



End-point assessment plan for Facilities Services Operative apprenticeship standard

Apprenticeship standard reference number	Level of this end point assessment (EPA)	Integrated
ST0617	2	No

Contents

Introduction and overview	2
EPA summary table	4
Length of end-point assessment period:	5
Order of assessment methods	5
Gateway	6
Assessment methods.....	7
Weighting of assessment methods	12
Grading.....	12
Roles and responsibilities	15
Internal Quality Assurance (IQA).....	17
Re-sits and re-takes.....	17
Affordability.....	188
Professional body recognition	18
Reasonable adjustments	18
Mapping of knowledge, skills and behaviours (KSBs)	18

Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the Facilities Services Operative apprenticeship standard. It is for end-point assessment organisations (EPAOs) who need to know how EPA for this apprenticeship must operate. It will also be of interest to Facilities Services Operative apprentices, their employers and training providers.

Full time apprentices will typically spend 12 months on-programme (before the gateway) working towards the occupational standard, with a minimum of 20% off-the-job training. All apprentices will spend a minimum of 12 months on-programme.

The EPA period should only start, and the EPA be arranged, once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, all of the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPAO.

All pre-requisites for EPA assessment methods must also be complete and available for the assessor as necessary.

As a gateway requirement and prior to taking the EPA, apprentices must complete all approved qualifications mandated in the Facilities Services Operative standard.

These are:

- Level 2 Facilities Services Principles

For level 2 apprenticeships, apprentices without English and mathematics at level 2 must achieve level 1 English and mathematics and take the tests for level 2 prior to taking their EPA.

The EPA must be completed within an EPA period lasting a maximum of 3 month(s), beginning when the apprentice has passed the EPA gateway.

EPA must be conducted by an organisation approved to offer services against this apprenticeship standard, as selected by the employer, from the Education & Skills Funding Agency's Register of End-point assessment Organisations (RoEPAO).

The EPA consists of 3 discrete assessment methods.

The individual assessment methods will have the following grades:

Assessment method 1: Knowledge Test

- Pass
- Fail

Assessment method 2: Observation

- Pass
- Merit
- Fail

Assessment method 3: Professional Discussion

- Pass
- Merit
- Fail

Performance in the EPA will determine the overall apprenticeship standard and grade of:

- Pass
- Fail
- Merit

EPA summary table

On-programme (typically 12 months)	Training to develop the occupation standard's knowledge, skills and behaviours.
End-point Assessment Gateway	<ul style="list-style-type: none"> • Employer is satisfied the apprentice is consistently working at, or above, the level of the occupational standard. • Achieve Level 1 English and Mathematics • English/mathematics at Level 2 attempted <p>Apprentices must complete the following approved qualifications mandated in the standard:</p> <ul style="list-style-type: none"> • Level 2 Facilities Services Principles <p>Apprentices must complete:</p> <ul style="list-style-type: none"> • Apprentices must have completed their portfolio prior to passing through the gateway • This portfolio must be submitted no later than 2 weeks after the start of the EPA period
End Point Assessment (which would typically take 3 months)	<p>Assessment Method 1: Knowledge Test</p> <p>With the following grades:</p> <ul style="list-style-type: none"> • Pass • Fail <p>Assessment Method 2: Observation</p> <p>With the following grades:</p> <ul style="list-style-type: none"> • Pass • Merit • Fail <p>Assessment Method 3: Professional Discussion of FM performance and knowledge</p> <p>With the following grades:</p> <ul style="list-style-type: none"> • Pass • Merit • Fail
Professional recognition	<p>Aligns with recognition by:</p> <ul style="list-style-type: none"> • Institute of Workplace and Facilities Management

Length of end-point assessment period:

The EPA must be completed within an EPA period lasting a maximum of 3 month(s), beginning when the apprentice has passed the EPA gateway.

Any supporting material required for the EPA should be submitted no later than 2 weeks after the start of the EPA period.

If an EPA assessment method is failed, it should be retaken within the EPA period and in-line with the requirements set out in this assessment plan.

Order of assessment methods

The assessment methods can be delivered in any order – however, it is recommended (but not a requirement) that the multiple-choice examination be taken first, followed by the observation.

