

RICS Associate Assessment Submission Document – Facilities Management Pathway

Candidate Name:	XXXXX
RICS Membership Number:	XXXXXXXX
Pathway:	Facilities Management
Date:	2016

Please declare anything which would impact your ability to perform your role and wish the assessor to take this into account when assessing your submission:

- | | | | |
|----------------------------|--------------------------|-------------------------------|--------------------------|
| Learning, such as dyslexia | <input type="checkbox"/> | Hearing | <input type="checkbox"/> |
| Access | <input type="checkbox"/> | Speech | <input type="checkbox"/> |
| Visual | <input type="checkbox"/> | Other, please provide details | <input type="checkbox"/> |

Any factors must be supported in writing and certified accordingly. The supporting evidence must suggest what reasonable adjustments RICS should take into consideration.

Candidate details

Candidate Name:	xxxxxx	
RICS Membership Number:	xxxxxxxx	
Date of Birth:	xx/xx/xxxx	
Pathway	Facilities Management	
Number of years of relevant experience:	14	
Do you have relevant qualifications	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	
If 'YES' to either of the above, what subject?	Click here to enter text.	
Employer/organisation:	XXX	
Counsellor:	xxxxxxx	xxxxxxxx
Month and Year of Assessment:	January	2016
Previously Referred at Associate:	No	Number of previous attempts
Case Study Title :	A New Way of Working: A FM Project to utilise space more efficiently and effectively	

Checklist

	Candidate - enter 'X' to confirm complete	RICS (office use only)
Associate Submission		
Candidate Details	<input checked="" type="checkbox"/>	
Summary of Experience – Mandatory competencies	<input checked="" type="checkbox"/>	
Summary of Experience – Technical competencies	<input checked="" type="checkbox"/>	
Case Study	<input checked="" type="checkbox"/>	
Continuing professional development (CPD)	<input checked="" type="checkbox"/>	
Referral Report – (Referred candidates only)	<input type="checkbox"/>	
(If you are a referred candidate only indicate the templates that you have updated for reassessment above)		
Below to be completed by Referred candidates ONLY		
Which technical and mandatory competencies are being reassessed?		

Click here to enter text.	Click here to enter text.
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Summary of Experience - Mandatory Competencies

There are eight mandatory competencies – these are the ‘softer’ skills that all responsible practitioners need, regardless of their RICS pathway. Please refer to your Associate pathway guide for the details of the mandatory competencies. These competencies are essential: they demonstrate your ability to work with colleagues, meet client requirements, manage your own work and act with honesty and integrity. Please provide a brief example for each to demonstrate you have met each of them in the relevant box below. You are not required to write about Conduct rules, ethics and professional practice because you will demonstrate it by completing the RICS ethics module and test. **Please note you have a 1000 - word limit in total.**

Mandatory Competencies	Summary of how you meet competency requirements
Client care	<p>My clients are mainly staff within my organisation who require assistance or guidance with Facilities Management (FM) matters. I also deal with Departmental Ministers, Senior Management, Executive Agencies, Arm’s Length Bodies and Other Government Departments in respect of the sustainable management of our estate.</p> <p>I deal with clients in a professional and courteous manner and undertake my tasks with integrity. I listen to my client to understand their needs and advise on any relevant legislative or regulative requirements. I then convert that client requirement into an agreed plan of works with the service provider, to meet the client need and ensure legal and statutory compliance.</p> <p>Any complaints or issues from either the client or supplier, that cannot be resolved locally, are dealt with through clear and agreed escalation and complaints procedures.</p>
Communication and negotiation	<p>My role involves the need to correspond by email, face to face and by telephone, all of which I deliver to a high standard. My communications are clear and concise and avoid the use of jargon or overly complicated /technical language, to ensure mutual understanding. I also produce regular reports on Health & Safety for the XXX lead co-ordinator and senior management.</p>

