

# FM Designer Plan of Works 2016

Our in-house FM team has developed a bespoke process chart for all FM designer delivery. It incorporates experience and up-to-date industry guidance. The chart provides an overview to how we bring value at every stage of an appointment.

RIBA Stages	0. Strategic Definition	1. Preparation and Brief	2. Concept Design	3. Developed Design	4. Technical Design	5. Construction	6. Handover and Close over	7. In Use
<b>Compliance</b>	Identify and stipulate operational outcomes identified within the client's strategic brief  Set high-level measurable targets for all key objectives and services.	Examine the intended performance in relation to utilities and environmental aspects to support environmental operational requirements	Input into H&S strategy	Continue input into H&S strategy			Identify all relevant asset data and facilities information	
<b>Plan</b>	Draft change management strategy Draft intelligent building strategy Draft communication strategy	Clarify Clients Organisational Information Requirements (OIR) and Asset Information Requirements (AIR)  Propose process for capture and presentation of asset information (including information required for Construction Operations Building Information Exchange – COBie)  Develop the initial service implementation plan	Further develop the FM services delivery strategy including operational plans, interface schedules and roles & responsibilities once operational  Contribute and comment on Project Execution Plan (PEP)  Develop the commissioning plan  Map out required operational processes  Develop FM manual	Review RDS for compatibility with the FM service delivery strategy  Agree format for O&M manuals  Review design to facilitate future removal and replacement	Initiate planning for migration of operations	Monitor the construction plan to ensure that the handover plan is not compromised  Develop a Business Continuity Plan (BCP)  Develop detailed plan of activities in relation to migration of occupiers and operations	Develop an annual and five year planned maintenance plan  Develop spares schedule and specialist equipment requirements  Change control strategy developed and in place for operational phase	Facilitate lessons learned workshop  Post occupancy analysis
<b>Data</b>	Establish a system for recording, documenting and tracking FM related activities	Collate all information / documentation in relation to the existing property/ services	Develop CAFM/IWMS strategy	Update operational and WLC models	Ensure that construction contract includes appropriate provision for data and documentation handover	Finalise helpdesk/ CAFM/IWMS process		Interrogate BIM data to ensure level of asset information is as agreed within the EIR, OIR and AIR documentation
<b>Design</b>	Develop and issue a FM design guide  Support the development of the Employers Information Requirements (EIR's)  Develop and issue a FM design guide  Establish a system for recording, documenting and tracking FM related activities	Develop statement of needs and functional brief for overarching project brief  Develop high level operating statement for FM services including performance objectives  Facilitate design workshops to identify space requirements for overall requirements and FM service operations	Agree detailed targets for the buildings performance in the post occupancy review  Occupancy surveys and findings included within concept design proposals  Review project efficiencies created via value engineering  Assess FM support space requirements	Value engineering review in respect of Life Cycle/Facilities Management impact.			Review as built information for accuracy and completeness	Change Control process to ensure documentation is kept up to date
<b>Risk</b>		FM risks and opportunities tracker to be implemented	Undertake and regularly review risk assessments of operational related issues arising from design; operation; end of life and the technology employed  Develop spares and warranties strategy	Undertake and regularly review risk assessments of operational related issues arising from design; operation; end of life and the technology employed	Undertake and regularly review risk assessments of operational related issues arising from design; operation; end of life and the technology employed	Develop risk assessment and method statement document suite  Capture and review changes in relation to operational activities, life cycle costs and risks		Undertake and regularly review risk assessments of operational related issues arising from design; operation; end of life and the technology employed
<b>Communication</b>	Issue FM design guide  Support the development of the Employers Information Requirements (EIR's)	Services Implementation plan developed and shared with key stakeholders	Stakeholder report	FM Design review issued	Stakeholder updates	Review and comment upon draft O&M manuals		User satisfaction surveys
<b>People</b>	Establish the FM Project team  Identify leadership roles, specialist areas, management reporting lines, levels of responsibility and accountability  Identify soft landings champion	Soft Landings / operational readiness group formed	Review project strategies to ensure that they are compatible with the needs of the building occupiers	Support end users change management team	Support end users change management team  Review design for compatibility or conflict issues  Initiate planning for migration of occupiers	Attend design meetings as appropriate  Capture and review changes in relation to operational activities, life cycle costs and risks  Assess skills requirement for incoming FM staff	Plan for first user-satisfaction survey  Finalise end user guides  Schedule and deliver training programmes regarding use of building	
<b>Procurement</b>	Develop FM delivery strategies	Develop initial operating budget and WLC plan	Create detailed service procurement plan  Develop detailed FM cost plans		Advise during contraction tender process in the context of FM related issues	FM contracts developed and tendered	FM service provider in place	Service Evaluation / Contract management of FM Services