This recommendation is made to maintain the affordability of the End Point Assessment

Gateway

The EPA period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that is to say they have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider(s), but the decision must ultimately be made solely by the employer.

In addition to the employer's confirmation that the apprentice is working at or above the level in the occupational standard, the apprentice must have completed the following gateway requirements prior to beginning EPA:

Apprentices without English and mathematics at level 2 must achieve level 1 English and mathematics and take the tests for level 2 prior to taking their EPA.

For those with an education, health and care plan or a legacy statement the apprenticeships English and mathematics minimum requirement is Entry Level 3 and British Sign Language qualification are an alternative to English qualifications for whom this is their primary language.

Apprentices must complete the following approved qualifications as mandated in the standard:

- Level 2 Facilities Services Principles

For Knowledge Test:

- no specific requirements

For Observation:

- no specific requirements

For Professional Discussion the apprentice will be required to submit:

- Apprentices must have completed their portfolio (which includes a record of on programme learning and performance) prior to passing through the gateway. This must not be assessed on-programme.
- The employer must sign off the portfolio thereby authenticating as the apprentice's own work
- The portfolio must contain sufficient evidence to prove that the apprentice meets all the requirements of the knowledge, skills and behaviours across the whole standard. A variety of evidence must be collected. This may take the form of naturally occurring work products (e.g. reports and accompanying working notes, calculations, drawings, emails and correspondence); witness testimony from an independent person e.g. work colleagues or customers; records of observations; extracts of appraisal documentation; videos or audio recordings. One piece of evidence may attest to competence in two or more aspects of the standard. If so, then they should be cross-referenced clearly showing to which knowledge, skills and behaviours it relates. Typically, 20 pieces of evidence may be included in the portfolio.

Assessment methods

Assessment Method 1: Knowledge Test (This method has 1 component.)

Method 1 Component 1: Multiple Choice Question Examination

Overview

The rationale for this assessment method is:

The Multiple-Choice Question (MCQ) examination is a valid test of the knowledge required of a Facilities Services Operative – EPAOs will be responsible for developing and maintaining a bank of questions of sufficient size and will randomly select questions for each exam from this bank in order to prevent predictability. They must also ensure that questions are not repeated in the event of re-sits/re-takes.

Test Format

The test can be:

- computer based

It will consist of 20 knowledge-based questions.

These questions will consist of:

- Closed response, multiple-choice questions.

Test administration

Apprentices must have a maximum of 40 minutes to complete the test.

The test is closed book which means that the apprentice cannot refer to reference books or materials.

The multiple-choice examination may be conducted remotely using a proctoring system. Apprentices must take the test in a suitably controlled environment that is a quiet space, free of distractions and influence. The EPAO is required to have an invigilation policy that will set out how the test/examination is to be carried out. This will include specifying the most appropriate ratio of apprentices to invigilators to best take into account the setting and security required in administering the test/examination.

The EPAO is responsible for ensuring the security of testing they administer to ensure the test remains valid and reliable (this includes any arrangements made using online tools). The EPAO is responsible for verifying the validity of the identity of the person taking the test.

This assessment method will be carried out as follows:

The EPAO must verify the suitability of the venue for taking the test and the identity of the person taking the test. Apprentices' must provide photographic evidence to verify their identity.

Marking

Tests must be marked by independent assessors or markers employed by the EPAO following a marking guide produced by the EPAO. Alternatively, marking by computer is permissible where questions types allow this, to improve marking reliability.

Any incorrect or missing answers must be assigned 0 marks.

Correct answers must be assigned 1 mark

Question and resources development

Questions must be written by EPAOs and must be relevant to the occupation and employer settings. EPAOs must develop ‘question banks’ of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure they, and the questions they contain, are fit for purpose. The question bank will generate test papers that assess the knowledge mapped to this assessment method.

Required supporting material

As a minimum EPAOs will produce the following material to support this method:

- A test specification
- sample tests and mark schemes
- live tests and mark schemes
- analysis reports which show areas of weakness for completed tests/exams and an invigilation policy.

Assessment Method 2: Observation (This Method has 1 component.)

