

# Higher Education Facilities Management Association (HEFMA)

## 2022 Development Programme

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# FACILITY MANAGEMENT STANDARDS

Presenter:  
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CER Facility Management (Pty) Ltd

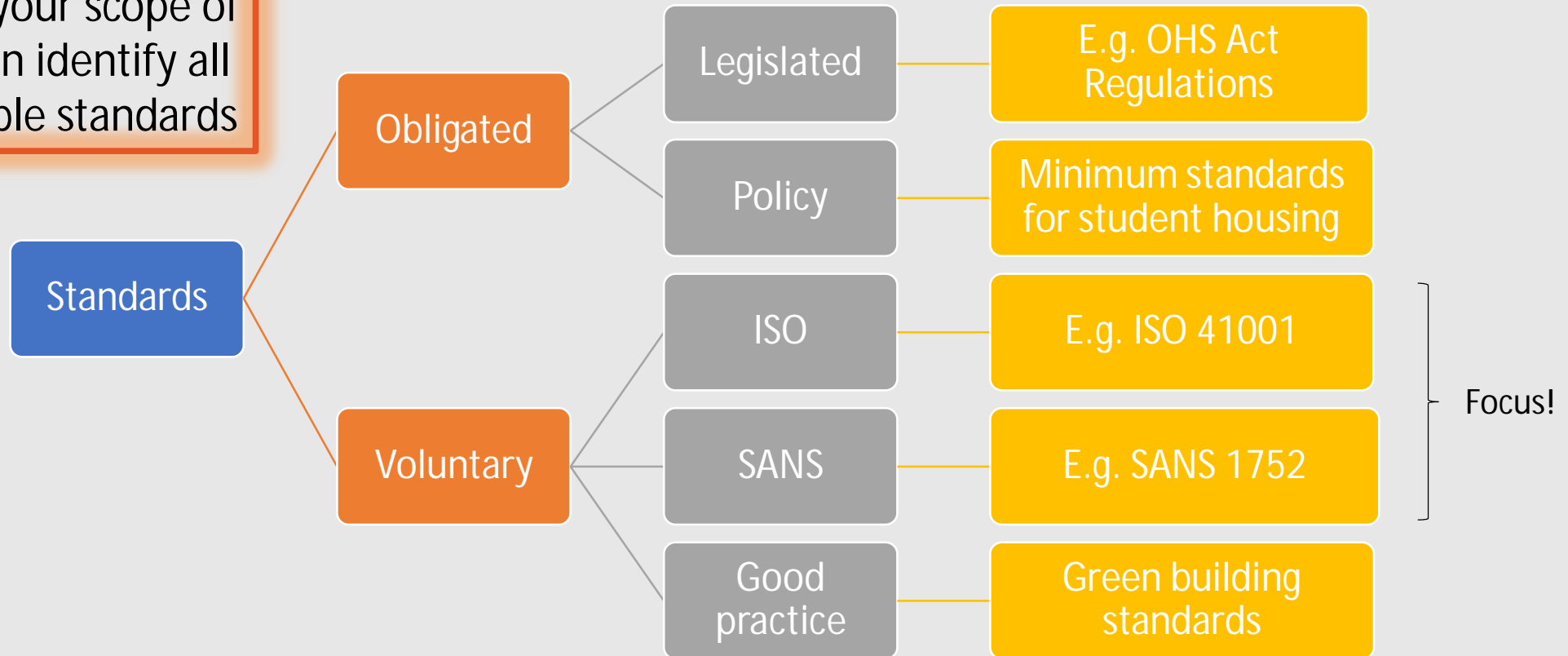
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Presenter's access to standards is either through being member of SABS Technical Committee 267 and/or purchased standards.*

## FACILITY MANAGEMENT STANDARDS

- ✓ Compliance standards
- ✓ Voluntary standards

# RANGE OF STANDARDS

Define your scope of FM, then identify all applicable standards



# EN, ISO AND SANS STANDARDS

“Standards are the distilled wisdom of people with expertise in their subject matter...” International Standards Organisation

# WHY THE NEED FOR FACILITY MANAGEMENT STANDARDS?

- BS EN 15221 was the British and European standard for facility management from 2006 to 2018
- The standard was to support the belief that the **facilities management profession should be considered as equal to traditional professional disciplines** (architecture, engineering, surveys and others) associated with the built environment.

# BRITISH (BSI) AND EUROPEAN UNION (EN) STANDARDS

Standard Reference	<u>PUBLISHED</u> standards
BSI 8210:2012	Guide to Facilities Maintenance Management
BSI 8536:2010	Facility Management Briefing - Code of practice
EN 15221-1:2006	Facilities Management: terms and definitions
EN 15221-2:2006	Guidance on how to prepare facility management agreements
EN 15221-3:2011	Guidance on Quality in Facilities Management
EN 15221-4:2011	Taxonomy, Classification and Structures in Facilities Management
EN 15221-5:2011	Guidance on Facilities Management Processes
EN 15221-6	Area and Space Measurement in Facilities Management
EN 15221-7:2012	Guidelines for Performance Benchmarking in Facilities Management

# SOUTH AFRICAN NATIONAL STANDARDS (SANS) STANDARDS

Standard Reference	<u>PUBLISHED</u> standards
SANS 1752: 2017	Strategic Facility Management Standard

# INTERNATIONAL STANDARDS ORGANISATION (ISO) STANDARDS

Standard Reference	<u>PUBLISHED</u> Standards
ISO 41011:2017	Facility management - Vocabulary
ISO 41012:2017	Facility Management – Guidance on Strategic Sourcing and Development of Agreements
ISO 41013:2017	Facility Management – Scope, Key Concepts and Benefits
ISO 41001:2018	Facility Management – Management System Standard
ISO 41014:2020	Facility Management – Development of facility management strategy
ISO 41018: 2022	Development of a Facility Management Policy



# INTERNATIONAL STANDARDS ORGANISATION (ISO) STANDARDS

Standard Reference	<u>UNDER-DEVELOPMENT</u> standards
ISO 41015	Influencing organisational behaviours for improved facility outcomes
ISO 41016	Technology in facility management – Scope, key concepts and benefits
ISO 41017	Guidance on emergency preparedness and management of an epidemic
ISO 41019	The role of facility management in sustainability and resilience
ISO 41020	Performance management and improvement

# MANAGEMENT SYSTEM STANDARDS APPLICABLE TO FM

Standard	Title	Sector
ISO 9001	Quality management systems -- Requirements	Business Management and Innovation
ISO 14001	Environmental management systems -- Requirements with guidance for use	Sustainability and Environment
ISO 16000	Indoor Air Quality Management System (Part 40)	Sustainability and Environment
ISO 18788	Management system for private security operations -- Requirements with guidance for use	Security, Safety and Risk
ISO 20121	Event sustainability management systems -- Requirements with guidance for use	Services
ISO 22301	Societal security -- Business continuity management systems --- Requirements	Security, Safety and Risk
ISO 26000	Guidance on social responsibility	Horizontal Subjects

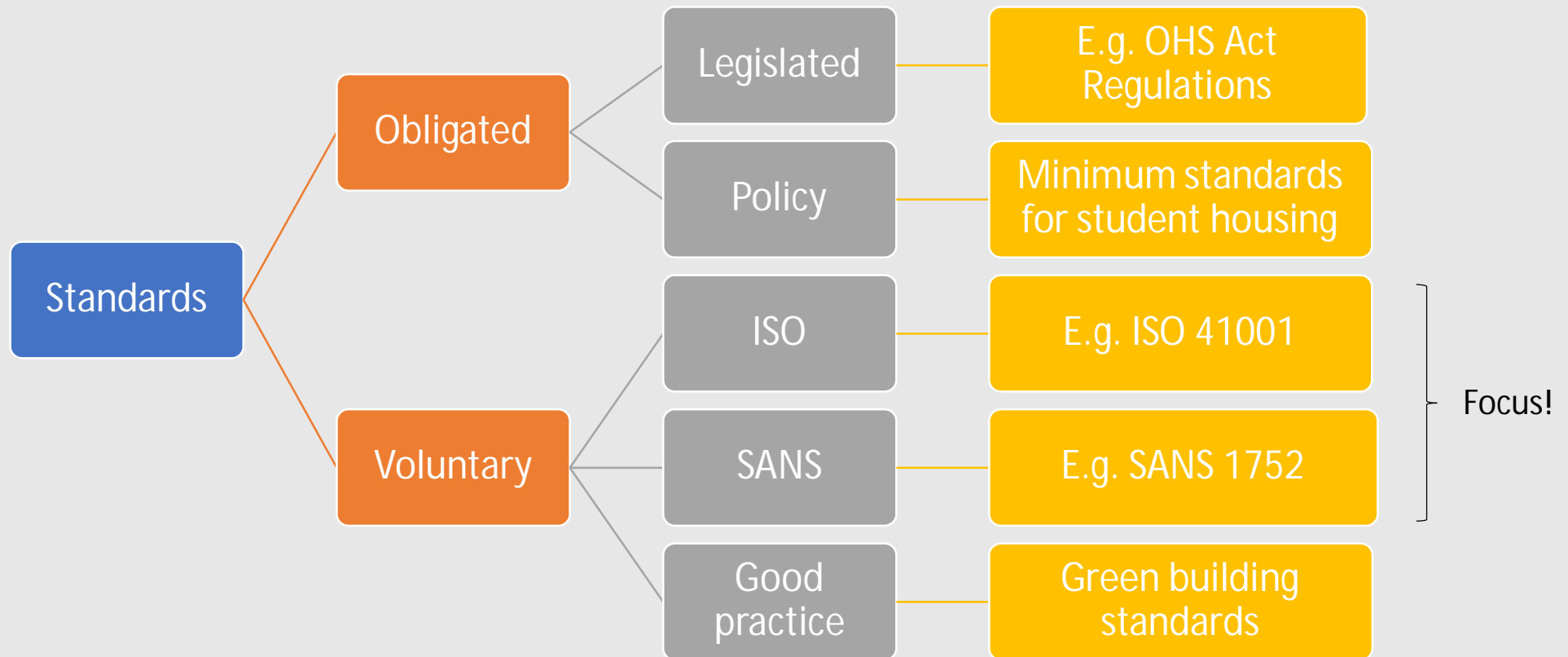
# MANAGEMENT SYSTEM STANDARDS APPLICABLE TO FM

Standard	Title	Sector
ISO 27001	Information technology -- Security techniques -- Information security management systems -- Requirements	Information Technology, Graphics and Photography
ISO 27005	Information technology — Security techniques — Information security risk management	Information Technology, Graphics and Photography
ISO 30301	Information and documentation -- Management systems for records -- Requirements	Information Technology, Graphics and Photography
ISO 30401	Human resource management -- Knowledge management systems -- Requirements	Business Management and Innovation
ISO 31000	Risk management -- Guidelines	Security, Safety and Risk
ISO 37101	Sustainable development in communities -- Management system for sustainable development -- Requirements with guidance for use	Sustainability and Environment
ISO 37301	Compliance management systems -- requirements with guidance for use	Business Management and Innovation

# MANAGEMENT SYSTEM STANDARDS APPLICABLE TO FM

Standard	Title	Sector
ISO 41001	Facilities management -- Management systems -- Requirements with guidance for use	Building and Construction
ISO 44001	Collaborative business relationship management systems -- Framework	Business Management and Innovation
ISO 45001	Occupational health and safety management systems -- Requirements with guidance for use	Security, Safety and Risk
ISO 46001	Water efficiency management systems -- Requirements with guidance for use	Services
ISO 50001	Energy management systems -- Requirements with guidance for use	Energy
ISO 55001	Asset management -- Management systems -- Requirements	Business Management and Innovation

# RANGE OF STANDARDS



# ISO STANDARDS

FACILITY MANAGEMENT – SCOPE, KEY CONCEPTS  
AND BENEFITS  
(ISO 41013: 2017)

# CORE AND SUPPORT BUSINESS PROCESSES

- The primary activities of an organization constitute its distinctive and indispensable competencies in its value chain.
- Every organization relies on support services that provide an infrastructure within which the primary activities can be achieved effectively.
- The relationship and interface between facilities processes and the primary activities shall be decided by each organization according to its needs, and should be reviewed as those needs and the competitive environment evolves.

# SCOPE OF FACILITY MANAGEMENT (FM)

- FM has the purpose of **improving** ...
- the **quality of life of people** and ...
- the **productivity of the core business** of organisations.



# SCOPE OF FACILITY MANAGEMENT (FM)

- Understand the needs of the core business and interpreting the decisions of top management
- Define the demands for support services across the entire organization.
- Synthesise all ideas into an applied management function

# SCOPE OF FACILITY MANAGEMENT (FM)

- Integrates a very broad scope of processes, services, activities and facilities ....
- Towards cost-effective, safe and healthy workplaces and ensuring an efficient provision of facility services.

# SCOPE OF FACILITY MANAGEMENT (FM) – IMPACT/OBJECTIVES

- **Productivity**

- √ FM function competes with other functions for limited resources
- √ Optimize performance by integrating facility processes even more effectively and by providing support even more efficiently.
- √ FM can contribute to higher productivity and improve the competitiveness of the demand organization.

# SCOPE OF FACILITY MANAGEMENT (FM) – IMPACT/OBJECTIVES

- **Impact on people**

- FM contributes to people's health, safety, security and environmental needs.
- Well-designed and operated workplaces create increased motivation and productivity resulting in a positive impact on employee recruitment and retention, corporate culture and brand identity.

# SCOPE OF FACILITY MANAGEMENT (FM) – IMPACT/OBJECTIVES

- **Risk mitigation and legal compliance**
  - Risk analysis is a process used to understand the nature, sources and causes of risk.
  - Foreseeable risks are identified, quantified and, where possible eliminated.
  - The level of detail and complexity applied to the review will depend upon the potential impact and likelihood of occurrence.

# SCOPE OF FACILITY MANAGEMENT (FM) – IMPACT/OBJECTIVES

- **Sustainability**

- FM can add substantially to the sustainability of an organization because it covers a broad spectrum of activities concerning economic, environmental and social aspects. FM, with its holistic approach, will play an important role in the next years to manage the future requirements.

