

ASTFM516

Mobilise facilities management contracts



Overview

This standard is for senior managers in the facilities management environment. It is about agreeing with a client the requirements and expectations of a contract - this could be a new contract, or a renewal. It covers the functions and tasks involved with implementing a contract, from setting and recording milestones and KPIs, to monitoring client satisfaction, budgeting and dealing with change.

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 develop a clear vision of the end goal and objectives of the service to be provided
 - P2 clarify and confirm contract objectives, milestones, critical success factors and KPIs with the client
 - P3 carry out due diligence procedures, where required
 - P4 develop a service level agreement, where this is required
 - P5 work with the client to develop a detailed bespoke mobilisation plan, key deliverables, timescale for delivery and demobilisation procedures
 - P6 agree reporting frequencies and review points for monitoring deliverables and client satisfaction
 - P7 where appropriate, develop a communications plan for the contract
 - P8 develop budgeting controls to ensure efficient and cost-effective delivery
 - P9 develop a detailed risk register including mitigating actions
 - P10 allocate key roles and responsibilities for contract mobilisation
 - P11 identify any training needs to deliver the contract according to the mobilisation plan and liaise with relevant others, where appropriate, to address those needs
 - P12 where appropriate, create contract specific processes and procedures for effective delivery of the service
 - P13 work with the client and, where relevant, incumbent contractors to deliver the service
 - P14 where incumbent contractors or employees are involved in the contract, follow relevant procedures to protect employees' terms and conditions of employment
 - P15 protect the organisation's reputation by managing employee and client expectations of the service
 - P16 deal with changes in contract scope, delivery process and procedures which affect operational delivery

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Knowledge and understanding

You need to know and understand:

- K1 the vision and end goal that the contract is seeking to achieve
- K2 the importance of due diligence in the pre-contract process
- K3 where appropriate, the requirements of quality standards such as ISO and BSI
- K4 the organisation's obligations for recording legal and regulatory information such as Risk Assessments, Method Statements, and other relevant data
- K5 how to identify appropriate critical success factors and KPIs, and their purpose
- K6 the purpose of agreeing project objectives and milestones, and the importance of ensuring that they are realistic and achievable
- K7 methods of recording agreements and the contract model(s) adopted by the organisation
- K8 the advantages and uses of contract administration processes and management controls
- K9 the information that should be included in a contract mobilisation plan
- K10 the level of service required in contract delivery
- K11 the importance of recording the agreement, and of all parties confirming the accuracy of that record
- K12 the importance of monitoring client satisfaction, and how this information is used
- K13 how to develop a communications strategy, the information it should contain and how it will be used
- K14 the principles of profit and loss
- K15 how the organisation defines cost-effective delivery and the purpose of budgetary controls
- K16 the purpose of a risk register and the information it should contain
- K17 the key roles and skills required to deliver the service
- K18 organisational processes and procedures for addressing identified training needs and skills gaps
- K19 the importance of working collaboratively with the client and, where appropriate, contractors to deliver the service
- K20 the importance of managing employee and client expectations of the service
- K21 ways of monitoring the delivery of the service to identify any required changes in scope, process and/or procedure
- K22 how to assess and recommend changes to scope, process and/or procedures to respond to changing circumstances or requirements

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Developed by	Asset Skills
Version number	1.0
Date approved	August 2011
Indicative review date	August 2016
Validity	Current
Status	Original
Originating organisation	Asset Skills
Original URN	ASTFM516
Relevant occupations	Combined facilities support activities
Suite	Facilities Management for Senior Managers
Key words	Project, service, KPIs, budgeting, monitoring, mobilisation, milestones, critical success factors, communications plan, risk register, operational delivery