



Assessment of Professional Competence

Facilities Management

August 2015



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Facilities Management APC

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About the APC

The RICS Assessment of Professional Competence (APC) ensure that those applying for RICS membership are competent to practise and meet the high standards of professionalism required by RICS. There is a wide range of pathways available to qualify as an RICS member covering many different areas of practice.

The APC normally consists of:

- a period of experience
- a final assessment

The experience is based on candidates achieving a set of requirements or competencies. These are a mix of technical, professional, business and management skills.

How to use this guide

This guide supports the facilities management pathway. It is designed to help you understand more about qualifying as an RICS member in facilities management. Facilities management is a global pathway but it is appreciated that markets may vary from country to country. If you have any queries please contact your local office. The material is set out in three sections.

Section one – provides information on this area of practice with a general overview of the facilities management pathways.

Section two – lists the competency requirements of the facilities management APC pathway.

Section three – describes the main technical competencies associated with facilities management, providing expanded sector specific guidance on each of them. This forms the main part of the guide.

You **MUST** use this guide in conjunction with the core APC documentation which is available on the RICS website and comprises:

- APC Requirements and competencies guide
- The candidate guide
- The counsellor guide.

You can download all the supporting guidance from www.rics.org/apcguides

Introduction

About the competencies

The APC aims to assess that you are competent to carry out the work of a qualified chartered surveyor. To be competent is to have the skill or ability to perform a task or function. The RICS competencies are not just a list of tasks or functions, they are also based upon attitudes and behaviours. The competencies have been drawn up in a generic way so that they can be applied to different areas of practice and geographical locations. This guide is designed to help you interpret these competencies within the context of facilities management.

The competencies are defined at three levels of attainment and each APC pathway has its own specific combination of competencies that you must achieve at the appropriate level. You must reach the required level in a logical progression and in successive stages:

Level 1 – knowledge and understanding

Level 2 – application of knowledge and understanding

Level 3 – reasoned advice and depth of technical knowledge.

The competencies are in three distinct categories:

Mandatory competencies – the personal, interpersonal, professional practice and business competencies common to all pathways and compulsory for all candidates.

Core competencies – the primary competencies of your chosen APC pathway.

Optional competencies – a set of competencies selected by the candidate from a list defined for the particular pathway. In most cases there is an element of choice. These are mostly technical competencies, but certain mandatory competencies also appear on the optional competency list and candidates are permitted to select one of these at a higher level.

Choosing your competencies

It is important that you give careful thought to your choice and combination of competencies. Your choice will inevitably reflect the work you do in your day-to-day environment [driven by the needs of your clients/employer]. Your choice and combination of competencies will be a reflection of your judgement. At the final assessment interview, the assessors will take these choices into account. They will expect you to present a sensible and realistic choice that reflects the skills needed to fulfil the role of a surveyor in your field of practice.

This guide should help candidates and employers with a degree of assistance in choosing the competencies that are most appropriate to their area of practice.

How to find help

RICS has fully trained teams across the globe who will be able to help you with any general APC queries. For details of your local office – www.rics.org/contactus

RICS HQ
Parliament Square
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About facilities management

Facilities management (FM) is the total management of all services and built environment infrastructure that support the core business of an organisation.

Good facilities management makes a huge difference to the efficiency and productivity of a company, its staff and even its clients. Using best business practice, a company's operating costs can be reduced while its productivity is increased.

It is the discipline that ensures all the different buildings and services of a company work as efficiently as possible.

FM professionals are found in all sectors of industry, commerce and services and may be employed by consultants, facilities management providers, client departments, the public sector etc.

RICS qualification

This pathway is suitable for an individual embarking on a career as a professional advisor (in-house or external) in facilities management.

Professional facilities managers assist businesses to plan and execute essential property decisions, from day to day matters to strategy planning (for example, moving the company to bigger or better buildings).

Once established within the premises, businesses must make their buildings and offices as efficient as possible.

Facilities managers will look at the best use of space, suitable technology solutions, human resources and safe surroundings.

Running a company also means complying with legal responsibilities including health and safety, building regulations, fire regulations, access and security. Facilities managers advise on these and other essential services such as catering, cleaning and maintenance.

The scope for facilities managers is extremely varied and services are likely to include:

- Business operations
- Business re-location
- Business support
- Health and safety
- Outsourcing
- Performance measurement
- Procurement
- Property management
- Strategic planning and advice
- Utilities and services.

Chartered alternative designations related to this pathway

All candidates qualifying under the facilities management APC pathway will be entitled to use the designation 'Chartered Facilities Management Surveyor'.

Pathway requirements

Facilities management APC

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Level 3

- Conduct rules, ethics and professional practice

Level 2

- Client care
- Communication and negotiation
- Health and safety

Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Sustainability
- Team working

Core competencies

Two competencies to Level 3 **and** two competencies to Level 2 from the list below.

- Analysis of client requirements
- Corporate real estate management
- Maintenance management
- Procurement and tendering
- Project financial control and reporting
- Supplier management

Optional competencies

One competency to Level 3 **and** two competencies to Level 2 from the list below (including any core competencies not already used).

- Building Information modelling (BIM) management
- Construction technology and environmental services
- Consultancy services
- Contract administration
- Contract practice
- Design and specification
- Environmental management
- Fire safety
- GIS
- Landlord and tenant (including rent reviews and lease renewals)
- Project audit
- Property management
- Strategic real estate consultancy
- Works progress and quality management
- Conflict avoidance, management and dispute resolution procedures **or** Health and safety (must be taken to Level 3) **or** Sustainability

Plus one competency to Level 2 from the full list of technical competencies, including any not already chosen from the lists on this page.

Competency guidance

The pages that follow are intended to provide guidance for users on the main competencies associated with facilities management.

The guidance has been drawn up by experienced practitioners and aims to give you a clear and practical understanding of how to apply the listed core and optional competencies in the context of facilities management.

The official competency definitions (at levels one, two and three) are provided, followed by a description of the key knowledge and activities that are likely to fall within the scope of each competency.

