

# Quest for Facilities A5 – Operational and Environmental Management

## Guidance Notes



<b>Focus:</b>	The module focuses on ensuring safe, efficient, and sustainable facility operations through planned and preventative maintenance, robust health and safety practices, high standards of cleanliness and presentation, effective risk management, and strategies for energy efficiency, waste reduction, and environmental sustainability.
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### Key elements:

- Planned and preventative maintenance
- Health & safety, cleanliness, and presentation
- Energy use, waste reduction, and sustainability
- Risk management and emergency readiness.

### Best Practice Examples

- **Embedding Operational and Environmental Management:** Operational and environmental practices are fully integrated into daily management. Staff understand their roles, follow procedures consistently, and contribute to maintaining safety, efficiency, and environmental performance. Compliance is monitored, and operational systems are regularly reviewed to prevent issues and maintain high standards.
- **Planned and Preventive Maintenance:** Maintenance schedules are proactive and preventive, covering all equipment, plant, and building systems. Planned checks and audits prevent breakdowns, reduce downtime, and support operational efficiency. All maintenance activities are documented, reviewed, and linked to measurable performance indicators.
- **Comprehensive Operational Procedures:** Procedures are fully documented, accessible, and consistently followed. Staff receive role-specific training, and adherence is monitored. Procedures cover all significant operational areas, including health & safety, equipment use, emergency preparedness, and day-to-day operations. Staff awareness is regularly reinforced through training refreshers and inductions.
- **Comprehensive Environmental Procedures:** Environmental procedures cover energy, water, waste, recycling, and sustainable practices. They are documented, consistently applied, and linked to organisational objectives such as reducing carbon footprint and energy consumption. Staff receive targeted training, and compliance is monitored. Procedures are regularly reviewed to reflect industry best practice and emerging sustainability priorities.

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### Best Practice Examples (continued...)

- **Role-Specific Training and Development:** All staff, including casual or volunteer staff, are trained in operational and environmental procedures relevant to their role. Training is documented, refreshed regularly, and aligned with performance objectives. Staff are empowered to identify issues and suggest improvements, fostering a culture of shared responsibility.
- **Monitoring, Measurement, and Review:** Performance is tracked using KPIs, audits, inspections, and feedback. Operational and environmental procedures are reviewed regularly to ensure they are effective and fit for purpose. Lessons learned are used to update procedures, improve processes, and reduce environmental impact.
- **Evidence-Based Continuous Improvement:** Operational and environmental improvements are based on evidence such as energy monitoring, waste audits, incident reports, and user feedback. Changes are implemented strategically, with measurable outcomes in safety, efficiency, service quality, and environmental performance.
- **Measurable Impact and Recognition:** Improvements result in tangible benefits: reduced energy and water usage, lower carbon footprint, safer operations, improved service delivery, and enhanced facility condition. Achievements are celebrated internally and externally, reinforcing staff engagement and motivation.
- **Integration with Industry Best Practice:** Practices align with recognised standards and guidance, including health & safety regulations, environmental management standards (e.g., ISO 14001), and energy efficiency benchmarks. The facility uses sector insights to continually enhance operational and environmental performance.
- **Staff Engagement and Ownership:** Staff are fully engaged in operational and environmental management. They are trained, informed, and empowered to contribute to monitoring, reporting, and continuous improvement. Ownership of procedures ensures sustained performance and a proactive, solution-focused culture.

