

SABS AND ISO STANDARDS FOR FACILITIES MANAGEMENT

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CONGRATULATION TO SA !!

- SANS 1752 Strategic Facilities Management System – Requirements
- Approved in March 2017 after public consultation process
- SA is a key role player the development of ISO FM standards
- Forms input for developing ISO 41000 world FM standards

WHY HAVE STANDARDS ??????



WHY FM STANDARDS

- To define common words & terms
 - ISO 41011 Facility Management – Vocabulary
 - ISO 41013 Facility Management – Scope, key concepts and benefits (under development)
- What's the best way of doing this?
 - ISO 41012 Facility Management - Guidance on strategic sourcing and the development of agreements

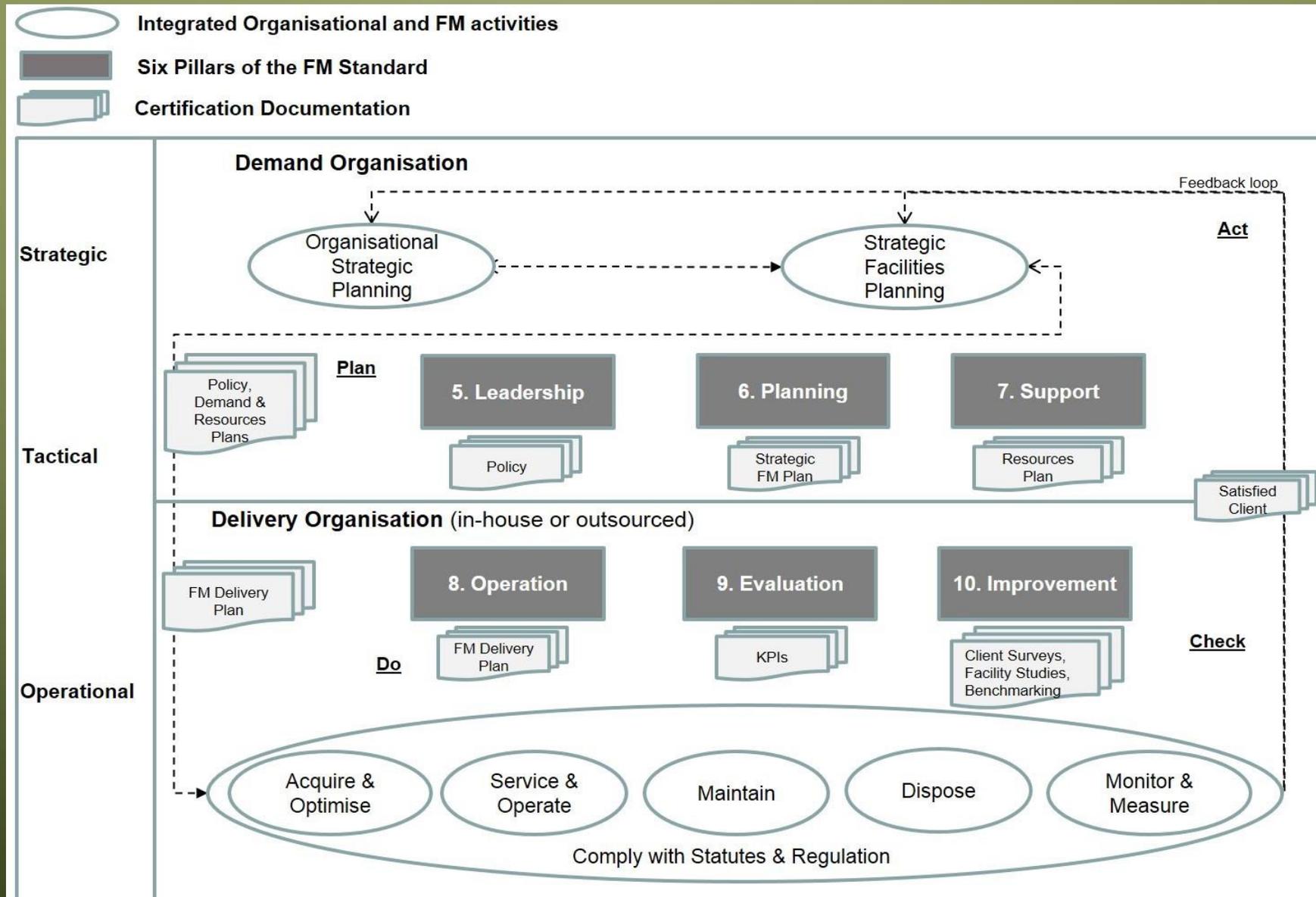
WHY FM STANDARDS

- Consumers can have confidence that their products /services are safe, reliable and of good quality
- Framework for how a business manages its key processes.
 - SANS 1752 Strategic Facilities Management System – Requirements
 - ISO 41001 Facility Management – Management Systems – Requirements with guidance for use (under development)

KEY FACTS

- SANS 1752 IS A STRATEGIC FACILITIES MANAGEMENT SYSTEM
 - Defines the high level management system in delivering a quality service
 - Short, Medium and Long term planning
 - Principles of Asset Management (ISO 55000)
