction with competence-based *Unit 16: Understanding Sustainability and Environmental Issues and the Impact on Facilities Management* from the Edexcel Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learners should be given a copy of the unit standards and have them explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. For example, evidence for the learning outcomes of this unit can be usefully combined with evidence for the outcomes of competence-based *Unit 16: Understanding Sustainability and Environmental Issues and the Impact on Facilities Management* from the Edexcel Award, Certificate and Diploma in Facilities Management Practice (QCF) and referenced to meet the assessment criteria of both. Assessors will find that adopting a holistic approach in this way reduces the amount of evidence needed to achieve the specified outcomes.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Response to oral questioning and/or professional discussion can be used to achieve learning outcomes demonstrating that learners have the relevant knowledge and experience.

The bulk of evidence for learning outcome 2 could be readily obtained during workshop delivery using material submitted by learners in response to set tasks. Remaining assessment criteria for this unit could be met by written submissions from learners after a small amount of research and private study.

Essential resources

No special resources are required for this unit. It is expected that the learner will have access to the facilities and equipment in the employers’ organisation relating to this unit.

Indicative resource materials

Textbooks

Blewitt J – *Understanding Sustainable Development* (Earthscan, 2008)
ISBN 9781844074549

Dresner S – *The Principles of Sustainability* (Earthscan, 2002)
ISBN 9781853838422

Lawson N – *An Appeal to Reason: A Cool Look at Global Warming*
(Overlook Duckworth, 2008) ISBN 9780715637869

Simon C A – *Alternative Energy* (Rowman and Littlefield, 2006)
ISBN 9780742549098

Journals

Environmental Science and Technology

International Journal of Global Environmental Issues

Journal of Environmental Economics and Management

Journal of Environmental Policy and Planning

Websites

www.environment.about.com	Environmental issues
www.globalissues.org	Social, political, economic and environmental issues
www.topten.eu	Energy efficient products

Unit 22: Understanding Incident Management and Disaster Recovery in the Workplace

Unit code: M/502/0148

QCF Level: 3

Credit value: 2

Guided learning hours: 8

Unit aim

To develop knowledge and understanding of incident management and disaster recovery in the workplace, including risk assessment, potential hazards, the reduction of hazards identified and how to recover following an incident in the workplace.

Unit introduction

Learners working in a facilities management environment will be expected to understand the processes and procedures surrounding the identification and assessment of items, which may present a risk or hazard to learners or others in the workplace. Following the identification of possible hazards and risks, learners will need to understand the methods that can be used to reduce the impact of the identified hazards on both people and organisations. There is an unfortunate inevitability that an incident may occur within the workplace and it will be expected that learners will understand the requirements of their organisation following such an incident.

This unit aims to develop the knowledge required to identify potential risks and hazards in the workplace, investigate the possible outcomes if the risks and hazards are not managed properly and investigate ways to minimise or reduce the impact of hazards on individuals or organisations. Learners should also be able to identify the recovery procedures that exist in their organisation should such an event occur and their part in the recovery procedure.

On completion of this unit learners will know how to identify and assess risks and hazards that could occur in the workplace, explain how to minimise the impact of the identified hazards and recognise their role in incident recovery in their organisation. This unit deals with the risk identification process, considering the hazards and the implications if the hazards are not managed. It also deals with the reduction of the impact of the identified hazards on people and organisations as well as the procedures surrounding the recovery from an incident, which could occur within learners' own organisations.

This unit can be combined with *Unit 14: Managing Health and Safety at Work*. Evidence used in this unit can, with suitable cross-referencing, satisfy some of the requirements of this unit.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand risk assessment and potential hazards and risks in the workplace</p>	<p>1.1 explain the process of risk assessment</p> <p>1.2 describe potential hazards and incidents that could occur in own workplace</p> <p>1.3 describe potential outcomes if hazards and incidents are not managed</p>
<p>2 Understand how to reduce the impact of hazards on people and the organisation</p>	<p>2.1 explain how to reduce the impact of hazards on people and the organisation</p> <p>2.2 list mitigation measures used to prevent incidents in the organisation</p> <p>2.3 describe monitoring and review processes that are used in own organisation</p>
<p>3 Understand how to recover after an incident has occurred in the workplace</p>	<p>3.1 explain the recovery procedures in own organisation</p> <p>3.2 describe an incident that could occur in own workplace and explain their role should this incident occur</p>

Unit content

1 **Understand risk assessment and potential hazards and risks in the workplace**

Risks: a risk is the likelihood that a hazard will actually cause its adverse effects, together with a measure of the effect

Hazards: a hazard is something (an object, a property of a substance, a phenomenon or an activity) that can cause adverse effects e.g. water on a staircase is a hazard, because you could slip on it, fall and hurt yourself

Potential outcomes: consequences or end results; injuries; accidents; loss of life; loss of facilities; loss of property or data; fire; flood

2 **Understand how to reduce the impact of hazards on people and the organisation**

Reduction of impact: minimisation of an effect or outcome; assessment of risk; measures to minimise risk; inform and educate; consideration of alternative methods; materials or processes

Mitigation measures: measures considered necessary to prevent, reduce and where possible remedy or offset any significant adverse impacts; risk assessments; method statements

Monitoring and review processes: inspections; risk assessments; audits external or internal; meetings

3 **Understand how to recover after an incident has occurred in the workplace**

Recovery procedures: reporting measures and procedures; specialist advice; resource reallocation

Incident: fire; flood; accident; security breach; data loss; explosion

Essential guidance for tutors

Delivery

In order to achieve this unit learners need to effectively recognise and assess risks and hazards in the workplace and investigate methods of reducing the impact of the identified hazards and risks. Learners will also need to be aware of the systems in place in their own organisation to both monitor and review existing processes and to respond to an incident should it occur.

Learners should be encouraged to produce evidence based on their current workplace demonstrating the identification of risks, hazards, methods of management and recovery measures. The unit is probably best delivered through workplace sessions followed by tutorials on risk identification, assessment, management and recovery procedures. Tutors should check learners' project plans to judge their appropriateness and give guidance and feedback accordingly.

Learners should be given a copy of the unit standards and supported to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Experience with portfolio-building workshops shows that they allow learners to compare notes and encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for this unit can be combined with appropriate referencing to meet the learning outcomes of other units. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and, in some cases, answers to written questions. Professional discussion can also usefully be employed to achieve specific outcomes after learners have gained relevant knowledge and experience.

To achieve assessment criteria 1.1, 1.2 and 1.3 learners need to produce evidence of knowledge and understanding of the principles involved in identifying risks and hazards and the potential outcomes if the identified risks and hazards are not managed correctly. This evidence may be in the form of research notes, evaluation conclusions and/or reports. Assessment criteria 2.1, 2.2 and 2.3 involve learners producing evidence relating to the reduction of the impact of risks and hazards and processes involved in monitoring the systems identified within the workplace. This can be achieved using reports, research notes and evidence gained from the workplace. Assessment criteria 3.1 and 3.2 can be achieved using learners' workplace research notes covering existing recovery procedures in their own organisation and a written report on an incident that could occur in their workplace.