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PLAN	
Challenge: How does the facility plan to reduce its utility consumption and reduce its carbon footprint?	
<b>Unsatisfactory</b>	<ul style="list-style-type: none"> <li>No clear plans exist</li> <li>Day-to-day operations, maintenance, and environmental impact are managed reactively</li> <li>Energy use and carbon footprint are not considered.</li> </ul>
<b>Satisfactory</b>	<ul style="list-style-type: none"> <li>Basic plans exist for operational and environmental management, but they only cover certain areas and are not always followed</li> <li>Operational procedures are partially planned.</li> </ul>
<b>Good</b>	<ul style="list-style-type: none"> <li>A facility-specific environmental sustainability strategy is in place, supported by an action plan covering all key areas (electricity, water, waste, gas, where applicable)</li> <li>Operational management activities, like maintenance and safety, are planned and monitored</li> <li>Carbon footprint is measured, and initiatives are applied in most areas.</li> </ul>
<b>Very Good</b>	<ul style="list-style-type: none"> <li>The environmental sustainability strategy includes net zero aspirations and is linked to a detailed facility-specific action plan covering all significant aspects, using information from multiple sources (e.g., DEC reports)</li> <li>Plans are SMART</li> <li>Objectives are realistic, actions costed, and payback documented</li> <li>Operational management and environmental initiatives are applied consistently and monitored regularly.</li> </ul>
<b>Excellent</b>	<ul style="list-style-type: none"> <li>The facility has a full environmental sustainability strategy with net carbon zero objectives, milestones, and baselines for carbon footprint</li> <li>A comprehensive, SMART action plan covers all aspects of the facility and is informed by multiple sources</li> <li>All staff are trained in environmental and operational management</li> <li>Actions are embedded in daily operations, monitored continuously, and show measurable improvements in safety, efficiency, and environmental performance.</li> </ul>

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PLAN	
Challenge: How do you plan to maintain and improve the condition of the facility?	
<b>Unsatisfactory</b>	<ul style="list-style-type: none"> <li>No plans exist for maintenance or improving the facility</li> <li>Repairs are reactive. There is no approach to prevent future problems</li> <li>Operational or environmental issues are unmanaged.</li> </ul>
<b>Satisfactory</b>	<ul style="list-style-type: none"> <li>Some basic maintenance or improvement plans exist, covering certain equipment or building areas</li> <li>Environmental and operational considerations are limited, and improvements are only occasional.</li> </ul>
<b>Good</b>	<ul style="list-style-type: none"> <li>A clear, facility-wide maintenance and improvement plan is in place, covering equipment, building, and operational systems.</li> <li>Preventive maintenance is scheduled, improvements are planned, and environmental factors such as energy efficiency or waste reduction are considered.</li> </ul>
<b>Very Good</b>	<ul style="list-style-type: none"> <li>Comprehensive maintenance and improvement plans are embedded across the facility.</li> <li>Operational systems are regularly reviewed, preventive maintenance is applied consistently, and improvements are aligned with environmental sustainability goals.</li> <li>Plans are monitored, updated, and informed by performance data.</li> </ul>
<b>Excellent</b>	<ul style="list-style-type: none"> <li>Maintenance and improvement planning is fully integrated into operational and environmental management</li> <li>Preventive maintenance, upgrades, and sustainability initiatives are evidence-based, costed, and linked to clear objectives</li> <li>Continuous monitoring ensures measurable improvements in safety, efficiency, environmental performance, and facility condition</li> <li>Staff at all levels understand, contribute to, and take ownership of maintenance and improvement activities.</li> </ul>

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DO	
Challenge: Are comprehensive environmental procedures in place, and are they adhered to?	
<b>Unsatisfactory</b>	<ul style="list-style-type: none"> <li>No environmental procedures are documented</li> <li>Staff do not follow any environmental practices</li> <li>Energy, water, waste, and other impacts are unmanaged.</li> </ul>
<b>Satisfactory</b>	<ul style="list-style-type: none"> <li>Some environmental procedures exist, covering basic areas such as waste management or energy use</li> <li>They are not consistently applied, monitored, or updated</li> <li>Staff awareness is limited.</li> </ul>
<b>Good</b>	<ul style="list-style-type: none"> <li>Comprehensive environmental procedures are documented and applied across most key areas of the facility, including energy, water, waste, and recycling</li> <li>Staff are generally aware of the procedures, and some monitoring is in place to check compliance.</li> </ul>
<b>Very Good</b>	<ul style="list-style-type: none"> <li>Environmental procedures cover all significant areas of the facility, are fully documented, and are applied consistently</li> <li>Staff are trained to follow procedures, and compliance is regularly monitored</li> <li>Procedures are linked to environmental objectives, such as reducing energy use, water consumption, and waste generation.</li> </ul>
<b>Excellent</b>	<ul style="list-style-type: none"> <li>Environmental procedures are fully embedded and integrated into daily operations</li> <li>Staff are fully trained, consistently follow procedures, and contribute to continuous improvement</li> <li>Procedures are evidence-based, monitored, and reviewed regularly to reflect best practice, emerging sustainability priorities, and measurable improvements in environmental performance, such as reduced carbon footprint, energy efficiency, and waste reduction.</li> </ul>

