

## Essentials of facilities management

### Overview

The facilities management (FM) function continues to evolve, as do the range of responsibilities and the methods employed to deliver services. This workshop covers the entire FM range, offering the latest thinking in the profession. It confronts head-on the practical problems encountered on the ground and offers real solutions. Key to the success of individuals in this arena is the ability to deal with people and manage change, hence the workshop format of this course which enables participants to confront the implications of their actions in a 'safe' environment.

### Training objectives

Depending on the particular focus required (see 'Special features', below), this programme will give participants:

- An update on current best practice in FM
- Greater awareness of the customer / financial / organisational context in which the FM function operates
- A complete view of the role and responsibilities of the FM function
- Practical advice and guidance on selection and management of suppliers
- Greater awareness of health and safety compliance issues, risk management and business continuity
- An appreciation of the importance and benefits of good project management

### Audience

The course is intended primarily for FM teams (including building services and estate managers) but, depending on the nature of the organisation, it can also be a very useful opportunity to bring in other personnel who would benefit from a greater insight into the FM function or service, eg, procurement, commercial, contracts, accounts and project managers and staff.

### Format

A highly interactive two-day course, with workshops and informal breakout discussions a feature of every session. Additionally, the course notes have been prepared as a real aid to inform, containing many checklists and example forms to assist participants in their workplace.

### Special features

The course outline below is an indicative programme, which can easily be tailored to focus on those issues which are of particular concern to your organisation or sector.

The supporting materials can be supplied in either printed or electronic form.

Post-course support, whereby participants can call or email the trainer direct with any questions or concerns, can also be arranged.

### The expert trainer

Graham is a very experienced and senior practitioner in the facilities management arena. A Fellow of the British Institute of Facilities Managers, he is a regular speaker on public training seminars and conferences and was a major contributor to the development of the BIFM training programme. He is a member of the International Facilities Management Association (IFMA), a regular contributor to a number of publications and a visiting lecturer to UCL, Reading University and the College of Estate Management. His practical experience was gained in the management of major building projects and later as the Head of Facilities of a national public sector organisation (where he was at the forefront of

guiding the public sector in outsourcing services – including PFI – and was responsible for leading associated change management programmes), as a Group Board director of a major FM company, as Chairman of an FM consulting company and now as Director of an independent consultancy specialising in FM and PFI with clients such as Clearstream International DBG, Mitchells & Butlers and Stonemartin Corporate Centres.

He is an advocate of the need for managers to take the high ground and focus on strategy and planning, management of resources and the harnessing of data through information technology, in order to inform the decision making process. As a firm believer in developing intellectual capital through education, he has throughout his career introduced programmes of professional development for his various work teams.

## **Course outline**

### DAY ONE

#### **1 Defining FM**

- What is Facilities Management (FM)? – ‘the facilities umbrella’
- Defining FM within an organisation
- The 8 key roles of FM
- FM – overhead or profit centre?
- The strategic importance of managing facilities
- Developing an FM plan and team

#### **2 Establishing control of support services**

- Identifying and reviewing support service requirements
- Profiling current service levels and costs
- Reviewing contracted services
- Outsourcing v in-sourcing
- Contract ‘bundling’ and ‘aggregation’
- Determining and implementing a contract strategy

#### **3 Focusing on the customer**

- Understanding customer business needs and objectives
- Engaging the customer
- Customer service strategy
- Developing a customer action plan
- The pursuit of excellence

#### **4 Managing the budget**

- Harnessing cost data
- Identify spending patterns
- Building up the budget plan
- Defending the plan
- Control mechanisms and reports
- How to maximise the budget

#### **5 Understanding service contracts**

- What is a contract and why do we need them?
- Tender terms
- Objectives and understanding what the contractor wants
- Contract structure explained
- Terms and conditions
- Specifications – output v input
- Schedules of tender
- Supplier ‘own’ contracts – common traps!

#### **6 Controlling the tender process**

- Why tender?

- Tender timetable
- Roles and responsibilities
- Tender stages
- Tender board interview techniques
- Negotiation techniques
- Award and debriefing
- TUPE issues

## DAY TWO

### **7 Mobilisation of service contracts**

- Managing change
- Implementation programme
- Briefings and site familiarisation
- Lines of communication
- Procedures and manuals
- Handover arrangements

### **8 In-contract management**

- Review and revise contract strategy objectives
- Building successful contract management relationships
- Monitoring process step by step
- Service level agreements and KPIs demystified
- Reports that inform and managing contract meetings
- Contract review process and dealing with contract variations
- How to handle disputes and contract termination
- Planning and preparing for re-tendering
- Practical tips on managing support services

### **9 Compliance and risk management**

- What legislation and who is accountable?
- Developing a safety policy
- Managing safety
- How to carry out a risk assessment
- Permits to work
- Practical guidelines to handling emergencies
- Business continuity – FM's role

### **10 Managing a project (eg, a relocation)**

- How to get started – plan, brief, consult
- Understanding the building – structure, design constraints
- Space – cost, open plan, storage, restaurant, nursery, gym
- Moving people– the issues and how to avoid the pain
- Removal contracts – the pitfalls
- Managing a 'happy' move
- Settling in or 'Happy ever after'!

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**TO DISCUSS YOUR TRAINING REQUIREMENTS  
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