Method 2 Component 1: Workplace observation and follow up Q&A

Overview

Apprentices must be observed by an independent assessor completing work in their normal workplace, in which they will demonstrate the KSBs assigned to this assessment method. The EPAO will arrange for the observation to take place, in consultation with the employer.

One assessor may observe up to a maximum of 1 apprentice at any one time, to allow for quality and rigour.

The rationale for this assessment method is:

The occupation involves practical activity best assessed through observation; it would be difficult to replicate the working environment in a valid way. This gives employers the confidence that apprentices are accurately demonstrating their occupational competence.

Delivery

The observation will take 2 hours. The observation may be split into discrete sections held over a maximum of 1 working day. The length of a working day is typically considered to be 7.5 hours. The assessor has the discretion to increase the time of the observation by up to 10% to allow the apprentice to complete a task at the end of this component of the EPA. The independent assessor must be unobtrusive whilst conducting the observation

In advance of the observation, apprentices must be provided with information on the format of the observation, including timescales.

The following activities **MUST** be observed during the observation:

1 Carrying out a process which demonstrates compliance with health, safety and environmental legislation and organizational policies and procedures

2 Maintaining soft FM services

3 Delivering front-of-house services

4 Supporting hard FM functions

During the observation the assessor will record how the apprentice has demonstrated competence in the KSB's assigned to this assessment method.

The observation should be conducted in the following way, to take account of the occupational context in which the apprentice operates:

The observation must take place within the apprentices' workplace to enable the independent assessor to observe naturally occurring work within their typical day to day roles and responsibilities

Questions may be asked after the observation is complete. Those KSB's that did not occur naturally during the observation by the independent assessor can instead be covered by questioning after the observation. The independent assessor may ask a minimum of 3 and maximum of 5 questions. These questions must be asked within a time period not exceeding 15 minutes. This 15-minute questioning period must be included within the total 2-hour observation period.

KSBs observed, and answers to questions, must be documented by the independent assessor.

The independent assessor will make all grading decisions.

Other relevant information

There may be breaks during the observation to allow the apprentice to move from one location to another as required.

Support material

EPAOs will produce the following material to support this assessment method:

- Outline of the observation's requirements
- Marking and grading materials
- Observation recording template as produced by the EPAO

Venue

The observation can take place in:

- employer's premises
- workplace other than the employer's own premises (e.g. premises of a client)

Question development

The follow up questions generated by the assessor following the observation may be open or closed and must refer to KSB's and activities not demonstrated in the observation but which are specified within and mapped to the assessment method.

Assessment Method 3: Professional Discussion of FM performance and knowledge (This Method has 1 component.)

Method 3 Component 1: Professional Discussion

Overview

This assessment will take the form of a professional discussion, which must be appropriately structured to draw out the best of the apprentice's competence and excellence and cover the KSBs assigned to this assessment method. It will involve the questions that will focus on coverage of prior learning or activity.

The professional discussion can take place in any of the following:

- employer's premises
- a suitable venue selected by the EPAO (e.g. a training provider's premises)

The rationale for this assessment method is:

It is a valid assessment method of those aspects of apprentices' knowledge, skills and behaviours that have been assigned to the professional discussion and where the portfolio can provide strong evidence. It also assesses apprentices' knowledge, understanding and the rationale for their performance.

Delivery

The independent assessors will conduct and assess the professional discussion.

The professional discussion must be conducted on a 1:1 basis and must last for 60 minutes. Nobody other than the EPAO assessor and the apprentice may participate in the professional discussion.

During this method, the independent assessor must ask a minimum of 6 open questions to ensure that apprentices' skills, knowledge and behaviours are demonstrated. The independent assessor has the discretion to increase the time of the professional discussion by up to 10% to allow the apprentice to complete their last answer.

The professional discussion will be conducted as set out here:

The discussion should focus on the KSB's assigned to this method of assessment. Apprentices' portfolios completed on-programme (but not assessed) will be used to support the discussion. The portfolio must be submitted to the EPAO within 2 weeks after the EPA has started. Independent assessors must receive these from the EPAO ten working days prior to the discussion to enable them to prepare for it.