	<p>I regularly communicate with clients and suppliers to reach agreement on when, where and to what standard services will be delivered. I ensure that I am fully conversant with the terms and conditions of contracts so I can ensure compliance and manage client expectations. I ensure understanding by all parties, through written confirmation.</p> <p>I also produce reports detailing departmental performance against a range of cross-Government targets concerning the sustainable performance of our estate.</p>
Conflict avoidance, management and dispute resolution procedures	<p>All contracts that we use have an agreed dispute resolution procedure, which includes mediation, adjudication and conciliation. The last resort, if all other methods fail, would be to seek resolution through the law courts.</p> <p>The primary resolution technique that I have employed is mediation. The aim is to find common ground between the parties and then look for small movements from both parties towards each other. This can often achieve an acceptable outcome for all parties. Where mediation is not successful I have access to an independent adjudicator.</p>
Data management	<p>I am the Departmental manager for all data related to the sustainable performance of our estate and business travel. The system I operate holds details of all the utilities used and business travel undertaken by the Department and its associated bodies. All business travel data stored is anonymised to minimise any risk under data protection. The supplier of the data management system was required to demonstrate adherence to the Data Protection Act as part of the tendering process. As the contract manager for this data management contract I also conduct periodic checks with the supplier to ensure continued compliance.</p> <p>With the adoption of this data management system I have been able to minimise the amount of duplicate data held and therefore reduce the risk of inaccurate data being held. Data obtained or held by the Department is only used for the purpose for which it was collected and is shared within the Department to prevent duplication of effort.</p>
Health and safety (H&S)	<p>I am the lead H&S co-ordinator in my office and represent it in Departmental H&S meetings.</p> <p>I have responsibility for my own H&S at work as well as that of work colleagues and visitors to my office. I am aware of the main legislation such as the Health & Safety at Work Act 1974 and attend regular refresher courses to keep my knowledge current.</p> <p>As a Department we provide guidance for display screen equipment (DSE) assessments, lone working, expectant and new mothers and site specific issues and when required I undertake risk assessment talks with staff identified as lone workers or new/expectant mothers. All staff undertake a DSE self-assessment, with issues arising dealt with locally or by appointment with a qualified DSE assessor. As a co-ordinator I deliver H&S briefings as part of the induction course for new staff and those new to my office.</p> <p>The Department maintains asbestos registers in all its sites</p>

	to ensure compliance with the 2012 Control of Asbestos Regulations. I ensure that any contractor working on site has access to the asbestos register before starting work.
Sustainability	<p>The “three pillars” of sustainability form the cornerstone upon which the XXX mission statement is based. Sustainability is a key element of my current workload which is concerned with delivering an environmentally efficient estate. This has been achieved through the modernisation of our workspace, adoption of an 8:10 desk ratio and enhancements to our IT provision. This has built much greater flexibility into the work environment enabling staff to operate flexibly both in and out of the office.</p> <p>Whenever refurbishments or equipment replacements are scheduled I work with the project manager to ascertain whether there are more efficient and effective alternatives to the current provisions. The aim being to reduce environmental impact and lower the whole life costs of operating assets.</p> <p>I introduced the Display Energy Certificate programme to our Department as part of the wider Energy Performance of Buildings Directive and I’m continually looking at ways to improve our buildings ratings.</p>
Teamworking	<p>I work within a team of experienced property experts and my clients benefit from that collective knowledge. Whilst I am the identified expert in Sustainability others in the team have expertise in FM, Property Leasing and Surveying which provides my clients with an all-encompassing property collective upon which to call.</p> <p>I have set up a network of sustainability experts from XXX organisations and these meet at quarterly forums, which I chair, to discuss successes, look at issues and generally share best practise. As chair of the sustainability forum I also sit on the Group Property Operating Board which meets quarterly to discuss all elements of property management including property strategy, FM and professional standards. I am a member of the XXX FM Forum which looks at what FM we procure for the Department and then oversees how that FM is delivered and managed.</p>

Total word count for your mandatory summary of experience: = 988

Summary of Experience – Technical/Supervisory Competencies

Your summary of experience should be no more than 2000 - words in total. You must only select six technical competencies. If you have 10 years or more relevant experience then you have the option to replace two of the technical competencies with two of the supervisor competencies to reflect the fact you have moved to a more management -focussed position. Refer to your pathway guide for further details.

Technical competencies

Technical competencies	Summary of Experience
Procurement and tendering	<p>I am a Member of the Chartered Institute of Purchasing and Supply, having qualified in 2010. I've previously been the Departmental furniture buyer and whilst I no longer hold that role I set up the furniture contracts for the Department. At XXX we utilise framework contracts let by Crown Commercial Services (CCS), a Cabinet Office body that provides commercial services to the public sector, bringing together policy, advice and direct buying, and delivering savings for the taxpayer. To meet the daily furniture requirements, we run a further competition on the CCS framework for the core furniture items, removing the need to tender each time a requirement is identified. That exercise requires:-</p> <ul style="list-style-type: none"> • The requirement to be defined; • Pre-Qualification Questionnaire (PQQ) to be developed to determine which suppliers can meet the requirements; • Invitation to Tender for those suppliers who pass the PQQ • Tender evaluation – based on a set of pre-determined criteria including quality, service delivery and cost • Contract Award <p>I have recently procured a hosted software solution for Departmental sustainability data utilising the CCS IT Framework known as G-Cloud. This procurement route required:-</p> <ul style="list-style-type: none"> • Supplier selection process – requiring all capable suppliers to be invited to tender. In this instance there was only one supplier who could meet all the service requirements. • Development of a service delivery agreement with the supplier. • Working with Procurement colleagues to draw up the contract documentation for signing by the delegated authorities. <p>I am now managing this contract and meet regularly with the supplier to give and receive feedback on performance, discuss issues and future product developments.</p> <p>I am currently involved in the early stages of procuring a new multi-million pound FM contract that will deliver a Total Facilities Management (TFM) service across XXX. This contract will be drawn from a CCS framework and XXX organisations will migrate</p>

