



the community-led regeneration network

***“Facilities Management  
Fundamentals, Empowering Charities  
for Success”***

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August 2024**

# Contents



- The different elements of FM.
- What support is available from Dtas.
- Facilities Management Plan.
- Risk Assessments.
- Budget Planning.
- FM Handbook.
- Useful Training and wider information available.

# DTAS, Facilities Management Support Service



- Energy
  - Insurance
  - Maintenance
  - Fire Safety
  - H&S
- Licencing
  - Capital Projects
  - Procurement
  - Risk Management
  - Business Continuity

To request Support please email [Andrew@dtascot.org.uk](mailto:Andrew@dtascot.org.uk)

# Managing Community Buildings



# Legal & Regulatory Responsibilities

<b>Licensing</b>	<ul style="list-style-type: none"><li>• Serving of alcohol</li><li>• Playing of music/video</li><li>• Building owners have duty to ensure tenants are adhering to licensing laws</li></ul>
<b>Health and safety</b>	<ul style="list-style-type: none"><li>• Health and Safety at Work Act</li><li>• Additional regulations covering first aid, hazardous substances and fire safety</li></ul>
<b>Fire precautions</b>	<ul style="list-style-type: none"><li>• Fire (Scotland) Act 2005</li><li>• The Fire Safety (Scotland) Regulations of 2006</li><li>• Ensure the safety of others by putting in place appropriate fire safety measures</li></ul>
<b>Children &amp; vulnerable adults</b>	<ul style="list-style-type: none"><li>• Scottish 'Protecting Vulnerable Groups' scheme</li></ul>
<b>Disability and access</b>	<ul style="list-style-type: none"><li>• Mix of devolved and reserved legislation</li><li>• Equality Act 2010</li></ul>
<b>Insurance</b>	<ul style="list-style-type: none"><li>• Insurance for the building and its contents</li><li>• Insurance for any activities that take place there</li></ul>
<b>Formal agreements</b>	<ul style="list-style-type: none"><li>• Lease</li><li>• Licence</li><li>• Hire agreement</li></ul>
<b>Planning &amp; building standards</b>	<ul style="list-style-type: none"><li>• <b>Planning permission</b></li><li>• Permitted development rights</li><li>• Building warrant &amp; completion certificate</li></ul>

# Building Fabric

Ensure regular inspection and sufficient maintenance & capital expenditure budget, to avoid deterioration of the asset - as this can result in:

- Higher costs in the long-term
- Loss of services, users – and income
- De-valuation of asset
- H&S & Insurance-cover risks

# Operational Management

Use available checklists, templates and create a building manual

Electrical fixed wiring	Electrical PAT testing	Emergency and exit lights	Fire alarms	Portable firefighting equipment
Any renewable energy products (PV cells, turbines etc)	Lifts	Gas appliances test and certification	Gas systems, including boilers	Oil boilers and other oil-fired appliances
Air conditioning systems	Water quality sampling and chlorination	Playground equipment	Gym equipment	Kitchen equipment: coffee machine
Utilities & Rates	Risk Assessments	Burglar alarms Control panel testing	Powered access doors	Staff, volunteer & contractor management

# DTAS FM resources & training

The FM support resources have seen extensive use since their launch, with the top-4 used resources as follows:

- Building handover [checklist](#)
- Day 1 what should be in place [checklist](#)
- Tasks required for managing your community facility [checklist 1 & 2](#)
- A community hub manual example [contents-list](#)
- Asset maintenance [checklist](#)

2-day on-line FM training, ca. 60 groups participated in 2023 to-date, next dates 4<sup>th</sup> and 11<sup>th</sup> October.

SCVO/DTAS - Village & Community Halls Handbook,  
<https://scvo.scot/support/village-community-halls>



# Facilities Management Plan

- What is this?
- Do I need it?
- Will it help?



# Insurance

Facilities Management plan						
Work area	Area required	What to check	Frequency	Date completed	Person responsible	Review date
Insurance	Public Liability Insurance		12 Monthly			
	Buildings Insurance		12 Monthly			
	Contents Insurance		12 Monthly			
	Vehicle Insurance		12 Monthly			

# Servicing and Testing

Facilities Management plan						
Work area	Area required	What to check	Frequency	Date completed	Person responsible	Review date
Servicing and Testing	Electrical Fixed Wirng		Every 5 years			
	Pat Testing		12 Monthly			
	Emergency lighting		12 Monthly			
	Fire Alarms		12 Monthly			
	Portable Fire Fighting Equipment		12 Monthly			
	Renewable Energy Products		12 Monthly			
	Powered Access Doors		12 Monthly			
	Lifts		12 Monthly			
	Gas Applicences and Boilers		12 Monthly			
	Air Conditioning		12 Monthly			
	Water Quaiity		Depends on the facility and its use			
	Kitchen Equipment		12 Monthly			
Burglar Alarms		12 Monthly				

# Building Fabric

Facilities Management plan						
Work area	Area required	What to check	Frequency	Date completed	Person responsible	Review date
Building Fabric	Floors, stairs and Landings		Monthly			
	Roof coverings		Monthly			
	Gutters and Drain pipes		Monthly			
	Windows and doors		Monthly			
	Walls and Ceilings		Monthly			
	Sinks and visible Pipes		Monthly			
	Pest Control		Monthly			
	Car Parks		Weekly			
	External Grounds		Weekly			
	Fences, Gates, Boundary Walls		Monthly			
	Internal, External Decoration		Monthly			
	Lighting		Monthly			