# SCOPE OF FACILITY MANAGEMENT (FM) – IMPACT/OBJECTIVES

- **Identity**

- Advises top management on the way in which the built infrastructure contributes to the visual quality and how the organization is perceived by the outside world.
- FM also executes the exposure symbolically representing the organization in relation to the surrounding world.
- This includes the way in which the demand organization cares for their guests and customers.

# SCOPE OF FACILITY MANAGEMENT (FM) – IMPACT/OBJECTIVES

- **Cost and quality**
  - FM aims to balance demand and supply, in order to reach the optimized mix between requirements/service levels and capabilities/constraints/costs of support services.
  - To optimise performance and the value of assets



# SCOPE OF FACILITY SERVICES

- Managing real estate or sites providing space
  - *E.g. factories, offices, laboratories, classrooms, hospitals, shops, warehouses, data centres, airports, military installations, hotels, museums, playgrounds, prisons, internal roads, parking, lawns, parks, etc.;*
- Managing infrastructure such as:
  - *E.g. roads, bridges, dams, canals, levees, railroads, and transit systems;*

# SCOPE OF FACILITY SERVICES

- Managing equipment and systems
  - *E.g. such as structural components, furniture and workplace equipment, information and communication technology ICT, lighting, sanitary, heating, ventilation and air conditioning, elevators, safety and surveillance, building automation and information management, computer aided FM, transport vehicle fleet, primary business specific systems, etc.;*

# SCOPE OF FACILITY SERVICES

- Managing utilities such as:
  - *Electricity, gas, oil, district heating, solar energy, geothermal energy, pressurized air, technical gases, water treatment, etc.*

# SCOPE OF FACILITY SERVICES

- Safety management, security management, catering, access control, fleet management, reception and visitor services, printing services, greens service, winter service, event management etc.;
- Specific services for users and guests which make all of these resources productive for them and for the organization and which maintain their functionality

# BENEFITS OF IMPLEMENTING A FM APPROACH

- A simple and manageable concept of **internal and external responsibilities for services**, based on strategic decisions, which leads to **systematic insourcing or outsourcing procedures**;
- **Clear and transparent communication** between the demand side and the supply side by dedicating persons as single points of contact for all services, which are defined in a FM agreement;

# BENEFITS OF IMPLEMENTING A FM APPROACH

- A most effective use of synergies amongst different services, which will help to improve performance and reduce costs of an organization in alignment with its strategic goals;
- Reduction of conflicts between internal and external service providers due to fewer and better managed interfaces;

# BENEFITS OF IMPLEMENTING A FM APPROACH

- Integration and coordination of all required support services ensuring quality and efficiency as well as flexibility and adaptability;
- Transparent knowledge and information on service levels and costs, which can be clearly communicated to the end users to ensure that quality meets requirements;

# BENEFITS OF IMPLEMENTING A FM APPROACH

- Improvement of the sustainability of an organization by the implementation of life cycle analysis for the facilities and reduction of organizational risks; and
- Help support the reputation and desired perception of the organization that it wants its stakeholders to have and improve the accountability of the organization to the communities that it serves.



# SCOPE OF A FACILITY

- A facility is a collection of assets which is built, installed or established to serve an entity's needs.
- A single asset is not a facility (for example, a car is not a facility, nor is an air handling unit).
- Something that has not been built is not a facility, even if it is an asset (for example, a nature preserve is not a facility).

# SCOPE OF A FACILITY

- Facility can be anything to which the following questions can be positively answered:
  - *Is it a collection of assets?*
  - *Were they built, installed or established for the purpose to serve people or an organization's needs?*

# ISO STANDARDS

## FACILITY MANAGEMENT - VOCABULARY (ISO 41011: 2017)

# SANS / ISO STANDARDS

STRATEGIC FACILITY MANAGEMENT STANDARD  
(SANS 1752 – 2017)  
/  
FACILITY MANAGEMENT – MANAGEMENT SYSTEM  
STANDARD  
(ISO 41001: 2018)

# ISO 41001 – FM MANAGEMENT SYSTEM STANDARD

## Context of the organisation

- Strategic objectives, needs, expectations
- Scope of the FM management system

## Leadership

- Leadership commitment
- Policy
- Organisation roles and responsibilities

## Planning

- Addressing risks and opportunities
- FM objectives and planning to achieve those
- Planning horizons

## Operation

- Operation planning and control
- Coordination with end users
- Delivery of services

# ISO 41001 – FM MANAGEMENT SYSTEM STANDARD

## Support

- Resources and competence
- Communication and awareness
- Documented information

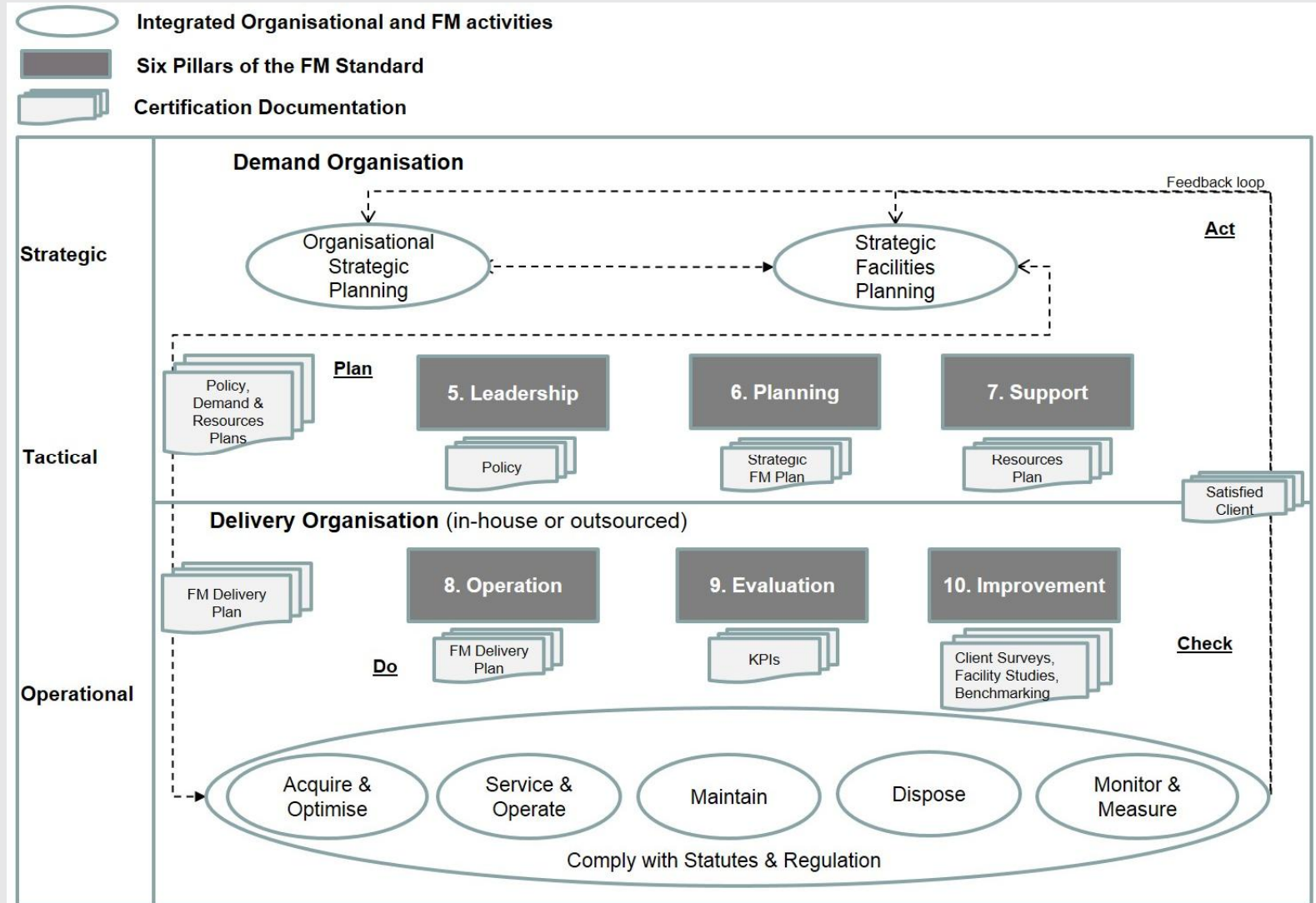
## Performance evaluation

- Monitoring, measurement, analyses and evaluation
- Internal audit
- Management review

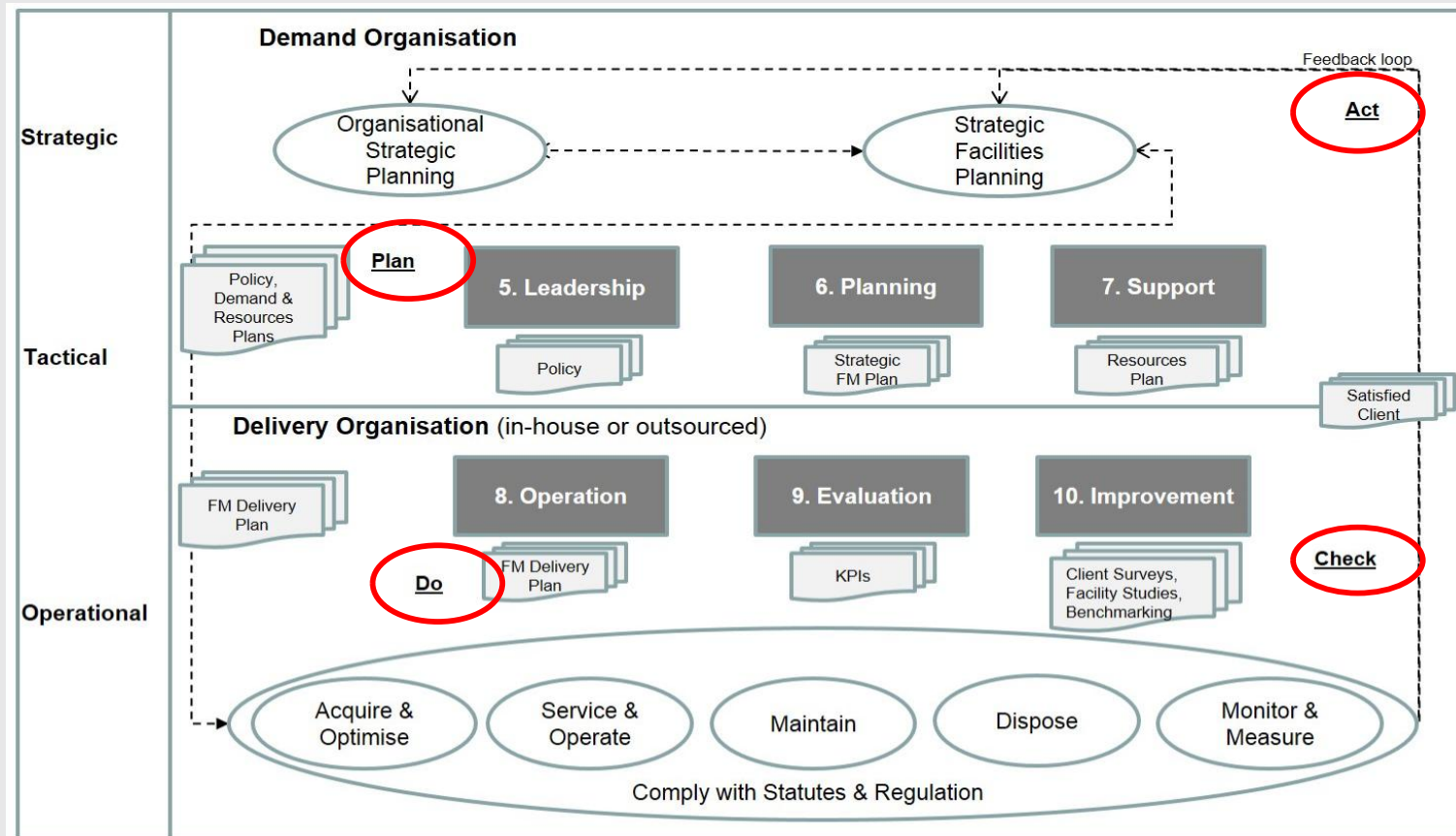
## Improvement

- Non-conformity identification and corrective action
- Preventive actions
- Continuous improvement

