Government Property Function

Facilities Management Standard

FMS 001: Management and Services Maturity Tool Guidance Document

December 2021

Contents

List of abbreviations

Term	Description
BIM	Building Information Model
CAFM	Computer-Aided Facilities Management
TFM	Total Facilities Management
IWMS	Integrated Workplace Management System
BMS	Building Management Systems
FM	Facilities Management
FMR	Forward Maintenance Register
NRM	New Rules of Measurement
OGP	Office of Government Property
PPM	Planned Preventative Maintenance
SFG20	Standard maintenance specification for building engineering services

1. Introduction

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Background

The Office of Government Property ('OGP') formed the FM Strategy Programme Team in January 2020. A new cross-department FM Taskforce was established and first met in February 2020. As part of a landscape review, the FM Taskforce has identified management and service standards as a priority area. This will help improve facilities management across the government estate.

There are a number of reasons why actions are being taken to improve FM:

• **Senior Civil Servant Function Surveys** – FM was identified as a key a driver behind poor performance ratings for the Property Function.
• **Cross-Government feedback** – Senior officials and non-execs from Departments and property bodies have frequently raised concerns over services and a lack of strategy on FM.
• **Confidence in suppliers** –In recent years FM procurements have focused on minimising costs, this has impacted on service delivery and reduced suppliers' margins. One major FM provider collapsed and the financial stability of a significant part of the marketplace was questioned.
• **Changing needs** – The needs and demands of users have changed but approach to workplace and FM has not adapted. A refocus is needed to ensure buildings function well, user experience improves and to address policy issues such as sustainability.
• **Investment in maintenance** – Lack of investment, and significant backlog maintenance, is the single biggest risk across the Property Function.

Objective

The objectives of the management and service standard include:

• **Collaboration and knowledge sharing** – a common standard and common language across FM services will facilitate collaboration and knowledge sharing between organisations.
• **Common Service Standards** - will help drive more consistent experiences across organisations. improving satisfaction ratings of government staff and maintenance standards, which will help reduce future maintenance costs.
• **Strengthening FM Management Standards** – will improve interoperability and resilience across the estate, supporting a better customer experience and better value for money.

Purpose of this document

This document contains guidance on how to interpret and use both the standard document and the maturity tool.
The FM management and service standard is aimed at improving consistency and quality of FM service delivery across the follow areas – Strategy, Management, Hard Service Delivery and Soft Service Delivery. The maturity tool has been developed to support organisations in assessing themselves against the standard, to indicate potential areas that require improvement and evidence the required case for change and investment.

The purpose of this document is to help users:
• **To understand the FM management and service standard** – to provide an overview of what the FM standards are, as well as an understanding of when and how it should be used.
• **To guide users through how to complete the maturity tool assessment** – to provide step by step guide for organisations on how to use the maturity tool to complete the self assessment.

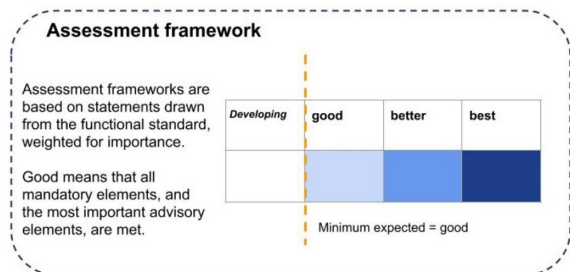# 1.2 Maturity Framework – Stages

Maturity framework

This maturity framework has been developed to assist organisations in self assessing against the FM management and service standard. The maturity tool will support organisations in evidencing investment requirements to adhere to the FM management and service standard. This framework is designed around five maturity stages (Developing – Basic, Developing – Improving, Good, Better, Best) and five assessment dimensions (Strategic, Insightful, Intelligent, Collaborative, Delivery Excellence). These are detailed in the section '1.2 Maturity Framework - Dimensions'.

Functional Standards Framework

The stages in the maturity framework are aligned to the "**Government Functional Standards - Handbook for assessing performance against functional standards, version 1.1**", issued 25th November 2020.

The functional standards framework sets out different levels of maturity against the most important aspects of a functional standard - from 'Developing', to 'Good' (which is the level at which the service standard is developed), to 'Better' and 'Best', as shown in figure below:

Assessment framework

Assessment frameworks are based on statements drawn from the functional standard, weighted for importance.

Good means that all mandatory elements, and the most important advisory elements, are met.

Developing	good	better	best

Minimum expected = good

Maturity Framework Stages

For the purposes of the FM management and services standard maturity framework, the 'Developing' stage has been separated into two: 'Developing – Basic' and 'Developing – Improving' to allow differentiation in the levels below 'Good'. In order to be 'Developing - Improving', 'Good', 'Better' or 'Best', an organisation would need to meet all the criteria for that level across the framework, so by default an organisation is 'Developing - Basic' if it doesn't meet at least 'Developing - Improving' across all five dimensions.

Developing – Basic	Developing – Improving	Good	Better	Best
Non existential or very basic stage (Default value)	Meets some of the mandatory and important elements	Meets all the mandatory and most important elements (Minimum expected stage)	Exceeds expectations beyond the mandatory and most important elements	Industry leading / Best in the market covering wide range of elements

1.2 Maturity Framework – Dimensions

The dimensions of the maturity framework have been defined to be closely aligned to the proposed sections of the FM Management and Services standard. The definition and sub components of these dimensions are detailed below.