Essential resources

No special resources are required for this unit. It is expected that the learner will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbooks

Atkin B and Brooks A – *Total Facilities Management* (Wiley-Blackwell, 2009)
ISBN 9781405186599

Booty F – *Facilities Management Handbook* (Butterworth-Heinemann, 2008)
ISBN 9780750689779

Journal

International Journal of Project Management

Websites

www.contingency-planning-disaster-recovery-guide.co.uk	Contingency planning guide
www.hse.gov.uk	Health and Safety Executive
www.todaysfacilitymanager.com	Blogs, articles, columns and resources for facilities management

Unit 23: Understanding Security Measures in the Workplace

Unit code: T/502/0149

QCF Level: 3

Credit value: 2

Guided learning hours: 8

Unit aim

To develop knowledge and understanding of security measures in the workplace, the legislation surrounding them, their effectiveness and improvements that could be made to existing systems in place.

Unit introduction

Learners working in a facilities management environment will frequently be involved in both the provision of new security measures and the assessment of existing measures in the workplace. Security is often key to the operation of many companies and organisations in today's market place. The security of personnel, data, information and premises are all considerations that should be carefully assessed when looking to provide a complete service.

This unit aims to develop the knowledge and understanding required to identify existing security measures, assess both the legislation surrounding the existing measures and their effectiveness in achieving the client's requirements. Learners should also be able to identify potential weaknesses to the measures prescribed and identify appropriate improvements to the existing systems in place. This unit can be combined with a number of other units, notably *Unit 3: Delivering Service in the Workplace* and *Unit 9: Understanding Support Service Operations*. Evidence used in this unit may, with suitable cross referencing, satisfy some of the requirements of other units.

This unit deals with the identification and legislation of existing systems in the workplace as well as the effectiveness and potential weaknesses of the existing systems. It also deals with the identification of appropriate improvements that could be implemented.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand security measures in the workplace and associated legislation	1.1 identify and explain security measures in own organisation and workplace 1.2 briefly describe relevant legislation affecting security measures in the workplace
2 Know whether the prescribed security measures are effective in the organisation	2.1 examine the effectiveness of prescribed security measures in the organisation and workplace 2.2 identify potential weaknesses between prescribed security measures and what happens in reality
3 Know how to identify improvements to existing security measures	3.1 based on the most important potential weaknesses identified propose appropriate improvements to security measures

Unit content

1 **Understand security measures in the workplace and associated legislation**

Security: access control; security of staff; security of property; security of information/data; security of visitors

Legislation: data protection; Official Secrets Act 1989; violence in the workplace; theft in the workplace

2 **Know whether the prescribed security measures are effective in the organisation**

Effectiveness of prescribed security measures: meet the needs of the client; meet the needs of the organisation; protect staff/data/property/visitors; cost effective

Potential weaknesses: ineffective; not meeting requirements; not within current legislation

3 **Know how to identify improvements to existing security measures**

Improvements: cost; effectiveness; efficiency; compliance

Essential guidance for tutors

Delivery

In order to achieve this unit learners need to understand the tools and techniques required to effectively assess and improve security measures in the workplace. Prior to learners producing evidence in the form of a portfolio, it is recommended that training is given on the legislation surrounding security measures.

Learners should be encouraged to produce evidence based on their current workplace security measures. They should ensure that the requirements of their employer's security policies are adhered to in producing workplace evidence for this unit. The unit is probably best delivered through workshop sessions, followed by tutorials on legislation. Tutors should check learners' project plans to judge their appropriateness and give guidance and feedback accordingly.

Learners should be given a copy of the unit standards and have them explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence for this unit can be combined with appropriate referencing to meet the learning outcomes of other units. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and, in some cases, answers to written questions. Professional discussion can also usefully be employed to achieve specific outcomes after learners have gained relevant knowledge and experience.

To achieve assessment criteria 1.1 to 2.2 learners need to produce evidence of security measures, compliance and weakness in the work place. This may be in the form of a case study, research notes, evaluation conclusions and/or reports. Assessment criterion 3.1 can be achieved using learners' written proposal for improvement of a chosen weakness.

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the relevant workplace information relating to security measures.

Indicative resource materials

Textbooks

Atkin B and Brooks A – *Total Facilities Management* (Wiley-Blackwell, 2009)
ISBN 9781405186599

Booty F – *Facilities Management Handbook* (Butterworth-Heinemann, 2008)
ISBN 9780750689779

Reuvid J and Hinks J – *Managing Business Support Services: Strategies for Outsourcing and Facilities Management* (Kogan Page Ltd, 2001) ISBN 0749430613

Journal

International Journal of Project Management

Websites

www.fmlink.com/article.cgi?type=How%20To&title=Security%20Measures%20and%20Services&pub=BOMI%20International&id=31135&mode=source Security measures and services

www.todaysfacilitymanager.com Blogs, articles, columns and resources for facilities management

Unit 24: Introduction to Leadership and Management

Unit code: K/502/0150

QCF Level: 3

Credit value: 2

Guided learning hours: 6

Unit aim

To develop an understanding of leadership and management and to gain an understanding of own management style and its impact on the team, colleagues, peers and subordinates in the workplace.

Unit introduction

This unit gives learners basic knowledge and understanding of leadership and management and reviews the factors to be taken into account in leading a team in the facilities management sector.

The unit examines the meaning of leadership and management and explores the various management styles that may be relevant to learners' own roles. Learners will develop an understanding of the factors that can influence management style and the ways in which the choice of management style impacts on members of the team.

On completion of this unit learners will have a good awareness of management techniques applicable within an organisation. The unit provides learners with sound knowledge and understanding that can be applied to many facilities management operations. This unit links well with several other general management units, in particular *Unit 18: Organising and Delegating*. For learners working towards an apprenticeship the unit provides useful underpinning knowledge for *Unit 15: Provide Leadership and Direction for Own Area of Responsibility* from the Edexcel Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand leadership and management	1.1 define leadership and management 1.2 explain various leadership and management styles that may be relevant in their organisation
2 Understand own management style	2.1 identify factors in the workplace that will influence own choice of management style(s) and behaviours 2.2 explain how their management style and behaviour impacts on their team and work colleagues

Unit content

1 Understand leadership and management

Leadership and management: social influence to accomplish tasks; maximisation of resources to achieve goals; organising people to accomplish objectives; planning; controlling/monitoring; directing; staffing; motivation

Management styles: autocratic; paternalistic; democratic; *laissez-faire*; management by walking around (MBWA)

2 Understand own management style

Factors influencing management style: team composition; company ethos; business sector; precision requirements; military influence; country of operation; exposure to public; contract terms; language barriers; security considerations

Impact of management style on team: staff morale; retention; achievement; output; time lost through sickness; motivation, staff development

Essential guidance for tutors

Delivery

It is important for learners to understand the basics of management in order to successfully lead a team. Learners should be encouraged to consider and examine various styles of management and the impact these could have on a facilities management service. The unit contributes to learners' basic knowledge, understanding and skill set. It combines well with several other general management units, in particular with *Unit 18: Organising and Delegating*. General management units are best delivered at an early stage in the course where they could influence learners' approach to subsequent units dealing with specific operational knowledge.

