



Australian Government

Department of Education, Employment and Workplace Relations

CPPDSM6008A Develop strategic facilities management plan

Release: 1

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Modification History

Not Applicable

Unit Descriptor

Unit descriptor

This unit of competency specifies the outcomes required to develop and implement a strategic facilities management plan that is consistent and appropriate. It requires the ability to measure the effectiveness of the facilities management plan using a variety of review and evaluation methods and to modify and implement corrective action strategies.

The unit may form part of the licensing requirements for persons working in the property industry, including in the real estate, business broking, stock and station agency and property operations and development sectors, in those States and Territories where these are regulated activities.

Application of the Unit

Application of the unit

This unit of competency supports the work of those involved in developing and implementing strategic facilities management plans.

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Prerequisite units Nil

Employability Skills Information

Employability skills The required outcomes described in this unit of competency contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit of competency is packaged, will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency. Performance criteria describe the required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Establish facilities management requirements.	1.1 Facilities management performance needs are determined and confirmed as required in consultation with relevant people. 1.2 Risk assessment of facilities management outcomes is conducted and assessed according to industry and organisational policies and procedures. 1.3 Relevant industry benchmarks are analysed to assess expected performance of assets in varying market conditions. 1.4 Applicable industry, organisational and legislative requirements are interpreted to establish user, contractual and legal compliance for facilities performance.
2 Prepare plan.	2.1 Facilities management plan including aims and objectives is prepared in appropriate format for dissemination to relevant people. 2.2 Quality assurance goals and strategies are established according to facilities management plan. 2.3 Monitoring and reporting arrangements for facilities management plan are determined in line with client requirements. 2.4 Life cycle analysis is undertaken and capital investment strategies are planned.
3 Organise resources and support processes.	3.1 Financial, physical and human resource requirements are organised according to facilities management plan. 3.2 Information relating to implementation of facilities management plan is distributed using established communication channels. 3.3 Reliable management methods are used, making efficient use of time and resources. 3.4 Roles and responsibilities associated with implementation of facilities management plan are clearly defined and documented.
4 Review, evaluate and modify facilities management plan.	4.1 Facilities management plan is reviewed and evaluated in consultation with relevant people using appropriate feedback strategies. 4.2 Systematic review processes are established and suitable evaluation methods used to evaluate facilities management plan outcomes. 4.3 Evaluation results are reviewed and recommendations for modification of plan and corrective actions are

ELEMENT**PERFORMANCE CRITERIA**

incorporated as required into facilities management plan.

4.4 Information is securely maintained with due regard to client confidentiality, and legislative and organisational requirements.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills:

- analytical skills to interpret documentation, evaluate plan, analyse risk and estimate costings and budget needs
- communication skills to include relevant people in the planning process, discuss issues that may impact on others and receive feedback
- computing skills to access the internet and web pages, prepare and complete online forms, lodge electronic documents and search online databases
- interpersonal skills to obtain feedback that enables a review and evaluation of plan and to relate to people from a range of social, cultural and ethnic backgrounds and varying physical and mental abilities
- leadership skills to take a leading role in a variety of situations and pursue new challenges and opportunities
- literacy skills to access and interpret relevant information and prepare required documentation and information for those involved in implementation activities
- problem solving skills to identify potential barriers to implementation of the plan and establish contingencies
- research skills to collect reliable and valid information and match forecasting models and techniques with specific asset or facility requirements
- technical skills to design facilities or asset management plan, schedule tasks and report outcomes.

Required knowledge and understanding:

- building services and operation methods and practices
- financial analysis and forecasting principles
- impact analysis and investment scenario planning
- industry benchmarks for maintenance procedures
- industry performance benchmarks, including use and application of value analysis and benchmarking techniques
- long-range and annual facility planning techniques and practices

REQUIRED SKILLS AND KNOWLEDGE

- organisational and professional procedures, ethical practices and business standards
- organisational quality systems, such as recording systems and strategic planning processes
- principles and practices of performance measurement, including review and evaluation procedures, processes and techniques
- principles and processes of objective setting
- relevant federal and state or territory legislation and local government regulations related to:
 - anti-discrimination
 - consumer protection
 - environmental issues
 - equal employment opportunity (EEO)
 - financial probity
 - franchise and business structures
 - industrial relations
 - OHS
 - privacy
 - property sales, leasing and management.

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

Overview of assessment This unit of competency could be assessed through practical demonstration of developing and implementing a facilities management plan. Targeted written (including alternative formats where necessary) or verbal questioning to assess the candidate's underpinning knowledge would provide additional supporting evidence of competence. The demonstration and questioning would include collecting evidence of the candidate's knowledge and application of ethical standards and relevant federal, and state or territory legislation and regulations. This assessment may be carried out in a simulated or workplace environment.

Critical aspects for assessment and evidence required to demonstrate A person who demonstrates competency in this unit must be able to provide evidence of:

- competency in this unit**
- conducting a life cycle assessment and planning appropriate investment and disposal strategies for incorporation into facilities management plan
 - determining facilities and asset management requirements using industry benchmarks and risk assessment strategies
 - evaluating the facilities management plan and making recommendations for immediate action or modification of the plan
 - identifying resource requirements, communicating roles and responsibilities and designing an implementation strategy for the plan
 - knowledge of organisation's practices, ethical standards and legislative requirements associated with developing and implementing facilities management plans
 - preparing a facilities management plan incorporating quality systems and reporting procedures.