Dimensions	Definition
Integrated	i. **CAFM** – integrated technology and systems are used to ensure a single version of the truth, supporting effective decision making and efficient operation of the estate ii. **Integrated Leadership** – leadership across the wider property function is integrated and aligned. Total cost of ownership is considered and understood across all aspects of asset lifecycle.
Collaborative	i. **Partnership & Transparency** – the management organisation works collaboratively and in partnership with the delivery organisation, with transparency of activity, data and cost. Building trusting relationships and working together to achieve continuous improvement in an ever-changing FM landscape.
Delivery Excellence	i. **Compliance** – the estate is safe, productive and sanitary and the organisation can easily evidence compliance and effective risk management in the delivery of FM. Data is easy to access and validate and is regularly reviewed. It is managed by competent people and a robust QA process is in place. ii. **Standards & Best Practice** – industry standards and best practice are used, supporting interoperability. iii. **Defined Roles** – clearly defined roles are in place within both delivery and management organisation, and those roles are resourced with appropriate capability and capacity.
Strategic	i. **Enabling** – FM is an effective enabling service and supports wider and changing business priorities in an agile way. ii. **FM Strategy** – FM is a strategic resource, forward looking and proactive, with a service plan and strategy in place that supports and enables the wider organisation in achieving its priorities. iii. **Governance** – effective governance is in place; the role of FM in wider organisational priorities is understood and FM is an integrated part of service delivery.
Intelligent	i. **Intelligent Client** – the organisation recognises the value of an intelligent client and has a defined intelligent client function, supporting an efficient and effective FM provision. ii. **Control levers** – the service is aware of the commercial, financial and quality controls available to improve performance. iii. **Management Structure** – The service is appropriately resourced with the right skills in the right place. iv. **Forward Planning** – the service is forward looking and has an effective FMR in place, allowing for more informed, efficient and effective service delivery.

1.2 Maturity Framework – Summary

The table below combines the maturity stage and dimensions into the maturity framework.

Key ☐ = FM management and services standard

Maturity Framework

Dimensions	Developing - Basic	Developing - Improving	Good	Better	Best
Integrated	FM is reactive and operates in a disjoined way with the wider business. No CAFM is in place and basic spreadsheets or similar are used to manage the service.	FM works closely with construction and estates teams, but is not fully integrated at a leadership level. Several systems are in use and no clear single version of the truth.	Leadership across the wider property function is well integrated and aligned. This allows for joined up decision making including an understanding of total cost of ownership. Several CAFM systems are in use but a recognised single version of the truth exists.	Leadership across the wider property function is well integrated and aligned. An integrated CAFM is used for management with only financial data held in a separate system.	Leadership is exceptionally well aligned, and all property activities and systems are integrated.
Collaborative	Relationship with supply chain is transactional and can be adversarial. No transparency regarding performance or cost.	Supply chain shares key info on a periodic basis and is validated by the management organisation. Client and supplier teams meet to discuss performance improvement.	Organisation has immediate access to key datasets and MI in a transparent and open way. Supplier and management organisation work together collaboratively to continually improve.	Data is jointly owned and transparent for all parties. Supplier and management organisation work together in an open and honest way.	All parties have access to high quality management information. The relationship is built upon a foundation of trust and all parties work together to continuously improve.
Delivery Excellence	Compliance across the estate cannot be evidenced. There are few agreed standards in place. Roles and responsibilities are poorly defined.	High risk compliance items can be evidenced and data is regularly validated. Some standards are used, such as SFG20.	Compliance and effective risk management can easily be evidenced with robust quality assurance in place. Roles and clearly defined.	Full oversight of all compliance and risk items, with associated remedial actions is easily accessible and a robust quality assurance process is in place.	Performance is exceptional and evidence of an effective programme of continuous improvement can be demonstrated.
Strategic	Reactive support service only. No real strategy in place and works in a silo. May have annual service plan as part of corporate initiatives.	An effective service plan is in place and reviewed annually. A high level strategy has been developed to guide the service over the short to medium term.	An FM strategy is in place for the medium term (3 - 5 years) and linked in with the wider property function. Service plan is developed and refreshed annually.	FM is well understood and involved in shaping the organisation as a key enabler and catalyst. Integrated strategies and service delivery plans are in place.	FM has an integrated strategy and delivery plan with the wider organisation. It is aligned back to back with strategy and plans of supply chain partners.
Intelligent	No identifiable client department exists.	A strong client department exists, with a range of subject matter experts forming a basic intelligent client function.	A recognisable and effective intelligent client is in place. It supports value through understanding the levers of change available to it.	A strong and effective intelligent client is in place, supported by an appropriately resourced management team.	An exceptionally strong intelligent client function, effectively integrated with the wider business. The value of the ICF is understood at leadership level.

2. 'How to' User Guides

2.1
FM management and services standard

2.2
Maturity Tool

2.1 FM Management and Services standard – Overview

Overview of the FM management and services standard

The aim of the standard is to improve quality, consistency and interoperability of FM across the Government Estate. The adoption of an agreed FM management and services standard will help improve consistency and quality across the public estate, through a common approach to FM service delivery within the public sector.