The information provided is designed to be helpful but informal guidance. The knowledge and activities described under each competency are not exhaustive, and should not be relied upon as any form of revision list. Candidates must satisfy themselves and their employers that they have reached the required level of attainment before applying for final assessment.

The competencies are arranged in alphabetical order.

Mandatory competencies

These competencies are a mix of the professional practice, interpersonal, business and management skills that are considered common to, and necessary for, all professional members.

Title	Definition	Level required
Conduct rules, ethics and professional practice	<p>Level 1 Demonstrate knowledge and understanding of the role and significance of RICS and its functions. Also an appreciation of your personal professional role and society's expectations of professional practice and RICS Rules of Conduct and conduct regulations, including the general principles of law and the legal system, as applicable in your country of practice.</p> <p>Level 2 Provide evidence of practical application in your area of practice, being able to justify actions at all times and demonstrate personal commitment to the RICS Rules of Conduct, ethics and RICS 5 professional and ethical standards.</p> <p>Level 3 Provide evidence of application of the above.</p>	3
Client care	<p>Level 1 Demonstrate knowledge and understanding of the principles and practice of client care including:</p> <ul style="list-style-type: none"> • the concept of identifying all clients/colleagues/third parties who are your clients and the behaviours that are appropriate to establish good client relationships • the systems and procedures that are appropriate for managing the process of client care, including complaints • the requirement to collect data, analyse and define the needs of clients <p>Level 2 Provide evidence of practical application of the principles and practice of client care in your area of practice.</p>	2
Communication and negotiation	<p>Level 1 Demonstrate knowledge and understanding of effective oral, written, graphic and presentation skills including the methods and techniques that are appropriate to specific situations.</p> <p>Level 2 Provide evidence of practical application of oral, written, graphic and presentation skills that are appropriate in a variety of situations, specifically including where negotiation is involved.</p>	2

Title	Definition	Level required
Health and safety	<p>Level 1 Demonstrate knowledge and understanding of the principles and responsibilities imposed by law, codes of practice and other regulations appropriate to your area of practice.</p> <p>Level 2 Provide evidence of practical application of health and safety issues and the requirements for compliance, in your area of practice.</p>	2
Accounting principles and procedures	Demonstrate knowledge and understanding of accounting concepts and the format and preparation of management and company accounts, including profit and loss statements, cash flow statements and balance sheets.	1
Business planning	Demonstrate knowledge and understanding of how business planning activities contribute to the achievement of corporate objectives.	1
Conflict avoidance, management and dispute resolution procedures	Demonstrate knowledge and understanding of the techniques for conflict avoidance, conflict management and dispute resolution procedures including for example adjudication and arbitration, appropriate to your APC pathway.	1
Data management	Demonstrate knowledge and understanding of the sources of information and data, and of the systems applicable to your area of practice, including the methodologies and techniques most appropriate to collect, collate and store data.	1
Sustainability	Demonstrate knowledge and understanding of why and how sustainability seeks to balance economic, environmental and social objectives at global, national and local levels, in the context of land, property and the built environment.	1
Team working	Demonstrate knowledge and understanding of the principles, behaviour and dynamics of working in a team.	1

Technical competencies

Analysis of client requirements

Description of competency in context of this sector

This competency is about the establishment and agreement of a client brief, but primarily deals with the inception stage of a facilities management project. This requires a sound understanding of the law applying to facilities management projects, the preparation of outline design proposals in various formats, the preparation of budget costs, project programmes, and advising on various procurement options. It also requires an understanding of matters concerning energy efficiency, sustainability and alternative energies.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the need to collect data, analyse and define the needs of clients.	Provide evidence of the practical application of that knowledge and understanding. This should include the development of strategies and methodologies and, where appropriate, undertaking feasibility studies, proposals and costings.	Provide evidence of developing appropriate strategies to meet the client's requirements under minimum supervision, based on analysis and interpretation. Demonstrate the ability to report on and present tailored strategies to the client.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> The methods of data gathering during the inception stage of a project including client briefings and site based information The law applicable to facilities management projects and in particular those relating to employment law, statutory compliance, consents and approvals The principles of sustainability The principles of the preparation of alternative outline proposals The methodology of preparing an option appraisal The principles of preparing outline schedules of work along with approximate quantities The principles of preparing budget costs including elemental cost plans The principles of preparing a project programme of works The various contract procurement options 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Understanding of the business strategies owing from the organisations vision and mission statements Analysing the data gathered through the client briefing process and formulating a detailed client brief Consulting with the statutory authorities on the consents and other approvals required Considering the impact of sustainability and the need for alternative energy sources Preparing alternative outline design proposals Preparing option appraisals Preparing outline schedules of work with approximate quantities Preparing budget costs including elemental cost plans Preparing a project programme of works Analysing contract procurement options 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Developing tailored proposals linked to business strategies Presenting a prioritised and informed brief to enable decision-making Value management with stakeholders to ensure delivery against client expectations Advising on the need for statutory and other consents and approvals Advising on the impact of sustainability Presenting alternative proposals Presenting option appraisals Presenting outline schedules of work with approximate quantities Presenting budget costs including elemental cost plans Presenting a project programme of works

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Analysis of client requirements continued

Examples of likely knowledge, skills and experience at each level

Level 1 [cont.]	Level 2 [cont.]	Level 3 [cont.]
<ul style="list-style-type: none"> The need for specialist consultants and options for engaging with them 	<ul style="list-style-type: none"> Considering the need for specialist consultants and the options for engaging them. 	<ul style="list-style-type: none"> Advising on contract procurement options Advising on the need for specialist consultants and the options for engaging them Presenting a feasibility study Presenting a detailed project plan.

Building information modelling (BIM) management – Facilities Management

Description of competency in context of this sector

This competency encompasses the establishment and management of the information modelling systems on projects. It covers collaborative process and technological principles involved in implementing Building Information Modelling (BIM).