Video conferencing can be used to conduct the professional discussion, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided in some way.

The independent assessor must produce and keep a written record of the professional discussion and submit it to the EPAO. Any templates must be provided by the EPAO to accurately and consistently record all assessments.

The independent assessor will make all grading decisions.

Venue

The professional discussion may take place face-to-face or remotely. If it is conducted face-to-face, it must take place in a private room that is free from distractions and which is of sufficient size to hold the apprentice and the assessor. It is expected that it will normally take place at the apprentice's workplace

Other relevant information

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.

Independent assessors must be developed and trained by the EPAO in the conduct of professional discussion and reaching consistent judgement.

EPAOs will produce the following material to support this assessment method:

Outline of the Professional Discussion's requirements
Guidance and materials relating to marking and grading

Weighting of assessment methods

All assessment methods are weighted equally in their contribution to the overall EPA grade.

Grading

Assessment method 1: Knowledge Test

Level	Failure criteria	Pass criteria
Level 2	Apprentices who fail:	To achieve a pass grade, apprentices must achieve all the following criteria:
	<ul style="list-style-type: none"> • do not reach the pass rate (75%) 	<ul style="list-style-type: none"> • reach the required pass rate (75%)

The following grade boundaries apply to the test:

Grade	Minimum score (%)	Maximum score (%)
Pass	75	100
Fail	0	74

Assessment method 2: Observation

Level	Failure criteria	Pass criteria	Merit criteria
Level 2	Apprentices who fail:	To achieve a pass grade apprentices must meet all the following criteria:	To achieve a merit grade, apprentices must meet all the pass criteria and all the following merit criteria:
	<ul style="list-style-type: none"> • DO NOT MEET PASS CRITERIA 	<ul style="list-style-type: none"> • comply with relevant health, safety and environmental legislation, as well as other legislation relevant to the workplace, e.g. GDPR (S1.1, S1.2) • follow organizational procedures (S1.3, S1.4, S5.1, S7.1, S7.3, B5) • respond to customers' queries and incidents in accordance with SOPs in collaboration with others 	<ul style="list-style-type: none"> • identify the implications of non-compliance with relevant health, safety and environmental legislation (S1.1) • identify the way in which proposed improvements may benefit the organization (S1.4) • explain the implications of not following company SOPs and the impact on the customer (S3.5)

		<p>(S3.1, S3.2, S3.5, S10.2, B1, B2)</p> <ul style="list-style-type: none"> • Communicate effectively in-line with employer guidelines (S10.2) • Manage the repairs and maintenance of equipment to ensure correct functioning of services in accordance with SOPs (S8.3, B4) • assess the suitability of communal areas to ensure they meet required standards in accordance with SOPs (S7.2) • carry out inspections to ensure the correct functioning of buildings and plant equipment in accordance with SOPs (S5.2, S8.2) 	<ul style="list-style-type: none"> • exceed customer expectations, e.g. gains positive feedback that an issue was resolved quicker than expected or a problem resolved to a high standard (S3.1, S3.2, B1, B2)
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Assessment method 3: Professional Discussion

Level	Failure criteria	Pass criteria	Merit criteria
Level 2	Apprentices who fail:	To achieve a pass grade, apprentices must achieve all the following criteria:	To achieve a merit grade, apprentices must achieve all the pass criteria and all the following merit criteria:
	<ul style="list-style-type: none"> • DO NOT MEET PASS CRITERIA 	<ul style="list-style-type: none"> • identify and manage risks in compliance with organizational procedures (S1.5, S2.1, S2.2, S2.3, S2.4, K1.2, K1.3, K1.4, K2.1, K2.2, K2.4, K2.5) • identify areas for improvement in sustainable and corporate social responsibility performance in accordance with SOPs (S4.1, S4.2, S4.3, K4.1) • deal with FM queries and complaints in accordance with SOPs (S3.3, S3.4, K3.2, K3.4, K3.5, K3.7) • report the findings of inspections of premises and 	<ul style="list-style-type: none"> • identify the implications of non-compliance with relevant health, safety and environmental legislation (S2.1) • identify the way in which proposed improvements may benefit the organization (S4.3) • make suggestions for improvements to the way in which customers' queries and complaints are handled (S3.3, S3.4) • display awareness of the impact of personal behaviours (S9.2, S9.3, B3)