The standard covers the following components related to FM:
- **Strategic –** including strategic planning, effective governance and adding value as an enabling service.
- **Integrated –** having integrated leadership and working closely with related service areas. Able to present a single version of truth across the organisation.
- **Intelligent –** an effective intelligent client, supporting management structure, the right capability and capacity of staff, forward planning and an understanding of levers available to improve performance.
- **Collaborative –** the ability to work collaboratively with the delivery organisation, in a transparent way built on trust.
- **Delivery Excellence –** ability to evidence and validate asset compliance, use of industry standards and best practice and clearly defined roles both within the management organisation itself and between the management and delivery organisation.

Audience of the FM management and services standard

The audience of the standard is individuals involved in management, delivery and procurement of facilities management.

How to self assess against the standard?

To support with self assessing against the FM service standard there is an associated maturity tool. This tool provides a set of questions to understand where an organisation is adhering to the standard and where it is not. This maturity assessment could then be used to provide some of the supporting evidence for investment require around FM management and service standards.

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Facilities Management Standard
FMS 001: Management and Service

We're transforming the public estate:
building skills, driving value,
and creating prosperity.
It's more than bricks and mortar.

Version: 1.5
Status: Draft / Not Issued
Date issued: TBC

2.1 FM Management and Service Standard – Principles and Definitions

Principles and Definitions

The standard has been developed to support consistency and improvement of FM management and services across Government. The corresponding maturity tool and guidance are designed to support in assessment against the standard and to provide evidence to support any required case for change.

When applying the standard there are a set of definitions and principles which should be considered:

- **Scope of FM services** – the scope of FM services is across management, hard and soft services, with a focus on the management of FM. The standard does not cover the natural and non-built environment on sites not organisation specific services such as clinical or high containment.

- **Space types** – the standard applies to most space types across Government. It is noted specific space types / estates will have specific requirements around FM service standards that will be in addition to this core standard.

- **Delivery model agonistic** – the standard has been developed to be delivery model agnostic and can be operated across a range of FM delivery models, including outsourced, inhouse or mixed economy service provision.

2.1 FM management and service standard – Guidance

Guidance

When applying the standard, the following guidance points should be considered:

- **Tailoring for specific organisation requirements** – the standard has been developed to promote consistency across Government organisations, however it is noted and understood that organisations will have specific requirements which will require them to deviate from the standard, such as international estates, specialist space types and enhanced healthcare or customer focussed standards.

- **Contract lifecycle** – the processes and specifications which are agreed during the contracting of FM suppliers shall be adjusted to the standard when renegotiating contracts (e.g. collaboration, continuous improvement). The other elements of the standard (e.g. Intelligent client, team capacity and capability) shall be adopted as soon as practicable.

- **Level of detail** – the standard has been set at a level of detail, to provide enough information for organisations to interpret and adhere to the standard, but not too much specificity as to restrict an organisation's flexibility to adjust to specific requirements.

- **Portfolio Estates** – the standard should be applied to FM provision across the whole portfolio of an organisation's estate. Where this includes various business units or ALBs with different FM arrangements, organisations may find it useful to undertake separate maturity assessments for each one.

2.1 FM management and service standards – Related Documents

Related Documents

The FM Service standard has been developed alongside a maturity tool and supporting guidance. These supporting documents are designed to support assessments against the standard and to provide evidence to support any required case for change.

The standard is designed to set FM management and service standards across the public estate, and not to replace existing specifications of legal requirements.

In any event, the below hierarchy of standards should be applied:
• All applicable laws as relevant in England and Wales.
• Organisational FM management or services standards that exceed the standard.
• FM management and service standard.

The FM management and service standard is associated with the Government Functional Standard for property, namely GovS 004: Property and forms part of the Governance and Management Framework for the Government Property Function.

Organisations and Government Commercial Functions shall continue to maintain detailed up to date standards as policy and legislation evolves. The FM standard is not intended to duplicate these and will need to accommodate them by changing over time.

2.1
FM management and service standards

2.2
Maturity Tool

2.2 Maturity Tool – Overview

Maturity Tool Overview

The Maturity tool is an Excel-based tool that allows organisations to assess themselves against the framework developed.

Users can determine where components meet the required standard, where further development is required or where they exceed the standard and are examples of best practice.

In turn, the tool will allow organisations to provide additional evidence in favour of investment in those areas identified as requiring further development.

Note: The tool uses macros, so selecting 'enable macros' when the tool opens will allow these to work as intended. Please note that these macros are intended only to enhance user experience and are not necessary for the tool to work.

2.2 Maturity Tool – Overview

Structure

- **Introduction and Framework –** this section contains the *'Introduction', 'Stages', 'Dimensions'* and *'Summary'* tabs. These tabs are to provide the user with an introduction and overview of the maturity framework (see pages 18-20 for further detail).
- **Inputs –** the Inputs section contains the '*Assessment'* tab (see pages 21-23 for further detail). This tab contains a set of questions for users to answer, scoring their organisation alongside the guidance provided in this document, as well as using the information provided in the tool.
- **Outputs –** the answers provided on the '*Assessment'* tab determine the '*Dashboard'* tab outputs (see pages 24-26 for further detail), where overall scores are displayed for each of the Dimensions. The Dashboard provides a graphical representation of where organisations meet, exceed, or require development to meet each of the standards outlined in the Framework.

