

ASTFM514

Plan estates in facilities management



Overview

This standard is for senior managers in the facilities management environment. It is about using organisational data to identify the appropriate size of estate for the organisation and using that information to plan and manage the organisation's property portfolio. Considerations will need to take into account the different requirements of estate planning and management when dealing with owned or leased property.

This standard is applicable to those who deliver facilities management services:

- within an organisation, and
- to a client organisation

In this context 'the organisation' can be either your employer or a client.

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Performance criteria

You must be able to:

- P1 use organisational data on space utilisation to calculate an appropriate and achievable ratio of usable area to gross built area
- P2 use organisational data on space utilisation to identify the appropriate and affordable size of estate for the organisation
- P3 communicate findings to senior management and, where appropriate, the board to influence future estates management, planning and strategy
- P4 ensure there is a system in place for annual review and refreshment of the strategy to reflect the strategic and financial objectives of the organisation
- P5 secure support for optimising use of assets and for actions designed to improve estate management strategy and policy
- P6 use forecasting tools and cost-benefit analysis to support organisational strategic development and portfolio planning
- P7 maximise the built space on the footprint of new buildings and, where appropriate, by overseeing additions and extensions in existing buildings

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Knowledge and understanding

You need to know and understand:

- K1 the vision and strategic plan of the organisation
- K2 the financial and strategic objectives of the organisation
- K3 organisational policies for facilities and estate management
- K4 the organisational data required to effectively plan for an efficient use of space
- K5 the importance of space efficiency
- K6 the importance of forecasting and projection
- K7 financial investment models
- K8 the value of technology in guiding strategic decision making, including through computer aided facilities management
- K9 capital and revenue costs to the organisation associated with property portfolio and asset management
- K10 the principles of life-cycle management and its application to estates management
- K11 the importance of financial planning to achieve effective portfolio management for the organisation
- K12 ways of influencing future estates management, planning and strategy
- K13 the respective restrictions in estates planning and management when dealing with leased and owned property
- K14 techniques for achieving efficiencies and optimising asset use in the management of portfolios
- K15 the importance of sustainability and environmental issues in estate portfolio management
- K16 the importance of taking into consideration issues of building quality and condition in estate planning and portfolio management

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