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the technical, process and collaborative aspects of the use of BIM.	Demonstrate knowledge and understanding of the technical, process and collaborative aspects of the use of BIM.	Show how the knowledge and experience gained in this competency has been applied to advising clients and/or senior management on BIM strategy.
<p>Examples of knowledge comprised within this level, in relation to the operational phase of buildings, are:</p> <ul style="list-style-type: none"> • Understanding of BIM strategies and implementation • Understanding of the various technical options and solutions for using information modelling in operations • Understanding of the collaborative processes necessary for BIM adoption • Knowledge of digital surveying techniques such as laser scanning • Knowledge of standard classification systems and their use in operational phases of buildings • Knowledge of standards such as PAS 1192 -2 and PAS 1192 -3 or local equivalence • Knowledge of relevant information exchange processes such as Construction Operations Building Information Exchange (COBie). 	<p>Examples of knowledge comprised within this level, in relation to the operational phase of buildings, are:</p> <ul style="list-style-type: none"> • Design and implementation of a BIM management process • Utilize BIM data to provide options for lifecycle, maintenance and energy management strategies in use <p>Define the data required within the BIM model to ensure optimum FM data</p> <ul style="list-style-type: none"> • Define and implement surveying programmers to ensure effective data capture • Maintenance and upkeep of an information model in operational use • Agree and implement contractual aspects of BIM such as separate protocol • Facilitate and manage project team members for BIM implementation. 	<p>Examples of activities and knowledge comprised within this level in relation to the operational phase of buildings, are:</p> <ul style="list-style-type: none"> • Analysing, assessing, evaluating and reporting on options for BIM in operations strategies at a corporate or project level • Designing and advising on collaborative strategies for the successful implementation of BIM on operational projects • Advising on the contractual and commercial implications of using BIM on operational projects • Advising on options for software and protocols on BIM • Advising on technical information systems requirements for BIM at corporate or project level.

Conflict avoidance, management and dispute resolution procedures

Description of competency in context of this sector

This competency covers knowledge, understanding and application of a range of processes related to dispute/conflict avoidance, management and dispute resolution.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the techniques for conflict avoidance, conflict management and dispute resolution procedures including for example adjudication and arbitration, appropriate to your APC pathway.	Provide evidence of practical application in your area of practice having regard to the relevant law.	Provide evidence of the application of the above in the context of advising clients in the various circumstances referred to above.
<p>Examples of knowledge comprised within this level are:</p> <p>A basic knowledge and understanding of some of the following, as most appropriate to your market sector/areas of specialism:</p> <ul style="list-style-type: none"> • Common causes of disputes • The contribution of some of the following to dispute avoidance: <ul style="list-style-type: none"> – Risk management – its basic principles and techniques – Early warning systems – Partnering techniques – Clear and robust client briefings • Theories of negotiation and the role of effective communication and negotiation • The primary features, advantages and disadvantages of a range of dispute resolution procedures and their surrounding statutory and/or non-statutory legal/judicial context (eg how forms of contract deal with dispute resolution, and the scope of such clauses): <ul style="list-style-type: none"> – Mediation (could include contracted and project mediation) and conciliation 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Advising clients of the most suitable means of dispute avoidance on their projects, and of dispute resolution procedures appropriate to their individual circumstances, demonstrating appreciation of when to seek further specialist advice and when to advise clients within the scope of the insurance cover of the candidate's organisation • Adopting – or encouraging the adoption of (as appropriate) – suitable dispute avoidance techniques • Negotiating actively on behalf of clients (eg performance failure, unavailability, contract variations, contract interpretations and payment) prior to third party referral • Assisting in the collation or preparation of claims/ counter-claims and submissions • Assisting in the identification, gathering and collation of facts and expert evidence for use in expert reports • Sufficient understanding of the main points of the statutory or non-statutory law relevant to/ underpinning any particular dispute resolution process and its application. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Involvement in, or assistance with, a referral to a third party resolution process and associated management of that process on behalf of client • NB: Please note that the roles of acting as a third party dispute resolver – or expert witness, are – for the vast majority of APC candidates – not likely to be an activity that is undertaken. It is only a small minority of candidates with substantive work experience for whom this is likely to be relevant.

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Conflict avoidance, management and dispute resolution procedures continued

Examples of likely knowledge, skills and experience at each level

Level 1 [cont.]	Level 2	Level 3
<ul style="list-style-type: none"> - Dispute Resolution Boards (DRBs) - Dispute Resolution Advisers (DRAs) - Adjudication - Independent expert determination - Arbitration - Litigation • The possible roles of a surveyor as an expert witness and/or an advocate, to include an awareness of the existence and scope of applicability of the RICS Practice Statements and Guidance Notes for expert witnesses and advocates • The range of nominating bodies and services available to resolve disputes, and particularly the role of the RICS Dispute Resolution Service and any specialised dispute resolution schemes it offers relevant to your market sector. 		

Construction technology and environmental services

Description of competency in context of this sector

This competency covers the design, construction and operation of buildings and other structures. Candidates should have a clear understanding of the design and construction processes commonly used in the industry. They should have detailed knowledge of construction solutions relevant to their projects.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the principles of design and construction relating to your chosen field of practice.	Apply your knowledge to the design and construction processes.	Advise on the selection and application of particular processes within your area of experience. This should include liaison with specialists and consultants to develop project specific design, construction and operational solutions.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • The stages of design from inception to completion • Impact of current legislation and regulations • How the various elements of the building work and inter-relate • The process of constructing the works • Operational and maintenance processes post contract. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Appreciating how design solutions vary for different types of building such as clear span requirements for warehousing or acoustic requirements for accommodation • Understanding alternative construction details in relation to functional elements of the design such as the operational effect on the building. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Advising on the choice of construction solution on your project • Reporting on the impact of different design solutions and construction processes on operational cost, sustainability, functional effectiveness and stakeholder satisfaction.