# Health and Safety

Facilities Management plan						
Work area	Area required	What to check	Frequency	Date completed	Person responsible	Review date
Health and Safety	Fire evacuation procedure		3 monthly			
	Staff training		Monthly			
	Operating Procedures		12 Monthly			
	Risk Assessments		12 Monthly			
	Control of Substances Hazardous to Health (COSHH)		12 Monthly			
	First Aid		3 yearly			

# Staffing

Facilities Management plan						
Work area	Area required	What to check	Frequency	Date completed	Person responsible	Review date
Staffing	Induction		6 Monthly			
	Training		Monthly			
	Probation		6 Monthly			
	1 to 1 process		Monthly			

# Risk Assessments

## Risk assessment template

Company name:

Assessment carried out by:

Date of next review:

Date assessment was carried out:

What are the hazards?	Who might be harmed and how?	What are you already doing to control the risks?	What further action do you need to take to control the risks?	Who needs to carry out the action?	When is the action needed by?	Done

For more information on managing risk: [www.hse.gov.uk/simple-health-safety/risk/](http://www.hse.gov.uk/simple-health-safety/risk/)

Published by the Health and Safety Executive 10/19

**Budget 2024-25 FF**

Company Name

April 2024 to March 2025

Account	Apr-2024	May-2024	Jun-2024	Jul-2024	Aug-2024	Sep-2024	Oct-2024	Nov-2024	Dec-2024	Jan-2025	Feb-2025	Mar-2025	2024-25 Total
DofE Centre Income - Members (4209)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Income - Centre Events/Courses Members (4205)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Income - Centre Events/Courses Non Members (4206)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Income - Education (4201)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Income - Members (4200)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Income - Non Members (4202)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Income - Shop (4204)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Income - Staff Accommodation & Clothing (4207)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Insurance Claims (7304)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Marquee & Equipment Hire Income - Other Groups (4701)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Marquee & Equipment Hire Income - Scouts (4700)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Miscellaneous Income (4003)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
<b>Total Income</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>
<b>Less Cost of Sales</b>													
Activity/Programme Expenditure (6000)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Badges & Welcome Packs Expenditure (8100)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Catering Equipment & Supplies (6003)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Centre Maintenance - Grounds & Buildings (6301)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Centre Maintenance - Health & Safety (6304)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Centres Catering Purchases (6002)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Cleaning/Laundry/Housekeeping Expenditure (6300)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
DofE Expenditure - Activity & Food (6005)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Equipment Costs/Maintenance (6302)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Expenditure - Centre Events/Courses Members (8205)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Marquee Hire Expenditure (6400)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Section Events - The Howling Expenditure (8602)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Shop Purchases for Resale (6001)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Site Vehicle/Pool Car Fuel (6201)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Site Vehicle/Pool Car Maintenance (6202)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Vehicle Hire & Expenses (6200)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Wages - Invoiced Course Instructors (6508)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Wages - Invoiced Staff Others (6507)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
<b>Total Cost of Sales</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>
<b>Gross Surplus/(Deficit)</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>
<b>Less Overheads</b>													
Bank/PayPal Fees & Charges (7101)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Business Lead expenditure	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Card Terminal Charges (7102)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Centre Staff Accommodation Charges (7403)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Contingency (7999)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Council Tax & Service Charges (7401)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Electricity (7201)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Employers NIC (Permanent) (7502)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Employers Pension Costs (Permanent) (7501)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Gas & Oil (7202)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Insurance - Vehicle (7303)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
IT Costs (7006)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Larchwood House Charges (7404)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Legal & Professional Fees (7103)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Licence Fees (7104)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Photocopying/Printing (7205)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Postage & Packaging (7203)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Salaries (Permanent) (7500)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Staff Entertaining (7603)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Staff General Expenses (7602)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Staff Meals/Catering Expenses (7604)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Staff Mileage Expenses (7601)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Staff Travel/Accommodation Expenses (7600)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Staff/Volunteer Uniforms (7606)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Stationery (7204)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Telephone - Office, Centres & Mobiles (7206)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Volunteers Expenses (7607)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Water Rates (7400)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
<b>Total Overheads</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>





## The Muir Hub Manual - Contents List

### **Section 1 – Background and Management**

- 1.1 Muir of Ord Hall and Facilities Company
- 1.2 The Muir Hub
- 1.3 The Calman Trust
- 1.4 Management of the Muir Hub

### **Section 2 – Hiring Space**

- 2.1 Opening times
- 2.2 Rooms and facilities
- 2.3 Terms and conditions of hire
- 2.4 Room set up guide
- 2.5 New user checklist

### **Section 3 – Health and Safety**

- 3.1 COSHH
- 3.2 Risk assessments
- 3.3 Disabled access
- 3.4 Location of first aid box/First aiders
- 3.5 Emergency procedures
- 3.6 Fire alarm and tests

### **Section 4 - Building Operations**

- 4.1 Key holders
- 4.2 Building access and locking up procedures
- 4.3 Equipment guides
- 4.4 Hearing loops
- 4.5 Cash handling
- 4.6 Kitchen and catering facilities
- 4.7 Rubbish and recycling
- 4.8 Building repairs and maintenance
- 4.9 Insurance
- 4.10 Licences – music, film

# Useful Training courses

- DTAS 2 day Facilities Management course, 4<sup>th</sup> and 11<sup>th</sup> October
- Online COSHH training
- IOSH Managing Safely
- NEBOSH National General Certificate in Occupational Health and Safety
- BASP Outdoor First Aid, valid for 3 years.



# Useful Links

- <https://dtascommunityownership.org.uk/facilities-management>
- <https://iosh.com/>
- <https://www.hse.gov.uk/simple-health-safety/risk/index.htm>
- <https://www.iwfm.org.uk/>
- <https://scvo.scot/support/village-community-halls>



# Thanks & Questions

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