# SANS 1752 SUMMARY VIEW



# MANAGEMENT PRINCIPLE – PLAN-DO-CHECK-ACT

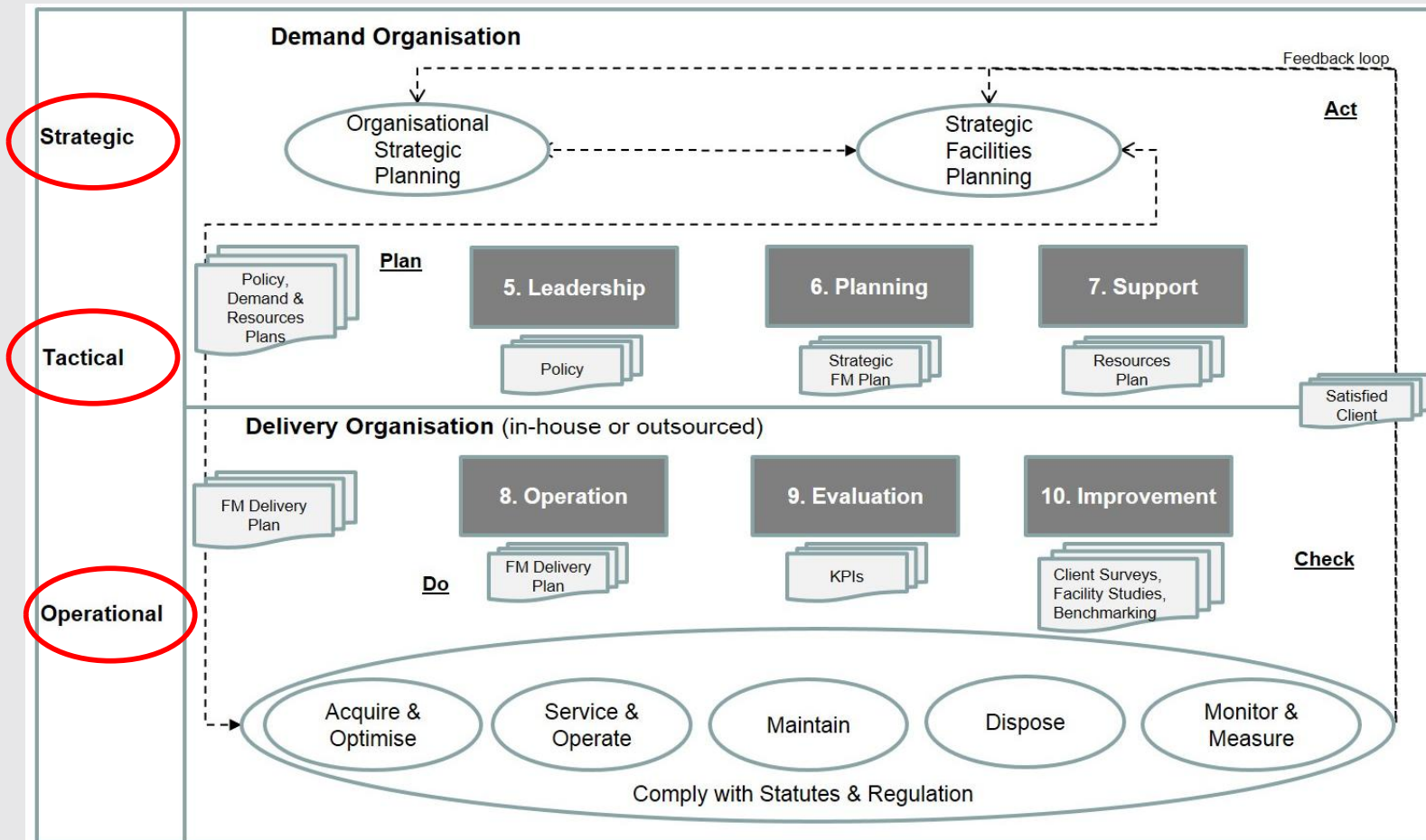




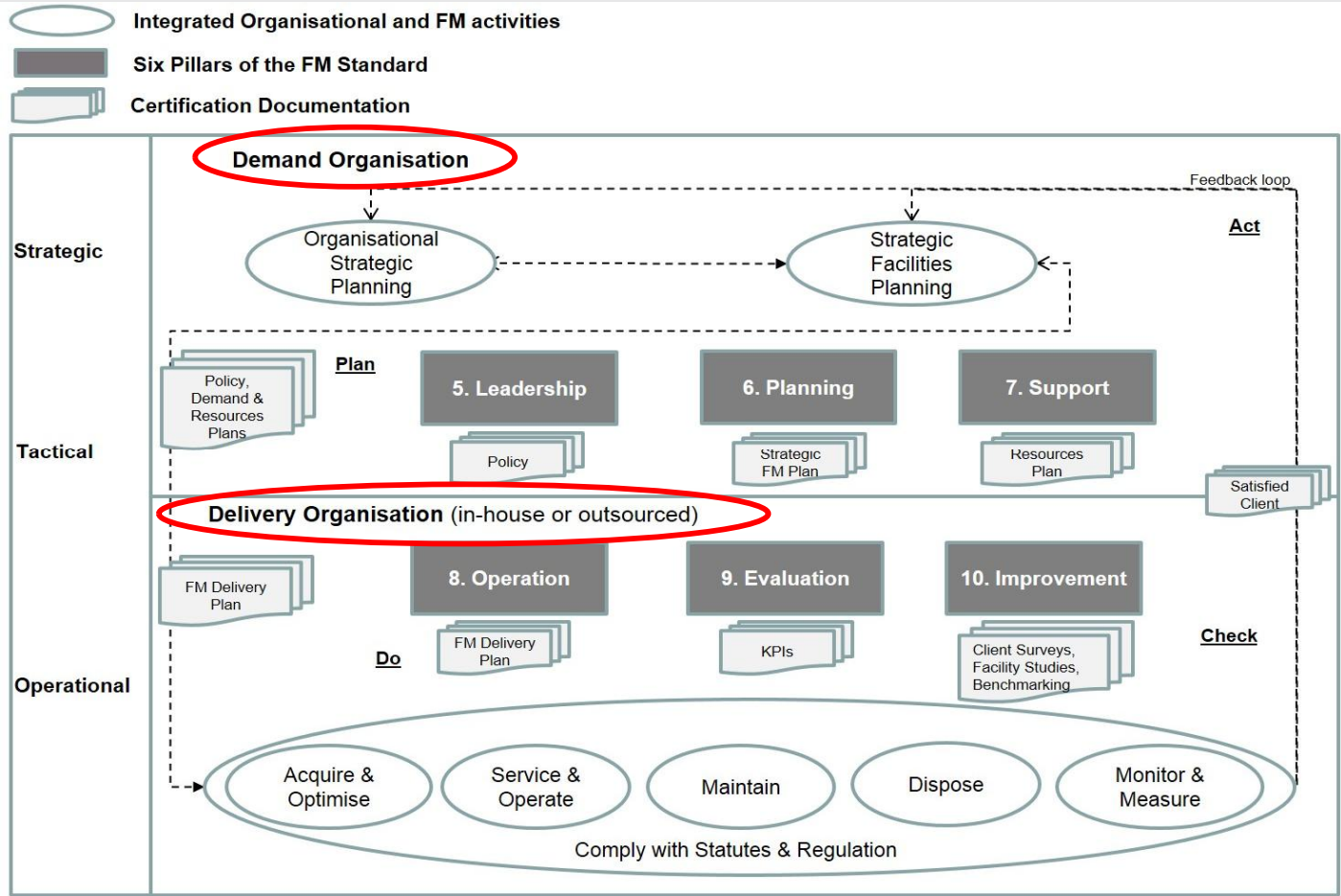
# MANAGEMENT PRINCIPLE – PLAN-DO-CHECK-ACT

- Plan: Establish the objectives and processes necessary to deliver the outcomes in accordance with customer requirements and the organisation's policies
- Do: Implement the processes
- Check: Monitor and measure processes and product against policies, objectives and requirements for the product and report the results
- Act: Take actions to continually improve process performance

# MANAGEMENT FOCUS



# ORGANISATIONAL ROLES



# MANAGEMENT FOCUS

*Delivery Organisation*

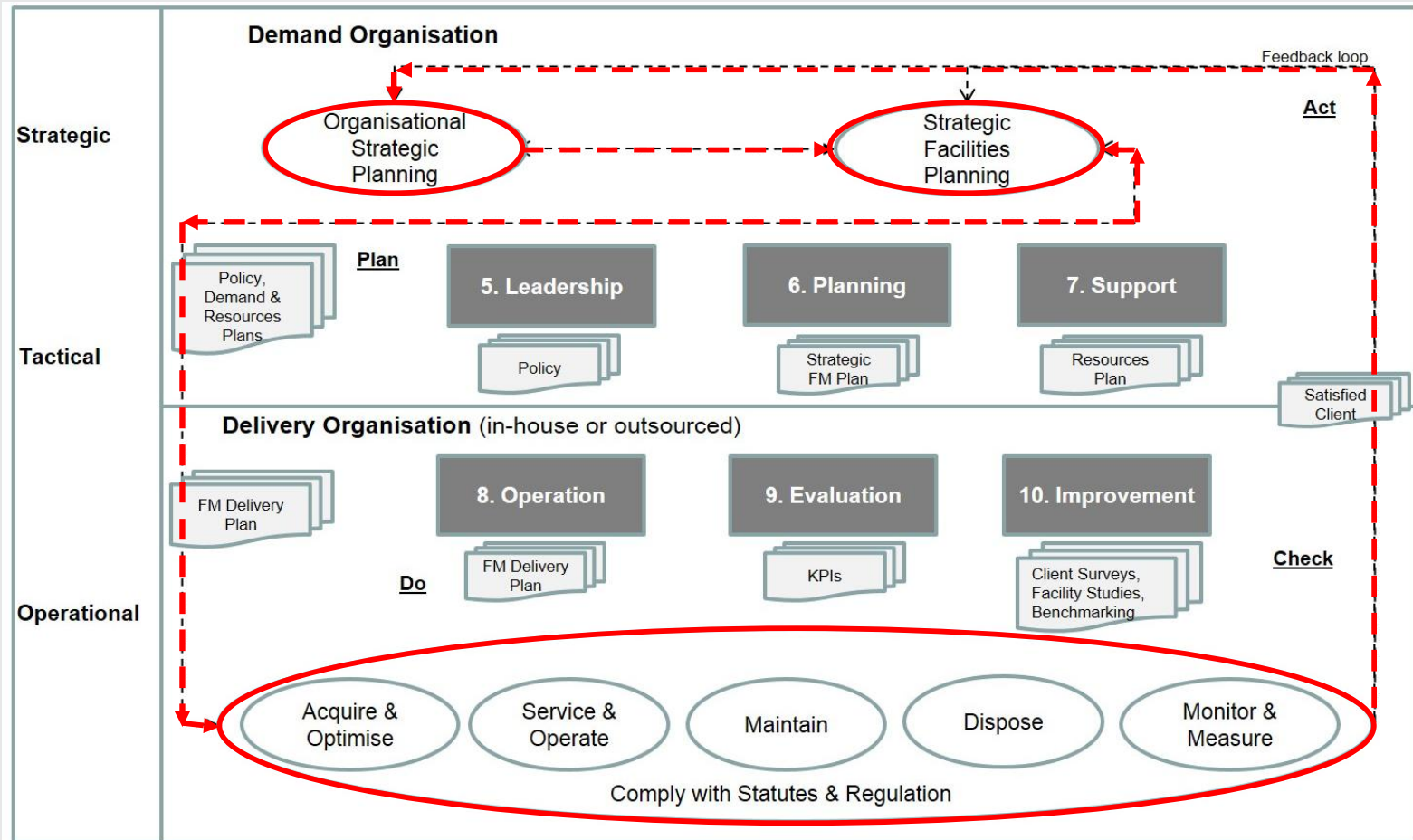
*Demand Organisation*

- Strategic: Longer term focus of organisational objectives and related strategies; and supporting FM objectives and associated strategies
- Tactical: The policies, procedures, plans and objectives to guide the operations to achieve the strategic objectives; and
- Operational: The execution of processes and activities through deployment of resources within the same PDCA cycle.

# DEMAND AND DELIVERY ORGANISATIONS

- Demand Organisation: The organisation requiring the facilities management services and specifies its requirements
- Delivery Organisation: Either an internal organisational unit or a contracted service provider to deliver the services in accordance with the Demand Organisation's requirements