The guidance provided in this document, as well as the Framework tabs, provides supporting the information for completing the Assessment. The answers provided in the Assessment section determines the visualisations in the Dashboard section.
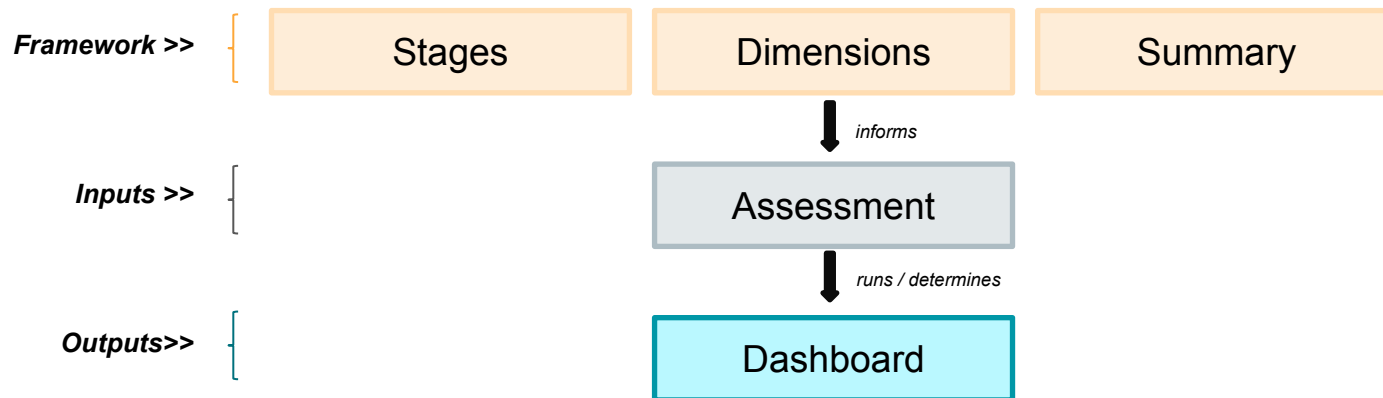
2.2 Maturity Tool – Framework Stages

Structure

The tool is split into three sections, **Framework** (blue tabs), **Inputs** (orange tabs), and **Outputs** (green/teal tabs).

Framework

- **Framework –** the '*Stages'*, '*Dimensions'* and '*Summary'* are all included on separate tabs to allow users quick reference to the framework against which organisations are assessed.

Framework - Stages

- The '*Stages'* tab details and defines the scores / tiers by which organisations will be measured through each of the Framework Dimensions. This determines where, for each Dimension, organisations are adhering to standard, exceeding standards, or require further development to meet the standard.

2.2 Maturity Tool – Framework Dimensions

Framework - Dimensions

- The *'Dimensions'* tab details the key areas through which organisations will be assessed.

- The table displays the Dimension names and their definitions.

- Each Dimension is split into Sub-dimensions, which are then further defined.

Definitions of each dimension. Each dimension is split into sub-dimensions, which are then further defined.

Dimension names

Dimensions	Definition
Strategic	i. **FM Strategy** - FM is a strategic resource, forward looking and proactive, with a service plan and strategy in place that supports and enables the wider organisation in achieving its priorities. ii. **Governance** - effective governance is in place; the role of FM in wider organisational priorities is understood and FM is an integrated part of service delivery. iii. **Enabling** - FM is an effective enabling service and supports wider and changing business priorities in an agile way.
Insightful	i. **CAFM** – integrated technology and systems are used to ensure a single version of the truth, supporting effective decision making and efficient operation of the estate
Intelligent	i. **Intelligent Client** – the organisation recognises the value of an intelligent client and has a defined intelligent client function, supporting an efficient and effective FM provision. ii. **Management Structure** – The service is appropriately resourced with the right skills in the right place. iii. **Forward Planning** – the service is forward looking and has an effective FMR in place, allowing for more informed, efficient and effective service delivery.
Collaborative	i. **Partnership & Transparency** – the management organisation works collaboratively and in partnership with the delivery organisation, with transparency of activity, data and cost. Building trusting relationships and working together to achieve continuous improvement in an ever-changing FM landscape.
Delivery Excellence	i. **Compliance** – the estate is safe, productive and sanitary and the organisation can easily evidence compliance and effective risk management in the delivery of FM. Data is easy to access and validate and is regularly reviewed. It is managed by competent people and a robust QA process is in place. ii. **Standards & Best Practice** – industry standards and best practice are used, supporting interoperability. iii. **Defined Roles** – clearly defined roles are in place within both delivery and management organisation, and those roles are resourced with appropriate capability and capacity.

Framework - Summary

- The *'Summary'* tab combines both the Framework Stages and Dimensions, providing a matrix of the criteria for each of the Framework Stages (see pages 7-8 for further detail).