	<p>to this contract as existing FM contracts expire. We are currently determining the full requirement of this contract and the required terms and conditions of NEC3 contracting under which the framework operates. NEC3 is the third generation of the New Engineering Contract (NEC) form of contracting which was developed to stimulate good management through the use of plain language. This will be a fixed price contract with Key Performance Indicators (KPIs) used to determine performance and the levels of profit the contractor can earn.</p> <p>For any contract that I utilise I have the Government Legal Service available to deal with any legal or contractual issues that cannot be resolved through the contract management process.</p> <p>All CCS frameworks that I utilise for FM are competitively tendered under the Official Journal of the European Union (OJEU) and therefore meet the all the EU procurement rules and financial thresholds.</p>
Supplier management	<p>I am the XXX Property intelligent client for the Government Car Service (GCS), a division of the core Department, which requires me to assist them in the management of their TFM contract.</p> <p>That assistance includes</p> <ul style="list-style-type: none"> ▪ Monitoring supplier performance, ensuring all Planned Preventative Maintenance (PPM) and reactive maintenance tasks are completed in accordance with the terms of the contract. ▪ Supplier progress/feedback meetings where both the client and supplier provide feedback on performance and have the opportunity to raise issues and discuss service improvement opportunities. These meetings are currently held monthly whilst the contract is in its infancy, but will become bi-monthly or quarterly as the contract matures and confidence levels rise. ▪ Identifying potential service alterations to reduce costs for both the client and supplier whilst maintaining the required service levels. ▪ Authorising invoices once the performance levels for the period have been agreed with the client and supplier. ▪ Contract management, ensuring that all parties to the contract are at least meeting their obligations. <p>I have previously been the Facilities Manager at the Fire Service College which required:-</p> <ul style="list-style-type: none"> ▪ Managing the contract end for the incumbent soft services supplier ensuring service levels were maintained throughout. ▪ Managing the transition to a new supplier albeit with many of the staff transferred across to the new contract under the Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE). This legislation ensures that when a contractor is superseded the staff including their

	<p>terms and conditions are protected/substantially continued in the transfer to the new contractor</p> <ul style="list-style-type: none"> ▪ Monthly meetings with the supplier to monitor performance against KPIs and identify potential changes, improvements and variations. ▪ Performance monitoring through regular inspections, consultation with both the client and supplier and feedback from customers. ▪ Stakeholder meetings to report on performance and inform potential changes and improvements
<p>Property management</p>	<p>In my intelligent client role with GCS I have been leading in getting their TFM contract up and running. That has required me to:-</p> <ul style="list-style-type: none"> ▪ Define the client requirement and draft the service specification for agreement with the supplier. ▪ Ensure all task related to statutory compliance on the site are completed to the agreed schedule. ▪ Negotiate the PPM schedule with the supplier including the prioritisation of tasks. ▪ Work with GCS and the supplier to ensure all work undertaken on site is recorded in the site book and appears on the monthly report of tasks undertaken. ▪ Embed agreed procedures for fault reporting so all required tasks are correctly recorded, ensuring GCS receives the required level of service and the supplier is able to manage and prioritise tasks appropriately. <p>I liaise with building landlords as necessary and take professional advice from Property team colleagues when required.</p> <p>In my role as Facilities Manager at the Fire Service College I had responsibility for managing a site of 200+ hectares with a wide range of accommodation, storage and operational buildings. That required me to:-</p> <ul style="list-style-type: none"> ▪ Develop a PPM schedule for both the in-house maintenance team and external suppliers employed to service the specialist equipment such as vehicle ramps, lifts, roller shutters and swimming pool plant. Statutorily compliant facilities were critical for the college to attract clients and deliver its required outcomes. ▪ Maintain a comprehensive records management system which I developed upon arrival as the existing records were only partially complete. I made it a priority to understand what assets we had on site to maintain and set the records management system up based on that asset register and the required maintenance schedule. ▪ I held regular maintenance review meetings with both internal staff and contractors to determine the condition of assets, any required changes to the maintenance regime and any legislative changes that would affect either the