Workshop sessions addressing this unit should cover the theory of management and its practical application to leading a facilities management team. An understanding of management principles and the effects of different management styles is important. Learners should be encouraged to examine leadership and management within their own organisation. Knowledge and understanding developed from this unit can usefully be applied to learners' normal job roles. Learners working towards an apprenticeship will find knowledge gained from this unit useful in tackling *Unit 15: Provide Leadership and Direction for Own Area of Responsibility* from the Edexcel Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learners should be given a copy of the unit standards and have them explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence to meet the outcomes of this unit can be used to support evidence for other units both competence- and knowledge-based. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can also usefully be employed to achieve specific outcomes demonstrating that learners have the relevant knowledge and experience.

Essential resources

No special resources are required for this unit. It is expected that the learner will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbooks

Adair J – *How to Grow Leaders* (Kogan Page, 2009) ISBN 9780749454807

Adair J – *The John Adair Handbook of Management and Leadership*
(Thorogood, 2004) ISBN 9781854182043

Cole G A – *Management Theory and Practice* (Cengage Learning EMEA, 2003)
ISBN 9781844800889

Pedler M – *A Manager's Guide to Leadership* (McGraw-Hill, 2010)
ISBN 9780077128842

Journals

Edge (from ILM)

People Management Magazine

Websites

www.i-l-m.com

Institute of Leadership and Marketing

www.managementtoday.com

Management today

Unit 25: Solving Problems and Making Decisions

Unit code: K/501/3795

QCF Level: 3

Credit value: 2

Guided learning hours: 11

Unit aim

To develop knowledge and understanding of solving problems and making decisions as required by a practising or potential first line manager.

Unit introduction

This unit looks at the qualities required by learners in solving problems and making decisions. Problem-solving and decision-making knowledge underpin virtually all of the functions of a practising facilities manager.

The unit examines a range of processes including defining a problem, solving it and monitoring outcomes based on decisions made. From defining a problem the unit looks at the gathering and interpreting of information, the employment of problem-solving techniques, the use of decision-making techniques, through to implementing and monitoring decisions made. Learners will develop an understanding of problem solving and decision-making processes, which could be applied within their own organisation.

On completion of this unit learners will have a better understanding of problem-solving principles and be able to relate them to their own organisation and job role. For learners working towards an apprenticeship, the unit provides useful underpinning knowledge for *Unit 4: Monitor and Solve Customer Service Problems* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Know how to describe a problem, its nature, scope and impact	1.1 describe a problem, its nature, scope and impact
2 Know how to gather and interpret information to solve a problem	2.1 gather and interpret information to identify possible solutions to a problem
3 Know how to solve a problem	3.1 briefly summarise the options, providing facts and evidence, not just opinion 3.2 use at least one simple decision making technique to evaluate options to arrive at the best solution
4 Know how to plan the implementation and communication of decisions	4.1 plan the implementation and communication of the decision 4.2 briefly discuss which monitoring and review techniques could be used to evaluate outcomes

Unit content

1 Know how to describe a problem, its nature, scope and impact

Describing a problem: dilemma; uncertainty; overruns; malfunction; circumstances; parameters; boundaries; severity level e.g. mission critical; financial; security; performance; health and safety

2 Know how to gather and interpret information to solve a problem

Gathering and interpreting information: surveys; research e.g. internet, reference material; graphs; charts; SWOT analysis; Pareto charts; stem plots; customer feedback; complaints

3 Know how to solve a problem

Problem-solving options: thought showers; root cause analysis; fishbone diagrams; five whys; flowcharting; what if analysis; trial and error; hypothesis testing; abstraction; reduction; customer engagement; consultation

Decision-making techniques: prioritisation; decision matrix; Plan-Do-Check-Act (PDCA); positional; combinatorial; line balancing; optimising; satisfying; flipism; performance management indicators

4 Know how to plan the implementation and communication of decisions

Planning and implementation: action charts; targets; objectives; milestones; resource levelling; payback period; induction; training; customer engagement

Monitoring and review techniques: scheduling; progress reviews; deliverables; measurables; feedback; evaluation; SMART objectives; GANTT charts; available resources

Essential guidance for tutors

Delivery

Learners should be encouraged to adopt a structured approach to solving problems which occur within their own organisation. A rational approach to decision making should also be encouraged. This unit forms useful underpinning knowledge, which can be applied to a wide range of facilities management activities. The unit is best delivered at an early stage in the course, where it can influence learners' approach to subsequent units dealing with specific operational activities.

Workshop sessions covering this unit should examine a number of the available structured problem-solving techniques. Learners should be encouraged to apply these to problems in their own work environment. Rational decision making should also be employed in the resolution of these problems. Knowledge developed from this unit can be applied to several other units. Learners working towards an apprenticeship will find problem-solving techniques to be useful in tackling *Unit 4: Monitor and Solve Customer Service Problems* from the Edexcel Award, Certificate and Diploma in Facilities Management Practice (QCF).

Learners should be given a copy of the unit standards and have them explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence to meet the outcomes of this unit can be used to support evidence for other units, both competence- and knowledge-based. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can also be employed to achieve learning outcomes demonstrating that learners have the relevant knowledge and experience.

Essential resources

No special resources are required for this unit. It is expected that the learner will have access to the facilities and equipment in the employers’ organisation relating to this unit.

Indicative resource materials

Textbooks

Ammerman M – *Root Cause Analysis Handbook* (Productivity Press, 1998)
ISBN 9780527763268

Higgins J M – *101 Creative Problem Solving Techniques* (New Management Publishing Company, 2005) ISBN 9781883629052

March J G – *A Primer on Decision Making* (Simon & Schuster, 1994)
ISBN 9780029200353

Russo E J – *Winning Decisions: Getting It Right First Time* (Crown Business, 2001)
ISBN 9780385502252

Watanabe K – *Problem Solving* (Vermillion, 2009) ISBN 9780091929664

Journals

Journal of Behavioural Decision Making

Journal of the Society for Judgment and Decision Making

Websites

- | | |
|--|--|
| www.consensusdecisionmaking.org | Making decisions by consensus |
| www.decisionmaking.org | Creative decision making and critical thinking |
| www.decision-making-solutions.com | Decision making decisions |

Unit 26: Commercial Awareness and Improving Profits in Facilities Management

Unit code: D/503/6037

QCF Level: 3

Credit value: 4

Guided learning hours: 23

Unit aim

This unit aims to develop understanding of commercial awareness and the factors required to operate profitably in a commercial, facilities management environment.

Unit introduction

This unit looks at the qualities required by learners to have a good commercial awareness to be able to operate profitably in a commercial, facilities management business environment. Business knowledge, understanding and experience, combined with a certain amount of entrepreneurial flair, can help to increase profits for an organisation.

