



**Community
Ownership
Support Service**

Development Trusts Association Scotland



**Development
Trusts Association
Scotland**

A Thriving Community-led Network

“Facilities Management Fundamentals, Empowering Charities for Success”

**Andrew Aldous
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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

Legal & Regulatory Responsibilities

Licensing	• Serving of alcohol • Playing of music/video • Building owners have duty to ensure tenants are adhering to licensing laws
Health and safety	• Health and Safety at Work Act • Additional regulations covering first aid, hazardous substances and fire safety
Fire precautions	• Fire (Scotland) Act 2005 • The Fire Safety (Scotland) Regulations of 2006 • Ensure the safety of others by putting in place appropriate fire safety measures
Children & vulnerable adults	• Scottish 'Protecting Vulnerable Groups' scheme
Disability and access	• Mix of devolved and reserved legislation • Equality Act 2010
Insurance	• Insurance for the building and its contents • Insurance for any activities that take place there
Formal agreements	• Lease • Licence • Hire agreement
Planning & building standards	• Planning permission • Permitted development rights • Building warrant & completion certificate

Legal requirements, recommended must haves.

- Fire risk assessment Evacuation plan
 Fire checks
- Asbestos Register First aid
 Accident recording
- COSHH Safety info
 Risk Assessment
- PAT Display
 certs Food Hygiene
- Emergency Process PPE
 Recording repairs
- Training Legionella
 Insurance
- EICR



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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

- Extensive resources on the Community Ownership Support Service website.
- [Facilities Management - DTAS Community Ownership Support Service](#)
- 2-day on-line FM training, next dates tbc. £50.
- Monthly Webinars, March to September, free to attend
- [Development Trusts Association Scotland](#)
- SCVO/DTAS - Village & Community Halls Handbook, <https://scvo.scot/support/village-community-halls>
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Facilities Management Plan

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



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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 Appliances and Boilers		12 Monthly			
	Air Conditioning		12 Monthly			
	Water Quaity		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/

Published by the Health and Safety Executive 10/19

Operational Budget

Operational planning and budgeting involve forecasting revenues, estimating costs, and allocating resources to meet organisational goals, typically through an annual operating budget that outlines expected turnover, expenses, and performance targets.



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What to Include



All income including grants,
rentals, donations



All costs of sales, activity costs,
programme costs, H&S,
maintenance, cleaning, catering



All overhead costs, salaries,
electricity, insurance, postage, (it
can be a long list)

What are the benefits?

You can track income and expenditure on a monthly basis, this helps to avoid overspending and identifying gaps in income.



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Is it Necessary?

- In a word Yes!
- It helps to avoid slipping into financial difficulty.
- Often, groups who are in crisis have not set a budget plan for the year.



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Useful Training courses

- DTAS 2 day Facilities Management course,
- Monthly DTAS webinars
- Online COSHH training
- IOSH Managing Safely
- NEBOSH National General Certificate in Occupational Health and Safety
- BASP Outdoor First Aid, valid for 3 years.



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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>



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Thanks & Questions

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