	<p>maintenance frequency or coverage of assets.</p>
<p>Project financial control and reporting</p>	<p>I was responsible for a multi-million pound budget at Fire Service College which required:-</p> <ul style="list-style-type: none"> ▪ A detailed annual FM budget, developed through extensive consultation with colleagues and contractors. This budget was then agreed with the finance director and any variation resulted in either a re-negotiation with suppliers or amendment to the annual programme of work. ▪ The annual budget was broken down into monthly segments with a 5% tolerance. Exceeding the tolerance required an exception report to the finance director detailing why the variance occurred and what actions were being taken to bring the budget back within tolerance. Any surplus budget outside of the tolerance levels which remained for two months was reclaimed by finance unless exceptional reasons could be provided. <p>A major project I delivered at the Fire Service College was a 100 bedroom hotel block. This project had an overall budget of £3m and was the largest project the college had embarked on for over a decade. This project required me to provide:-</p> <ul style="list-style-type: none"> ▪ Monthly finance reports to the project Senior Responsible Officer (SRO), highlighting any variances against budget and identifying actions that would bring the project back on budget. ▪ Stage end finance reports to the SRO, which were scheduled into the project at strategic points during the planning and implementation phases. All reports had to firstly be agreed by the contractor(s) and myself as the project manager, before being signed off by the SRO. Only after that had been achieved were the funds for the next stage released. ▪ Identify and manage variances between anticipated and actual expenditure. I achieved this through regular weekly meetings with the lead contractor, where any delays or overruns were discussed, including any impact on the project budget. Corrective plans were then put in place to rectify the situation or an exception report was submitted to the SRO explaining why the budget could not be brought back in line with the projected expenditure at that stage. ▪ Contingencies and retentions in the budget so as to ensure unforeseen circumstances could be covered and that the contractor was incentivised to complete the project to the required standard, on time and to budget.
<p>Choose your competency</p>	<p>Click here to enter text.</p>
<p>Choose your competency</p>	<p>Click here to enter text.</p>

Supervisory competencies

Supervisory competencies	Summary of Experience
Managing resources	<p>My FM role at the Fire Service College required me to:-</p> <ul style="list-style-type: none"> • Set annual maintenance budgets, with input from all my team. I spoke with each category lead to determine their priorities for the upcoming year which they formulated from consultation with other Departments to ensure we delivered the right facilities. This formed an in year prioritisation of works which were then costed, meaning that that if there was a budget allocation shortfall I could quickly identify tasks to be removed. Once budgets were approved the prioritisation of works was published so everyone was aware of the works planned for that year and that anything not listed would require an exceptional circumstance in order to be included. • Provide Finance with monthly reports on budget utilisation and exception reports where budget variance exceeded 5%. In order to achieve this I had to ensure my team kept on top of their scheduled tasks as any deviation could result in a budget variance outside the agreed tolerance. My staff were required to seek my prior approval if they needed to deviate from the plan, so I could identify corrective actions which would keep the budget in tolerance that month or return it to within tolerance the following month. • Provide the College board with an asset utilisation and condition report. This showed the annual usage of each asset, costs of maintaining that asset and income generated. This enabled the board to see where money was being spent and how economic each asset was in terms of balancing income and expenditure. This report on several occasions provided the Board with all the required information to make strategic decisions about the direction of the College and to enhance the financial viability of the College.
Managing people	<p>I have been a manager for many years of my working life and that experience has taught me:-</p> <ul style="list-style-type: none"> • I need to understand skills of my staff if I am to realise their full potential and ensure my team performs to its full potential. I conduct a skills audit when taking over a team and at regular intervals to obtain a complete picture of the abilities within the team. This allows me to identify, any skills shortages, development opportunities and to appropriately allocate tasks. By knowing the skillsets within my team I can also be confident in accepting new or additional tasks. • I cannot do everything myself and have to empower staff to take decisions and drive tasks themselves. I can be confident in doing

this because I know they have the required skills. I provide a mentoring role until they have gained sufficient experience. By me giving appropriate decision making powers, team performance is enhanced and staff confidence grows.

- I need have a process for managing staff performance, I do this by setting objectives that are challenging but ultimately achievable. I meet with my staff regularly to provide feedback on performance against objectives, discuss any issues and identify any training needs. I produce evidence based reports at year end, formulated after discussions with individual staff. I use moderation meetings at objective setting and year end reporting stages to ensure consistency across all grades in my organisation and to provide evidence of equality and fairness.

- I develop clear communication strategies to ensure everyone in my organisation understands who from the FM team is supporting them and the correct procedures they need to follow to report faults, suggest changes or additional works.

Total word count for your summary of experience: = 2000

Case Study

Submit one case study of no more than **2500** words in total. The focus of the case study must be on one specific project you have been involved in recently. If possible select a project you have worked on in the last 2 years. The project you choose **MUST** allow you to demonstrate at least **TWO** technical competencies from your chosen pathway, and how you used the competency skills

Case study title - A New Way of Working: A FM Project to utilise space more efficiently and effectively

1. Context / Introduction

My career in FM started in 1998 when I assisted the client side facilities manager for the XXX office. In that role I learnt the essential basics of day to day management of a building and FM contractors.

In 2001 I was appointed the facilities manager at the Fire Service College, a 200+ hectare site used for training fire service personnel in the more advanced fire and building safety related subjects and techniques. My role was to manage the site which included accommodation blocks, offices, live training facilities and a sports centre.