 - Principles of Quality Management (ISO 9001)
- SANS 1752 MAY BE APPLIED DEPENDING ON CIRCUMSTANCES
 - Inhouse FM
 - Outsourced Integrated or Single Service FM

FACILITIES MANAGEMENT SYSTEM



5. LEADERSHIP

- Understanding the Organisation
 - Strategic Aims, financial, technical
 - Needs and Expectations
 - Drivers – economic, cultural, political, social
 - Values – organisational, cultural, political, social
- Defining the FM Scope
 - Priorities, Objectives, Financial
 - Standards – operations, quality, sustainability, health, safety
 - Risk Profile – economic, utilisation
 - Internal Stakeholders – employees, departments (processes)
 - External Stakeholders – customers, suppliers, contractors

DEVELOP INTO AN FM STRATEGY & POLICY

5. LEADERSHIP (CONT)

- Leaders Commitment
 - Ensure policies and objectives are established
 - Ensure objectives are measured and achieved
 - Ensure Resourcing (finances, staff, equipment)
 - Ensure communications (platforms, routine)
 - Delegation of responsibilities and authority
 - Directing and supporting
 - Continual improvement
 - Integration and Alignment to organisation

STRATEGIC ALIGNMENT

A. JENSEN, "ORGANISATION OF FACILITIES MANAGEMENT IN RELATION TO CORE BUSINESS," 2011, *J OF FACILITIES MANAGEMENT*, VOL. 9, PP. 78-95.

The different levels of integration is shown in the figure 6 below: [50]