The unit examines the concept of commercial awareness as it relates to facilities management business culture and profitability. Learners will develop an understanding of the business culture within their own organisation and the need to remain competitive while operating profitably. The unit links well with mandatory *Unit 1: Understanding Facilities Management for Businesses and Organisations*.

On completion of this unit learners will have a better understanding of general commercial principles and be able to relate these to their own organisation and job role. This unit looks at working to maintain a competitive advantage and at ways of increasing profits.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand the concept of commercial awareness in facilities management	1.1 explain factors that business culture forms in organisations 1.2 explain the need for profitability in a commercial organisation 1.3 explain ways of maintaining competitive advantage in facilities management functions
2 Know how to forecast profits in facilities management	2.1 identify factors to be taken into account when forecasting profits 2.2 analyse simple accounts from a facilities management function to identify profitability
3 Know how to improve profits in facilities management	3.1 identify factors that managers in facilities management would investigate to identify areas where profits could be improved

Unit content

1 Understand the concept of commercial awareness in facilities management

Business culture: mission statement; customer service; targets; bonus systems; environmental considerations; terms and conditions; target markets; staff handbook; Investors in People; ISO standards; industry bodies and regulatory organisations

Profitability: gross margin; net profit; liquidity; shareholders; cost of sale; return on investment; administration; receiver; credit risk

Competitive advantage: differentiation; brand and culture; focus; lean operating; core competencies; barriers to entry; market share; target market; sole agency; added value; customer satisfaction; staff development and retention

2 Know how to forecast profits in facilities management

Forecasting profits: fixed costs; variable costs; staff costs; equipment costs; material costs; hidden costs; risk analysis; overheads; risk versus reward; working capital; interest charges; before tax; after tax

Simple accounts: credit and debit; balance sheet; profit and loss statement; tax liability; working capital; interest charges; written down value; repairs and renewals

3 Know how to improve profits in facilities management

Improving profits: turnover; waste; efficiency; technology; growth; reduced overheads; preferred suppliers; outsourcing; offshoring; reduced costs; redundant assets

Essential guidance for tutors

Delivery

It is important that learners understand the basics of working in a commercial environment. Part of this understanding should be focused on the need for a commercial organisation to remain profitable. Learners should be encouraged to work towards improving profits in their own organisation. The unit forms one of the basic building blocks of this qualification and combines well with *Unit 1: Understanding Facilities Management for Businesses and Organisations*. The two are best delivered at an early stage in the course where they could influence learners' approach to subsequent units of a more specific nature. The unit also combines well with *Unit 28: Generating Business Opportunities in Facilities Management*. The two are best delivered at an early stage in the course, where they could influence learners' approach to subsequent units dealing with operational knowledge.

Workshop sessions dealing with this unit should cover the basic factors influencing business operations. Learners should be encouraged to examine the culture and profitability of their own organisation. Knowledge developed from this unit can usefully be applied to other units. Learners working towards mandatory *Unit 3: Delivering Service in the Workplace* will find that commercial awareness supports the delivery of good service in a profitable manner. Learners working towards an apprenticeship will find commercial awareness to be useful in tackling *Unit 4: Monitor and Solve Customer Service Problems* from the Edexcel Award, Certificate and Diploma in Facilities Management Practice QCF.

Learners should be given a copy of the unit standards and have them explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence to meet the outcomes of this unit can be used to support evidence for other units, both competence- and knowledge-based. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can also be employed to achieve specific outcomes demonstrating that learners have the relevant knowledge and experience.

Essential resources

No special resources are required for this unit. It is expected that the learner will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbooks

Barrow C – *Cut Costs Not Corners: A Practical Guide to Staying Competitive and Improving Profits* (Kogan Page, 2010) ISBN 9780749459765

Goleman D – *Business: The Ultimate Resource* (Bloomsbury, 2002)
ISBN 97800747559788

Johnson M and Gustafsson A – *Improving Customer Satisfaction, Loyalty and Profit: An Integral Measurement and Management System* (Jossey-Bass, 2000)
ISBN 9780787953102

Journals

Building Profits Magazine
Business Week

Websites

www.accountingcoach.com

Accounting website

www.commercial-awareness.co.uk

Developing and delivering leadership and commercial skills programmes

Unit 27: Continuous Business Improvement in Facilities Management

Unit code: H/503/6038

QCF Level: 3

Credit value: 4

Guided learning hours: 24

Unit aim

This unit aims to develop understanding of techniques used to effect continuous business improvement in the facilities management industry.

Unit introduction

The value of continuous business improvement is universally recognised both at an individual and at an organisational level. Techniques developed in the manufacturing industries (particularly from Japan) have been applied to service industries with good results.

Continuous business improvement is a subject in its own right for which this unit forms a useful introduction. Learners working in the field of facilities management can benefit greatly from the application of continuous business improvement techniques.

This unit provides a good grounding of the understanding required in the selection and implementation of continuous business improvement techniques. This unit focuses on identifying areas for improvement as well as developing understanding to be able to successfully implement and monitor continuous improvement.

On completion of this unit learners will be able to apply continuous improvement techniques in the workplace. Use of these techniques will help the learner to improve the efficiency of workplace operations resulting in cost savings and/or higher customer satisfaction.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand how to identify continuous business improvements in facilities management</p>	<p>1.1 explain methods of identifying possible continuous business improvements in facilities management</p> <p>1.2 analyse key performance indicators</p> <p>1.3 explain possible areas for improvement in a facilities management service</p>
<p>2 Understand how to manage continuous business improvements in facilities management</p>	<p>2.1 explain the concept of lean systems in relation to a facilities management organisation</p> <p>2.2 describe the process for generating Standard Operating Procedures (SOPS) in relation to facilities management</p> <p>2.3 describe techniques used to implement continuous business improvement in a facilities management service</p> <p>2.4 describe how continuous business improvement can be sustained in a facilities management service</p>

Unit content

1 **Understand how to identify continuous business improvements in facilities management**

Identifying improvements: thought showers; cause and effect diagrams; checklists; flow charting; decision matrix; suggestion box; root cause analysis; five whys; customer and stakeholder surveys

Key performance indicators: business objectives; down time; cost and budget; quality; environmental impact; waste; energy consumption

Areas for improvement: operational efficiency; competitiveness; waste reduction; reduced lead times; sick leave; equipment availability; quality; product/service effectiveness; customer satisfaction

2 **Understand how to manage continuous business improvements in facilities management**

Lean systems: constraint management; Just in Time (JIT) philosophy; non-value reduction; close supplier ties; flexible workforce; pull methods of workflow; quality at source; standardisation

Standard operating procedures: level scheduling; Kanban systems; five S methodology; value stream mapping; organisational considerations; quality circles; workplace organisation; waste reduction; quality kite marks e.g. ISO, BSI, IIP

Continuous business improvement techniques: Kaizen activity; business process improvement (BPI); red tagging; 5S audits; six sigma

Sustaining continuous business improvement: benchmarking; 5S audits; quality circles; Deeming cycle; performance management

Essential guidance for tutors

Delivery

In order to achieve this unit learners will need to demonstrate their understanding of the tools and procedures used in implementing continuous improvement in the workplace. Learners working towards an apprenticeship will find that the unit links well with *Unit 6: Set Objectives and Provide Support for Team Members* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF). It also gives added value to other units in this qualification. The unit is applicable to service industries while drawing on knowledge gained from the manufacturing industries.