- For example, point (1), highlighted red in the diagram to the right, provides guidance as to what 'Best' practice is defined as with regards to 'Intelligent'

The Framework Dimensions and underlying Sub-dimensions

The Framework Stages, from Developing – Basic -> Best

Maturity Framework

Dimensions	Developing - Basic	Developing - Improving	Good	Better	Best
Strategic	Reactive support service only. No real strategy in place and works in a silo. May have annual service plan as part of corporate initiatives.	An effective service plan is in place and reviewed annually. A high level strategy has been developed to guide the service over the short to medium term.	An FM strategy is in place for the medium term (3 - 5 years) and linked in with the wider property function. Service plan is developed and refreshed annually.	FM is well understood and involved in shaping the organisation as a key enabler and catalyst. Integrated strategies and service delivery plans are in place.	FM has an integrated strategy and delivery plan with the wider organisation. It is aligned back to back with strategy and plans of supply chain partners.
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Intelligent	No identifiable client department exists.	A strong client department exists, with a range of subject matter experts forming a basic intelligent client function.	A recognisable and effective intelligent client is in place. It supports value through understanding the levers of change available to it.	A strong and effective intelligent client is in place, supported by an appropriately resourced management team.	An exceptionally strong intelligent client function, effectively integrated with the wider business. The value of the ICF is understood at leadership level.
Collaborative	Relationship with supply chain is transactional and can be adversarial. No transparency regarding performance or cost.	Supply chain shares key info on a periodic basis and is validated by the management organisation. Client and supplier teams meet to discuss performance improvement.	Organisation has immediate access to key datasets and MI in a transparent and open way. Supplier and management organisation work together collaboratively to continually improve.	Data is jointly owned and transparent for all parties. Supplier and management organisation work together in an open and honest way.	All parties have access to high quality management information. The relationship is built upon a foundation of trust and all parties work together to continuously improve.
Delivery Excellence	Compliance across the estate cannot be evidenced. There are few agreed standards in place. Roles and responsibilities are poorly defined.	High risk compliance items can be evidenced and data is regularly validated. Some standards are used, such as SFG20.	Compliance and effective risk management can easily be evidenced with robust quality assurance in place. Roles and clearly defined.	Full oversight of all compliance and risk items, with associated remedial actions is easily accessible and a robust quality assurance process is in place.	Performance is exceptional and evidence of an effective programme of continuous improvement can be demonstrated.

(1)

Note: Greyed out text indicates elements required at the 'Good' stage as well as at 'Better' and 'Best' stages.

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Assessment

The *'Assessment'* tab allows users to assess their organisation against the standards provided in the Framework.

Assessment Fields

1. **Dimension** indicates the relevant dimension for the question currently being answered. This will determine the overall score for this dimension in the Dashboard.

2. **Sub-Dimension** indicates the relevant sub-dimension for the question being answered; these sub-dimensions are outlined in the Framework. The structure of sub-dimensions and dimensions is hierarchical: the scores for each of these Sub-dimensions will determine the score for the Dimensions that sit above.

3. **Questions** – the questions and answers against which the organisation is scored.

4. **Self-Assessment Score** – the score the user provides as per the question asked, using the answer scheme provided for that question. Scores map as: *1 = Development, Basic; 2 = Development, Improving; 3 = Good; 4 = Better; 5 = Best*. The Dimension score will be determined by the answer with lowest score achieved against each of the questions within that Dimension.

5. **Rationale** – the user can support their score with commentary in the text box provided alongside.
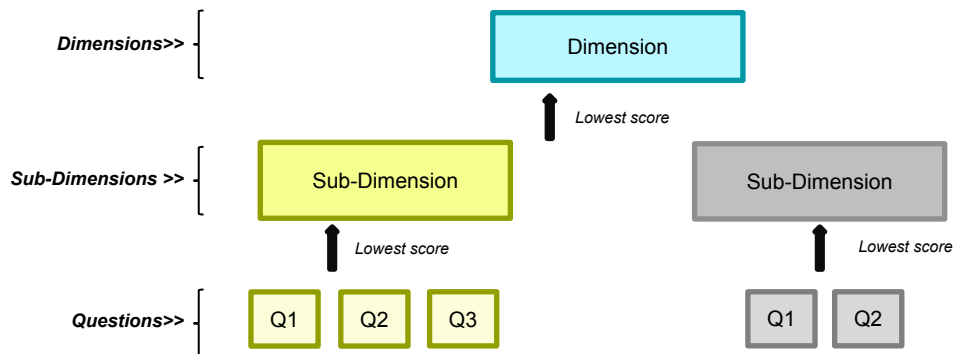
2.2 Maturity Tool – Assessment

Instructions

1. The answers are in tabular format, and provide further context as to how the organisation might be scored. The Guidance and Frameworks are also available to provide further context and instruction.

1. To answer, select the cell and then click on the arrow that appears (1). A drop down list of scores should appear.

1. Further guidance points for each question are included in Appendix A.

1. Selecting your answer will populate the Self-Assessment Score field.

1. If necessary, complete the comment section to provide additional context and support for this answer.

Scoring

1. The score for each question determines the Sub-dimension score. These Sub-dimension scores then determine the score for that Dimension. The scores at each stage determine what is displayed in the Dashboard.

(1)

Q1	How integrated are your FM Management IT Systems?	
1	No CAFM, basic spreadsheets or similar used to monitor and manage FM.	
2	Several systems in use, e.g. asset management system, CAFM, finance system, supplier system. Limited or no integration. Multiple versions of the truth.	
3	A combination of systems are used between departments and suppliers, but a recognised master system is in place, showing one version of the truth.	3
4	An integrated CAFM is in use holding all but financial data, which is held in corporate finance system.	
5	Organisation has a single, integrated CAFM system holding a single version of the truth, with other key systems feeding into a master system.	