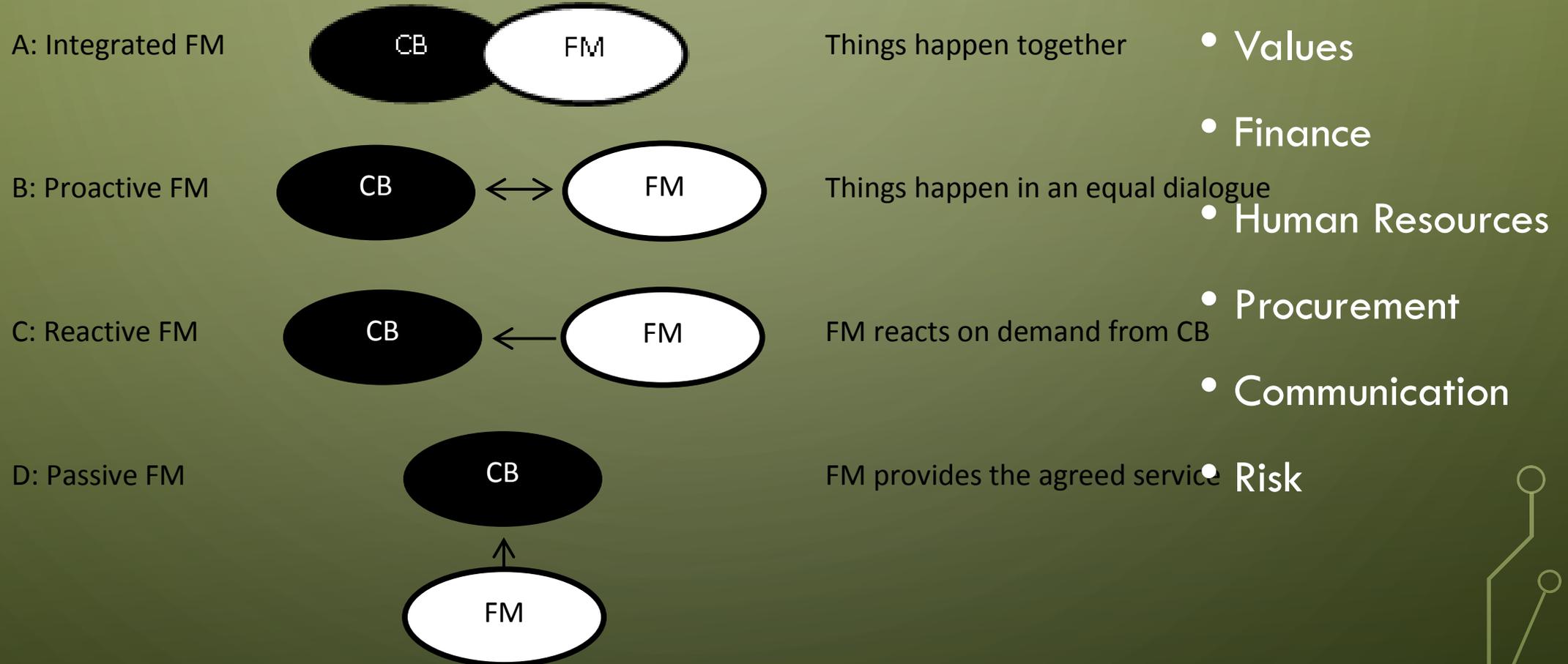


Figure 1 Linkages between strategic planning for core business (CB) and FM [50]

6. PLANNING

- Development of Strategic FM Plan
 - Short and Long Term plans (needs, operations)
 - Asset Management plans – facilities and infrastructure life cycle
 - Design, Planning and Acquisition of facilities
 - Management and Operations
 - Maintenance
 - Refurbishment
 - Disposal of facilities
 - Sustainability – utilities, carbon footprint
 - Improvements in productivity
 - Impact of FM in terms of bottom line.

7. SUPPORT

- Human Resource - Staff competency (education, training, experience) based on functional requirements
 - Strategic planning
 - Client relationship management / communications
 - Operations and maintenance
 - Property Real Estate management
 - Emergency and Business continuity
 - Environmental / sustainability
 - Finance
 - Quality
 - Technology

7. SUPPORT (CONT)

- Financial Budget
 - Strategic budget (3-5 years in line with business plans)
 - Life cycle replacement (long term up to 20 years)
- Technological
 - Help Desk – staff or portal
 - Maintenance Management
 - Utilities Management
 - Building Management Systems
 - Space Planning
 - Project Management

7. SUPPORT (CONT)

- Financial Budget
 - Strategic budget (3-5 years in line with business plans)
 - Life cycle replacement (long term up to 20 years)