		<p>equipment and deal with feedback in accordance with SOPs (S5.3, S5.4, S5.5, S8.4, S8.5, K5.1, K5.4, K5.5, K5.6)</p> <ul style="list-style-type: none"> • collate FM information and report on opportunities for improvement in information collection (S6.1, S6.2, S6.3) • report issues and problems in front-of-house services in accordance with SOPs (S7.4, S7.5, S7.6, K7.1, K7.2, K7.3) • log jobs and arrange for repairs in accordance with SOPs (S8.1, K8.1, K8.2, K8.5) • keep FM-related skills and knowledge up-to-date (S9.1, S9.2, S9.3, K9.2, K9.3, K9.4) • provide support to FM projects in accordance with SOPs and organizational expectations (S10.1, S10.3, S10.4, B3, B6, K10.1, K10.5) 	
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Overall EPA grading

All EPA methods must be passed for the EPA to be passed overall.

Grades from individual assessment methods should be combined in the following way to determine the grade of the EPA as a whole:

A fail in any assessment method result is an overall EPA fail.

Observation	Multiple-choice exam	Professional discussion	Final grade
Pass	Pass	Pass	Pass
Merit	Pass	Pass	Pass
Pass	Pass	Merit	Pass
Merit	Pass	Merit	Merit

Roles and responsibilities

Role	Responsibility
Apprentice	<ul style="list-style-type: none"> • Completes the on-programme element of the apprenticeship • Prepares for and completes the EPA
Employer	<ul style="list-style-type: none"> • Makes decision on when apprentices enter the gateway to the EPA taking into account advice from the training provider • Notifies the EPAO that the apprentice is ready to enter the gateway • Contributes to the logistics of assessment planning and delivery • Monitors the performance of apprentices during the on-programme period. • Ensures apprentices work to agreed standards and deadlines • Makes time and resources available to enable apprentices to complete assessment tasks • Records the fact that apprentices are ready for the EPA in the portfolio
EPAO	<p>As a minimum EPAOs should:</p> <ul style="list-style-type: none"> • Develops assessment instruments and marking specifications based on the standard and the assessment plan • Records the fact that apprentices are ready for the EPA • Manages EPA assessment arrangements • Produces assessment guidance to guide apprentices and employers • Monitors the performance of apprentices during EPA • Liaises with employers and apprentices on progress and issues • Ensures EPAs are carried out in line with the assessment plan

	<ul style="list-style-type: none"> • Conducts quality assurance and standardization activity to ensure the consistency of assessment • Arranges re-takes/re-sits of assessments for apprentices where they fail assessments • Applies for apprenticeship completion certificates
EPAO assessor	<p>As a minimum an Independent assessor should:</p> <ul style="list-style-type: none"> • Be independent of the apprentice, their employer and training provider i.e. there must be no conflict of interest • Hold or be working toward an independent assessor qualification and have had training from their EPAO in terms of good assessment practice, operating the assessment tools and grading • Attend the required number of EPAO's standardization and training events per year (as defined in the IQA section) • Hold a qualification in FM or a related subject at level 3 or above or a minimum of 2 years' relevant FM experience at management level; • Provide evidence of current FM-related CPD; • Reviews apprentices' portfolio • Prepares probing questions for EPA professional discussion based on the portfolio and reflective log • Conduct EPA observation and professional discussion • Grades EPA observation and professional discussion • Confirms successful completion of the apprenticeship • Decides the final apprenticeship grade in accordance with the grade descriptors and records the rationale for it • Provides feedback to apprentices and employer • Records and provides evidence of the EPA process and final result for external quality assurance purposes
Training provider	<p>As a minimum the training provider should:</p> <ul style="list-style-type: none"> • Works with the employer to ensure that the apprentice is given the opportunities to develop the KSBs outlined in the standard and monitors their progress during the on-programme period

	<ul style="list-style-type: none"> • Advises the employer upon request on the apprentice's readiness prior to the gateway • Plays no part in the EPA itself
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Internal Quality Assurance (IQA)