Learners will need planned opportunities to acquire the necessary knowledge and build a portfolio to meet the assessment criteria. The unit is probably best delivered through workshop sessions supplemented by individual study. Taught sessions can also be used to give guidance to learners on assembling evidence for related knowledge and competence-based units.

Learners should be given a copy of the standards and have them explained to ensure that the requirements are fully understood. Regular review and tracking will help with motivation and progress. A series of portfolio-building workshops could also provide useful help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence to meet the outcomes of this unit can be used to support evidence for other units, both competence- and knowledge-based. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies or in some cases answers to written questions. Professional discussion can also be used to generate evidence to achieve the learning outcomes.

Where continuous business improvement techniques are already being used in the workplace, learners can produce actual work products as evidence, provided that their contribution can be demonstrated.

Essential resources

No special resources are required for this unit. It is expected that the learner will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbooks

Cooper M P – *Kaizen Sketchbook* (Moffitt Associates, 2008)
ISBN 978-0615190112

Dinero D – *Training within Industry: The Foundation of Lean*
(Productivity Press, 2005) ISBN 1563273071

Journals

Kaizen Academy Official Magazine

Productivity Magazine

Work Process Improvement Today

Websites

www.flexinfont.com

Lean tools as files to download (click on Union Jack symbol)

www.houseofkaizen.com

Conversion rate optimisation agency

Unit 28: **Generating Business Opportunities in Facilities Management**

Unit code: K/503/6039

QCF Level: 3

Credit value: 3

Guided learning hours: 16

Unit aim

This unit aims to develop understanding of ways in which business opportunities can be generated in the facilities management sector.

Unit introduction

This unit gives learners the understanding required to identify, evaluate and follow up opportunities for generating business in facilities management.

The unit examines the identification of business opportunities within the facilities management function. Learners will develop an understanding of the ways of evaluating the risks and benefits to an organisation of the business opportunities that have been identified. An understanding of how to follow up business opportunities is also examined as part of this unit.

On completion of this unit learners will have a good awareness of business development techniques applicable within an organisation. This unit, together with *Unit 26: Commercial Awareness and Improving Profits in Facilities Management*, provides learners with sound underpinning understanding that can be applied to most facilities management operations.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand how to identify business opportunities in facilities management</p>	<p>1.1 explain factors to consider when identifying a business opportunity for a facilities management function</p> <p>1.2 identify barriers to business opportunities within the facilities management sector</p>
<p>2 Understand how to develop business opportunities in facilities management</p>	<p>2.1 identify potential benefits of a business opportunity to a facilities management service</p> <p>2.2 identify potential risks of a business opportunity to a facilities management service</p> <p>2.3 explain viable ways in which a business opportunity could be followed up</p>

Unit content

1 **Understand how to identify business opportunities in facilities management**

Identify a business opportunity: factors e.g. organisational change, new products, new technology, business expansion, financial considerations, client database, client contact, changes in legislation, problem solving, added value, diversification, customer surveys, market trends

Identify barriers to business opportunity: factors e.g. financial considerations, client requirements, contract terms, competition, market acceptance

2 **Understand how to develop business opportunities in facilities management**

Identify the potential benefits of a business opportunity: factors e.g. employment, increased profits, market share, growth, economies of scale, vertical integration, mutual benefit, customer satisfaction and retention

Identify the potential risks of a business opportunity: factors e.g. risk assessment, cost overruns, lack of appropriate skills, inadequate resources, contravening existing legislation, adverse impact on health and safety, security concerns

Follow up a business opportunity: factors e.g. business plans, proposals, estimates, market research, identify features, benefits

Essential guidance for tutors

Delivery

It is useful for learners to understand the basics of business development even though they may not be directly involved with sales and marketing. Learners should be encouraged to consider and examine new business opportunities for a facilities management service. The unit contributes to learners' basic commercial knowledge, understanding and skill sets. It combines well with *Unit 26: Commercial Awareness and Improving Profits in Facilities Management*. The two are best delivered at an early stage in the course, where they could influence learners' approach to subsequent units dealing with operational knowledge.

Workshop sessions addressing this unit should cover the basic aspects of sales and marketing operations. An understanding of these principles is important even where new business opportunities arise, for example, within learners' current job role. Learners should be encouraged to examine new business opportunities within, for example, their own organisation. Knowledge and understanding developed from this unit can be applied in learners' normal working environments.

Learners should be given a copy of the unit standards and have them explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit can be included in a single portfolio, which addresses the requirements of both competence- and knowledge-based qualifications. Evidence to meet the outcomes of this unit can be used to support evidence for other units, both competence- and knowledge-based. Assessors will find that adopting a holistic approach reduces the amount of evidence needed.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence may be in the form of assignments, reports, case studies and in some cases answers to written questions. Professional discussion can also usefully be employed to achieve learning outcomes demonstrating that learners have the relevant knowledge and experience.

Essential resources

No special resources are required for this unit. It is expected that the learner will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbooks

Butler D – *Business Development: A Guide to Small Business Strategy* (Butterworth-Heinemann, 2001) ISBN 9780750652476

Denny R – *Winning New Business: Essential Skills for Non-sales People* (Kogan Page, 2007) ISBN 9780749450090

Wijtttenbroek A – *BDM Business Development Methodology* (Assign, 2004) ISBN 9789055900503

Journals

Business Development Magazine

Sales Training Journal

Websites

www.newbusiness.co.uk

Business advice

www.taskmanagementguide.com

Task management

Unit 29: Developing Yourself and Others

Unit code: R/501/3807

QCF Level: 3

Credit value: 2

Guided learning hours: 11

Unit aim

To develop knowledge and understanding of personal development and providing opportunities for others to learn.

Unit introduction

This unit is related to the personal development of learners within the facilities management field and their ability to identify and provide opportunities for others to learn or benefit from their experience.

This unit aims to develop the knowledge required to develop one's self and identify learning opportunities for others, in order to achieve own objectives and the objectives of the organisation. Learners will acquire knowledge of learning and development tools and procedures used to identify, undertake, provide and support others in development activities. Learners will also learn to identify and overcome barriers to learning.