My career in FM started in 2001 I was appointed the facilities manager at the Fire Service College, a 200+ hectare site used for training fire service personnel in the more advanced fire and building safety related subjects and techniques. My role was to manage the site which included accommodation blocks, offices, live training facilities and a sports centre.

In 2005 I joined the ABC (XXX) special projects team who were responsible for improving the training facilities across the Department. My role included upgrading conferencing facilities with improved fixtures and fittings and extending the use of video-conferencing.

In 2007 my role changed to supplier management and managing the sustainability performance of the XXX estate. My role initially was 90% supplier management and 10 % estate management, however over the last 8 years sustainability has become the primary task and I have also added being an FM intelligent client for the GCS.

The project described here is the re-modelling of the XXX Hastings office to, promote and accommodate a more modern way of working, reducing the square meterage and lowering the costs of accommodation. I dealt with this project from the initial requirement, through the negotiation with staff and the major occupier over space, design of the floor plan, planning the order of moves, fit out and the occupation of the remodelled space.

The XXX office in Hastings is housed within a Department for Work and Pensions (DWP) building, with DWP as the landlord and other Government Departments also on site.

In this case study I aim to demonstrate my skills in respect of Property Management, Project Financial Control and Reporting, Managing Resources and Managing People, conflict avoidance, communication and negotiation and the other mandatory competencies..

2. The Approach

The space that XXX occupied in their Hastings office was, following the transfer of tasks and posts to other offices, excessive for the remaining 90 staff. In September 2013 the decision was taken to reduce the amount of space rented in the Hastings office from 2,200m² to 900m² to bring the office in line with Cabinet Office guidelines of 10m² per full time employee. That decision was based on my analysis of space utilisation in the Hastings office.

This project would be classified as a phase of a larger pan core department project called "New Ways of Working" (NWoW) which was looking to modernise and make more flexible the working environment and maximise the utilisation of office space. The Hastings office is a satellite office of the head office building in London and to provide some continuity between the offices and develop stronger links I sought agreement that the Hastings site should mirror the setup of the London office. I developed a programme of 6 months for the project to be completed to tie in with year-end accounting and also the scheduled finish of the overarching NWoW project.

With those drivers in place I discussed with the project owner the options for the Hastings site in terms of space reduction and maximising the utilisation of the remaining space. It quickly became apparent that this project needed to be split into two phases, reducing the space occupied and then modernising the remaining office space. To try and do everything in one phase would have potentially put the whole project at risk. There was a significant change required to operating practices for many of the 90 staff in order for the size reduction to happen and embedding that could have potentially risked losing the culture change impact of modernising the remaining office space and severely impacted on business as usual.

I agreed the approach with the project owner and set about devising plans for reducing the office footprint to the required 10m² per full time equivalent (FTE). Across Government we have two measures for staff numbers those being headcount and FTE, where FTE is based on the total contracted hours of staff rather than the number of staff themselves. The FTE count is always lower

than headcount where you employ part-time staff. Using FTE as a measure adds a level of complexity to a project like this as I needed to be aware of maximum possible occupancy levels in order to provide the right level of facilities.

Very quickly I identified that the existing room configurations did not immediately lend themselves to achieving an overall footprint of 900m² without considerable alterations, including the movement of walls and security doors. I obtained costings from the landlord to make the required changes to achieve the footprint goal and then discussed these with the project owner. It was agreed that these costs were disproportionate to the rent costs from retaining a slightly larger area than originally planned. Additionally such a move would leave the major occupier with an office area that would be very difficult to let as it provided access to toilet and kitchen facilities that would be required. This point was raised with the major occupier and after negotiation I reached an agreement whereby XXX would retain 1098m² at the same rate as charged for 900m². Another key fundamental to ensuring a successful move was the availability of IT infrastructure in the new area, particularly as we were losing a patch room as part of the downsizing which meant the loss of half the connection ports in the relocated area. I worked with the IT team were able to confirm that they would be able to provide the required number of live connection points as there was sufficient capacity in the remaining patch room. They did point out the design of the room layout would have to take into consideration where the location of the live connection ports, as these were not movable.

Having determined the footprint and feasibility of the move from an IT infrastructure perspective, I moved on to planning the room layouts and a programme of how the moves would be made. To do this I consulted with all the teams concerned as many of them would be required to make drastic reductions in their storage requirements in order to fit into the reduced footprint. I had meetings with individual teams, highlighting what the desired outcome of the moves were and the actions required by them prior to moves to ensure that the relocation ran smoothly. By giving each team 6-8 weeks prior notice they were able to make the necessary arrangements for non-essential files to be stored offsite and thus reduced the storage requirement in the relocated space. Storage was the only aspect of the relocation part of this project where we brought forward an element of the NWOw part of this project. This element was the installation of new storage cupboards as part of the moves, as there was no point unloading cupboards, moving the cupboards and reloading them only to have to unload them again a few weeks later.

