

## Unit FM3.12: Understand the estate management function for facilities managers

*The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.*

### Aim of the unit:

This unit provides an introduction to the estate management function. It is intended to provide context for the other facilities management functions, rather than to equip learners with the expertise required to take responsibility for estate management.

Title	Understand the estate management function for facilities managers	
Ofqual ref	A/504/5764	
Level	3	
Credit value	4	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand the responsibilities associated with property ownership and occupation	1.1	explain legislation affecting the ownership and use of property and assets <i>(By reference to legislation affecting planning, environmental matters and occupiers' liability. Also, Landlord and Tenant Act 1954, health and safety legislation and Equality Act 2010. NB Only an overview of the relevance to facilities management in each case is required rather than a detailed explanation of the law)</i>
	1.2	explain the benefits and disadvantages of being a tenant and of being an owner-occupier

	<p><i>(No further guidance)</i></p> <p>1.3 explain the obligations of landlord and tenant to each other <i>(By reference to either an example in the learner's own experience or by reference to generic/typical obligations in a lease of commercial premises)</i></p> <p>1.4. describe the difference between freehold and leasehold land tenure <i>(No further guidance)</i></p>
<p>2 understand property costs and charges</p>	<p>2.1 explain costs associated with the provision of property, including rent, rates, insurance and service charges <i>(Could also cover capital cost, depreciation and dilapidations)</i></p> <p>2.2 explain costs associated with occupying property, including maintenance, energy use and cleaning <i>(No further guidance)</i></p> <p>2.3 explain the effect of changes in occupancy levels on the costs associated with property provision and occupation <i>(Using examples to explain the relative effect on "fixed" and "variable" costs)</i></p>
<p>3 understand how to set up and manage registers for property and fixed assets</p>	<p>3.1 describe the purpose of a property asset register <i>(Including, for example, property information, e.g. lease renewal dates, to aid effective portfolio management, financial information for balance sheet, maintenance regimes and capital replacement plans)</i></p> <p>3.2 describe the technology that can be used to assist in setting up and managing a property asset register <i>(for example, simple spreadsheets and databases (e.g. MS Excel or MS Access), CAFM,</i></p>

	<p><i>financial/business management systems, e.g. SAP, bespoke IT programmes)</i></p> <p>3.3 describe the information that can be obtained from a property and fixed asset register and explain how this information is used <i>(for example, whole life costing, capital replacement, operating cost, performance comparison, legal compliance and asset utilisation rates)</i></p>	
<p>4 understand the factors involved in property relocation</p>	<p>4.1 describe the business factors driving the decision to relocate to new premises <i>(for example, organisation growth and/or change, shortage of space, financial pressures, operational efficiency, estate rationalisation)</i></p> <p>4.2 explain the factors to be considered in the choice of new premises <i>(for example, use of specialists (consultants), building appraisal, economic/financial appraisal)</i></p> <p>4.3 describe a process for organising the relocation to new premises <i>(Including preparations for move, appointing a removal contractor, programme for move, post-move activity)</i></p>	
<p>Additional information about the unit</p>		
<p>FM Professional Standards reference</p>	<p>FM functional area:</p>	<p>FM functional area component:</p>
	<p>Business Continuity and Compliance</p>	<p>Compliance</p>
	<p>Property Portfolio Management</p>	<p>Property and Asset Management</p>

## Resources:

[A-Z of Facilities and Property Management](#) by David M. Martin  
[Facilities Management: An Explanation \(Building & Surveying\)](#) by Alan Park  
[Outdoor Site and Facility Management](#) by Wynne Whyman  
[Recreation Facility Management](#) by Richard Mull, Brent Beggs, and Mick Renneisen  
[Corporate Property Management: Aligning Real Estate with Business Strategy](#) by Victoria Edwards and Louise Ellison  
[The CompleteLandlord.Com Ultimate Property Management Handbook](#) by William A. Lederer  
[Property Management](#) by Robert Kyle, Floyd Baird, and Marie Spodek  
[Property Asset Management](#) by Douglas Scarrett  
[GIS in Land and Property Management](#) by Dr Martin P Ralphs, Martin P. Ralphs, and Peter Wyatt  
[Economics of Property Management: The Building as a Means of Production](#) by Herman Tempelmans Plat  
[Corporate Property Management: Aligning Real Estate with Business Strategy](#) by Victoria Edwards and Louise Ellison  
[Business Occupier's Handbook: A Practical Guide to Acquiring, Occupying and Disposing of Business Premises](#) by Clifford Chance and Vicky Rubin  
BIFM Good Practice Guides:  
<http://www.bifm.org.uk/bifm/knowledge/resources/goodpracticeguides>  
FM World: [www.fm-world.co.uk/](http://www.fm-world.co.uk/)  
[www.bifm.org.uk](http://www.bifm.org.uk)  
[A Practical Guide to Facilities Management](#) by Ian C Barker MCIQB