7. SUPPORT (CONT)

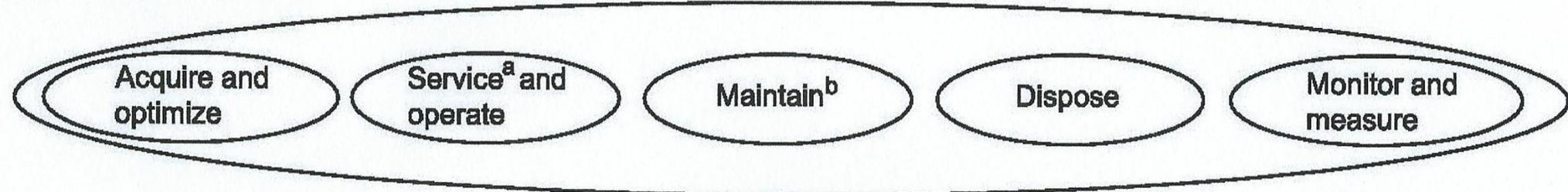
- Communications Plan
 - What
 - Why
 - To Whom
 - How often
 - In what medium
 - How to monitor effectiveness
- Document Control

7. SUPPORT (CONT)

- Information Requirements
 - Defined to achieve FM objectives
 - Significance of Risks
 - Roles and Responsibilities
 - FM processes and procedures
 - Quality, Availability and Decisions taken
- Document control, storage and review.

8. OPERATION

Facility Lifecycle Activities



Strategic Facilities Management Plan (SFMP)

- | | | | | |
|--|---|---|---|--|
| <ul style="list-style-type: none"> • Acquisition plan • Workspace plan • Green building programme | <ul style="list-style-type: none"> • Portfolio service^a and operation plans | <ul style="list-style-type: none"> • Portfolio maintenance^b plans - Mission critical, other • Green building programme | <ul style="list-style-type: none"> • Portfolio disposal plan | <ul style="list-style-type: none"> • Condition/backlog/compliance management plan |
|--|---|---|---|--|

Operational Plan (OP)

- | | | | | |
|---|--|--|---|--|
| <ul style="list-style-type: none"> • Implementation plan • Design plans • Resources plan | <ul style="list-style-type: none"> • Facility Service^a and operation schedules (facility type, client, criticality) • Resources plan • Project plans | <ul style="list-style-type: none"> • Facility maintenance^b schedules (facility type, client, criticality) • Resources plan • Project plans | <ul style="list-style-type: none"> • Implementation plan | <ul style="list-style-type: none"> • Facility maintenance^b/service schedules (facility type, client, criticality) • Project plans |
|---|--|--|---|--|