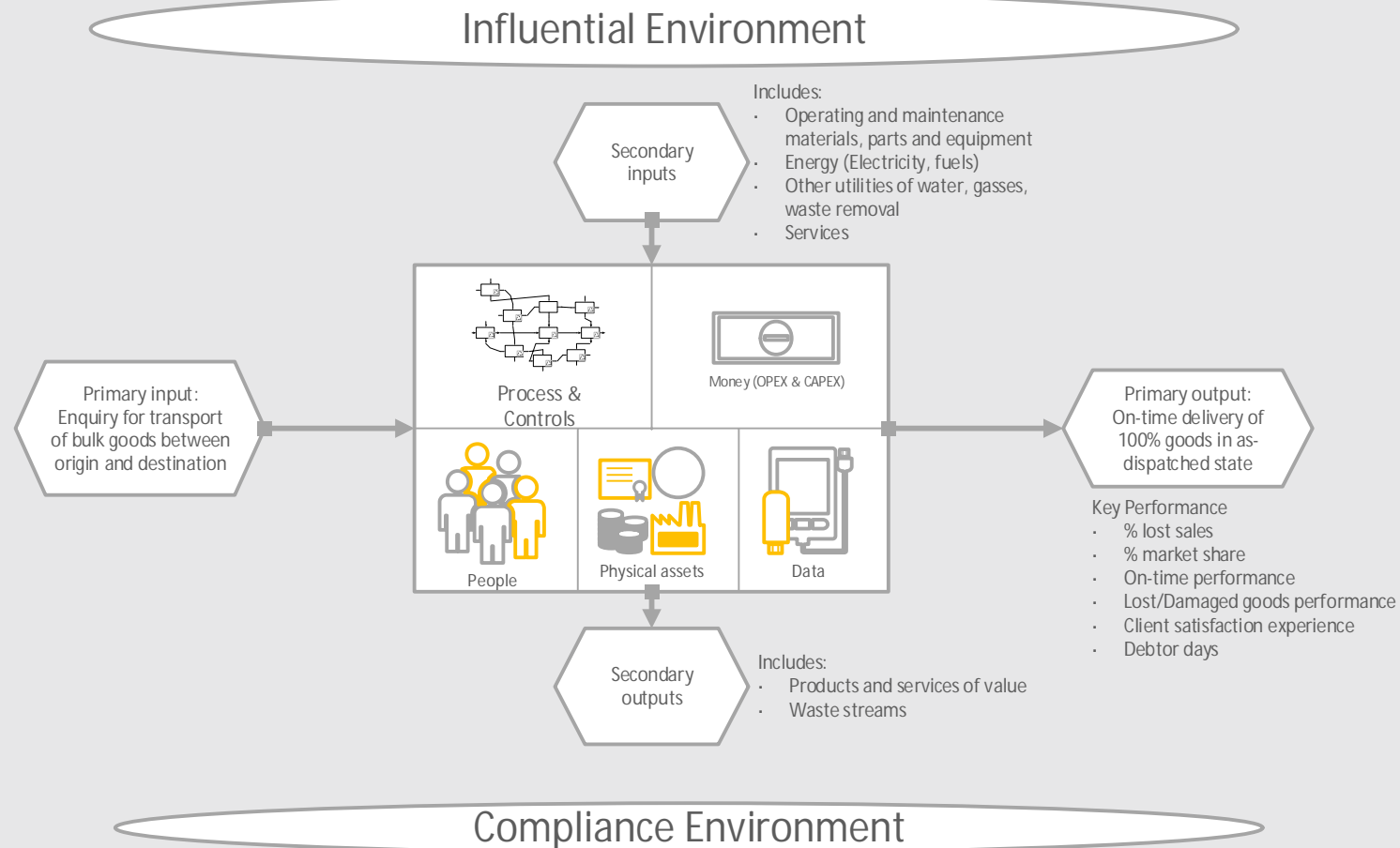
# PROCESS APPROACH



# STRATEGIC FACILITY MANAGEMENT STANDARD

## SECTION 4: ORGANISATION CONTEXT

# A BASIC BUSINESS MODEL



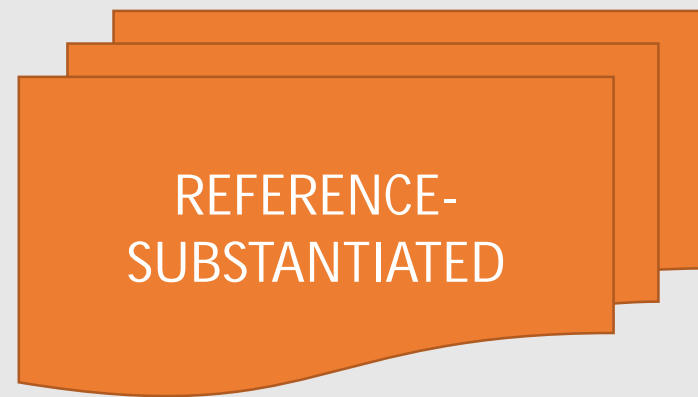


# ORGANISATION TO FM STRATEGIC PLANNING – UJ 2020 ANNUAL REPORT

# STRATEGIC FACILITY MANAGEMENT STANDARD

## SECTION 4: SCOPE OF FACILITY MANAGEMENT

# SECTION 4: SCOPE OF FACILITY MANAGEMENT



# WHAT IS A FACILITY?

- A FACILITY is a Built-Environment for Work ( $BE_fW$ ), for Living ( $BE_fL$ ) and/or for Service ( $BE_fS$ ):
  - $BE_fL$  include our residence and varied other places for non-work purpose, e.g. recreation, vacation and fitness
  - $BE_fW$  is typically the place where you perform responsibilities related to your profession, skill or trade
  - $BE_fS$  include all places where a service is provided to people or other organisations
- A FACILITY can be a  $BE_fL$ ,  $BE_fW$  and  $BE_fS$  in one. As example, a local fitness centre, is both a place of work to the fitness instructor, a place of Living to the exercising person, and a place of service where health and wellbeing is provided as a holistic service

# WHAT IS FACILITY MANAGEMENT (FM)?

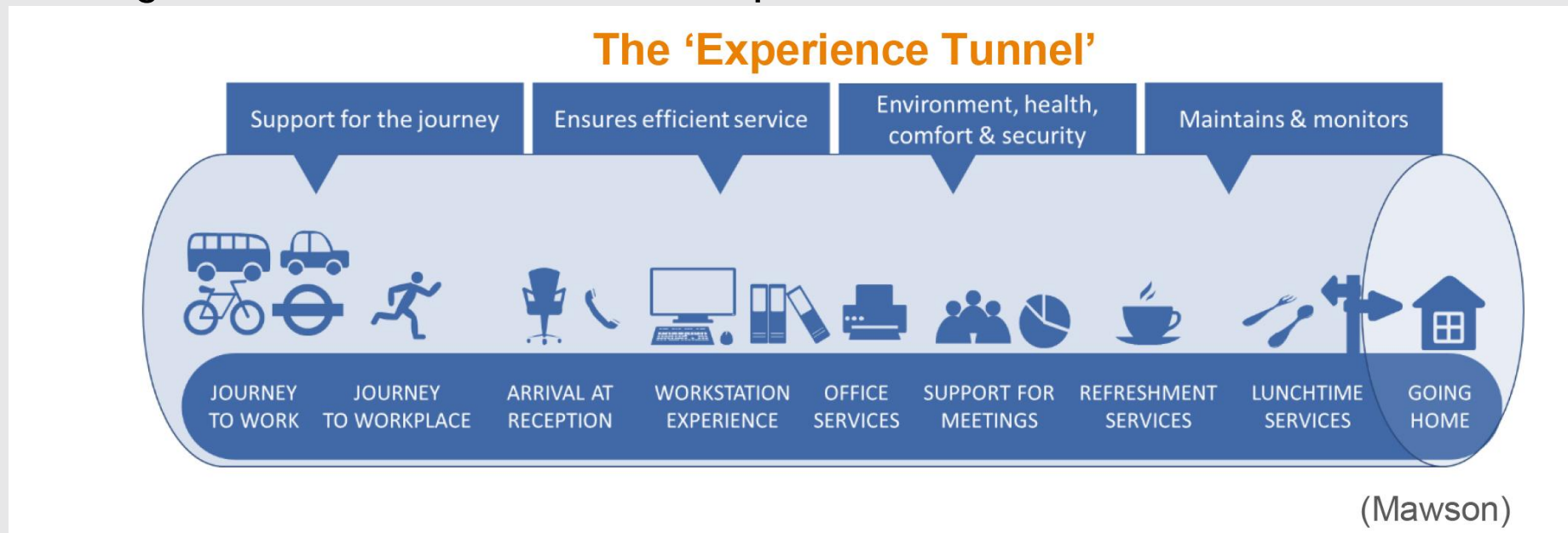
- The international definition of Facility Management per ISO 41011:2017,; *“Organisational function which integrates people, place and process within the built-environment with the purpose of improving the quality of life of people and the productivity of the core business”.*
- FM includes the following:
  - Physical Asset Management (PAM)
  - Provision of several specialised Facility Services, also defined as logistical or business support services
  - The integrative management of activities related to PAM and Facility Services to create the desired Facility experience, being the totality of quantitative performance and qualitative experiences important to people

# PHYSICAL ASSET MANAGEMENT



# WHAT ARE FACILITY SERVICES?

- Individual services delivered with excellence, and all services managed to create a seamless experience:



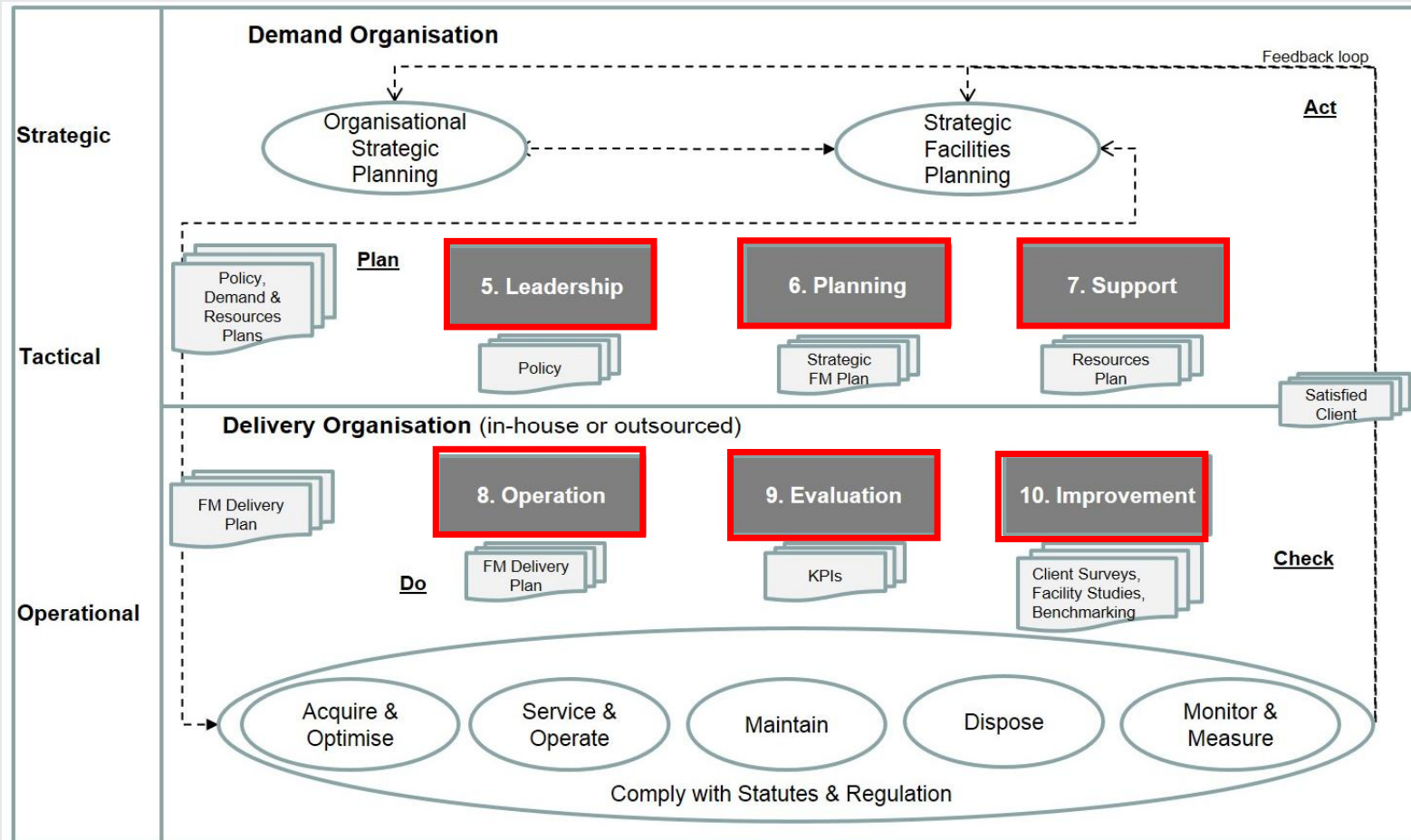
Source and credit: Advanced Workplace Associates Limited, The Workplace Management Framework, Dr Graham Jervis and Andrew Mawson

# STRATEGIC FACILITY MANAGEMENT STANDARD

## SIX MANAGEMENT PILLARS



# MANAGEMENT PILLARS



# SIX PILLARS OF MANAGEMENT

## SANS 1752 - Strategic Facilities Management Standard Outline

5 Leadership	5.1 Leadership and commitment
	5.2 Management commitment
	5.3 Policy
	5.4 Organizational roles, responsibilities and authorities
6 Planning	6.1 The Strategic Facilities Management Process (SFMP)
	6.2 Planning horizons
	6.3 Planning for competitive advantage
	6.4 The Strategic Facilities Management Plan (SFMP)
7 Support	7.1 Resources
	7.2 Competence
	7.3 Awareness
	7.4 Communication
	7.5 Documented information

# SIX PILLARS OF MANAGEMENT

## SANS 1752 - Strategic Facilities Management Standard Outline

8 Operation	8.1	Overview of operation
	8.2	Planning and control
	8.3	Mobilization of services
	8.4	Delivery and operations of facilities services
	8.5	Sourcing and outsourcing
	8.6	Risk management
	8.7	Service delivery review
9 Performance evaluation	9.1	Monitoring, measurement, analysis and evaluation
	9.2	Internal audit
	9.3	Management review
10 Performance improvement	10.1	Non-conformity and corrective action
	10.2	Continual improvement

# STRATEGIC FACILITY MANAGEMENT STANDARD

## MANAGEMENT PILLAR: LEADERSHIP

# SIX PILLARS OF MANAGEMENT

## SANS 1752 - Strategic Facilities Management Standard Outline



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	7.4 Communication
	7.5 Documented information

# LEADERSHIP – MANAGEMENT COMMITMENT

Management and other relevant management roles throughout the organisation shall demonstrate leadership with respect to the SFMS

Top management shall provide evidence of its commitment to the establishment, implementation, operation, monitoring, review, maintenance, and improvement of the SFMS

Establishing an FM policy

Ensuring that SFMS objectives and plans are established

Establishing roles, responsibilities, and competencies for FM management

Appointing one or more persons to be responsible for the SFMS with the appropriate authority and competencies to be accountable for the implementation and maintenance of the SFMS

# LEADERSHIP – MANAGEMENT COMMITMENT

Top management shall ensure that the responsibilities and authorities for relevant roles are assigned and communicated within the organisation by:

Defining the criteria for accepting risks and the acceptable levels of risk

Actively engaging in exercising and testing the SFMS

Ensuring that internal audits of the SFMS are conducted

Conducting management reviews of the SFMS

Demonstrating its commitment to continual improvement

# STRATEGIC FACILITY MANAGEMENT STANDARD

## MANAGEMENT PILLAR: PLANNING



# SIX PILLARS OF MANAGEMENT

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	7.4 Communication
	7.5 Documented information

# PLANNING: STRATEGIC FACILITIES MANAGEMENT PLAN

The contribution and role of the Facilities Management function to the organisation shall be documented in advance in the form of the Strategic Facilities Management Plan (SFMP). The plan shall be comprehensive in that it will be based on various Facility Lifecycle Activities and thus provide guidance to various functional activities and/or plans.

