

Overview

This standard covers contributing to workplace and facilities services projects. This includes contributing to project preparation and planning whilst working with others. It is about identifying the project scope and task dependencies. It involves providing plans for specific tasks to achieve the project's goals and the wider objectives of the organisation in compliance with the organisation's business efficiencies and sustainable practices policies.

It also covers identifying and communicating with key stakeholders, identifying risks and opportunities and planning for contingencies as well as developing realistic detailed workplace and facilities services delivery plans and resource allocation. It involves an evaluation of the outcomes of the project against the project scope and objective.

It is important that you know and understand your responsibilities under the current environmental and health and safety legislation, codes of practice and policies of your organisation.

This standard is applicable to those who deliver workplace and facilities services, this can be to an internal client (within your organisation) or to an external client, both are referred to as the "organisation" within this standard.

This standard is for managers working in the workplace and facilities services environment who assist in the planning of projects but do not have overall responsibility for them.

This standard has links to the standards suite Facilities Management and the standards suite Management and Leadership managed by Instructus.

Performance criteria

You must be able to:

1. carry out your work in accordance with the current environmental and health and safety legislation, risk assessment requirements, codes of practice and policies of the organisation, including business efficiencies and sustainable practices
2. identify the project scope and definition in detail with the organisation and stakeholders
3. identify the links between the project scope and the wider objectives of the organisation including business efficiencies and sustainable practice policies
4. communicate with all those involved in, or affected by, your work
5. identify the risks and opportunities associated with delivering the workplace and facilities services project
6. plan for contingencies throughout the life of the workplace and facilities services project including business efficiencies and sustainable practices
7. evaluate the feasibility of the workplace and facilities services project plan
8. establish the necessary competencies required to complete the agreed work
9. contribute to planning the delivery of the workplace and facilities services project
10. contribute to the planning of specific tasks that are achievable and measurable
11. provide estimates for the cost of the human and physical resources required to deliver the workplace and facilities services project
12. contribute to selecting and assigning roles and responsibilities
13. establish and maintain lines of reporting and project control
14. complete records as required by the current legislation and the procedures of the organisation
15. assess the costs, risks and opportunities of obtaining and managing physical resources and planned actions
16. contribute to setting up and operating financial control systems with the organisation and key stakeholders involved in the project
17. carry out an evaluation of the project upon completion against plans and resource allocations
18. confirm that the organisation operates within the current legal requirements and social responsibilities

Knowledge and understanding

You need to know and understand:

1. your responsibilities under the current environmental and health and safety legislation, codes of practice and policies of the organisation, including business efficiencies and sustainable practices
2. the different methods and application of project planning and management
3. the skills required to contribute to the management and delivery of a project
4. the components of workplace and facilities services project planning
5. the methods of identifying and managing risks and opportunities in project planning
6. how the project scope supports the wider objectives of the organisation
7. the requirements of the organisation related to managing resources and finances including business efficiencies and sustainable practices
8. the importance of maintaining communication with those involved in, or affected by, your work and how this should be done
9. what is meant by task dependencies and how to recognise the importance of prioritising work in order to manage the project
10. the challenges that may be faced when contributing to managing a project and how to adapt within your area of knowledge and responsibility
11. the ways of estimating human and physical resources
12. the costs, risks and opportunities of the planned actions
13. how to identify and allocate roles and responsibilities within the project team
14. how to identify the skills required to contribute to meeting the project's goals and where to obtain these skills
15. how to develop team members to acquire the necessary skills to manage facilities management projects
16. the records that need to be kept and the importance of completing them in accordance with the current legislation and procedures of the organisation
17. the methods of maintaining financial control of the project
18. how to evaluate projects against defined goals and objectives
19. the responsibility of managing workplace and facilities services in accordance with the current legal requirements and social responsibilities

Glossary

Business efficiencies

This relates to the sustainable management of resources such as water, energy efficiency and waste management, in line with the organisation's business efficiency policies which aim at improving operational efficiency. In business, efficiency refers to the production of goods or the offering of services by using the smallest amount of resources, such as capital, energy etc. Efficient businesses can create products, offer services and accomplish their overall goals with the minimum effort, expense or waste.

Financial control

Financial controls are processes, policies and procedures that are implemented to manage finances. They play a role in achieving an organisation's financial goals and meeting the obligations of corporate governance, fiduciary duty and due diligence.

Operational performance

This refers to an organisation's performance measured against a standard or prescribed indicator of effectiveness, efficiency, and environmental responsibility. These indicators could include time, productivity, waste reduction, and regulatory compliance.

Project scope

The project scope defines the boundaries of the work, so that each team member and the customer all understand what the project entails. Just as importantly, they understand what it does not entail. A project scope statement once shared with every member of the team and the project's stakeholders, is an integral part of project management.

Social responsibilities

Social responsibilities refer to a type of self-regulatory business plan and the efforts made by a company to improve society and contribute towards sustainable development. It describes initiatives run by a business to evaluate and take responsibility for their impact on issues ranging from human rights to the environment. The business plan will focus on achieving economic, social and environmental benefits for all the stakeholders involved (employees, consumers, investors and other groups). The purpose of it is to encourage businesses to conduct their companies in an ethical manner and work towards having a more positive impact on society through ensuring sustainable growth.

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Service Level Agreement (SLA)

A service level agreement (SLA) is a commitment between a service provider and an organisation. Aspects of the service – quality, availability, responsibilities – are agreed between the service provider and the service user. The most common component of an SLA is that the services should be provided to the customer as agreed upon in the contract.

Sustainable practices

Sustainable business practices are characterised by environmentally friendly practices initiated by an organisation for the purposes of becoming more sustainable.

Organisations aim to reduce their environmental footprint through initiatives that cut down on waste, poor environmental stewardship and unethical environmental practices so that they offer a reduced level of sustainability within the organisation's policies and practices.

Sustainable business practices differ between industries and are often specific to the type of organisation and the product or service it produces or provides.

Task dependencies

Project Managers reference project dependencies as the relationships between individual tasks in a project plan. Preceding tasks must be completed before moving on to the next or succeeding tasks. All of the tasks required to achieve the project's scope are sequenced according to their dependencies for each other, and then resources are linked to the tasks and a project schedule constructed.

The project or task dependencies are critical for the following:

- Sequencing the work packages (tasks) in a project plan.
- Calculating the critical path (longest path/duration) of tasks in a project plan.
- Identifying resource and scheduling issues and making supporting decisions.
- Monitoring and managing as part of the overall project plan.
- Identifying opportunities to accelerate the schedule via fast tracking or crashing.

Workplace and facilities services (soft services)

- Soft services are ones that make the workplace more pleasant or secure to work in

Examples of soft services are cleaning, catering, security.

- Hard services are ones that relate to the physical fabric of the building and cannot be removed. They ensure the safety and welfare of employees and generally are required by law.

Examples of hard services are plumbing, heating and lighting.

Hard services are covered in the Facilities Management suite

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