Consultancy services

Description of competency in context of this sector

This competency is about the provision of consultancy services to a range of different clients across the whole life cycle of the built environment.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the procurement and execution of advisory and strategic consultancy services in the context of the real estate and construction sectors.	Apply your knowledge of the provision of consultancy services in the context of the real estate and construction sectors.	Give reasoned advice, prepare and present consultancy reports, together with relevant analysis to clients, in the context of the real estate and construction sectors.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Different forms of procurement for consultancy services • The range of different consultancy interventions and approaches • The consultancy cycle • The types of problems, risks and issues that may arise during each phase of the consultancy cycle • The importance of agreeing a clear contract with clients • The need for the planning, timing and managing of consultancy interventions • Managing the use of resources • Managing client expectations • Forms of reporting • How to manage ethical dilemmas • The principal tools and techniques relevant to consultancy services • Importance of confidentiality when dealing with sensitive information. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Preparing consultancy service plans • Preparing client briefs • Updating reports to clients • Negotiating client contracts • Dealing with ethical dilemmas • Selecting appropriate tools and techniques for a given consultancy service • Using selected tools and techniques to achieve agreed outcomes • Keeping appropriate records. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Providing reports containing strategic advice and recommendations to a range of clients • Presenting to clients • Implementing consultancy intervention.

Contract administration

Description of competency in context of this sector

This competency covers the role of a surveyor administering a facilities management or construction contract. Candidates should be aware of the roles and responsibilities of the administrator under the main forms of contract. They should have a detailed understanding of the contractual provisions relating to the forms of contract that they have administered.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the contractual, legislative and statutory terminology/requirements, of a facilities or construction contract.	Implement administrative procedures necessary for the smooth running of a facilities or construction contract.	Advise on the administrative procedures necessary for the smooth running of a facilities or construction contract including document control techniques and systems, meetings and reporting procedures.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> The various standard forms of contract and sub-contract used in the industry The use of bespoke contracts and how they fit into a wider legal framework. Basic contractual mechanisms and procedures applied at various stages of the contract The roles and responsibilities of all parties. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Issuing instructions Dealing with payment provisions Managing the impact of change Being involved with dispute avoidance Dealing with completion and possession issues Managing performance mechanisms Developing collaborative relationships. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Resolving disputes Developing partnership strategies Advising all parties of their contractual rights and obligations.

Contract practice

Description of competency in context of this sector

This competency covers the various forms of contract used in the facilities and construction industry. Candidates should have an awareness of all of the main standard forms of contract and a thorough understanding of contract law, legislation and the specific forms that they have used.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the various forms of contract used in the construction industry and/or your area of business.	Apply your knowledge of the use of the various standard forms of contract at project level, including the implications and obligations that apply to the parties to the contract.	Provide evidence of reasoned advice, prepare and present reports on the selection of the appropriate form of contract and warranties for your chosen procurement route. This should include advising on the most appropriate contractual procedure at the various stages of a construction or other contract.
<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Basic contract law and legislation • Contract documentation • The various standard forms of contract and sub-contract • When the different forms would be used • Basic contractual mechanisms and procedures at various stages of the contract • Third party rights including relevant legislation and the use of collateral warranties. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Producing contract documentation • Carrying out the contractual mechanisms and procedures relevant to the financial management aspects of your project, such as change procedures, valuations, loss and expense and final accounts • Understanding general contractual provisions such as letters of intent, insurances, retention, bonds, liquidated and ascertained damages, early possession, practical completion and other common contractual mechanisms. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Selecting the appropriate form of contract and/or sub-contract for your chosen procurement route • Advising on the most appropriate contractual procedure at the various stages of a contract • Evaluating the appropriateness and implications of proposed contractual amendments.

Corporate real estate management

Description of competency in context of this sector

This competency covers the strategic management of occupational property – the space a business or public body needs in order to operate – taking an overall strategic view about its suitability for that business operation and the financial implications of continued occupation whilst ensuring that the facility is managed on a day to day basis in a cost effective and high quality manner to maximise occupational productivity.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the principles and practices underlying the structuring and financing of corporate transactions, with particular reference to the role of real estate within these transactions.	Apply your knowledge and understanding to assist in advising corporate organisations on the capital structure options relating to both occupational and surplus real estate. This should include the calculation and modelling of the cost of capital, plus a working knowledge of the regulatory framework within which the corporate finance marketplace operates.	Give reasoned advice on the effects of different corporate financing techniques and structures on real estate (or plant and machinery) holdings in a corporate context. This should include impacts on accounts and contributions to both merger and acquisition activity, as well as general corporate financing/ restructuring transactions.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> The role of property, space use and the financial implications of acquisition/ leasing accommodation as well as the ongoing occupational costs of running the facility in the context of business/ public authority operations The '4Ps': the key interaction of property (accommodation), people (staff/ customers), place (location) and pounds (financial effects) in the context of business or public sector operations. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Understanding the criteria which drive business/ public authority strategy formulation and how aligned accommodation and facility service provision strategies are then developed Demonstrating the importance of aligning operational resource planning to meet strategic business requirements Being aware of the financial implications of property and facility management to business operations – the effect on the balance sheet and on the profit and loss account Using analysis techniques associated with comparative returns on investment, for example in various fit-outs and the return to the business in the short, medium and longer term. Familiarity with life cycle costing and whole life returns on facility investment should be demonstrated 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Advising on property and facilities management strategies demonstrating the following: <ul style="list-style-type: none"> A full understanding of the business, its strategies and financial constraints Corporate support at a senior and, preferably, boardroom level A strategic, not a tactical, day to day approach to delivery An ability to procure and manage the effective and quality provision of a wide range of facilities services Full knowledge and reliable data of the operational portfolio IT availability and user skills

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Corporate real estate management continued

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2 [cont.]	Level 3 [cont.]
	<ul style="list-style-type: none"> • Communicating the strategic importance of property and facility management within a boardroom context. 	<p>Develop property and facilities management plans which support the relevant business and include some or all of the following strategic requirements:</p> <ul style="list-style-type: none"> - Occupation cost minimisation - Flexibility of occupation and use - Promotion of corporate image - Promotion of marketing, sales and/or selling messages - Improving staff facilities, workplace conditions and workstyle flexibility - Improved operational efficiency and productivity - Facilitating corporate culture changes - Protection, realisation and/or enhancement of asset value. <ul style="list-style-type: none"> • Using performance measurement techniques and benchmarking as valuable indicators by which to formulate and 'test' property and facilities management strategies, and to evidence the added value of strategically focused property and facilities management to the business • Using and understanding the various methodologies and metrics used by businesses and public bodies to measure business performance and developing an understanding of how these may be used to measure the contribution of property and facilities management to business efficiency, effectiveness and productivity.