In support of the SFMP, FM policy and/or objectives the organisation shall establish functional FM plans across the life cycle of FM activities, including

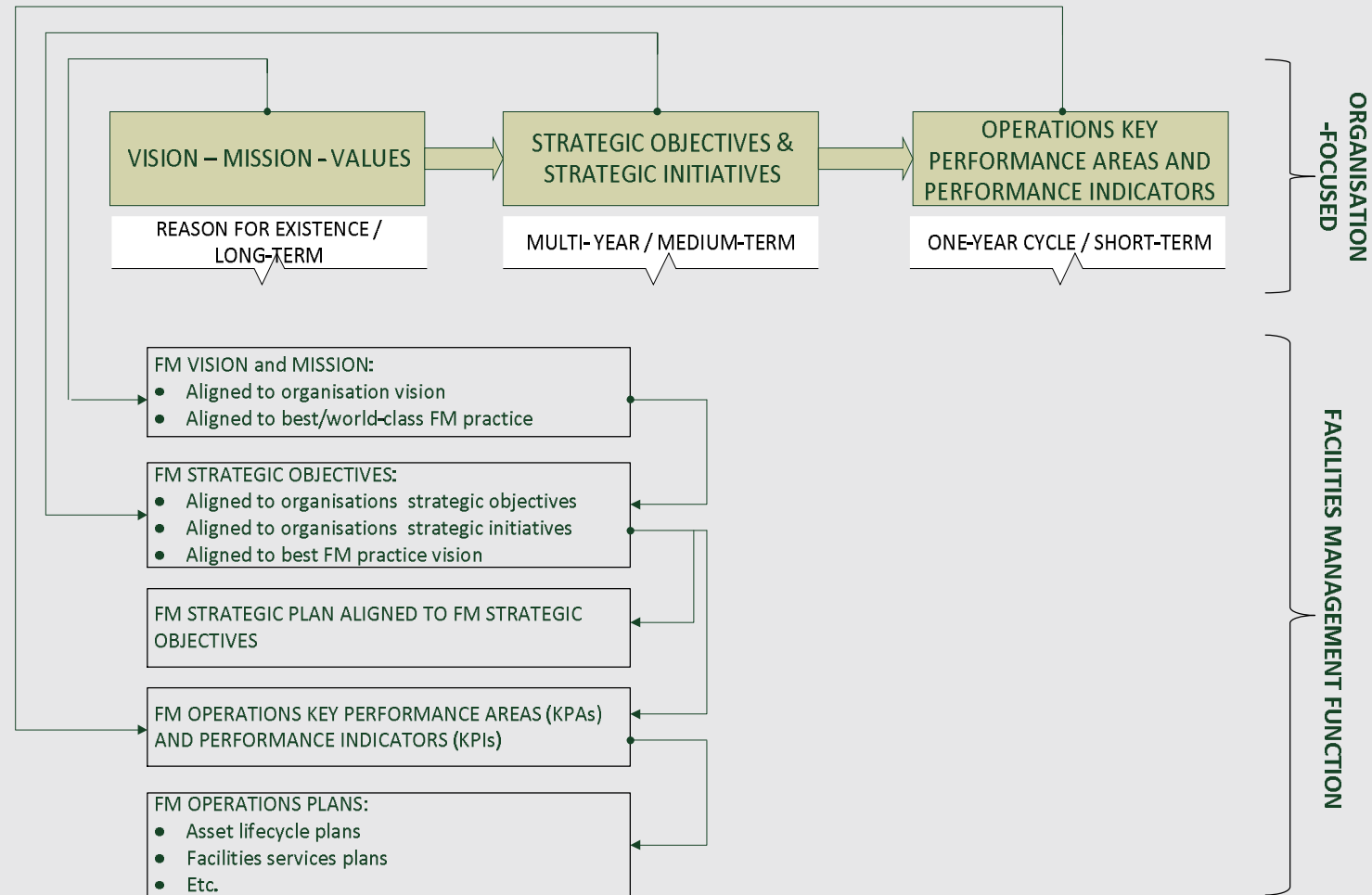
- a) Design, plan, acquisition of facilities;
- b) Management and operation of facilities;
- c) Maintenance of facilities;
- d) Refurbishment of facilities; and
- e) Disposal of facilities.

# PLANNING: STRATEGIC FACILITIES MANAGEMENT PLAN

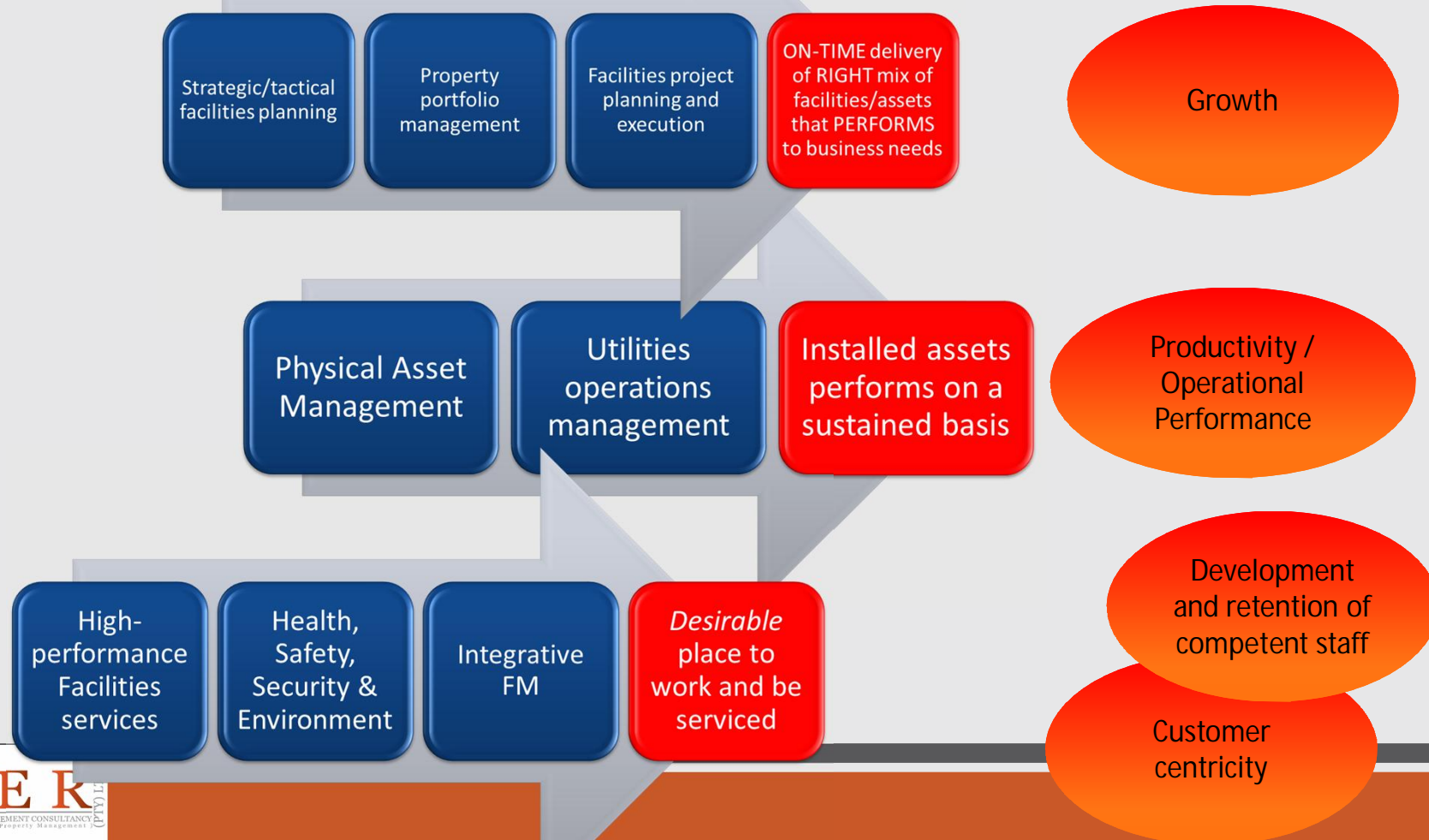
Principles of paramount importance in the development of the SFMP or strategic facilities planning:

- a) Strategic performance metrics relevant to top management are important and include but not limited to:
  - i. Bottom line impact
  - ii. Productivity, satisfaction and/or cultural impact
  - iii. Sustainability performance
  - iv. Risk mitigation / governance / statutory compliance
  - v. Service and project delivery performance
  - vi. Long term budget consistency. No-surprises budgets
- a) Strategic agility to anticipate and respond to organisational expectations to earn a competitive edge.

# ORGANISATION TO FM STRATEGIC PLANNING



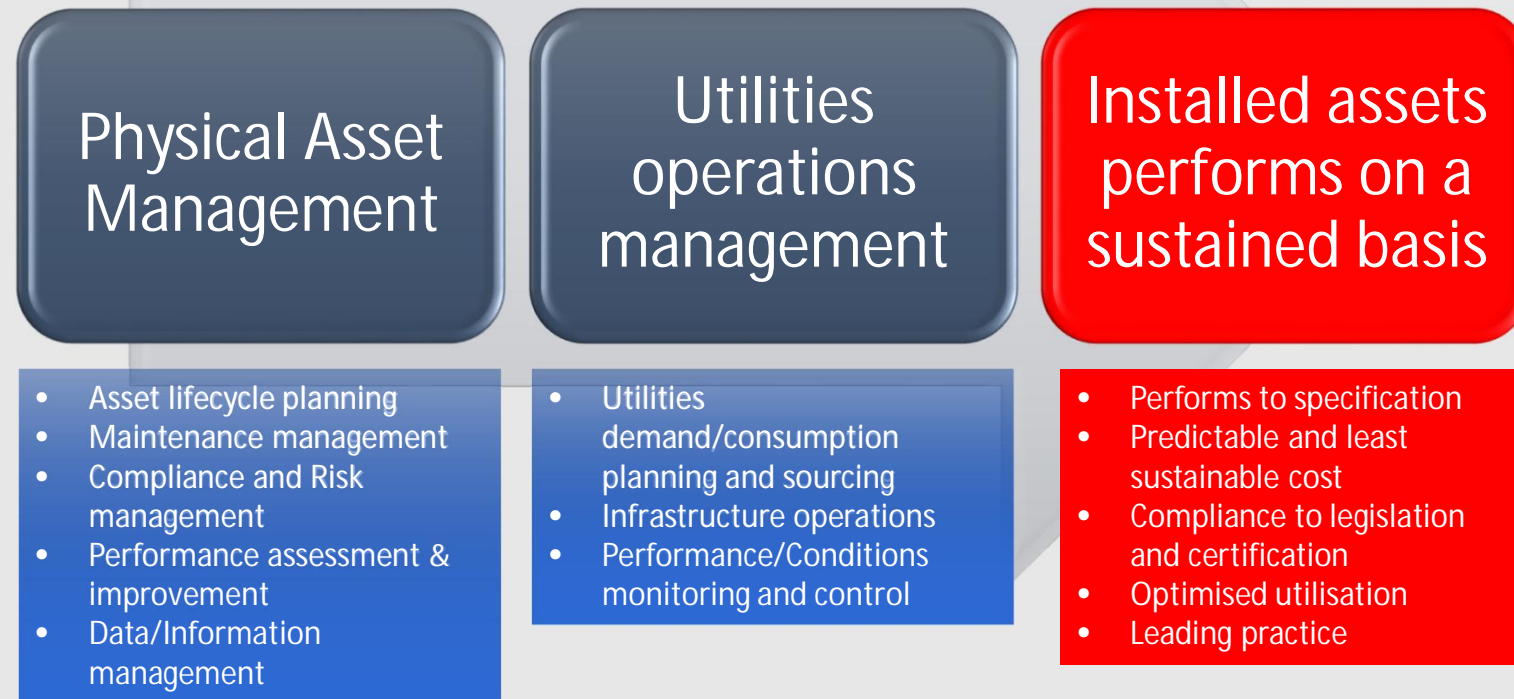
# ORGANISATION TO FM STRATEGIC PLANNING



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# ORGANISATION TO FM STRATEGIC PLANNING



Service and related facilities sub-structure		RESOURCES FUNCTION				
Item	Description	Personnel	Equipment	Material	Energy	Other
1	Facilities Management					
2	Occupational Safety and Health					
3	Occupational Health					
4	Security					
5	Environmental Management					
6	Emergency response management					
7	Operations planning and coordination					
8	Contact, monitoring & response centre					
9	Continuous improvement					

- Occupational safety
- Occupational Health
- Security
- Environmental Management
- Emergency response management

- Operations planning and coordination
- Contact, monitoring & response centre
- Continuous improvement

- Desirable regards:
- Enables productive work
  - Safe
  - Secure
  - Supports personal health and wellbeing
  - Leading edge environment



# MANAGEMENT PILLAR: PLANNING

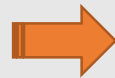
Performance outcome	Processes - Level 1	Processes - Level 2	Examples
On-time delivery of right facilities aligned with business strategy and demands	Strategic Facilities planning and resource optimisation	Develop and maintain facility master plans by organisation unit or strategic driver	Staff training and development campus development master-plan: <ul style="list-style-type: none"> <li>• Mpumalanga Middleburg Campus operational by 2020</li> </ul>
		Develop and maintain property-specific development master plans	Esselen Park Campus development master-plan: <ul style="list-style-type: none"> <li>• Sport field conversion to astro-turf multi-purpose field</li> </ul>
		Develop and maintain area occupation and use space plans	Esselen Park Campus - Main Building: <ul style="list-style-type: none"> <li>• Reconfiguring 1<sup>st</sup> floor by Dec 2018</li> </ul>
		Develop and maintain asset lifecycle plans (Capex and Opex)	Esselen Park Campus - Main Building: <ul style="list-style-type: none"> <li>• Rain guttering and downpipes: 5-year painting due 2019</li> </ul>

# STRATEGIC FACILITY MANAGEMENT STANDARD

## MANAGEMENT PILLAR: OPERATIONS

# SIX PILLARS OF MANAGEMENT

## SANS 1752 - Strategic Facilities Management Standard Outline



8 Operation	8.1 Overview of operation
	8.2 Planning and control
	8.3 Mobilization of services
	8.4 Delivery and operations of facilities services
	8.5 Sourcing and outsourcing
	8.6 Risk management
	8.7 Service delivery review
9 Performance evaluation	9.1 Monitoring, measurement, analysis and evaluation
	9.2 Internal audit
	9.3 Management review
10 Performance improvement	10.1 Non-conformity and corrective action
	10.2 Continual improvement