Internal quality assurance refers to the requirements that EPA organisations must have in place to ensure consistent (reliable) and accurate (valid) assessment decisions. EPA organisations for this EPA must:

- appoint independent assessors who have knowledge of the following occupational areas: The FM industry includes a wide range of industry sub-sectors, for example, maintenance, front-of-house logistics, post-room services and portering in residential developments and commercial properties, hospitals, schools or retail centres and industrial locations. Assessors and IQAs have occupational experience in any of the industry sub-sectors and hold a qualification in FM or related subject at least at level 3.
- appoint independent assessors who are competent to deliver the end-point assessment
- provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- have robust quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation and over time.
- operate induction training and standardisation events for independent assessors when they begin working for the EPAO on this standard and before they deliver an updated assessment method for the first time

Re-sits and re-takes

Apprentices who fail one or more assessment method will be offered the opportunity to take a re-sit or a re-take. A re-sit does not require further learning, whereas a re-take does.

Apprentices should have a supportive action plan to prepare for the re-sit or a re-take. The apprentice's employer will need to agree that either a re-sit or re-take is an appropriate course of action.

An apprentice who fails an assessment component, and therefore the EPA in the first instance, will be required to re-sit the failed component only.

Any assessment method re-sit or re-take must be taken during the maximum EPA period, otherwise the entire EPA must be taken again, unless in the opinion of the EPAO exceptional circumstances apply outside the control of the apprentice or their employer.

Re-sits and re-takes are not offered to apprentices wishing to move from pass to merit/distinction or merit to distinction.

Where any assessment method has to be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of pass, unless the EPAO determines there are exceptional circumstances requiring a re-sit or re-take.

Affordability

Affordability of the EPA will be aided by using at least some of the following practice:

- using an employer's premises
- assessing multiple apprentices simultaneously (this can only be done for MCQ as the other assessment methods are on a 1:1 basis)
- online assessment

Professional body recognition

This apprenticeship is designed to prepare successful apprentices to meet the requirements for Associate grade of membership of Institute of Workplace and Facilities Management

Reasonable adjustments

The EPAO must have in place clear and fair arrangements for making reasonable adjustments for this apprenticeship standard. This should include how an apprentice qualifies for Reasonable Adjustment and what Reasonable Adjustments will be made. The adjustments must maintain the validity, reliability and integrity of the assessment methods outlined in this assessment plan.

Mapping of knowledge, skills and behaviours (KSBs)

Assessment method 1: Knowledge Test

Knowledge
K1.1 Legislative requirements and responsibilities relating to health and safety, access & inclusion, manual handling, working at heights, hazardous substances (COSHH), reporting of injuries, diseases etc (RIDDOR)
K1.5 The roles and responsibilities of those within the FM reporting structure
K2.3 Good practice in risk management in the FM industry e.g. security, access and inclusion
K3.1 The features and purpose of effective customer service
K3.3 The range of FM contracts and Service Level Agreements (SLAs) including customers' performance standards

K3.6 The features of a complaint's procedure and typical timescales
K3.8 How innovation and change can support good customer relationships
K4.2 The contribution of FM to support sustainability (good practice, profitability, cost-savings, quality enhancements)
K4.3 Trends in FM of sustainable practice e.g. well-being, safeguarding
K5.2 The factors to be taken into account in costing the delivery of an FM service
K5.3 The features of a Service Level Agreement (SLA)
K6.1 Types and sources of FM-related information (e.g. on health and safety, energy usage, efficiency of heating and lighting systems, security and access systems)
K6.2 The uses of FM-related information (e.g. identifying recurrent problems, performance management, cost, efficiency, quality, continuous improvement etc)
K6.3 The nature and benefits of improvements to an FM business (value to customers, sustainability, environmental, profitability, cost-savings, quality enhancements)
K6.4 The features of the FM improvement cycle
K6.5 How to use software such as Word, spreadsheets, email, internet, communications systems and FM-specific software e.g. Building Management Systems (BMS), ID card systems and facilities helpdesk and how they support the FM function
K7.4 How to carry out a condition survey (e.g. taking photos, checking furniture and fittings etc) and prepare reports
K7.5 The different roles of those involved in the organization of events (e.g. security, marketing, IT, hospitality and catering, outsourced organizations etc)
K7.6 The way in which communication used in the front-of-house function influences visitors' perceptions of an organization
K8.3 The risks and hazards associated with maintenance activities and their consequences if realized
K8.4 The use of Building Management Systems (BMS) and operation and maintenance systems manuals to maintain specified operating conditions
K9.1 The purpose and features of personal performance measurement processes e.g. appraisals, one-to-ones
K9.5 The features of effective reflective practice and the impact of personal behaviours
K10.2 The purpose of establishing good customer relations and the features of effective customer relationships
K10.3 The advantages and disadvantages of different methods of communication
K10.4 The stages of a project, roles and responsibilities within a project