Design and specification

Description of competency in context of this sector

This competency involves the skills needed in the design and specification of a Facilities Management Solution or construction project. Facilities Management Surveyors are often asked to design and deliver FM solutions that support the core business of either an internal or external client, the services can be both Hard (i.e M&E or building fabric maintenance) and Soft (i.e cleaning, catering) FM surveyors may also be involved in refurbishment of property, and in many cases new build projects for which they may ultimately take operational responsibility. Knowledge of the stages of design and specification for building, from inception to completion, is an essential skill as is a full understanding of the skills required to deliver a complex FM solution that supports a clients key business drivers.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the design process and the scope and content of related documentation.	Prepare designs and specifications, including at outline and detail levels.	Co-ordinate and manage the design and specification process on projects.
<p>Examples of knowledge comprised within this level are:</p> <p>Building</p> <ul style="list-style-type: none"> The various stages of the design process The use of BIM to optimize design decisions The application of the relevant regulations in the design process Knowledge of the effect of the planning regime and technical standards on the design process An understanding of the structural implications of alterations to the load bearing components of building fabric and any operational impact of changes within the design. <p>Facilities</p> <ul style="list-style-type: none"> The ability to interpret the requirements of a client's brief and gain a full understanding of their business drivers Knowledge of the general issues surrounding sustainability Knowledge and understanding of contract documentation 	<p>Examples of activities and knowledge comprised within this level are:</p> <p>Building</p> <ul style="list-style-type: none"> Preparing of sketch designs to demonstrate compliance with a client's brief, while satisfying statutory requirements Developing of initial proposals to a detailed stage and obtaining statutory consents Completing of Design Risk Assessments, of the proposed design, to satisfy the requirements of the regulations, in connection with the future maintenance of the building <p>Facilities</p> <ul style="list-style-type: none"> Providing of advice to clients regarding sustainability issues surrounding the proposals for their building Providing advice to clients on space utilization, energy, asset management, whole life costings, benchmarking, cleaning regimes Providing advice to clients on compliance issues and statutory maintenance regimes and options. 	<p>Examples of activities and knowledge comprised within this level are:</p> <p>Building</p> <ul style="list-style-type: none"> Carrying out or assisting in the preparation of the design and specification of a building project from outline proposals to completion of the design and specification process Value management to ensure delivery of solution that matches life cycle expectations of stakeholders Demonstrate knowledge and application of the specification process, including detailed knowledge of the main methods of specification Demonstrate knowledge and application of the design and specification process, and its relevance and importance to the procurement and execution of the contract selected for the building works. <p>Facilities</p> <ul style="list-style-type: none"> Demonstrate preparing a full FM solution design from the initial clients brief through to a working deliverable solution that satisfies the clients aspirations

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Design and specification continued

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2 [cont.]	Level 3 [cont.]
<ul style="list-style-type: none"> Knowledge of the options relating to bundled or unbundled services. 		<ul style="list-style-type: none"> Demonstrate examples of reconfiguring FM services to drive a better value solution that increase client benefit Demonstrate knowledge and application of BIM and how influencing design decisions during the construction period have driven cost effective operational strategies Providing estate utilization strategy to match client accommodation requirements.

Environmental management

Description of competency in context of this sector

This competency deals with both the broad knowledge and application of environmental management practice, as well as the more specific knowledge and application of formal environmental management standards for land and property.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of appropriate environmental management concepts, processes, and systems.	Apply your understanding of appropriate environmental management concepts, processes, and systems.	Maintain and report on environmental management and/or environmental management systems.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> An understanding of environmental management An understanding of where environmental management applies in professional property and land practice An understanding of standards used in environmental management. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Advising clients on the needs of environmental management Advising clients on the scope and methods to be used for environmental management Advising clients on the specialisms and specialists required to conduct environmental management. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Carrying out environmental management and reporting, including data management systems Presenting and proposing actions following the findings of environmental management Negotiating and liaising with clients and regulators on the findings and actions arising from environmental management.

Fire safety

Description of competency in context of this sector

This competency is about having the skills to assess the level of fire safety in buildings, and in proposed building projects, and being able to advise on how to achieve required levels of safety when they are not present.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the consequences of fire in a building, how it is modified by the enclosure and how the impact may be controlled. Apply fire safety principles to practical situations so as to minimise the risk from fire to personal injury or death, physical loss and adverse environmental impact.	Demonstrate knowledge and understanding of the combustion process; the physics and chemistry of fire; the physiological and psychological effects of fire; and the ability to assess means of escape systems according to circumstance, including fire safety management systems.	Apply the principles and understanding by preparing a fire safety strategy for a moderately complex assembly or commercial building with multiple uses and a relatively high occupancy.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Relevant country's fire safety standards or regulations • Understanding of current means of escape and compartmentation guidance • Current construction techniques related to fire precautions. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Attending relevant fire safety course • Assessing project plans for fire safety compliance • Inspecting projects to assess satisfactory implementation of fire safety features. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Preparing a fire safety strategy for a building as described.