On completion of this unit the learner will understand how to identify, undertake, provide and support others in development activities in a facilities management environment. The unit explores the styles, methods and techniques employed in recognising development needs for learners and others, analysing the options available to them and providing support for others in the workplace. The unit provides a good grounding of developing both learners and others. Apprentices are required to undertake this unit and should also consider its links with other units. Knowledge gained from this unit is also applicable to other units, where development and learning activities are involved.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Know how to identify development needs and develop self and others to achieve organisational objectives</p>	<p>1.1 use at least one simple technique for identifying own development needs and the development needs of one other member of the team</p> <p>1.2 identify own learning style(s) of one other member of the team</p> <p>1.3 briefly analyse two learning/development options to meet need(s) of self and one other member of the team</p> <p>1.4 identify barriers to learning and explain how these barriers can be overcome</p> <p>1.5 identify support mechanisms for the development of self and one other member of the team</p> <p>1.6 describe methods used to monitor the development of self and one other member of the team</p>

Unit content

1 **Know how to identify development needs and develop self and others to achieve organisational objectives**

Development needs: gaps in the skills: knowledge and behaviour required to do job; required for advancement

Learning styles: identification of the most effective method of learning for the individual e.g. visual, auditory, reading/writing, tactile learning

Learning/Development options: internal training courses; external training courses; mentoring; on job training; qualifications; promotion; moves to alternative sites

Barriers to learning: literacy skills; numeracy skills; organisational skills; fears; costs; time

Support Mechanisms: mentoring; human resources department; line manager; external training providers; professional bodies

Methods to monitor development: appraisals; testing; progress reports; certification

Essential guidance for tutors

Delivery

In order to achieve this unit learners will need to demonstrate their understanding of the tools and procedures used in the development of themselves and others. This is a mandatory unit for apprentices but should not be discounted in other routes as it is a valuable resource for learners to be able to identify needs for themselves and others to suit a given situation.

Learners should be given opportunities to acquire the knowledge needed in order to build a portfolio which meets the assessment criteria. Centres may find that this unit is best delivered through workplace sessions combined with the delivery of other related knowledge units such as, *Unit 26: Continuous Business Improvement in Facilities Management*. These workplace sessions can also be used to provide guidance to learners on assembling evidence for this and related units.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit and other associated units can be combined to form part of a single portfolio with appropriate referencing to meet the learning outcomes of all the related units. By adopting a holistic approach in this way it will be found that evidence for this unit also meets some of the criteria for other competence- and/or knowledge-based units.

A variety of assessment methods can be used to generate the evidence needed for this unit. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies or in some cases answers to written questions. Professional discussion can also usefully be employed to achieve outcomes after learners have gained relevant knowledge and experience.

Assessment criteria 1.1, 1.2, 1.3, 1.5 and 1.6 could best be covered by the production of a personal development plan identifying learners needs and a plan to achieve those needs, both in the short and long term. A development plan could also be produced by learners for a colleague under the guidance of a work-based mentor or following in workplace sessions. The evidence may also be represented by working documents, appraisals, progress meetings and progress records. Assessment criterion 1.4 could be covered by an assignment or written report or statement. Some of the evidence submitted for *Unit 27: Continuous Business Improvement in Facilities Management* can also meet the assessment criteria for this unit and vice versa.

Essential resources

No special resources are required for this unit. It is expected that the learner will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbook

Cottrell S – *Skills for Success – The Personal Development Planning Handbook* (Palgrave Macmillan, 2010) ISBN 0230250181

Website

www.bbc.co.uk/learning/subjects/personal_development.shtml Online learning support and advice

Unit 30: Managing the Performance of Teams and Individuals in a Facilities Management Workplace

Unit code: T/503/8988

QCF Level 3: BTEC Professional

Credit value: 2

Guided learning hours: 12

Unit aim

This unit aims to develop an understanding of managing the performance of teams and individuals against set objectives in a Facilities Management workplace and providing them with feedback to manage them to improve future performance.

Unit introduction

Learners working in a facilities management environment will be expected to understand how to get the best possible performance from the teams and individuals. In order to achieve this, they will need to understand how to set objectives, assess performance against those objectives and the value of doing so, know how to motivate teams and individuals and understand the value of feedback in the workplace.

This unit aims to develop the knowledge required to enable understanding of the value of assessing performance and objective setting for the organisations needs, team's needs and individual needs. It aims to provide an understanding of the factors that affect performance and the techniques and theory behind motivation. Learners will also gain an understanding of giving feedback related to performance, its importance and effectiveness. For apprentices this unit can effectively be combined with *Unit 7: Procure Supplies* from the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF). It provides the underpinning knowledge for involvement in the management of teams and individuals in the work place.

On completion of this unit learners will have an understanding of the value of performance assessment and know how to ensure that formal assessments are fair and objective. They will have an understanding of the behaviour that may affect performance and the knowledge to be able to motivate teams and individuals. Understanding will also be gained in giving feedback, its importance in the improvement of communication and performance and the differing types of feedback available as well as their effectiveness. The unit links well with *Unit 11: Understanding Procurement and Supplier Management in the Workplace* and *Unit 27: Continuous Business Improvement in Facilities Management*. Some of the techniques used in motivating teams and individuals are also relevant to *Unit 12: Managing Contracts and Contractors in the Workplace*.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understanding the value of assessing performance against set objectives to meet organisational, team and individual needs</p>	<p>1.1 explain the value of formal and informal performance assessment in the workplace</p> <p>1.2 identify ways that will ensure fair and objective formal assessment</p> <p>1.3 describe how to assess the performance of a team and individuals in the work environment</p>
<p>2 Understand how to motivate teams and individuals to improve performance in the workplace</p>	<p>2.1 outline the factors that influence how individuals behave at work</p> <p>2.2 explain how to apply recognised theories of motivation to team members</p> <p>2.3 describe how you could motivate a team and individual to complete an item of work or task in your current workplace</p>
<p>3 Understand the value and effectiveness of feedback in the workplace</p>	<p>3.1 explain the importance of feedback to improve communication and performance</p> <p>3.2 describe different types of feedback that can be provided to teams and individuals</p> <p>3.3 justify the effectiveness of different types of feedback</p>

Unit content

1 **Understanding the value of assessing performance against set objectives to meet organisational, team and individual needs**

Formal performance assessment: annual appraisal; Key Performance Indicator (KPI); tests; exams; operation appraisal; progress report

Informal performance assessment: informal meetings; discussions

Fair and objective formal assessment: unbiased; witnessed; relevant information present; union involvement; Key Performance Indicators (KPIs); comparison against previous; arbitration; representation; factual

Assess performance: tests; exams; operation appraisal; monitoring against standards ie industry, national

2 **Understand how to motivate teams and individuals to improve performance in the workplace**

Factors that influence behaviour: management, company standards, type of work, supervision style, personal satisfaction, co-workers, communication, experience, personal circumstances, illness

Recognised theory of motivation: reward, progression, recognition, bonus, promotion, responsibility

How to motivate teams or individuals: team briefing, team talk, team building exercise, reward, bonus, certification, recognition

3 **Understand the value and effectiveness of feedback in the workplace**

Feedback sources: client, customer, manager, users, public, consumer, workforce, external bodies, internal specialists

Types of feedback: positive, negative, neutral, electronic, verbal, written, solicited, unsolicited

Essential guidance for tutors

Delivery

To achieve this unit learners need to understand the tools and techniques needed to assess performance in the workplace, feedback received from a variety of sources and use this information to improve the performance of teams or individuals. Learners working towards an apprenticeship in facilities management can undertake this unit in conjunction with *Unit 11: Understanding Procurement and Supplier Management in the Workplace* and *Unit 27: Continuous Business Improvement in Facilities Management*. Prior to the learner commencing this unit, it is recommended that training is given on the techniques of assessment of performance.