Each team put forward a representative to act as their move co-ordinator through whom I would communicate all relevant matters pertaining to the move. I co-ordinated plans with the IT Team as they would be critical in ensuring a smooth transition to the new workspace, as every item of IT kit had to be moved and re-patched. The moves were staged over several weekends to reduce the impact on normal business, make them achievable and to make the physical movement of furniture and files easier and safer without the majority of staff present.

Following the successful completion of all the moves, clearance of the vacated space and its return to the major occupier I held a lessons learnt meeting with the co-ordinators and IT team to discuss what went well and what could be done differently for future moves/relocations. A report on the moves and lessons learnt were submitted to the project owner and once that was signed off, that part of the project was closed down.

I then moved the attention on to designing and planning the upgrade of the office to the XXX NWOw Model. This required a modernisation of parts of the office space, inserting meeting spaces in the main office spaces, installing laptop/touchdown desks, installing personal lockers and removing desk pedestals.

In order to determine the exact requirements in terms of lockers and meeting space I held meetings with individual teams to define their “must have” and “nice to have” requirements. When I had collated all the requirements I had to revisit some of the teams and negotiate variations to their requirements as the sum of their requirements exceeded the total space and or budget available.

In order to ensure that we obtained as much of the useful life from an assets as possible I recommended to the project owner that we utilised the existing desking as it had only been in place for approximately four years and was in good working order. This also made sense as we had agreed to retain more than the 10m² per FTE and there wasn't therefore quite the squeeze on space as had been the case in our London office. Taking this approach would also lessen the upheaval during implementation and reduce the amount of wastage from this project supporting our environmental targets.

As with the initial relocation part of the project each team fielded a representative who attend weekly project meetings where plans were discussed, adjusted and finalised. Once agreed the plan and implementation programme were presented to the project owner for final agreement. With authorisation to proceed given, orders were placed for the internal works to create the NWoW space and for the required new furniture and lockers, as these had lead in times of 6 and 8 weeks respectively. Prior to placing the furniture order I had negotiated staggered delivery with the supplier so as to fit in with the implementation plan of installing everything over two consecutive weekends. With the internal works having a 6 week lead in time, I was able to schedule their out of hour completion in the two weeks leading up to the furniture delivery. The works had to be completed out of hours as it involved the movement of temporary partitioning which could not be done whilst the office was occupied. I closely monitored progress of the internal works as these were critical to the programme completing on time. I met regularly with the contractor and instructed them to notify me immediately if anything occurred which could or would result in a delayed completion date. All internal works were completed on time and to the agreed budget which allowed the furniture installation to proceed on programme.

The furniture installation was scheduled over two weekends to reduce the impact on the business and to make sure the work being undertaken was achievable. As with the relocation part of the project I heavily involved the IT team as some of the furniture installations required IT connections and new IT kit. Just prior to each installation weekend I contacted the furniture supplier to ensure that the required items were in the delivery for that week and to ascertain if there were any shortfalls to the orders for each week. If shortfalls had been identified I would have been able to compensate for these by either retaining certain items to cover until the right items were delivered or where possible amended the implementation plan. No shortfalls were identified prior to delivery and the installation went according to schedule. I had staff on site over the weekend identifying any snagging issues which were put right by the supplier there or then or recorded and issued to the supplier for rectification

Following the successful installation phase of the project, including snagging rectification and the NWoW space going live, I held a lesson learnt meeting with those involved with the installation including furniture suppliers, to discuss what went well and what could be done differently in the future. A report on the installation and lessons learnt were submitted to the project owner and once that was signed off, the project was closed down.

3. The result

The aims of this project were to make the more efficient and effective use of space in our Hastings office by reducing the footprint in line with the Cabinet Office FTE/m² guidelines and to modernise the working environment to bring equality and continuity with our London head office building.

This challenging project was delivered on time and within budget. These works transformed the Hastings office into a bright and vibrant workplace. This has changed the way all staff in Hastings work and provided much greater flexibility. The NWoW space engenders working together and provides a fairly seamless experience for staff visiting from our London office. Staff satisfaction was represented in a considerably improved rating for the Hastings office in the next staff survey.

By adopting this set up the Hastings office is well placed to deliver on any future directives on the amount of office space per employee. There is considerable flexibility within the set-up which at low cost could be changed to accommodate a more densely packed floor space.

All this was delivered with no noticeable impact on day to day business. I received feedback that this was quite an achievement considering the extent of the changes from start to finish of the project.

With the reduction in floor space we have also been able to reduce the environmental impacts of XXX's presence in the Hastings office. The greenhouse gas emissions were reduced by 40% as a result of a reduced lighting and heating requirement and halving the number of IT patch rooms

4. Lessons Learned

I produced lessons learned reports after each phase. This identified that:-

This project brought home to me the need to be able to manage resources and people as they were both critical in achieving a successful outcome. Being able to communicate clearly both in terms of listening to others requirements and being able to give concise instructions are paramount in a project of this nature.