GIS [Geographical Information Systems]

Description of competency in context of this sector

A GIS uses computer technology to integrate, manipulate and display a wide range of information to create a picture of an area's geography, environment and socio-economic characteristics. Beginning with a computerised topographic map as its base, a GIS overlays and integrates graphic and textual information from separate databases. The end result is a tool that can support decision making and problem solving and provide almost instantaneous answers to complex questions.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the principles of geographic information science and systems. Be aware of industry standard GIS, data structures, types and their applications, and of appropriate capture and output systems.	Apply your knowledge and assess data quality; define and use appropriate input and data transfer methods; analyse data and prepare databases; identify digital data sources and assess 'fitness for use'. Understand and be aware of national and international data standards.	Assess clients' needs and advise them accordingly. Define specifications including data and process modelling, customise systems, carry out advanced spatial analyses, and manage data and observe data standards
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Understand and be able to explain the generic concepts in GIS appropriate to different audiences Compare and contrast different commercial GIS software packages and explain their relative merits Proficiently operate at least one commercially available off-the-shelf GIS software package eg create, store, access, view, analyse and plot spatial data Understand and be able to describe the data types and data structures used for spatial data and explain their relative merits Understand and be able to explain different open source and proprietary data formats and explain their relative merits Understand and be able to describe the different methods of primary, and especially secondary, data capture and their underpinning technologies Understand and be able to describe the different output options and their underpinning technologies. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Specifying capture methods appropriate to the data source and the application, explaining and justifying the rationale used Managing data capture projects and providing quality control over the acquisition of spatial data for use in GIS Understanding the principles underlying the analysis of spatial data and implement these with typical GIS algorithms using standard functionality and/or a high level programming language Applying query languages in relation to database management systems eg data modelling, data loading, data maintenance, query, translate data formats, data export 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Designing and conducting user requirements analysis at consultancy level Analysing and synthesising user requirements into a coherent and convincing strategy Presenting, explaining and justifying findings and advice in a language appropriate to the customer Defining data standards to meet specific user requirements Analysing customer processes and presenting options to model these as appropriate with respect to availability of resources, criticality and customer expectations Customising GIS software using a high level programming language in order to implement data specifications, data models, process models etc Analysing, defining and implementing appropriate analytical methods

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GIS [Geographical Information Systems] continued

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2 [cont.]	Level 3 [cont.]
	<ul style="list-style-type: none"> • Identifying, assessing and sourcing datasets appropriate to user requirements and assessing their quality and fitness for purpose in the context of quantitative and qualitative measures such as: spatial resolution, accuracy/precision, temporal resolution, purpose of original capture etc • Understanding global industry standards and how these apply • Understanding metadata for third party datasets and be able to prepare, create and maintain appropriate metadata for new datasets. 	<ul style="list-style-type: none"> • Defining appropriate data management standards with respect to: currency requirements, conflict resolution, archiving, availability, backup and recovery, system resilience etc • Explaining all of the above in the context of the customer's wider information systems • Identifying and explaining the implications and limitations of advice with respect to any of the above • Preparing project proposals and draft tender documentation for system procurement, conducting benchmark tests, and overseeing implementation programmes.

Health and safety

Description of competency in context of this sector

This competency covers the relationship between the work of the facilities manager and health and safety issues within the built asset industry. Candidates should be aware of legal, practical and regulatory requirements. They should have a detailed understanding of the health and safety processes and guidelines used to achieve this.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the principles and responsibilities imposed by law, codes of practice and other regulations appropriate to your area of practice.	Apply evidence of practical application of health and safety issues and the requirements for compliance, in your area of practice.	Provide evidence of reasoned advice given to clients and others on all aspects on health and safety.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Personal safety on site and in the office • Procedures imposed by law • The impact on health and safety of: <ul style="list-style-type: none"> – Design – Construction processes – Building maintenance – Employment of staff – Compliance requirements – Safe systems of work – Under taking risk assessments. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Obtaining formal health and safety qualifications including first aid, industry specific or nationally recognised qualifications • Being involved with specific roles and responsibilities within the various regulations • The importance of behavioral safety and implementing the systems for health and safety management and monitoring. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Giving reasoned advice on and/or taking responsibility for health and safety issues relating to: <ul style="list-style-type: none"> – Impact of design on operations – Current legislation – Embedding a positive health and safety culture – Design and implement a health and safety strategy.

Landlord and tenant (including rent reviews and lease renewals)

Description of competency in context of this sector

This competency is about the management of the landlord and tenant relationship. It has a broad scope covering all aspects of lease negotiations arising between landlord and tenant. The candidate will be expected to understand the issues and how they affect both parties.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the law and practice relating to landlord and tenant.	Apply the principles of the law and practice relating to landlord and tenant. Carry out relevant negotiations to provide solutions to issues affecting both owners and occupiers of real estate.	Provide evidence of reasoned advice, prepare and present reports on the law and practice relating to landlord and tenant. Apply your knowledge to assist in undertaking relevant dispute resolution procedures.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • The principles of property law • The statutory and common law framework applying to the landlord and tenant relationship • The content, form, and structure of leases • Relevant market conditions and property values. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Reading and interpreting leases • Preparing reports containing recommendations prior to the commencement of negotiations • Giving appropriate valuation advice • Carrying out market research, collating and analysing comparable evidence • Preparing, serving and responding to legal notices • Entering into negotiations • Reaching an agreed solution and reporting recommendations to clients • Instructing legal advisers and seeing matters to conclusion. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Providing strategic advice upon landlord and tenant matters, relating to individual properties or blocks of properties • Dealing with more unusual/challenging cases • Providing advice as to alternative dispute resolution options in the event of breakdown of negotiations and taking any necessary action to protect the client's position • Demonstrating involvement with third party determination and associated submissions.

Maintenance management

Description of competency in context of this sector

Deliver maintenance services to a plan based on organisational need, either using an in-house work force, or maintenance contractors.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of maintenance management requirements of buildings, structures and other real estate	Determine and implement operational maintenance policies	Provide evidence of reasoned advice to clients on optimized maintenance operations.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Statutory and regulatory compliance requirements • Maintaining record systems • Management reporting • Developing and implementing maintenance plans e.g planned, reactive, statutory • Supply chain management • Confirming satisfactory completion of work • Understand the potential interfaces between various computerised systems used for facilities management purposes • Integrating maintenance activity with the occupant's operational needs. • Understanding concepts of lifecycle. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Implementing maintenance policy through establishing maintenance plans –to ensure agreed availability at a minimum resource cost • Understanding cost/benefit various maintenance regimes • Trend analysis and recommendations for continuous improvement • Creation and implementation of lifecycle plans • Forward maintenance planning • Develop and implement systems that will measure the performance of the maintenance organisation. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Providing advice and recommendations on issues relating to the management of maintenance policy • Determine maintenance policy, strategy and objectives linked to organisational objectives and whole life considerations • Determine and implement the type of maintenance regime and organisation that is required, including CAFM /BIM requirements • Interpret results from performance measurement of the maintenance organisation and provide reasoned advice and recommendations.