# OPERATIONS: OPERATIONAL PLANNING AND CONTROL

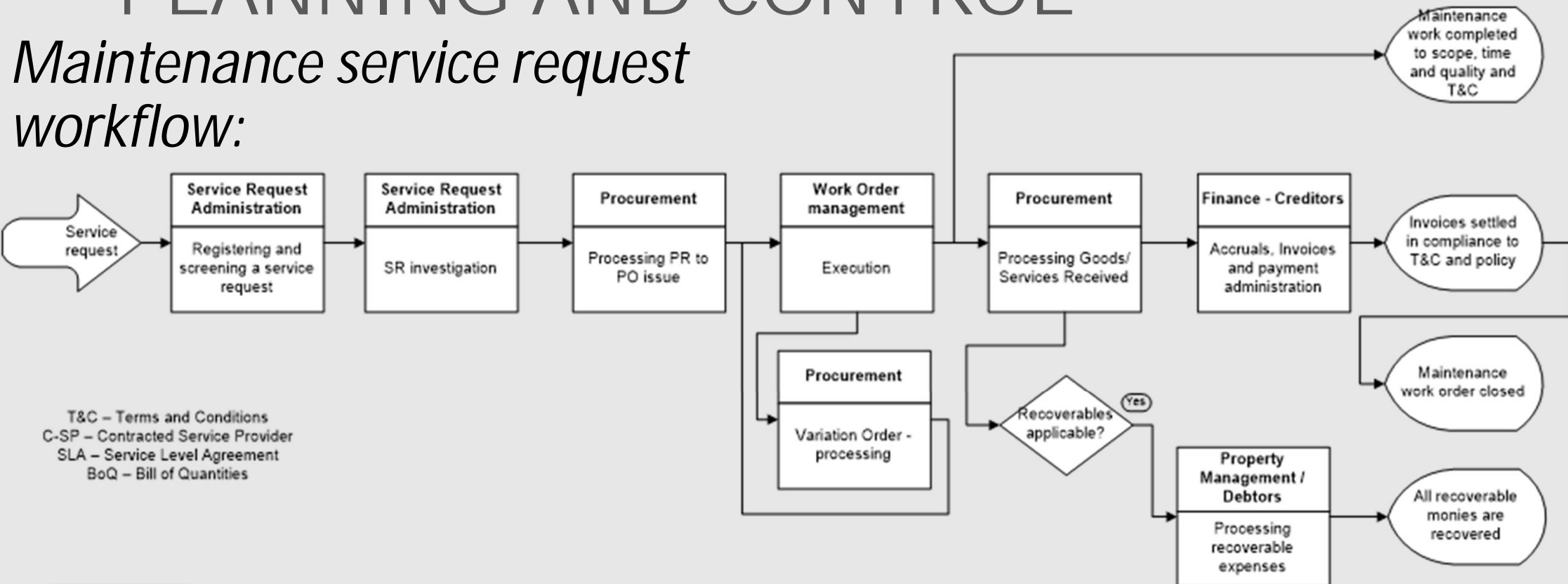
## SANS 1752 requirement

The Delivery Organisation shall plan, implement and control the processes needed to meet requirements, and to implement the actions determined by:

- a) Establishing criteria for the processes;
- b) Implementing control of the processes in accordance with the criteria; and
- c) Keeping documented information to the extent necessary to have confidence that the processes have been carried out as planned.

# OPERATIONS: OPERATIONAL PLANNING AND CONTROL

## Maintenance service request workflow:



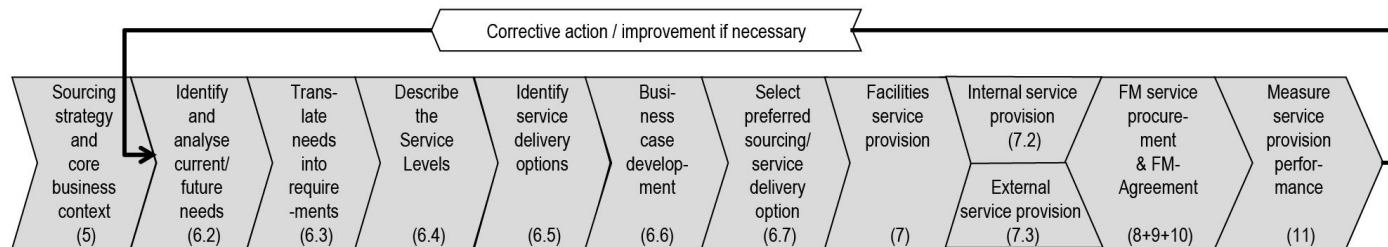
# OPERATIONS: SOURCING PROCESS

The Delivery Organisation shall ensure that sourced services conform to specified sourcing requirements. The type and extent of control applied to the supplier or Delivery Organisation and the sourced services shall be dependent upon the effect of the sourced services on subsequent service delivery or the final service.

The Delivery Organisation shall evaluate and select suppliers and / or Delivery Organisations based on their ability to supply services in accordance with the Delivery Organisation's requirements. Criteria for selection, evaluation and re-evaluation shall be established.

Records of the results of evaluations and any necessary actions arising from the evaluation shall be maintained.

# OPERATIONS – SOURCING AND OUTSOURCING

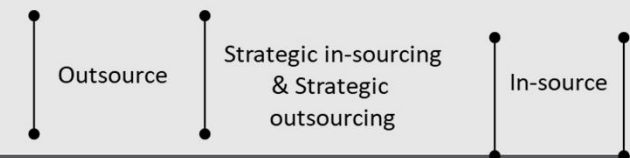
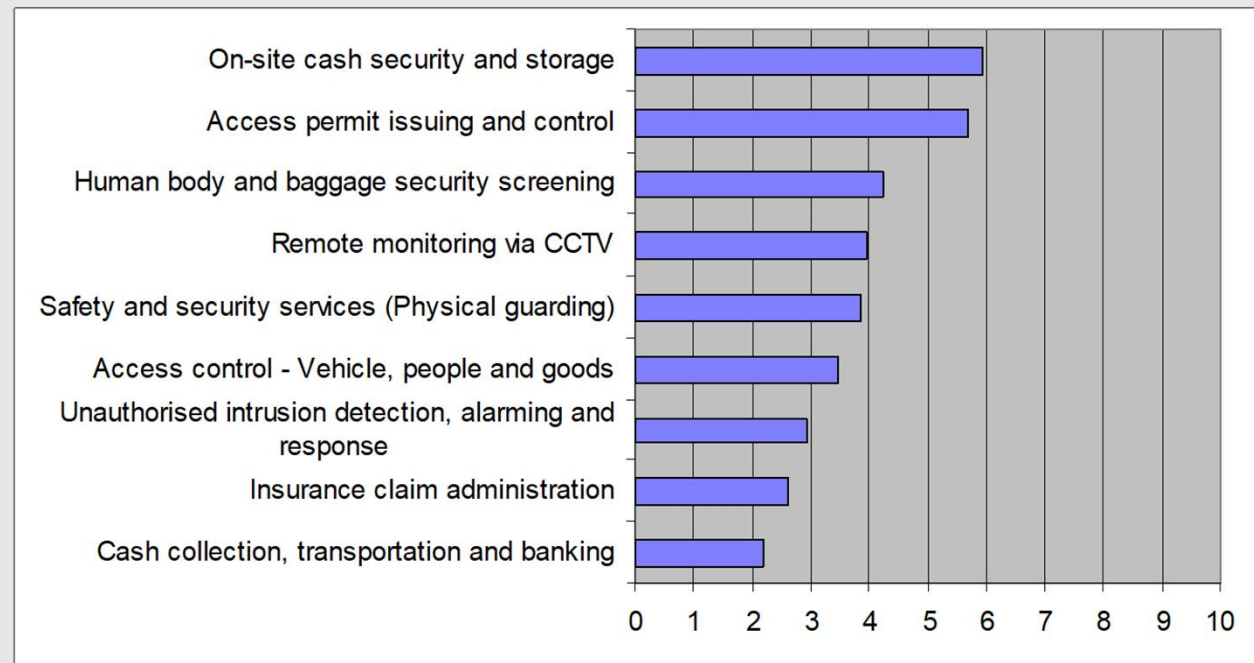


<p><b>Understand business context and strategies</b></p> <p>Align service strategies to business strategy including environmental, social responsibilities, legal, economic, and political issues</p>	<p><b>Identify current and future facility needs and expectations of the demand organization</b></p>	<p><b>Determine what needs to be delivered, where and how often</b></p> <p>Define strategic goals to be achieved (cost, quality, etc)</p>	<p><b>Specify criteria and parameters</b></p> <p>Identify expected measurable output (quality levels)</p> <p>Define performance indicators and targets for each service</p>	<p><b>Market research</b></p> <p>Determine cost and risk baseline</p>	<p><b>Establish business case</b></p> <p>Financial issues</p> <p>Define Investment strategy</p> <p>Estimate costs</p> <p>Pricing strategy</p> <p>Risk analysis</p> <p>Organization needs</p>	<p><b>Select and recommend preferred sourcing alternative</b></p> <p>Implement recommendation</p> <p>a) inhouse (define required competence level, allocate resources, organise)</p> <p>b) outsource (negotiate, sign agreement)</p>	<p><b>Develop service level agreement (SLA)</b></p> <p>Develop overall FM service provision agreements</p> <p>Incorporate required contract clauses</p> <p>Document performance criteria</p> <p>Execute FM agreement</p>	<p><b>Follow-up, monitor and verify service provider deliveries</b></p> <p>Data collection and report on facility services to buyer organization</p> <p>Compare delivery to service requirements</p> <p>Identify and implement corrective actions</p>
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(ISO  
41012:2017)

# OPERATIONS – SOURCING STRATEGY DECISION

## Sourcing strategy – Safety and security services





# STRATEGIC FACILITY MANAGEMENT STANDARD

## MANAGEMENT PILLAR: PERFORMANCE EVALUATION

# SIX PILLARS OF MANAGEMENT

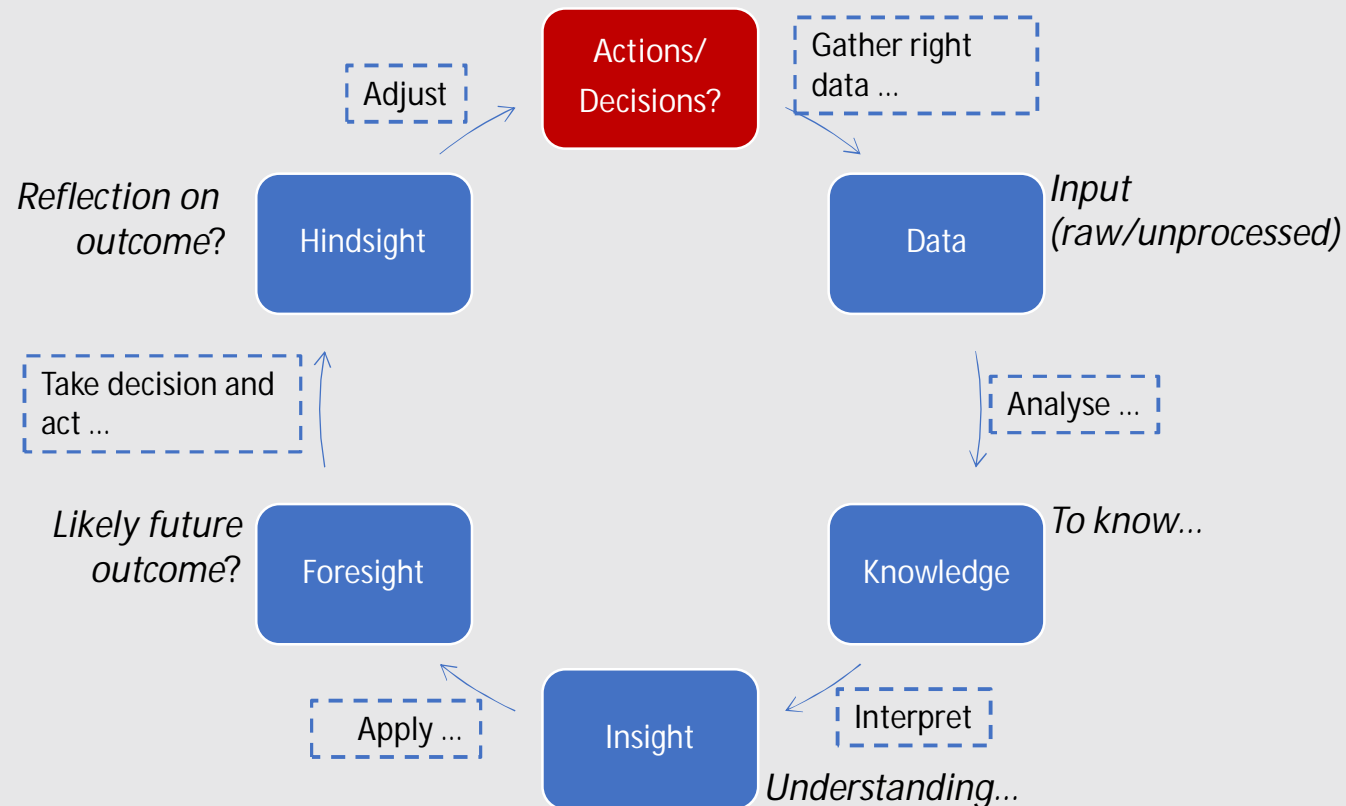
## SANS 1752 - Strategic Facilities Management Standard Outline

8 Operation	8.1	Overview of operation
	8.2	Planning and control
	8.3	Mobilization of services
	8.4	Delivery and operations of facilities services
	8.5	Sourcing and outsourcing
	8.6	Risk management
	8.7	Service delivery review
9 Performance evaluation	9.1	Monitoring, measurement, analysis and evaluation
	9.2	Internal audit
	9.3	Management review
10 Performance improvement	10.1	Non-conformity and corrective action
	10.2	Continual improvement

