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## Overview

This standard is for first line managers/supervisors in the FM environment. It is about establishing the nature of facilities required, arranging for their provision, and monitoring the effectiveness of services to clients.

The standard is about being aware of the nature of the client's business, the business drivers influencing the business and the contribution that managed facilities can make to the business objectives of the organisation. It is also about being aware of business development opportunities in terms of providing additional or improved facilities management services. The need to monitor the effectiveness of managed facilities and the premises themselves is a key requirement of this unit, including the management of energy usage.

Clients can be either your own organisation where facilities management services are integrated or external clients where you are providing a service to them as a supplier. Facilities can be either single services or integrated services meeting a wide range of client requirements. Services can relate to premises and equipment covering such discrete activities as front of office administration, security, catering, maintenance and other related functions.

## Establish and monitor the facilities required by clients

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### Performance criteria

- You must be able to:*
- P1 identify the relationship between the client's core business and facilities management functions
  - P2 establish the role of facilities management services in achieving the client's business objectives
  - P3 identify requirements which are consistent with the client's policies, objectives and constraints
  - P4 ensure identified services are cost effective and consistent with relevant legal and regulatory requirements
  - P5 agree requirements with the relevant people
  - P6 establish with clients how facilities and services will be monitored and evaluated
  - P7 agree with clients how issues and problems in relation to facilities and services will be handled
  - P8 evaluate on a regular basis if facilities and services are meeting original requirements and identify business opportunities to offer additional services to clients
  - P9 inspect the condition of premises and make recommendations on maintenance, improvements, whole life costings and energy efficiency measures
  - P10 identify problems likely to affect the safety and use of the premises and take immediate remedial action
  - P11 maintain accurate, complete and up-to-date records of the outcomes of monitoring and inspection and interpret the data
  - P12 monitor the use of facilities at intervals and identify reasons for changes in usage and the effect on energy consumption
  - P13 take action to assist in the conservation of energy and the introduction of relevant energy efficiency measures and encourage others to do so
  - P14 make recommendations for improvements in the in the use of facilities and energy efficiency measures

## Establish and monitor the facilities required by clients

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### Knowledge and understanding

*You need to know and understand:*

- K1 different organisational structures and their differing needs for FM requirements
- K2 how different organisations arrange their functions and how FM can support this process
- K3 how to contribute an FM perspective to decision making about the nature and delivery of FM services within the organisation
- K4 ways in which the culture of the client organisation impacts on the delivery of FM services and vice versa
- K5 the business objectives and key drivers of the client's organisation and how FM can support these
- K6 the culture and drivers effecting individual functions and operations within the client organisation
- K7 how to implement components of the overall FM strategy for the organisation
- K8 the importance of providing and maintaining an effective and efficient office facility
- K9 the range of office facilities, equipment and resources and what they can be used for
- K10 the relevant regulatory and legal frameworks controlling the delivery of facilities management services and products
- K11 how to interpret formal agreements with clients for the delivery of services
- K12 ways of monitoring and evaluating the delivery of services
- K13 ways of establishing procedures for dealing with issues and problems in the delivery of services
- K14 the types of additional or improved services which can be offered to clients in order to exploit business opportunities
- K15 methods of carrying out the inspection of premises and how to record findings
- K16 required maintenance routines and procedures for premises
- K17 ways of monitoring facilities usage and how to establish the reasons for changes in usage

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- K18 ways of conserving energy
- K19 alternative ways of improving energy usage
- K20 the range of energy efficiency measures that are available and practical for adoption and are compatible with the organisation's overall FM strategy
- K21 the implications of energy usage and efficiency measures on whole life costings
- K22 communication channels for making recommendations and suggestions
- K23 ways of encouraging others to adopt energy efficiency measures and energy and water conservation strategies

# ASTFM301

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<b>Originating organisation</b>	Asset Skills
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<b>Relevant occupations</b>	Managers; Managers and Proprietors in Other Service Industries; Managers and Senior Officials; Operations Managers; Property Managers; Contract Managers; First Line Managers; Quality and Customer Care Managers; Team Leaders; Team Project Manager; Construction, Planning and the Built Environment
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<b>Suite</b>	Facilities Management
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<b>Key words</b>	Facilities Management Services; Energy Management; Energy Efficiency;
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