Learners should be encouraged to use workplace experience to provide evidence for this unit based on a team or individual in their field. This could involve assessments, performance reviews and feedback following classroom sessions and tutorials. Tutors should check learners' subjects prior to commencement to judge their appropriateness and give guidance and feedback accordingly.

Learners should be given a copy of the unit standards and have these explained to ensure that the requirements are fully understood. A series of portfolio-building workshops could provide help and guidance to learners and form a convenient check on learner progress. Learners should be allowed to compare notes and findings to encourage a certain feeling of competition, which acts as a spur to progress.

Assessment

This unit is assessed through a portfolio of evidence. To achieve the unit all assessment criteria must be met. Where this qualification forms part of an apprenticeship framework, evidence for this unit, and other associated NVQ units, can be combined to form part of a single portfolio with appropriate referencing to meet the learning outcomes of all the related units. By adopting a holistic approach in this way it will be found that evidence for this unit also meets some of the criteria for other knowledge and/or competence units.

A variety of assessment methods can be used to generate the evidence needed for this unit. Learners should be encouraged to produce evidence from the workplace where possible. Assessment of learners' knowledge is probably best achieved by examination of written evidence. This evidence can be in the form of assignments, reports, case studies or in some cases answers to written questions. Professional discussion can be used to achieve learning outcomes after the learner has gained relevant knowledge and experience.

To achieve assessment criteria 1.1, 1.2 and 1.3 the learner needs to produce evidence of involvement with an actual formal or informal performance assessment in the workplace. This may be in the form of meeting minutes, records of discussions, evaluation conclusions and/or management reports. Assessment criteria 2.1, 2.2 and 2.3 can be achieved using the learners written answers to questions, a case study or a report on a workplace situation. Assessment criteria 3.1 and 3.2 could be covered either by workplace evidence relating to a variety of feedback gained and assessed with a report or summary on the effectiveness of each type or using the learners written answers to questions, professional discussion or observation.

Essential resources

No special resources are needed for this unit. It is expected that learners will have access to the facilities and equipment in the employers' organisation relating to this unit.

Indicative resource materials

Textbooks

Doyle S – *The Manager's Pocket Guide to Motivating Employees* (HRD Press Inc, 2005) ISBN 0874258464

Messmer M – *Motivating Employees for Dummies* (John Wiley and Sons, 2001) ISBN 0764553275

Websites

www.accel-team.com/motivation/index.html

Employee motivation: Theory and practice

Further information

For further information please call Customer Services on 0844 576 0026 (calls may be recorded for quality and training purposes) or visit our website (www.edexcel.com).

Useful publications

Related information and publications include:

- *Guidance for Centres Offering Edexcel/BTEC QCF Accredited Programmes* (Edexcel, distributed to centres annually)
- Functional Skills publications – specifications, tutor support materials and question papers
- *Regulatory arrangements for the Qualification and Credit Framework* (published by Ofqual) August 2008
- the current Edexcel publications catalogue and update catalogue.

Edexcel publications concerning the Quality Assurance System and the internal and external verification of vocationally related programmes can be found on the Edexcel website and in the Edexcel publications catalogue.

NB: Some of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

How to obtain National Occupational Standards

Please contact:

Asset Skills
Sol House
29 St Katherine's Street
Northampton NN1 2QZ

Telephone: 01604 233 336
Fax: 01604 233 573
Email: enquiries@assetskills.org
Website: www.assetskills.org

Professional development and training

Edexcel supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building Functional Skills into your programme
- building in effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website (www.edexcel.com/training). You can request customised training through the website or by contacting one of our advisers in the Training from Edexcel team via Customer Services to discuss your training needs.

Our customer service numbers are:

BTEC and NVQ	0844 576 0026
GCSE	0844 576 0027
GCE	0844 576 0025
The Diploma	0844 576 0028
DIDA and other qualifications	0844 576 0031

Calls may be recorded for training purposes.

The training we provide:

- is active – ideas are developed and applied
- is designed to be supportive and thought provoking
- builds on best practice.

Annexe A

The Edexcel/BTEC qualification framework for the facilities management sector

Progression opportunities within the framework.

Level	General qualifications	BTEC full vocationally related qualifications	BTEC specialist courses	NVQ/occupational
8				
7				
6				
5				
4				
3			BTEC Level 3 Certificate in Facilities Management (QCF)	Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF)
2				Level 2 Certificate in Property, Caretaking and Facilities Services (QCF)
1				
Entry				

Annexe B

Wider curriculum mapping

Study of the Edexcel BTEC Level 3 qualifications gives learners opportunities to develop an understanding of spiritual, moral, ethical, social and cultural issues as well as an awareness of citizenship, environmental issues, European developments, health and safety considerations and equal opportunities issues.

Spiritual, moral, ethical, social and cultural issues

Throughout the delivery of these qualifications learners will have the opportunity to actively participate in different kinds of decision making. They will have to consider fair and unfair situations and explore how to resolve conflict. Working in small groups they will learn how to respect and value others' beliefs, backgrounds and traditions.

Citizenship

Learners undertaking these qualifications will have the opportunity to develop their understanding of citizenship issues.

Environmental issues

Developing a responsible attitude towards the care of the environment is an integral part of this qualification. Learners are encouraged to minimise waste and discuss controversial issues.

European developments

Much of the content of the qualification applies throughout Europe, even though the delivery is in a UK context.

Health and safety considerations

Health and safety is embedded within many of the units in this qualification. Learners will consider their own health and safety at work, how to identify risks and hazards and how to minimise those risks.

Equal opportunities issues

There will be opportunities throughout this qualification to explore different kinds of rights and how these affect both individuals and communities, for example learners will consider their rights at work and the rights of employers and how these rights affect the work community.

Annexe C

National Occupational Standards/mapping with NVQs

The grid below maps the knowledge covered in the Edexcel BTEC Level 3 Certificate in Facilities Management (QCF) with the underpinning knowledge of the Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF).