Procurement and tendering

Description of competency in context of this sector

This competency relates to services and goods rather than construction. It covers the selection of service providers – pre-qualification, tender lists, selection criteria; contract selection – alternative forms of contract; and pricing documentation. In this context contracts might cover single service providers or multi service management and implementation.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the main types of procurement. Demonstrate knowledge and understanding of the regulatory framework, tendering and negotiation processes involved in procurement.	Apply your knowledge to the implementation of the procurement routes selected for your projects and to carrying out tendering and negotiation processes relevant to them.	Give reasoned advice on the appropriateness of various procurement routes. Manage the tendering and negotiation process and present reports on the outcome.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • A practical knowledge of the following areas: <ul style="list-style-type: none"> – Pre-qualification procedures – Selection criteria – Tender lists – Specifications – Service level agreements – Pricing documentation – Tender negotiation – Performance indicators – Service delivery models – Contract law. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Implementing pre-qualification procedures using selection criteria to draw up tender lists • Devising tender documentation including statements of scope of service and pricing schedule • Participating in pricing and/or vetting of tenders • Balancing risk and reward. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Providing reasoned advice and recommendations to clients on alternative procurement routes and tendering procedures • Taking a lead role in the award of contracts and providing reasoned advice on the decisions reached.

Project audit

Description of competency in context of this sector

This competency concerns the assessment of the performance of a project and its individual stakeholders. This can be used to identify areas for improvement on a live project, (for example mobilisation, relocations or service re-design) and/or to identify lessons learnt for application on future projects.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Describe the essential requirements of a project audit/close-out report.	Explain the procedures associated with producing a project audit/close-out report.	Undertake and report on a project audit/ close-out report.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • An understanding of the client's requirements and the development/ project brief • An understanding of the reasons for any changes to the client's requirements and the development/project brief • An understanding of the reasons for the chosen procurement route and the actual and planned performance of the project team • An understanding of the project team structures and procedures • An understanding of the reasons for any design, cost and programme variations • An understanding of the project risks and any unforeseen problems. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Analysing the reasons for, and implementation of, changes to the client's requirements and the development/project brief • Analysing the appropriateness of the chosen procurement route • Analysing the actual performance of the project team and identifying potential improvements • Analysing project team structures and procedures • Analysing reasons for, and implementation of, any design, cost and programme variations • Recording lessons learnt. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Preparing audit reports and advising the client • Identifying lessons learnt and recommending appropriate responses • Assessing and advising upon the performance of the project team • Assessing and advising upon the chosen procurement route, project team structures and procedures • Assessing and advising upon design cost and programme variations.

Project financial control and reporting

Description of competency in context of this sector

This competency covers the effective cost control of property/construction projects and/or facilities management contracts whilst in progress. Candidates should be aware of the principles of controlling and reporting costs on any project. They should have a detailed understanding of the control and reporting processes used on their projects.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the effective control of costs during a project. Demonstrate understanding of the legal and contractual constraints and the effect of time and quality on the cost of a project.	Apply your knowledge to the management of project costs. This should include the preparation and presentation of financial reports on the performance of a project at appropriate intervals, to provide effective forecasting of costs, risks and their financial implications.	Advise on strategies and procedures to control predicted expenditure in line with a budget.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • The effective control of costs while a property/ construction project is in progress • The legal and contractual constraints on the cost of a project such as changes in property or building legislation and design risk allocation • The reporting and forecasting of costs • The principles of contingencies/ risk allowances. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Managing project costs • Reporting and forecasting costs for different procurement routes and client types • Using cashflows in financial management • Managing client budget/ contingencies/ risk allowances. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Implementing change control procedures within the contract • Establishing reporting regimes/ protocols • Using risk management and analysis techniques • Advising on capital and operational expenditure.

Property management

Description of competency in context of this sector

This competency covers all aspects of day to day functions associated with property management. It includes issues relating to works, health and safety, landlord and tenant relationships, and service charges. In general, any matter associated with the smooth running of a property.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of property management and the relationship between owner and occupier.	Apply the principles of property management to provide solutions to issues affecting both owners and occupiers of real estate.	Provide evidence of reasoned advice including the preparation and presentation of reports in relation to property management.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Understand the key factors determining the landlord and tenant relationship in relation to the running of a property • Understand key lease terms and their implications to property management • Understand how disputes and problematical issues can be resolved, and be able to prioritise key tasks. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Managing property from both a landlord and tenant perspective, and understanding the key factors from each viewpoint • Understanding legal requirements associated with multi let property and/or managed property • Understanding property management accounting principles from the landlord and tenant perspective, and also the requirements of law and RICS • Understanding courses of action in relation to breaches of lease by landlord and tenant. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Participating in all aspects of property management including works, emergency reactive maintenance, planned programmes, budgets etc • Applying your negotiation, communication, and business skills in relation to contentious issues with both landlord and tenant • Participating in issues such as applications for licence for works, together with the associated legal frameworks.

Strategic real estate consultancy

Description of competency in context of this sector

This competency is about the provision of strategic consultancy advice to clients on real estate issues influencing the business.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the business context of real estate, and an appreciation of the role of the real estate professional as a strategic adviser.	Apply your knowledge and understanding of the business context of real estate in a corporate or other context.	Provide evidence of reasoned oral and written advice on the principles and application of real estate knowledge.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Organisational structures, values and objectives • Business performance • The role and importance of real estate in organisational/business performance • The role of real estate in business strategies • Strategic uses of real estate • The role of the real estate professional as a strategic business adviser • Styles of consultancy intervention. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Researching organisational background • Preparing relevant data • Analysing data • Using different styles of consultancy intervention for different clients' needs • Using your knowledge of real estate to find strategic solutions to meet clients' requirements. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Providing strategic advice and recommendations to clients • Presenting to clients • Conducting meetings with clients • Presenting data to support recommendations.