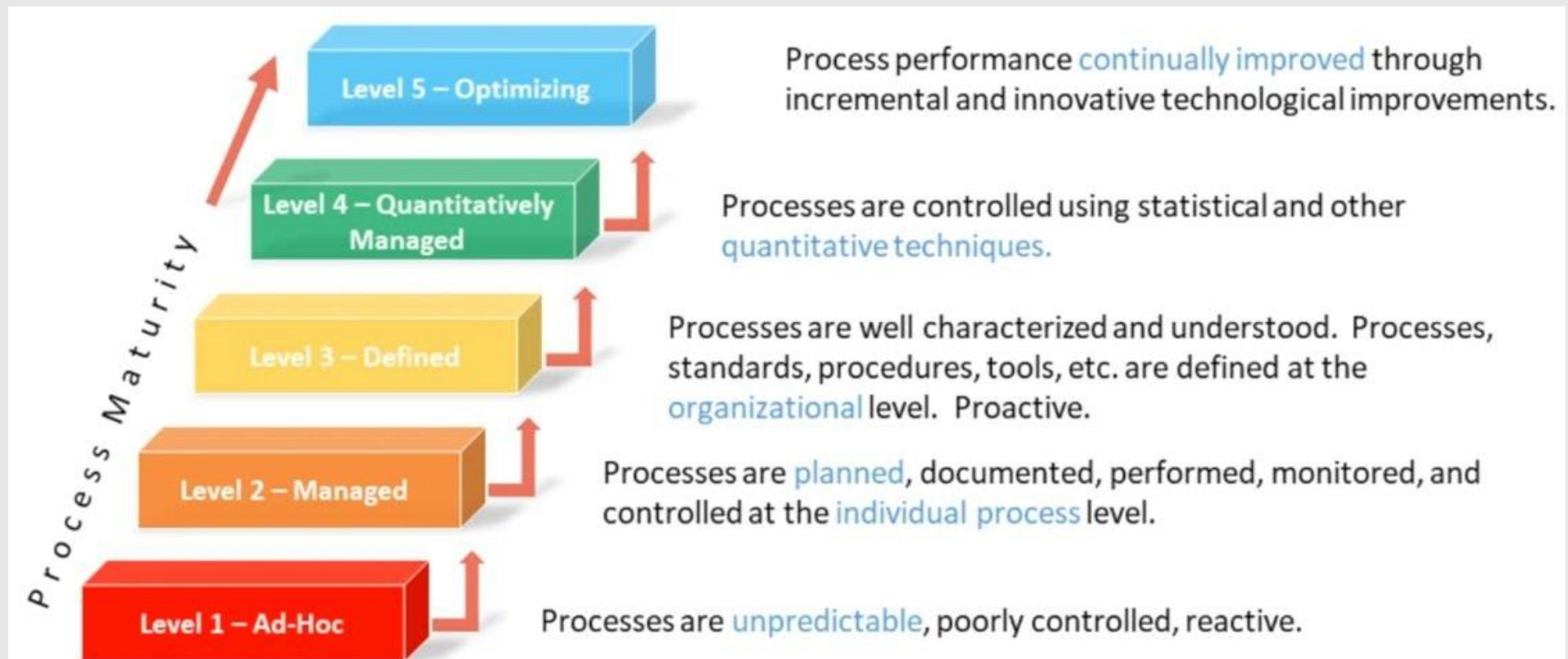
# PERFORMANCE EVALUATION – MEASUREMENT & ANALYSIS

- Defining what is required to be monitored and measured
- Methods and frequency for monitoring, measurement, analysis and evaluation, as applicable, to ensure valid results

# PERFORMANCE EVALUATION ...NEVER-ENDING CYCLE



# PERFORMANCE EVALUATION - PROCESS MATURITY PERFORMANCE



# PERFORMANCE EVALUATION – INTERNAL AUDIT

- Plan, establish, implement and maintain an audit programme(s)
- Define the audit criteria and scope for each audit
- Select auditors and conduct audits to ensure objectivity and the impartiality of the audit process
- Ensure that the results of the audits are reported to relevant management
- Retain documented information as evidence of the implementation of the audit programme and the audit results

# PERFORMANCE EVALUATION – MANAGEMENT REVIEW

- Status of actions from previous management reviews
- Changes in external and internal issues that are relevant to the SFMS
- Information on the FM performance, including trends in:
  - Non-conformities and corrective actions
  - Monitoring and measurement results
  - Audit results
  - Opportunities for continual improvement.

# STRATEGIC FACILITY MANAGEMENT STANDARD

## MANAGEMENT PILLAR: PERFORMANCE IMPROVEMENT



# SIX PILLARS OF MANAGEMENT

## SANS 1752 - Strategic Facilities Management Standard Outline

8 Operation	8.1	Overview of operation
	8.2	Planning and control
	8.3	Mobilization of services
	8.4	Delivery and operations of facilities services
	8.5	Sourcing and outsourcing
	8.6	Risk management
	8.7	Service delivery review
9 Performance evaluation	9.1	Monitoring, measurement, analysis and evaluation
	9.2	Internal audit
	9.3	Management review
10 Performance improvement	10.1	Non-conformity and corrective action
	10.2	Continual improvement



# IMPROVEMENT – NON-CONFORMITY AND CORRECTIVE ACTION

- Identify and react to the non-conformity
- Evaluate the need for action to eliminate the causes of the non-conformity, in order that it does not recur or occur elsewhere
- Implement any action needed
- Review the effectiveness of any corrective action taken
- Make changes to the SFMS, if necessary

# IMPROVEMENT – CONTINUAL IMPROVEMENT

- Stakeholder surveys
- Facility studies including condition audits, workspace use studies, etc.
- Benchmarking

# STRATEGIC FACILITY MANAGEMENT STANDARD

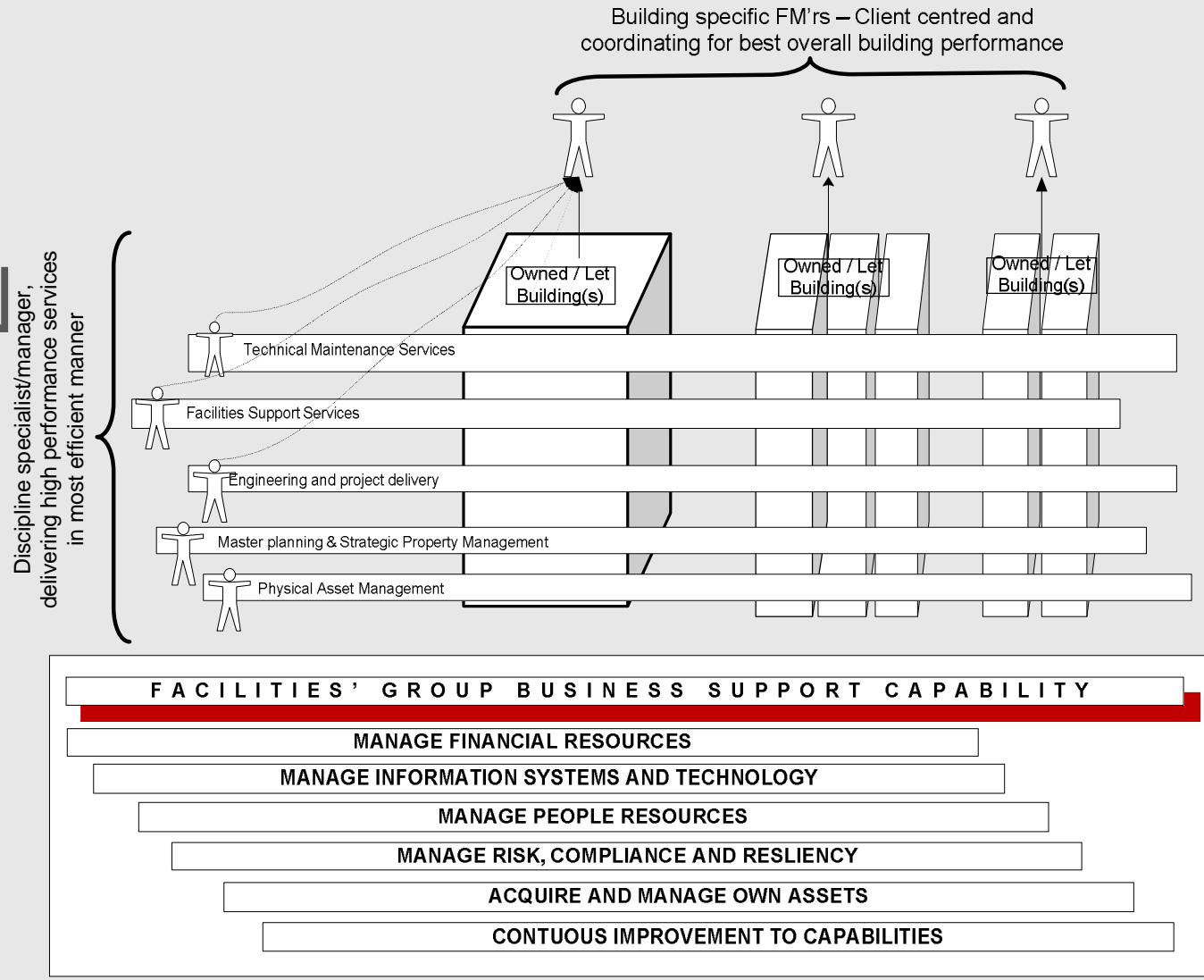
## MANAGEMENT PILLAR: SUPPORT

# SIX PILLARS OF MANAGEMENT

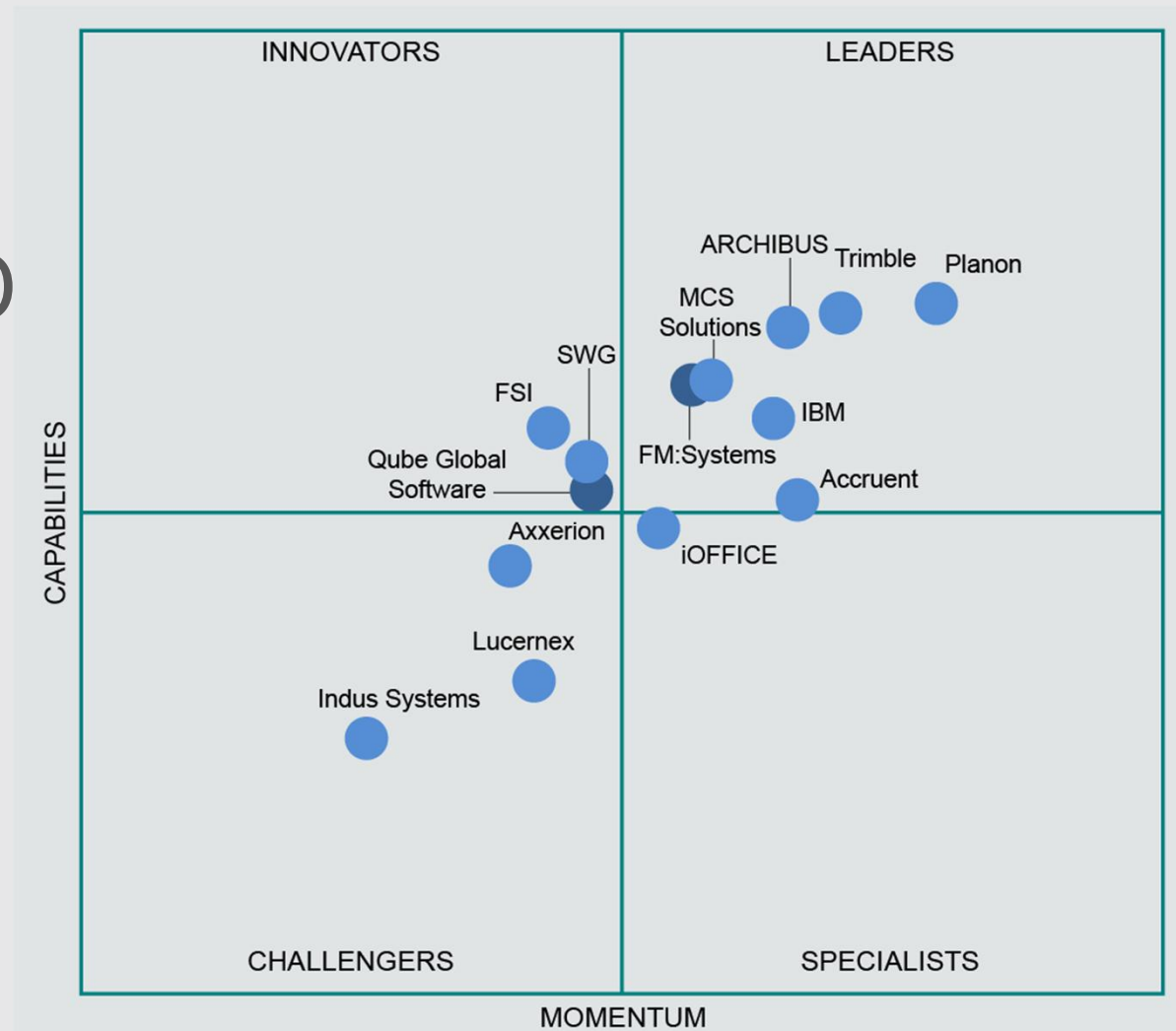
## SANS 1752 - Strategic Facilities Management Standard Outline

5 Leadership	5.1 Leadership and commitment
	5.2 Management commitment
	5.3 Policy
	5.4 Organizational roles, responsibilities and authorities
6 Planning	6.1 The Strategic Facilities Management Process (SFMP)
	6.2 Planning horizons
	6.3 Planning for competitive advantage
	6.4 The Strategic Facilities Management Plan (SFMP)
7 Support	7.1 Resources
	7.2 Competence
	7.3 Awareness
	7.4 Communication
	7.5 Documented information