Assessment method 2: Observation

Skills
S1.1 Comply with relevant health, safety and environmental legislation (Health and Safety at Work etc Act 1974) e.g. logging incidents, posting/distributing health and safety notices, checking fire extinguishers, fire alarms, confirming that checks have been carried out, use of PPE
S1.2 Comply with other relevant legislation e.g. food safety, employment rights and responsibilities, data protection, equality, diversity and inclusion
S1.3 Comply with standard operating procedures (SOPs) e.g. permits to work, contractor risk assessments, safe systems of work, site inductions
S1.4 Carry out health and safety checks in accordance with SOPs
S3.1 Collaborate with other colleagues (e.g. security officers, cleaning operatives, receptionists, engineers and catering staff) in accordance with SOPs
S3.2 Respond to customers' queries and incidents in accordance with SOPs
S3.5 Keep customers informed of developments, issues and delays in accordance with SOPs
S5.1 Operate the stock management system in accordance with SOPs e.g. stock checking, replenishment, stock ordering
S5.2 Confirm the correct functioning of equipment used to deliver FM services in accordance with SOPs (e.g. franking machines, reprographics equipment, cleaning equipment, vending machines, catering trolleys, radios, walkie-talkies etc)
S7.1 Provide support to the access management system in accordance with SOPs (e.g. ID checks, key authorization, security marking, security access data, building security alarm systems (access, CCTV etc)
S7.2 Ensure communal areas meet required standards of cleanliness and presentation in accordance with SOPs (e.g. cleanliness checks, keeping the area tidy and free from hazards, maintaining the currency of publicity displays, dealing with post, deliveries and laundry, acting as a traffic marshal, removing rubbish etc)
S7.3 Greet and treat visitors in accordance with SOPs
S8.2 Carry out inspections of premises and facilities to ensure the correct functioning of buildings and plant equipment in accordance with SOPs e.g. access systems, temperature checks, repairs carried out
S8.3 Carry out minor repairs and maintenance or ensure that they have been carried out in accordance with SOPs e.g. changing toner, changing batteries, replenishing stationery, PPM audits
S10.2 Communicate with customers confidently and clearly using communication methods that are appropriate to the situation in accordance with organizational expectations

Behaviours
B1 An active and responsive approach to all customers (internal and external)
B2 Collaborating positively with others to achieve objectives and standards
B4 Thoroughness in accomplishing a task
B5 Truthful in all aspects of work

Assessment method 3: Professional Discussion of FM performance and knowledge

Knowledge
K1.2 Other legislative requirements and responsibilities e.g. food safety, employment rights and responsibilities, data protection, equality, diversity and inclusion
K1.3 The distinctions between Hard FM (maintenance), Soft FM (support services), Total or Integrated FM and its contribution to an organization
K1.4 The roles and responsibilities of FM technical experts (e.g. contractors, engineers, surveyors etc)
K2.1 HSE Five steps to risk assessment
K2.2 The requirements of the emergency and evacuation procedures
K2.4 The limits of their personal authority and competence
K2.5 Risk-related information requirements and those of the FM risk register
K3.2 The functioning of FM services and their interrelationships
K3.4 The role of customer feedback in providing customer service
K3.5 How the requirements of the contract/SLA with the customer is used to manage their expectations
K3.7 The purpose of keeping customers informed of developments, issues and delays
K4.1 Customers' and organizational corporate social responsibility and sustainability policies and requirements e.g. environmentally-friendly initiatives; "People, Planet, Profit"
K5.1 The contribution of soft FM services to an organization (value to customers, profitability, cost-savings, quality enhancements)
K5.4 How to report inefficiencies and defects and suggest improvements
K5.5 The impact of feedback in a service industry
K5.6 The requirements of relevant SOPs
K7.1 The functioning of the access management system (health and safety, security, front-of-house) including egress