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DO	
Challenge: Are comprehensive operational procedures in place and are they adhered to?	
<b>Unsatisfactory</b>	<ul style="list-style-type: none"> <li>No operational procedures are documented</li> <li>Staff do not consistently follow any procedures</li> <li>Operational tasks, maintenance, and safety are unmanaged.</li> </ul>
<b>Satisfactory</b>	<ul style="list-style-type: none"> <li>Some operational procedures exist, but they are incomplete or only cover certain areas</li> <li>Staff awareness is limited, and procedures are applied inconsistently.</li> </ul>
<b>Good</b>	<ul style="list-style-type: none"> <li>Comprehensive operational procedures are documented and applied across most key areas of the facility</li> <li>Staff are generally aware of the procedures, and some monitoring is in place to check compliance.</li> </ul>
<b>Very Good</b>	<ul style="list-style-type: none"> <li>Operational procedures cover all significant areas, are fully documented, and applied consistently</li> <li>Staff are trained to follow procedures</li> <li>Compliance is regularly monitored</li> <li>Procedures are linked to operational objectives, such as safety, efficiency, and service quality.</li> </ul>
<b>Excellent</b>	<ul style="list-style-type: none"> <li>Operational procedures are fully embedded and integrated into daily operations</li> <li>Staff are fully trained, consistently follow procedures, and contribute to continuous improvement</li> <li>Procedures are evidence-based, monitored, and reviewed regularly to reflect best practice</li> <li>Measurable outcomes show improvements in safety, operational efficiency, and service delivery.</li> </ul>

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DO	
Challenge: Are staff trained in environmental management procedures?	
<b>Unsatisfactory</b>	<ul style="list-style-type: none"> <li>No training is provided</li> <li>Staff are not aware of environmental procedures or their responsibilities.</li> </ul>
<b>Satisfactory</b>	<ul style="list-style-type: none"> <li>Some basic training is provided on environmental procedures</li> <li>Staff awareness is limited, and training is not consistent across all teams.</li> </ul>
<b>Good</b>	<ul style="list-style-type: none"> <li>Staff receive training on all key environmental procedures, such as energy use, water management, and waste</li> <li>Training is documented and delivered to most staff.</li> </ul>
<b>Very Good</b>	<ul style="list-style-type: none"> <li>All staff are trained in environmental procedures relevant to their role</li> <li>Training is regular, monitored, and linked to environmental objectives like reducing energy, water, and waste</li> <li>Staff are aware of how their actions impact the facility's environmental performance.</li> </ul>
<b>Excellent</b>	<ul style="list-style-type: none"> <li>Environmental management training is fully embedded in staff induction and ongoing development</li> <li>All staff are fully competent, regularly refreshed, and contribute to continuous improvement</li> <li>Training is evidence-based, monitored for effectiveness, and supports measurable improvements in environmental performance across the facility.</li> </ul>

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DO	
Challenge: Are staff trained in operational management procedures?	
<b>Unsatisfactory</b>	<ul style="list-style-type: none"> <li>No operational training is provided</li> <li>Staff do not know procedures or their responsibilities</li> <li>Operational tasks, maintenance, safety, or service delivery are unmanaged.</li> </ul>
<b>Satisfactory</b>	<ul style="list-style-type: none"> <li>Some basic operational training is provided</li> <li>Staff are aware of some procedures, but coverage is inconsistent</li> <li>Training is not delivered to all teams or roles</li> <li>Monitoring of compliance is limited.</li> </ul>
<b>Good</b>	<ul style="list-style-type: none"> <li>Training covers all key operational procedures, including maintenance, health &amp; safety, equipment use and day-to-day operational tasks</li> <li>Most staff have completed training</li> <li>Training is documented, and staff are generally competent</li> <li>Some monitoring and checks are in place to ensure procedures are followed.</li> </ul>
<b>Very Good</b>	<ul style="list-style-type: none"> <li>All staff receive role-specific operational training</li> <li>Training is regular, monitored, and linked to operational objectives such as safety, efficiency, service quality, and facility performance</li> <li>Staff understand how their actions affect operational outcomes</li> <li>Feedback and operational performance data are used to update training.</li> </ul>
<b>Excellent</b>	<ul style="list-style-type: none"> <li>Operational training is fully embedded in induction and ongoing development</li> <li>All staff are fully competent, regularly refreshed, and understand their responsibilities</li> <li>Staff contribute to continuous improvement of operational practices</li> <li>Training is evidence-based, monitored for effectiveness, and linked to measurable improvements in operational performance, safety, and service delivery</li> <li>Training aligns with organisational policies, sector best practice, and long-term operational goals.</li> </ul>

