

FINANCE & BUSINESS

- ✓ Outline the importance and key terms in being finance and business aware.
- ✓ Outline basic accounting principles and practices that are the foundation for facility management operations.
- ✓ Develop, recommend and manage the FM budget.
- ✓ Identify the basic financial statements an FM organization prepares.
- ✓ Describe the elements impacted by FM operations.
- ✓ Identify fundamental cost concepts and subsequent cost behaviors that occur in response to business changes and activity levels in the FM organization.
- ✓ Identify cost-containment opportunities.
- ✓ Explain the use of chargebacks to allocate facility costs.
- ✓ Develop business cases that are supported by clear documentation.
- ✓ Determine the relevant financial data that should be included in a business case.
- ✓ Explain procurement principles and procedures that comply with the demand organization's policies and guidelines.
- ✓ Determine sourcing needs and implement outsourcing standards within the facility management organization.
- ✓ Identify the principles involved in the development and oversight of facility management contracts.
- ✓ Outline the requirements for administering contracts and monitoring their performance.
- ✓ Analyze and interpret contract elements and manage risk.
- ✓ Resolve conflicts that arise with vendors in the facility organization.

LEADERSHIP & STRATEGY

- ✓ Explain the importance and objectives of strategic planning.
- ✓ Align FM's strategic requirements to demand organization's requirements.
- ✓ Use strategic planning tools and frameworks to develop and assess a strategic plan.
- ✓ Use best practices to monitor internal and external factors that can affect facility management.
- ✓ Create a facility strategic plan.
- ✓ Obtain approval and funding for tactical plans.
- ✓ Establish performance requirements and metrics to evaluate performance success.
- ✓ Identify the different natures of leadership and management.
- ✓ Outline the theories of individual behavior and the benefits of adapting leadership style in the workplace.
- ✓ Execute change management principles to ensure adoption of facility management projects.
- ✓ Explain the importance of advocating for facility management needs and priorities.
- ✓ Outline the individual roles within teams.
- ✓ Apply best practices and management principles to maintain team performance.
- ✓ Identify the methods used to create a strong organizational structure and teams for the FM function.
- ✓ Outline the facility manager's role in developing and supporting robust FM policies, procedures, and practices that effectively support the demand organization.
- ✓ Describe the tools used in clarifying and communicating responsibilities and accountabilities for staff and contractors using proper job design and work coordination.
- ✓ Identify best practices in resolving conflict through understanding root causes and using principled negotiation.
- ✓ Promote, encourage, and adhere to a code of conduct by serving as a role model, enforcing codes, and exhibiting ethical leadership
- ✓ Outline best practices in developing and managing stakeholder relationships.
- ✓ Apply sensitivity while monitoring the needs of stakeholder groups.

OPERATIONS & MAINTENANCE

- ✓ Identify the role of operations and maintenance in facility management.
- ✓ Describe how to develop, recommend and manage a facility strategic plan and associated operations and maintenance tactical plans.
- ✓ Identify deficiencies in building structures, exteriors, systems, interiors and grounds and the associated health, safety, security and environmental considerations.
- ✓ Explain when an asset's life-cycle is initiated and the factors to consider when deciding on an acquisition.
- ✓ Explain how the installation of an asset should be commissioned, integrated and documented and why training on the asset is important.
- ✓ Describe how Reliability-Centered Maintenance is used to balance maintenance activities and the role of FM information systems in these activities.
- ✓ Describe occupant services.
- ✓ Describe the process for determining guidelines for occupant service performance expectations.
- ✓ Describe an effective approach to preparing for modifications to occupant services.
- ✓ Compare techniques for monitoring and improving customer satisfaction
- ✓ Discuss the elements, value and use of service level agreements.
- ✓ Compare contractors and select the best resources based on capability.
- ✓ Explain the discussion process for a typical service level agreement.
- ✓ Describe the principles of measuring competency, monitoring performance and evaluating outcomes for work/service.
- ✓ Describe key factors and attitudes relative to contract disputes and their resolution.

PROJECT MANAGEMENT

- ✓ Describe the attributes of a project, common facility management projects and what project management is.
- ✓ Explain the roles and responsibilities of the project manager vs. the facility manager in an FM project.
- ✓ Describe project management processes, knowledge areas and cycles and relate them to a common FM project format.
- ✓ Explain the Initiate phase of a project, including inputs, tools, outputs and activities.
- ✓ Define the project purpose statement and success measurement criteria.
- ✓ Perform the programming steps required to produce a statement of requirements.
- ✓ Outline the purpose of a project charter and how it is used to gain project approval and funding.
- ✓ Develop a statement of objectives to detail project scope and deliverables and constraints.
- ✓ Outline the elements of a typical site selection process and the progressive steps in the design process.
- ✓ Identify the elements of a project management plan and the methods and tools used to create it.
- ✓ Describe how to acquire internal staff or contracted resources for team positions, materials or professional services using an open tender/bidding process or direct negotiation.
- ✓ Execute and control project activities according to the project management plan, including project scope, schedule, cost, quality, teams, communications, risks and project changes.
- ✓ Discuss how to conduct final deliverable reviews and verify all tasks have been completed.
- ✓ Explain the contract and project closure process and how an organization learns from its successes and failures by collecting, evaluating and presenting data on project outcomes.