K7.2 The planned maintenance programme and how it affects the front-of-house
K7.3 Why it is necessary to understand the layout of the facility and any internal access restrictions (e.g. security restrictions, management of deliveries and contractors, access and inclusion, risk management)
K8.1 The contribution of hard FM to an organization (value to customers, profitability, cost-savings, quality enhancements)
K8.2 The difference between and requirements of planned preventative maintenance (PPM) and reactive maintenance
K8.5 The interrelationship and need for collaboration between the Mechanical & Engineering function and the FM function
K9.2 The requirements of a personal development plan
K9.3 Training interventions available to support the development of FM competence and knowledge
K9.4 Sources of information e.g. trade magazines, professional body
K10.1 The way in which an organization's mission, vision and values affect its operations
K10.5 The project management tools that are used in the project

Skills
S1.5 Report the findings of health and safety checks in accordance with SOPs
S2.1 Identify risks, hazards and threats to people, property and premises in accordance with SOPs
S2.2 Act on the findings of health and safety checks in accordance with SOPs
S2.3 Implement site emergency and evacuation procedures in accordance with SOPs e.g. acting as emergency evacuation marshal, submitting evacuation plans and reports/audits
S2.4 Report on the actions taken in accordance with SOPs
S3.3 Take action that is appropriate to the nature of the FM query (e.g. clarifying straightforward contractual/SLA queries, referrals/escalation)
S3.4 Deal with complaints in accordance with SOPs
S4.1 Apply policies in sustainability and corporate social responsibility in accordance with SOPs
S4.2 Identify areas for improvement in sustainable and corporate social responsibility performance in accordance with SOPs
S4.3 Make practicable suggestions for improvements to corporate social responsibility performance in accordance with SOPs
S5.3 Report the findings of equipment inspections in accordance with SOPs
S5.4 Carry out quality assurance checks in accordance with SOPs to ensure that FM services are delivered to the required standard
S5.5 Deal with feedback or escalate issues beyond their level of authority in accordance with SOPs

S6.1 Collect FM-related information from a variety of sources (e.g. from BMS, helpdesk or in-house systems) in accordance with the task specification
S6.2 Collate FM and health and safety information as specified (e.g. preparing preliminary reports such as energy usage and sustainability, heating systems, lighting systems, security and access systems) in accordance with the task specification
S6.3 Identify and report on opportunities for improvement from information collected in accordance with the task specification using appropriate software applications and communication platforms
S7.4 Ensure service areas are maintained in accordance with SOPs for cleanliness and hygiene (e.g. food preparation areas, control rooms, compactors & refuse areas)
S7.5 Support others through the provision of reception services, events organization, hospitality and catering, room set-up and restoration in accordance with SOPs and the task specification
S7.6 Report issues and problems in accordance with SOPs
S8.1 Log jobs and arrange for repairs and engineering maintenance in accordance with SOPs
S8.4 Report the correct operation of FM buildings and equipment in accordance with SOPs
S8.5 Keep asset registers up-to-date (checks, reconciliation, record keeping) in accordance with SOPs
S9.1 Complete and keep up-to-date personal development plans
S9.2 Keep FM-related skills up-to-date
S9.3 Keep FM-related knowledge up-to-date
S10.1 Manage customer expectations in accordance with SOPs and organizational expectations
S10.3 Support the project team constructively and in a way that engenders positive relationships in accordance with organizational expectations
S10.4 Report on the extent that objectives have been met and escalate any issues in accordance with organizational expectations

Behaviours
B3 Taking responsibility for personal development to deliver high quality FM services
B6 A willingness to accept changing priorities and tasks