Supplier management

Description of competency in context of this sector

This competency relates to the management of facilities service providers.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of how to manage suppliers using a logical process to ensure that the cost and quality of the service received meets organisational requirements.	Apply your knowledge and understanding by using an existing process to manage suppliers to ensure that the cost and quality of the service received meets organisational requirements.	Help define organisational requirements for supplier services and develop an appropriate approach to the management of an individual supplier or group of suppliers based on the scale of the service and the risk of service failure.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • A practical knowledge of the following areas: <ul style="list-style-type: none"> – Contracts – Service level agreements – Key performance indicators – Performance monitoring – Benchmarking. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Involvement in a range of the activities listed above [level 1] through: <ul style="list-style-type: none"> – Performance review meetings – Auditing of suppliers – Budgeting – Ordering variations to the service – Payment of suppliers – Developing collaborative relationships. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Using user/customer feedback to provide effective supplier management, ensuring that performance matches the needs of the organisation • Developing partnership relationships to deliver joint objectives with the supply chain • Developing learning and innovation within the supply chain.

Sustainability

Description of competency in context of this sector

This competency covers the impact of sustainability issues in facilities management. Candidates should have an awareness of the various ways in which sustainability can impact on facilities management. They must have a thorough understanding of the impact made by sustainability on their area of responsibility and have been involved with the financial management of that impact.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of why and how sustainability seeks to balance economic, environmental and social objectives at global, national and local levels in the context of land, property and the built environment.	Provide evidence of the practical application of sustainability appropriate to your area of practice, and of awareness of the circumstances in which specialist advice is necessary.	Provide evidence of reasoned advice given to clients and others on the policy, law and best practice of sustainability in your area of practice.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • The principles of sustainability within facilities management • The relationship between property and the environment • How national and international legislation, regulations and taxation relating to sustainability affect construction • Criteria by which sustainability is measured in relation to operational buildings • The principles of how design, technology, construction and operational processes can contribute to sustainable building • The principles of material resource efficiency within the supply chain. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Carrying out capital cost and value engineering exercises to determine the impact of sustainability issues on design and construction processes • Carrying out whole life analysis exercises which take account of sustainability issues • Corporate responsibility • Understanding the measures undertaken by governments and international bodies to encourage the reduction of the environmental impact of development. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Giving reasoned advice to your client and stakeholders on the impact of sustainability • Giving reasoned advice on the application of environmental law and policy • Interpreting environmental reports and giving reasoned advice on the financial impact and programme implications on a project • Giving advice on sustainable material selection and how performance baselines can be estimated.

Work progress and quality management

Description of competency in context of this sector

This competency involves the supervision of a Facilities Management contract or programme as well as the disciplines required to oversee project works on site. It is essential that candidates selecting this competency demonstrate a detailed knowledge of construction technology techniques and an in depth knowledge of the requirements of FM delivery. Quality of workmanship through the construction phase and service delivery during operation is vital to ensure the long term functional ability of buildings, and candidates will be expected to demonstrate detailed knowledge of project quality requirements both in the construction and operational phase.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Inspect and record progress and quality of building works. Monitor and report on service delivery throughout the lifetime of the FM contract.	Report and advise upon the adequacy of progress and quality of building works. Report on advise on options relating to service delivery and building functionality.	Manage and co-ordinate progress and quality of building works or Facilities Management delivery as a contract administrator/ supervising officer/ FM or equivalent.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> The ability to carry out a project review, and the importance of recording progress of works, and the quality of delivery. A knowledge of the requirements of recording progress, and comparing to programmed works progress Knowledge of the requirement for quality descriptors as set out in the contract documentation Knowledge of the difference between an input and output specifications and how these are being monitored Knowledge of the relevant standards that govern each of the service lines that are being delivered Knowledge of the Key performance indicators (KPI's) and Service Level Agreements (SLA's) relating to service delivery Knowledge of the monthly reporting obligations Knowledge of innovative techniques and developments within service delivery disciplines. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Carrying out inspections of works being completed on site, and preparing the necessary reports showing progress and quality issues that have arisen Preparing reports and advice for clients detailing the effects of additional instructions, amendments to specifications, and the likely effect on progress Recording for in house and external purposes reports on quality of works on site, including any works rejected, and the reasons for doing so Preparing business cases and options for clients that will enhance utilisation or staff wellbeing Preparing options relating to whole life cost and energy issues Advising on benchmarking options to test and challenge current and future services delivery Constantly challenging the service delivery model to drive improvement for your client. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> Preparing cost reports or monitoring maintenance/ capital and operating budgets for clients, on works progress, showing any deviation from expected progress or expenditure Implementing systems for recording progress and quality issues, and preparing reports for external circulation Showing an understanding of the differences between the duties of the various parties within either a building or FM contract, and those of a person appointed solely to report on progress and quality issues Incorporating into your duties the requirements for progress and quality reporting Preparing alternative quality options for clients which may drive cost savings without any detrimental effect on business delivery.



Confidence through professional standards

RICS promotes and enforces the highest professional qualifications and standards in the development and management of land, real estate, construction and infrastructure. Our name promises the consistent delivery of standards – bringing confidence to the markets we serve.

We accredit 118,000 professionals and any individual or firm registered with RICS is subject to our quality assurance. Their expertise covers property, asset valuation and real estate management; the costing and leadership of construction projects; the development of infrastructure; and the management of natural resources, such as mining, farms and woodland. From environmental assessments and building controls to negotiating land rights in an emerging economy; if our members are involved the same professional standards and ethics apply.

We believe that standards underpin effective markets. With up to seventy per cent of the world's wealth bound up in land and real estate, our sector is vital to economic development, helping to support stable, sustainable investment and growth around the globe.

With offices covering the major political and financial centres of the world, our market presence means we are ideally placed to influence policy and embed professional standards. We work at a cross-governmental level, delivering international standards that will support a safe and vibrant marketplace in land, real estate, construction and infrastructure, for the benefit of all.

We are proud of our reputation and we guard it fiercely, so clients who work with an RICS professional can have confidence in the quality and ethics of the services they receive.

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