Being able to negotiate well enabled me to get over some potential stumbling blocks when the differing priorities of teams created demands which exceeded the limits and scope of the project.

Ensuring sign off by all parties at each stage was imperative to the smooth running of the project and that was achieved by involving the relevant parties throughout the project.

The barriers I encountered were only there because the parties involved did not understand each other's requirements at the outset. Initial intransigence by individuals was soon overcome when colleagues and teams bought into the vision of the projects and the intended outcomes.

In future whilst I would certainly split a similar project again, I would definitely merge the two planning and programming aspects of the project, to reduce the time taken attaining approval by all parties.

Competencies demonstrated in this case study

Please insert the technical and mandatory competencies demonstrated in this case study. **(Only insert supervisory competencies if applicable)**

Technical/Supervisory competencies	Mandatory competencies
Managing Resources	Client Care
Managing People	Communication and negotiation
Analysis of client requirements	Conflict avoidance, management and dispute resolution
Property Management	Teamworking
Project financial control and reporting	Sustainability
Click here to enter text.	Click here to enter text.
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Total word count for your case study: = 2451

Continuing professional development (CPD)

Please list the CPD you have completed over the past 12 months. You must refer to a minimum of 48 hours and at least 50% must be dedicated to formal development Please follow the format below and add more rows if required.

Date	CPD	Hours
25/02/2015	<p>Activity type: Training course</p> <p>Purpose: To refresh my understanding of Administrative law pertaining to working in the Civil Service</p> <p>Description: An overview of administrative law and how working in the Civil Service can expose individuals and organisations to legal challenge</p> <p>Learning outcomes: A refreshed understanding of the pitfalls and challenges faced by civil servants when operation within administrative law boundaries.</p> <p>Formal</p>	1.5
03/03/2015	<p>Activity type: Work based learning</p> <p>Purpose: To understand what other Government departments are doing on Sustainable Development and to share my Departments actions on the subject</p> <p>Description: To discuss developments in my Department, understand what other departments are doing and to share ideas and best practice.</p> <p>Learning outcomes: A better understanding of what other Government departments are doing on Sustainable Development and some ideas to consider implementing in my Department.</p> <p>Formal</p>	5
27/03/2015	<p>Activity type: Work based learning</p>	16
04/06/2015	<p>Purpose: To understand and collate the actions being taken by the Executive Agencies of my Department to achieve the Greening Government Commitments on a quarterly basis.</p>	
20/10/2015	<p>Description: A workshop with representatives from each XXX Executive Agency discussing matters relating to the sustainable performance of the XXX estate and business travel</p>	
20/01/2016	<p>Learning outcomes: An understanding of the current thinking within each organisation on how to achieve the GGC targets and the sharing of ideas and best practice</p> <p>Formal</p>	
18/05/2015	<p>Activity type: Work based learning</p>	8
30/11/2015	<p>Purpose: To understand the availability of space within the wider public sector in the East Sussex region.</p>	
	<p>Description: A workshop discussing the challenges faced in terms</p>	

25/01/2016	of office and estate space across the region and presentations on the programmes being led by central government that affect local government estates.	
	Learning outcomes: An understanding of the pressures on Local Government estates and the potential opportunities for co-location.	
	Formal	
17/06/2015	Activity type: Work based learning	5
	Purpose: To get an understanding of the latest tools, support and thinking in the FM industry	
	Description: The Facilities Show provides an ideal opportunity to access the FM market, see what new innovations are available and to learn from other experiences.	
	Learning outcomes: A better understanding of the current thinking within FM in terms of space management, sustainability and cost reduction.	
	Informal	
22/06/2015	Activity type: Work based learning	7
	Purpose: To get a better understanding of what other public sector organisations are doing on FM and Sustainability	
	Description: The Public Sector Show provides access to information about the actions, thoughts and experiences of many other public sector organisations which could be useful for my organisation	
	Learning outcomes: A clearer understanding of what other public sector organisation have tried to improve estate and FM performance in terms of space utilisation and sustainable operations.	
	Informal	
24/06/2015	Activity type: Refresher Training	1
	Purpose: To understand the changes to the CDM regulations	
	Description: A presentation of the changes to the CDM regulations in 2015 by an external consultant.	
	Learning outcomes: I obtained an understanding of the CDM regulation changes and the confidence to ensure their implementation where appropriate.	
	Formal	
14/07/2015	Activity type: Work based learning	7
	Purpose: To get a better understanding of the complexities of acquiring the required sites for the High Speed 2 route	
	Description: Touring the west Midlands sites acquired for the development of the HS2 route.	
	Learning outcomes: Understanding why and how the sites were acquired and how they are being managed until construction begins. Additionally, understanding the impact HS2 has or will have on communities along its route.	
	Informal	
27/07/2015	Activity type: Training Course	5
	Purpose: To understand the contract model being used for the new TFM framework contracts.	
	Description: An external consultant led course highlighting the major elements of NEC3 contracting.	
	Learning outcomes: A fuller understanding of the contracting model	