Dimensions>> — Dimension

↑ *Lowest score*

Sub-Dimensions >> — Sub-Dimension | Sub-Dimension

↑ *Lowest score* | ↑ *Lowest score*

Questions>> — Q1 Q2 Q3 | Q1 Q2

Scoring (cont.)

2. The score is determined by the **lowest** score achieved in the level below i.e. the score for that dimension/sub-dimension is determined by the lowest score achieved against any of the questions within the dimension/sub-dimension. For some questions the highest answers that can be selected is '3+' or '4+', a score of '3+'/ '4+' will not limit the dimension/sub-dimension score to a '3'/'4' if higher scores ('4s' or '5s') are selected for other questions in that dimension/sub-dimension.

2.2 Maturity Tool – Dashboard

Dashboard

The Dashboard provides a graphical representation of where the organisation has been assessed, as per the Assessment, against each of the key Dimensions and overall.

Outputs

1. The '*Maturity Assessment – Overview*' visualises the current standing of the organisation against each of the Framework Dimensions. In the table on the left of the tab, an overall Maturity Rating is shown this is calculated as the lowest score achieved against each of the Dimensions. The maturity assessment for each of the Dimensions is listed below.

Radar chart (see page 25)

Overview - Assessment against Standard

Overview
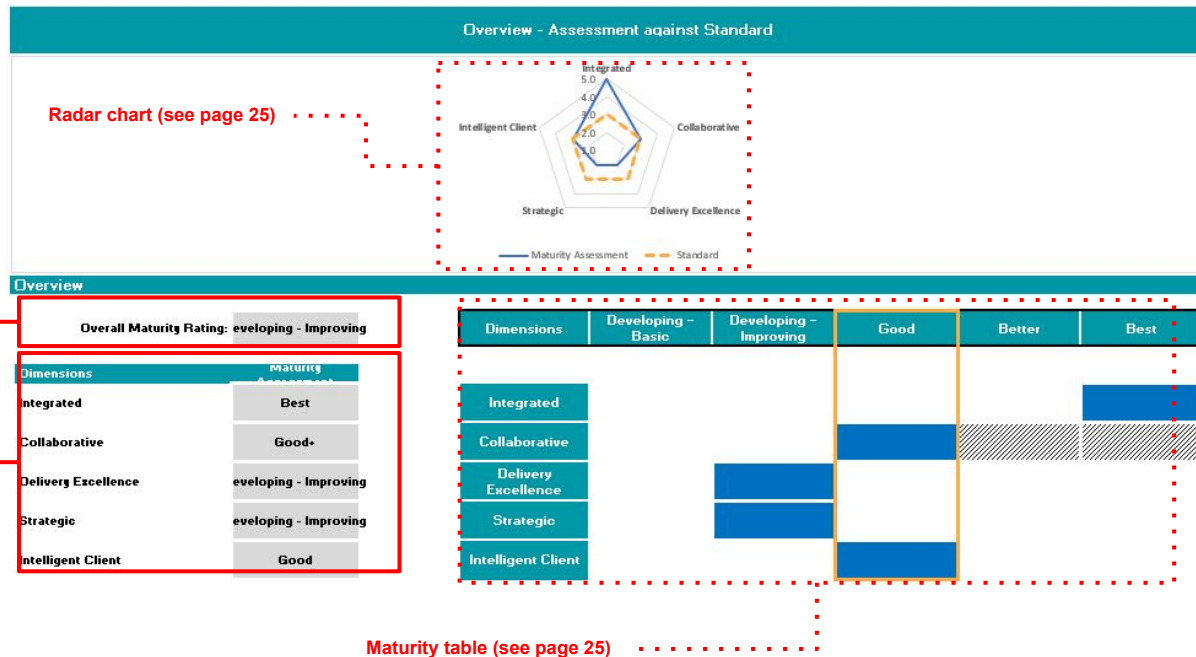
Overall Maturity Rating

Dimensions Maturity Ratings

| Overall Maturity Rating: | eveloping - Improving |

Dimensions	Maturity Assessment
Integrated	Best
Collaborative	Good+
Delivery Excellence	eveloping - Improving
Strategic	eveloping - Improving
Intelligent Client	Good

Dimensions	Developing – Basic	Developing – Improving	Good	Better	Best
Integrated					
Collaborative					
Delivery Excellence					
Strategic					
Intelligent Client					

Maturity table (see page 25)

Outputs

2. The radar diagram allows the user to quickly compare the assessment for each Dimension against the target of 'Good'. The target standard is set as 'Good' for all Dimensions and is marked by an orange line, and the organisation standing is marked by a blue line.

2. To the table, a graphical representation allow the user to quickly assess the Dimensions under which the organisation is meeting, exceeding and requires development to meet the standard. The target standard is set as 'Good' for all Dimensions and is marked by an orange line. The score for the organisation is then represented by a highlighted block.

The further towards the outer edge of the graph a point sits, the higher the rating for that Dimension

Here the Dimension is 'Integrated'. The blue line for Insights sits at the edge of the graph. This indicates a score of 'Best', which corresponds to the table on the left. It also sits closer to the edge of the graph than the orange line. This means it exceeds the target standard provided in the Framework.