Context of and specific resources for assessment Resource implications for assessment include:

- a registered provider of assessment services
- assessment materials and tools
- candidate special requirements
- competency standards
- cost and time considerations
- suitable assessment venue and equipment
- workplace documentation.

Where applicable, physical resources should include equipment modified for people with disabilities.

Access must be provided to appropriate learning and/or assessment support when required.

Assessment processes and techniques must be culturally appropriate, and appropriate to the language and literacy capacity of the candidate and the work being performed.

Validity and sufficiency of evidence require that:

- competency will need to be demonstrated over a period of time reflecting the scope of the role and the practical requirements of the workplace
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the person's competence
- all assessment that is part of a structured learning experience must include a combination of direct, indirect

and supplementary evidence

- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through simulated project-based activity and must include evidence relating to each of the elements in this unit.

In all cases activity and must include evidence relating to each of the where practical assessment is used it will be combined with targeted questioning to assess the underpinning knowledge. Questioning will be undertaken in such a manner as is appropriate to the language and literacy levels of the candidate and any cultural issues that may affect responses to the questions, and will reflect the requirements of the competency and the work being performed.

Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. ***Bold italicised*** wording in the performance criteria is detailed below. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Facilities may include:

- car parking
- child care centres
- community facilities
- educational facilities
- meeting places
- offices
- security facilities
- sport and recreation venues.

Relevant people may include:

- agents
- clients
- colleagues
- designated OHS representatives
- emergency personnel
- engineers and technicians
- government personnel
- installers
- legal representatives
- members of industry associations
- property owners
- site personnel
- subcontractors
- supervisors
- technical experts
- tenants
- tradespeople.

Industry benchmarks may relate to:

- discounted cash flows
- employment rates
- industry association performance index
- inflation rate
- internal rates of return
- life cycle costings
- published vacancy factors

Assets may be static or dynamic and include:

- tenancy mix.
- buildings
- business and marketing contracts
- equipment
- furniture
- goodwill
- land
- property
- vehicles.

Organisational requirements may be outlined and reflected in:

- access and equity principles and practice guidelines
- business and performance plans
- complaint and dispute resolution procedures
- emergency and evacuation procedures
- employer and employee rights and responsibilities
- goals, objectives, plans, systems and processes
- legal and ethical requirements and codes of practice
- mission statements and strategic plans
- OHS policies, procedures and programs
- policies and procedures in relation to client service
- policies and procedures relating to own role and responsibility
- quality and continuous improvement processes and standards
- quality assurance and procedure manuals
- records and information systems and processes.

Legislative requirements may be outlined and reflected in:

- Australian standards
- codes of practice covering the market sector and industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas and electricity), and contract or common law
- consumer protection
- environmental and zoning laws affecting access security, access and property use
- freedom of information relevant federal, and state or territory legislation that affects organisational operation, including:
 - OHS
 - environmental issues
 - EEO
 - industrial relations
 - anti-discrimination and diversity
- home building requirements

Facilities management plan may include:

- local regulations and by-laws
- privacy laws applying to owners, contractors and tenants
- public health
- quality assurance and certification requirements
- strata, community and company titles
- tenancy agreements
- trade practices laws and guidelines.
- asset management process and practice recommendations
- building and engineering maintenance plans
- environment plans and guidelines
- funding strategies
- life cycle management plans
- long-term capital and maintenance financial forecasts
- performance benchmarking recommendations and measurement processes
- planning guidelines
- quality standards
- risk management processes and practices
- utilities plans and infrastructure such as energy, water and sewerage.

Quality assurance goals and strategies may relate to:

- a formal structure against which progress can be evaluated
- budgets and timetables that enable the commitment of resources at appropriate points in the project
- compliance with Australian standards
- contingency plans to cater for a change of corporate focus or significant project difficulties
- continuous improvement strategies
- mechanisms for involving a wide variety of interested parties or stakeholders in the project
- procedures for monitoring and evaluating project outcomes and client satisfaction
- reducing risk by anticipating, evaluating and developing strategies for the management of possible problems
- reporting procedures and protocols.

Life cycle analysis may include:

- computer modelling
- examination of cash flows and other financial projections
- quantitative and qualitative analysis
- probability analysis
- time series recognition.

Information relating to implementation of facilities management plan may include:

- a formal structure against which progress can be evaluated
- acquisition and disposal strategies
- budgets and timetables that enable the commitment of resources at appropriate points
- consultation strategies to involve stakeholders
- contingency plans to cater for changes or significant difficulties
- objectives, scope and expected benefits
- quality assurance procedures
- specifications
- transition plans.

Communication channels may include:

- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- organisational networks.

Roles and responsibilities may be influenced by:

- codes of conduct
- job description and employment arrangements
- organisational policies relevant to work role
- skills, training and competencies
- supervision and accountability requirements, including OHS
- team structures.

Feedback strategies may include:

- clients and their legal representatives
- management and colleagues
- documentation and reports
- formal and informal communication
- regular meetings.

Evaluation methods could be qualitative or quantitative and may relate to:

- checklists
- cost data analysis
- expert and peer review
- interviews
- observation
- questionnaires
- review of quality assurance data.

Unit Sector(s)

Unit sector

Property development, sales and management

Competency field

Competency field Property operations and development