	being utilised for the current and future FM contracts utilised by the Department.	
	Formal	
05/08/2015	Activity type: Training Course	3
	Purpose: To get a refresher on the effective contract management.	
	Description: To refresh my contract management skillset and learn of any methodologies since my previous training on the subject.	
	Learning outcomes: I have refreshed my contract management knowledge and gained some useful techniques and styles from the examples and case studies presented.	
	Formal	
05/01/2016	Activity type: Training Course	3.5
	Purpose: To understand the contract cost, KPI and Payment mechanism being used for the tendering for the new FM framework contract.	
	Description: A Crown Commercial Services led demonstration of how the cost, KPI and Payment mechanism models were developed and how they will be utilised during the tendering process.	
	Learning outcomes: An understanding of how bidders cost will be evaluated in the tendering process, how KPIs will be measured and the Payments Mechanism monitored post contract award.	
	Formal	
12/01/2016	Activity type: Training Course	3
	Purpose: To familiar myself with the professional and ethical standards that underpin the behaviour of RICS members	
	Description: An online training course that makes up part of the Associate Assessment	
	Learning outcomes: Understanding the importance of ethics to RICS, knowing the 5 global professional and ethical standards that RICS members observe, understanding how those standards relate to the RICS regulatory framework and being able to apply those standards in an ethical analysis of a case.	
	Formal	

Total word count for your CPD: = 758

Associate Declaration

Application for assessment as an Associate Member of RICS

(This declaration must be signed by the candidate and the counsellor/proposer)

Candidate to complete:

I have read, understand and undertake the following:

- to comply with the RICS Charter, Bye laws and Regulations as they now exist, or as they may in the future be amended and also to comply with such other requirements as Governing Council shall determine;
- to promote the objects of RICS as far as in my power;

- not at any time after ceasing to be a member to use or permit to be used in conjunction with my name, or name of any organisation with which I may at any time be associated, any designation or expression denoting or suggesting membership or any connection with RICS
- to pay promptly any monies due to RICS, including but not limited to any fee, subscription, levy, arrears, fine or other penalty, or reimbursement in accordance with any scheme of compensation, or in respect of any goods or services commissioned by me from RICS
- To declare any criminal conviction within 30 days
- That should I wish to terminate my membership, to so signify in writing to the Chief Executive

I confirm the following:

- The work I am submitting for assessment is my own work and a true reflection of my experience, qualifications and development.
- I have disclosed any charge or conviction of a criminal offence where the penalty could be imprisonment, unless it is now a spent conviction, as provided in a rehabilitation of offenders Act 1974 or the equivalent in my jurisdiction.
- I have disclosed the full details of any pending disciplinary proceedings or adverse findings made against me by another regulatory body within the last 3 years.
- I have disclosed whether I am undischarged or bankrupt, or within the last 3 years have been subject to any insolvency proceedings or other arrangements with creditors in respect of my debts (such as insolvency voluntary arrangement)

I understand and accept that I am accountable for the truth of this declaration, that RICS reserves the right to interview me, or contact my mentor/proposer or employer as part of the Associate Assessment quality assurance process.

If at any time RICS discovers that I have failed to disclose any of the above or that I have provided false information it has the right to terminate my membership with immediate effect. (with no further obligation to refund any subscriptions or fees)

Candidate Name	xxxxxxx
RICS Membership Number	xxxxxxx
Signature	
Date	29 January 2016

Counsellor/proposer to complete:

Candidate name: xxxxxx

Candidate RICS membership number: xxxxxx

I, the undersigned, having read and understood the summary of experience, case study and professional development of the candidate. I can verify this is a true and accurate representation of the candidate's own work, training and experience.

All required documentation is present and has been prepared in line with the requirements of the RICS Associate Assessment process. The candidate has met the competencies for his/her chosen pathway as defined by RICS.

I propose and support the above named candidate from professional knowledge of his/her professional competence and achievements as being a fit and proper person to be admitted as an Associate member of RICS.

I understand and accept that I am accountable for the truth of this declaration in support of the above named Associate candidate. I am aware that as part of the assessment quality assurance process, RICS reserves the right to contact me and the company I represent to verify any element of the application. Any false declaration may also result in my professional qualification and standing falling under investigation.

Counsellor Name	xxxxxxx
RICS Membership Number	xxxxxxx
Grade of membership	MRICS
Firm name	XXXX
Signature	
Date	29 January 2016

(A proposer is only required if your counsellor is not an Associate Member (of four years of more), a Professional Member, or Fellow of RICS)

Proposer Name	Click here to enter text.
RICS Membership Number	Click here to enter text.
Grade of membership	
Firm name	Click here to enter text.
Signature	
Date	Click here to enter text.

Associate Referral Report

Please attach a copy of your referral report if you are a referred candidate.