Framework Stages, Developing – Basic -> Best

Key Framework Dimensions

The score for the Dimension 'Delivery Excellence' is 'Developing - Improving'

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2.2 Maturity Tool – Dashboard (Dimensions)

Outputs

4. Each of the subsequent tables display the maturity assessment for each Dimension. An Maturity Rating is shown for the Dimension, this is calculated as the lowest score achieved against each of the Sub-dimensions. The 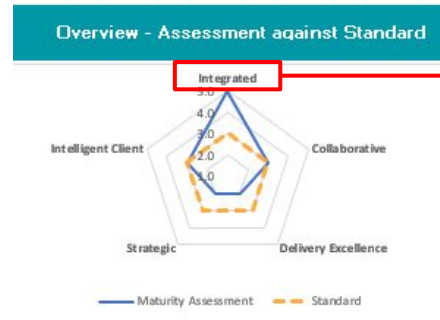maturity assessment for each of the Sub-dimensions is then listed below. The table format is similar to that of the *Maturity Assessment - Overview.*
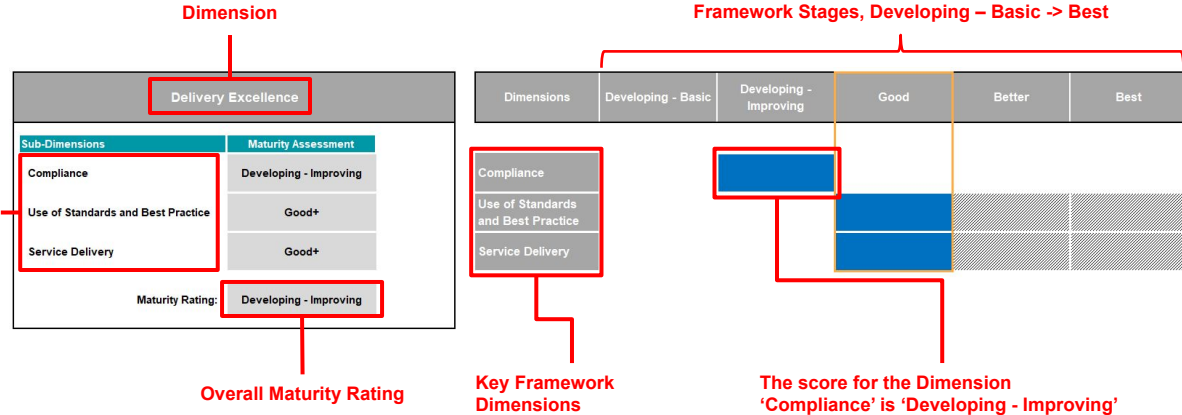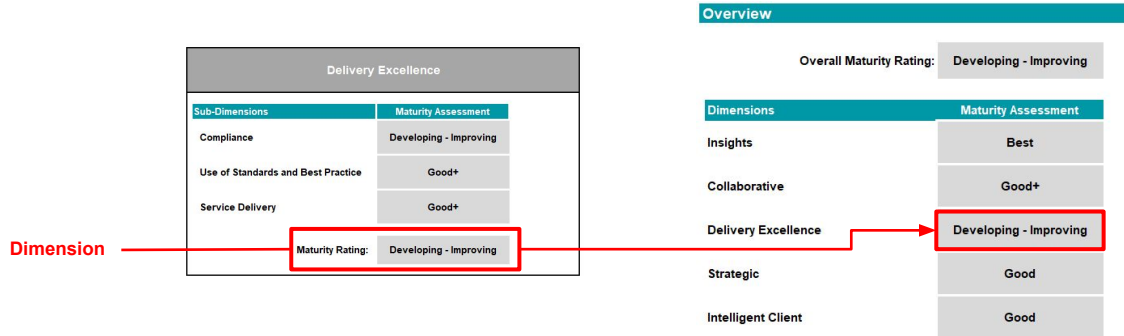
Dimension

Framework Stages, Developing – Basic -> Best

Delivery Excellence	
Sub-Dimensions	**Maturity Assessment**
Compliance	Developing - Improving
Use of Standards and Best Practice	Good+
Service Delivery	Good+
Maturity Rating:	Developing - Improving

List of Sub-Dimensions

Overall Maturity Rating

Dimensions	Developing - Basic	Developing - Improving	Good	Better	Best
Compliance					
Use of Standards and Best Practice					
Service Delivery					

Key Framework Dimensions

The score for the Dimension 'Compliance' is 'Developing - Improving'

4. The scores for Dimensions will then be represented above in the Overall Assessment.

Delivery Excellence	
Sub-Dimensions	**Maturity Assessment**
Compliance	Developing - Improving
Use of Standards and Best Practice	Good+
Service Delivery	Good+
Maturity Rating:	Developing - Improving

Dimension

Overview	
Overall Maturity Rating:	Developing - Improving
Dimensions	**Maturity Assessment**
Insights	Best
Collaborative	Good+
Delivery Excellence	Developing - Improving
Strategic	Good
Intelligent Client	Good

Appendix

A. Maturity Assessment Guidance

This table details the maturity assessment questions and is designed to provide additional guidance to the user completing the assessment. The dimension, sub-dimension, related standard sections and assessment considerations are detailed for each question.