KEY

✓ indicates full underpinning knowledge of the NVQ unit

indicates partial coverage of the NVQ unit

a blank space indicates no coverage of the underpinning knowledge

Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF) – Units	Edexcel BTEC Level 3 Certificate in Facilities Management (QCF) – Units									
	1	2	3	4	5	6	7	8	9	10
Unit 1: Provide and Monitor Facilities for Clients	✓					#	#	#	#	#
Unit 3: Develop and Implement a Risk Assessment Plan in Own Area of Responsibility						#				
Unit 10: Maintain Property and Assets							✓			
Unit 12: Manage Space								✓		
Unit 13: Carry Out Energy Management										✓
Unit 14: Manage Facilities Management Projects				✓						
Unit 16: Understanding Sustainability and Environmental Issues and the Impact on Facilities Management					#					
Unit 19: Implement Change in Own Area of Responsibility					#					

	Edexcel BTEC Level 3 Certificate in Facilities Management (QCF) – Units									
Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF) – Units	11	12	13	14	15	16	17	18	19	20
Unit 7: Procure Supplies	✓									
Unit 17: Recruit Staff in Own Area of Responsibility							✓			
Unit 18: Manage a Budget for Own Area of Work										✓
Unit 20: Specify, Commission and Manage External Contracts and Agreements		✓	#							

	Edexcel BTEC Level 3 Certificate in Facilities Management (QCF) – Units									
Edexcel Level 3 Award, Certificate and Diploma in Facilities Management Practice (QCF) – Units	21	22	23	24	25	26	27	28	29	30
Unit 1: Provide and Monitor Facilities for Clients	#									
Unit 2: Develop Working Relationships with Colleagues										#
Unit 4: Monitor and Solve Customer Service Problems					✓	#				
Unit 6: Set Objectives and Provide Support for Team Members							#			#
Unit 14: Manage Facilities Management Projects										#
Unit 15: Provide Leadership and Direction for Own Area of Responsibility				✓						#
Unit 16: Understanding Sustainability and Environmental Issues and the Impact on Facilities Management	✓									

Annexe D

Mapping to Level 1 Functional Skills

Level 1	Unit number									
English – Speaking, Listening and Communication	1	2	3	4	5	6	7	8	9	10
Take full part in formal and informal discussions and exchanges that include unfamiliar subjects	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
English – Reading	1	2	3	4	5	6	7	8	9	10
Read and understand a range of straightforward texts	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Level 1	Unit number									
English – Speaking, Listening and Communication	11	12	13	14	15	16	17	18	19	20
Take full part in formal and informal discussions and exchanges that include unfamiliar subjects	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
English – Reading	11	12	13	14	15	16	17	18	19	20
Read and understand a range of straightforward texts	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Level 1	Unit number									
English – Speaking, Listening and Communication	21	22	23	24	25	26	27	28	29	30
Take full part in formal and informal discussions and exchanges that include unfamiliar subjects	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
English – Reading	21	22	23	24	25	26	27	28	29	30
Read and understand a range of straightforward texts	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Level 1	Unit number	
Mathematics – representing	10	20
Understand practical problems in familiar and unfamiliar contexts and situations, some of which are non-routine		✓
Identify and obtain necessary information to tackle the problem		✓
Mathematics - analysing	10	20
Apply mathematics in an organised way to find solutions to straightforward practical problems for different purposes	✓	✓
Mathematics - interpreting	10	20
Interpret and communicate solutions to practical problems, drawing simple conclusions and giving explanations		✓

Level 1	Unit number				
ICT – using ICT	5	6	7	8	25
Identify the ICT requirements of a straightforward task	✓	✓	✓	✓	✓
Interact with and use ICT systems to meet requirements of a straightforward task in a familiar context	✓	✓	✓	✓	✓
ICT – finding and selecting information	5	6	7	8	25
Use search techniques to locate and select relevant information					✓
Select information from a variety of ICT sources for a straightforward task					✓

Annexe E

Glossary of Accreditation Terminology

The following information about this qualification can also be found on the Edexcel website: www.edexcel.com

Approval start/ review date	The first/last dates that Edexcel can register learners for a qualification.
Certification end date	The last date on which a certificate may be issued by Edexcel.
Credit value	All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.
Guided Learning Hours (GLH)	Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.
Learning Aim Reference	Unique reference number given to the qualification by the funding authorities on accreditation.
Level	The level at which the qualification is positioned in the Qualifications and Credit Framework (QCF).
Performance tables	This qualification is listed on the Department for Education (DfE) website School and College Achievement and Attainment Tables (SCAAT) as performance indicators for schools and colleges.
Qualification Number (QN)	Unique reference number given to the qualification by the regulatory authorities on accreditation.
Register of Regulated Qualifications	Link to the entry on the Register of Regulated Qualifications for a particular qualification. This database features detailed accreditation information for the particular qualification.

Section 96	Section 96 is a section of the Learning and Skills Act 2000. This shows for which age ranges the qualification is publicly funded for under-19 learners.
Title	The accredited title of the qualification.
UCAS points	This qualification is listed on the Universities and Colleges Admissions Service (UCAS) tariff for those wishing to progress to higher education.

Annexe F

BTEC Specialist and Professional qualifications

BTEC qualifications on the NQF	Level	BTEC Specialist and Professional qualifications on the QCF	BTEC qualification suites on the QCF
BTEC Level 7 Advanced Professional qualifications BTEC Advanced Professional Award, Certificate and Diploma	7	BTEC Level 7 Professional qualifications BTEC Level 7 Award, Certificate, Extended Certificate and Diploma	
BTEC Level 6 Professional qualifications BTEC Professional Award, Certificate and Diploma	6	BTEC Level 6 Professional qualifications BTEC Level 6 Award, Certificate, Extended Certificate and Diploma	
BTEC Level 5 Professional qualifications BTEC Professional Award, Certificate and Diploma	5	BTEC Level 5 Professional qualifications BTEC Level 5 Award, Certificate, Extended Certificate and Diploma	BTEC Level 5 Higher Nationals BTEC Level 5 HND Diploma
BTEC Level 4 Professional qualifications BTEC Professional Award, Certificate and Diploma	4	BTEC Level 4 Professional qualifications BTEC Level 4 Award, Certificate, Extended Certificate and Diploma	BTEC Level 4 Higher Nationals BTEC Level 4 HNC Diploma
BTEC Level 3 Qualifications BTEC Award, Certificate, Extended Certificate and Diploma	3	BTEC Level 3 Specialist qualifications BTEC Level 3 Award, Certificate, Extended Certificate and Diploma	BTEC Level 3 Nationals BTEC Level 3 Certificate, Subsidiary Diploma, Diploma and Extended Diploma

BTEC qualifications on the NQF	Level	BTEC Specialist and Professional qualifications on the QCF	BTEC qualification suites on the QCF
BTEC Level 2 qualifications BTEC Award, Certificate, Extended Certificate and Diploma	2	BTEC Level 2 Specialist qualifications BTEC Level 2 Award, Certificate, Extended Certificate and Diploma	BTEC Level 2 Firsts BTEC Level 2 Certificate, Extended Certificate and Diploma
BTEC Level 1 qualifications BTEC Award, Certificate, Extended Certificate and Diploma	1	BTEC Level 1 Specialist qualifications BTEC Level 1 Award, Certificate, Extended Certificate and Diploma	BTEC Level 1 qualifications BTEC Level 1 Award, Certificate and Diploma (vocational component of Foundation Learning)
	E	BTEC Entry Level Specialist qualifications BTEC Entry Level Award, Certificate, Extended Certificate and Diploma	BTEC Entry Level qualifications (E3) BTEC Entry Level 3 Award, Certificate and Diploma (vocational component of Foundation Learning)

NQF = National Qualifications Framework

QCF = Qualifications and Credit Framework

QCF qualification sizes	
Award	1-12 credits
Certificate	13-36 credits
Diploma	37+ credits

Publications Code BA031241 May 2012

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