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MEASURE AND REVIEW	
Challenge: What measures and reviews are in place to ensure the success of the plans and procedures?	
<b>Unsatisfactory</b>	<ul style="list-style-type: none"> <li>No measures or reviews are in place</li> <li>Plans and procedures are not monitored, and success is unknown</li> <li>Issues are only noticed when problems occur.</li> </ul>
<b>Satisfactory</b>	<ul style="list-style-type: none"> <li>Some measures or reviews are in place</li> <li>Monitoring is occasional and limited to certain areas</li> <li>Staff may be informed of outcomes inconsistently.</li> </ul>
<b>Good</b>	<ul style="list-style-type: none"> <li>Key performance indicators (KPIs) or checklists are used to monitor operational and environmental procedures</li> <li>Reviews take place regularly, and findings are shared with relevant staff</li> <li>Plans are adjusted occasionally based on review outcomes.</li> </ul>
<b>Very Good</b>	<ul style="list-style-type: none"> <li>Measures and reviews are systematic and cover all significant operational and environmental procedures</li> <li>Monitoring includes safety, efficiency, energy use, waste, and service delivery</li> <li>Data is reviewed regularly, and plans are updated based on evidence</li> <li>Staff are informed and involved in implementing improvements.</li> </ul>
<b>Excellent</b>	<ul style="list-style-type: none"> <li>A fully integrated monitoring and review system is in place for all operational and environmental plans and procedures</li> <li>KPIs, audits, inspections, and feedback are used to measure performance continuously</li> <li>Findings are analysed, reported, and acted on to drive continuous improvement</li> <li>Staff at all levels contribute to reviews, ensuring ownership and accountability</li> <li>Evidence shows measurable improvements in safety, operational efficiency, environmental performance, and service quality.</li> </ul>

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IMPACT	
Challenge: What positive impacts have resulted from the operational and environmental management practices?	
<b>Unsatisfactory</b>	<ul style="list-style-type: none"> <li>• There is no evidence that operational or environmental practices have made any difference</li> <li>• Safety, efficiency, or environmental performance remains poor or unchanged.</li> </ul>
<b>Satisfactory</b>	<ul style="list-style-type: none"> <li>• Some improvements are observed in parts of the facility</li> <li>• Environmental or operational practices have had a limited effect</li> <li>• Evidence of impact is inconsistent or informal.</li> </ul>
<b>Good</b>	<ul style="list-style-type: none"> <li>• Operational and environmental practices have led to noticeable improvements in some areas</li> <li>• Examples include safer operations, more efficient processes, or reduced energy or waste in certain areas</li> <li>• Evidence is recorded and shared with relevant staff.</li> </ul>
<b>Very Good</b>	<ul style="list-style-type: none"> <li>• Operational and environmental practices have resulted in significant improvements across multiple areas</li> <li>• Safety, efficiency, environmental performance, and service delivery show measurable gains</li> <li>• Staff and relevant stakeholders are informed of results</li> <li>• Practices are adapted based on lessons learned to improve further.</li> </ul>
<b>Excellent</b>	<ul style="list-style-type: none"> <li>• Operational and environmental practices have led to measurable, organisation-wide improvements</li> <li>• Safety, efficiency, service quality, energy use, waste, and environmental performance are all positively impacted</li> <li>• Staff at all levels are engaged in maintaining improvements and contributing to continuous development</li> <li>• Evidence demonstrates sustained benefits, and achievements are celebrated internally and externally.</li> </ul>