Dimension	Sub-dimension	Question	Related standard section(s)	Assessment considerations
Integrated	Integrated Leadership	• **Q1** – How integrated is facilities management - Soft Services?	7.3 Facilities Management System, 7.4 Quality Management System, 7.6 Understanding FM's role in the wider business, 7.8 Collaboration, 7.12 Governance, 7.13 Management Structure	– Level of integration – Number of individual teams – Governance arrangements
		• **Q2** – How integrated is facilities management - Hard Services?	7.3 Facilities Management System, 7.4 Quality Management System, 7.6 Understanding FM's role in the wider business, 7.8 Collaboration, 7.12 Governance, 7.13 Management Structure	– Level of integration – Number of individual teams – Governance arrangements
		• **Q3** – How integrated is Property Leadership?	7.3 Facilities Management System, 7.4 Quality Management System, 7.6 Understanding FM's role in the wider business, 7.8 Collaboration, 7.12 Governance, 7.13 Management Structure	– Level of integration – Number of individual teams – Governance arrangements
	CAFM	• **Q4** – How integrated are your FM Management IT Systems?	7.3 Facilities Management System 7.16 CAFM	– Number of systems used
Collaborative	Partnership & Transparency	• **Q5** – How closely does FM management work with the FM delivery organisation(s)?	7.8 Collaboration 7.15 Contract Management	– Regularity and types of interaction – Forward vs backwards looking meetings
		• **Q6** – How strategic and effective are supplier relationships?	7.8 Collaboration 7.15 Contract Management	– Regularity and types of interaction – Forward vs backwards looking meetings
		• **Q7** – How transparent is FM delivery between the management organisation and delivery organisation?	7.8 Collaboration 7.15 Contract Management	– Type of data shared – Frequency – Confidence in MI and datasets
		• **Q8** – Does the FM team collaborate outside of the management organisation?	7.8 Collaboration 7.15 Contract Management	– Cross government working – Membership of task forces or groups

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Delivery Excellence	**Compliance**	• **Q9** – How effective is your hard compliance management approach?	• 7.3 Facilities Management System • 7.4 Quality Management System • 7.9 Occupational Health • 7.10 Building User Welfare • 8.1 Statutory Compliance	– Ability to evidence compliance – Confidence in data – Policy of remedial actions – QA process – Incidents or failure rate
		• **Q10** – How effective is your soft compliance management approach?	• 7.3 Facilities Management System • 7.4 Quality Management System • 7.9 Occupational Health • 7.10 Building User Welfare • 9.0 Soft Services Standards	– Ability to evidence compliance – Confidence in data – Policy of remedial actions – QA process – Incidents or failure rate
	Standards and Best Practice	• **Q11** – How well standardised is FM management in line with industry best practice? (E.g. ISO)	• Whole Standard	– Use of standards – Frequency of standard amendments – Number of bespoke standards used – Gaps in standards
		• **Q12** – How well standardised is FM delivery in line with industry best practice? (E.g. SFG20, CCS)	• Whole Standard	– Use of standards – Frequency of standard amendments – Number of bespoke standards used – Gaps in standards
	Defined Roles	• **Q13** – How well defined are FM roles and responsibilities within Hard Services?	• 7.13 Management Structure	– Clarity of roles and responsibilities – Speed and effectiveness of decision making – A RACI document
		• **Q14** – How well defined are FM roles and responsibilities within Soft Services?	• 7.13 Management Structure	– Clarity of roles and responsibilities – Speed and effectiveness of decision making – A RACI document

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Dimension	Sub-dimension	Question	Related standard section(s)	Assessment considerations
Strategic	**Enabling**	• **Q15** – How flexible is FM to changing business needs?	• 7.2 Facilities Management Strategy • 7.6 Understanding FM's role in the wider business • 7.8 Collaboration	– Level of contract leakage – Level of variance charges – Forward plan
	FM Strategy	• **Q16** – How strategic is FM?	• 7.2 Facilities Management Strategy • 7.6 Understanding FM's role in the wider business	– Service plan in place and understood by stakeholders – FM strategy in place – FM integrated in wider property or organisation strategies
	Governance	• **Q17** – Do you have effective FM governance in place?	• 7.12 Governance	– Effectiveness of governance arrangements – Clarity of board terms of reference – Level of gaps or duplication in terms of reference

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Intelligent	Intelligent Client Intelligent Client	• **Q18** – Do you have a clear definition and recognised Intelligent client function?	• 7.13 Management Structures • 7.14 Intelligent Client Function	– Agreement on definition of an ICF – A recognised team in place – Recognised as a centre of expertise across the organisation
		• **Q19** – Is an effective client department in place?	• 7.13 Management Structures • 7.14 Intelligent Client Function	– Level of centralisation – Effectiveness of client department
	Control Levers	• **Q20** – How well do you understand the levers to improve performance?	• 7.13 Management Structures • 7.14 Intelligent Client Function • 7.15 Contract Management	– Use of financial, contractual, commercial, quality and control levers to improve performance – Focus on one lever (contractual) more than others
	Management Structures	• **Q21** – Is there sufficient management, capability and capacity to be effective? Are roles clear?	• 7.13 Management Structures • 7.14 Intelligent Client Function	– Ambiguity of roles – Clear gaps – Sufficient capability and capacity – Use of external resource – Staff turnover
	Forward Planning	• **Q21** – How proactive is FM service delivery in your organisation?	• 7.14 Intelligent Client Function • 7.18 Building Information Modelling	– Long term planning – Proactive vs reactive