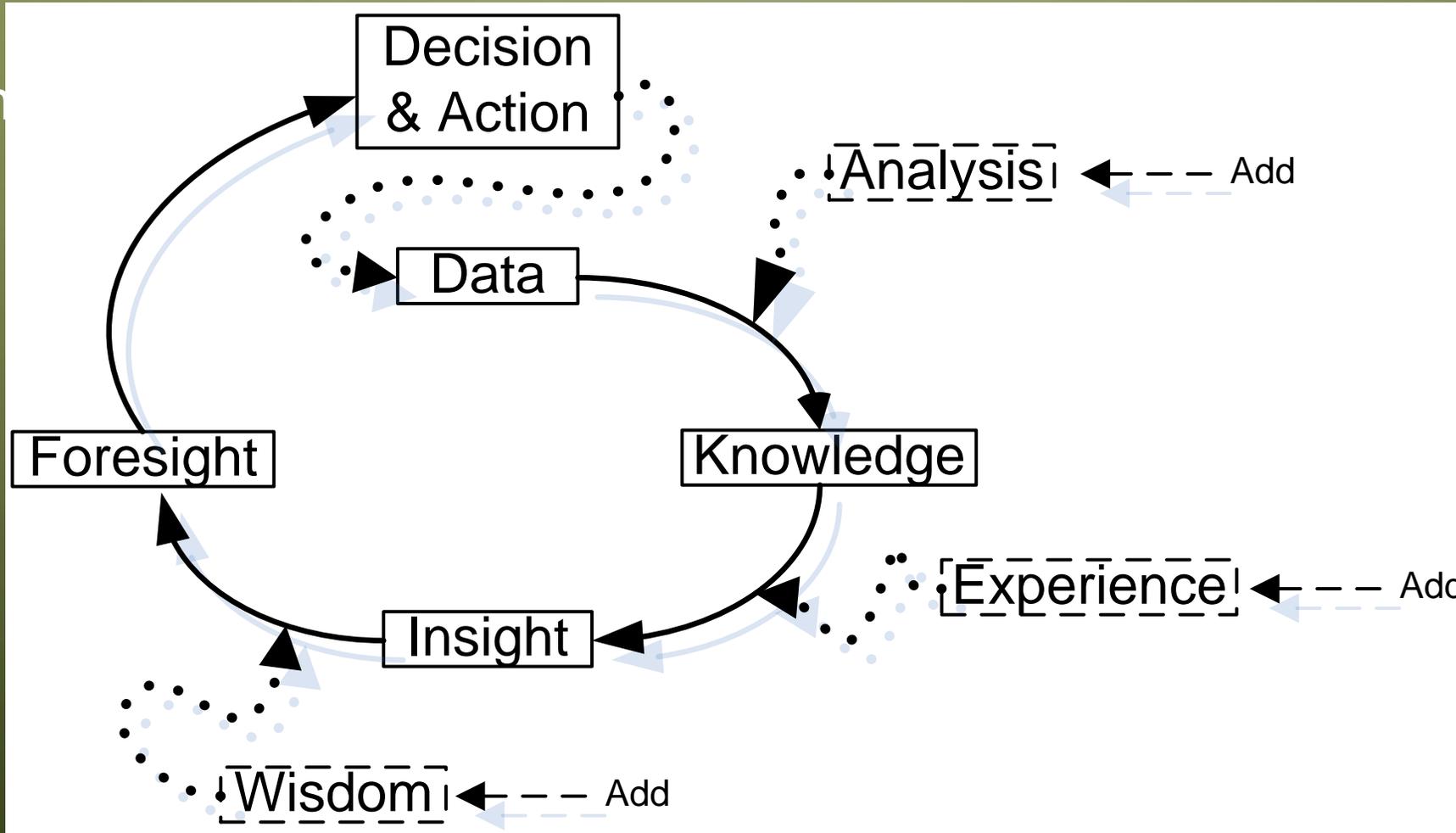
9. EVALUATION

- Monitoring, Measurement, Analysis and Evaluation (MMA&E)
 - Delivery organisation must determine:
 - What is to be measured and monitored
 - The methods of MMA&E to assure valid results
 - When the monitoring and measurement will be performed
 - When the analysis and evaluation will be performed
 - The delivery organisation will evaluate:
 - Effectiveness/Performance of the management system
 - Effectiveness of processes for managing risk and opportunities

9. EVALUATION

• Mon

(E)



9. EVALUATION

- Internal Audit
 - Conduct internal audits at planned intervals to verify:
 - The system has been implemented as designed
 - The system is performing effectively
 - Plan the audits taking consideration of:
 - Scope of audit
 - Audit criteria
 - Selection of auditors
 - Documenting the outcomes
- Management Review

10. IMPROVEMENT

- Non-conformity and corrective actions
 - Taking action to prevent and/or control non-conformities
 - Deal with consequences
 - Evaluate need to for actions to eliminate causes of non-conformities
 - Retain documented evidence of dealing with non-conformities and corrective actions
- Continual improvement of the suitability, adequacy and effectiveness of the System through:
 - Stakeholder surveys
 - Facility studies such as condition assessments
 - Benchmarking

SABS STANDARDS – WAY FORWARD

- Promotion of the Standard (Industry role players, Government)
- Development of Business Case
- Development of Certification Process (SANAS)
- Development of Compliance Process (SANAS)

**THANK YOU
DISCUSSION**