# SUPPORT: ORGANISATION AND PEOPLE

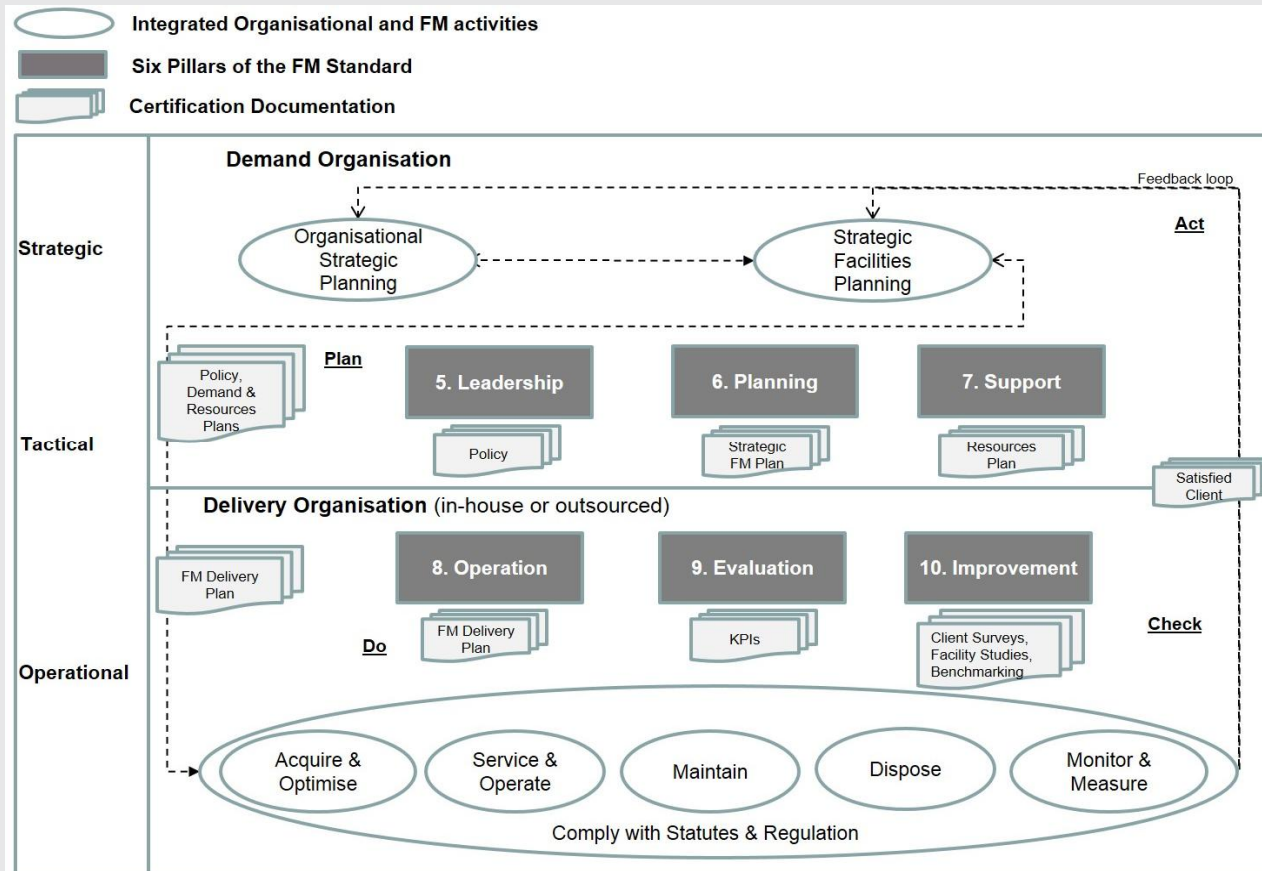


# SUPPORT: COMPUTERISED FM SYSTEMS



<https://www.google.com/search?q=gartner+magic+quadrant+integrated+workplace+management+systems&tbm=isch&tbo=u&source=univ&sa=X&ved=0ahUKewjp4MmirofcAhVHAcAKHe-NAY0QsAQIKQE&biw=1366&bih=651#imgrc=XCJsczJk98b08M:>

# STRATEGIC FACILITIES MANAGEMENT SYSTEM STANDARD – SANS 1752

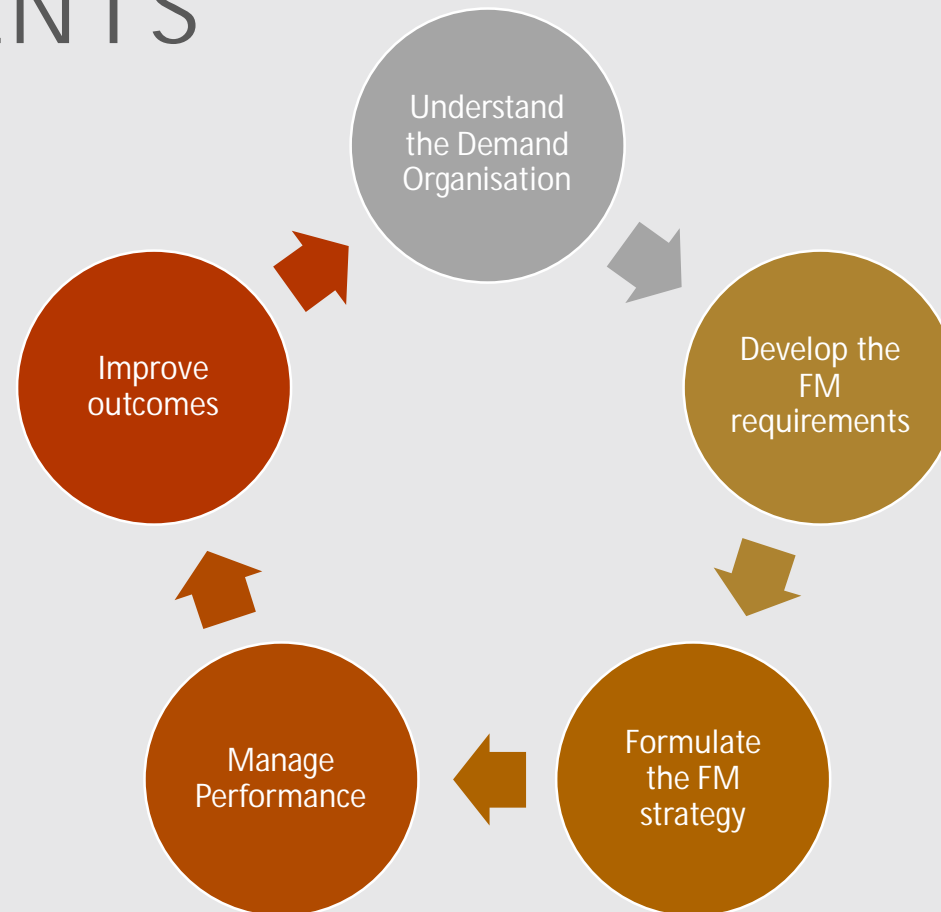




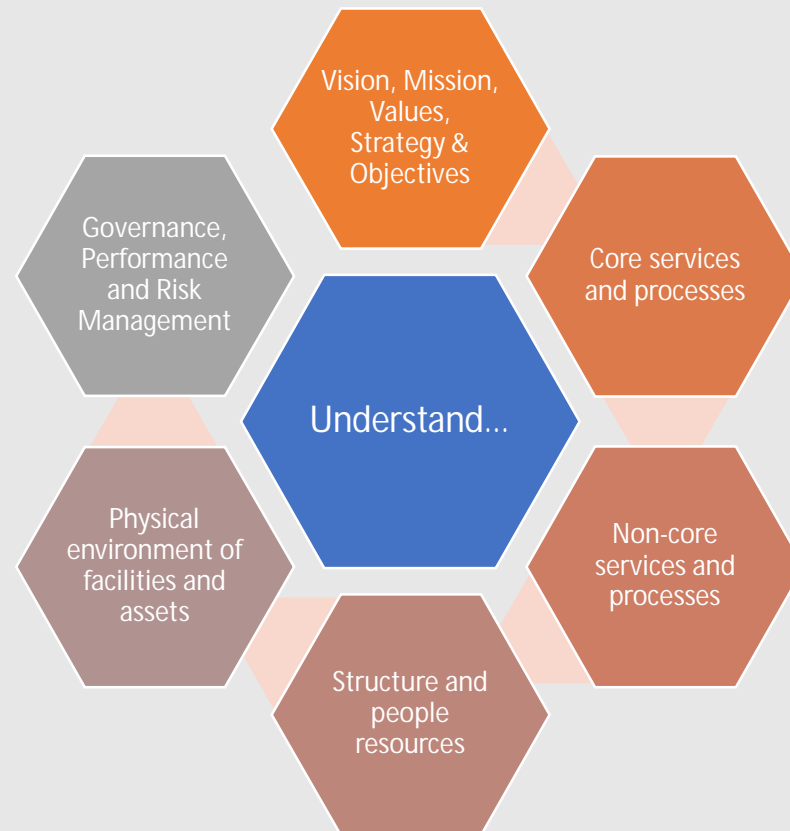
# ISO STANDARDS

## FACILITY MANAGEMENT – DEVELOPMENT OF FACILITY MANAGEMENT STRATEGY (ISO 41014: 2020)

# DEVELOPING FM STRATEGY – MAIN COMPONENTS



# UNDERSTAND DEMAND ORGANISATION



# DEVELOP FM REQUIREMENTS

## Current and future facilities

Nature of facilities

Sustainable space provision

## Stakeholders

Facility users

Users specifications

Accessibility & inclusiveness

## Scope of FM services

Technical services

Business support services

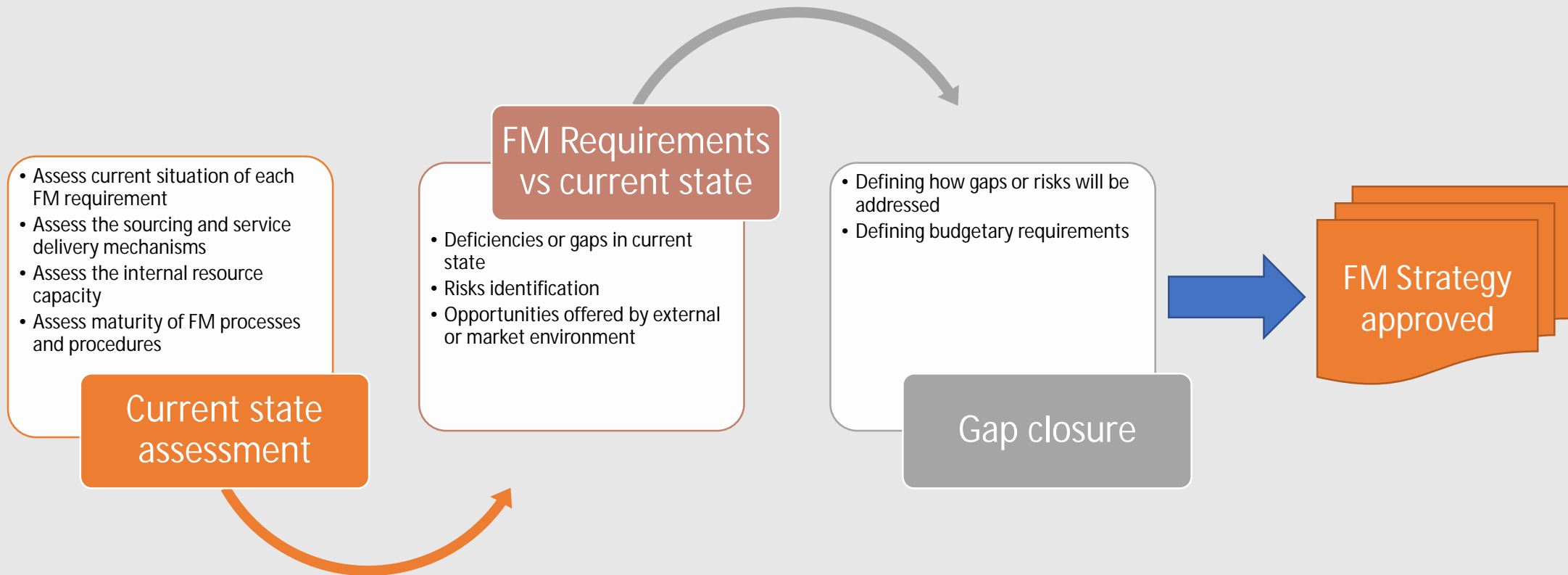
## FM service performance

Service specifications

Service level

Outputs and targets

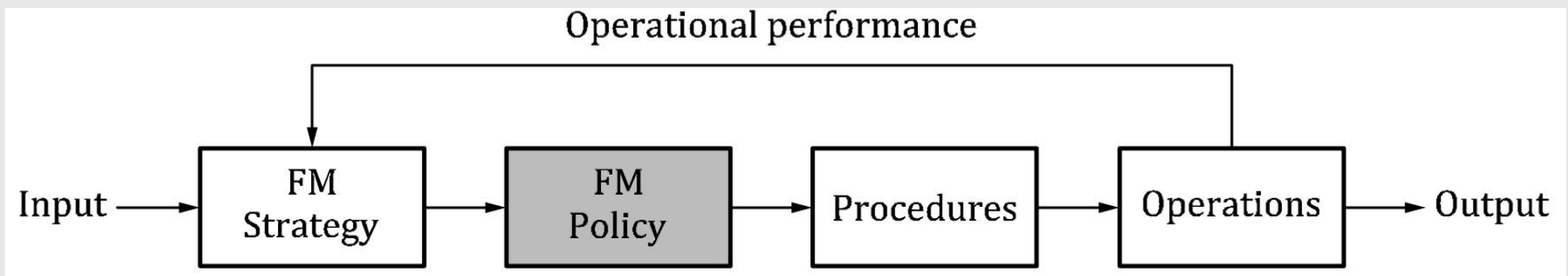
# FORMULATING THE FM STRATEGY



# ISO STANDARDS

## FACILITY MANAGEMENT – DEVELOPMENT OF FACILITY MANAGEMENT POLICY (ISO 41018: 2022)

# ISO 41018 – RELATIONSHIP BETWEEN STRATEGY – POLICY AND OPERATIONS



- FM Strategy directs FM Policy
- FM Policy directs FM processes and procedures
- FM processes and procedures directs FM operations

# ISO 41018 – BENEFITS OF FM POLICY

- A framework for setting FM objectives
- Support for the management of risk
- A commitment to the continual improvement of the FM system
- Leadership and commitment by top management or an agent of the demand organization to the operation of the FM system
- Reduced likelihood of a disconnect between the FM strategy and operational FM requirements
- Improved efficiency in the provision of FM in general and in the delivery of facility services in particular
- A commitment to the protection of people, property and the environment
- Strengthening of related policies of the demand organization.



# ISO 41018 – FM POLICY SHOULD GUIDE THE FOLLOWING

- Acquisition, use, maintenance, alteration or disposal of the facility (see ISO 41014)
- Sustainable operation of the facility and its space (see ISO 41014)
- Expected contribution of the facility and facility services to the core business of the demand organization (see ISO 41014)
- Service delivery, including the type and nature of facility services, and the performance of service providers
- Governance, including organization structure and reporting (s
- External and internal standards and procedures
- Compliance obligations and consequences of non-compliance

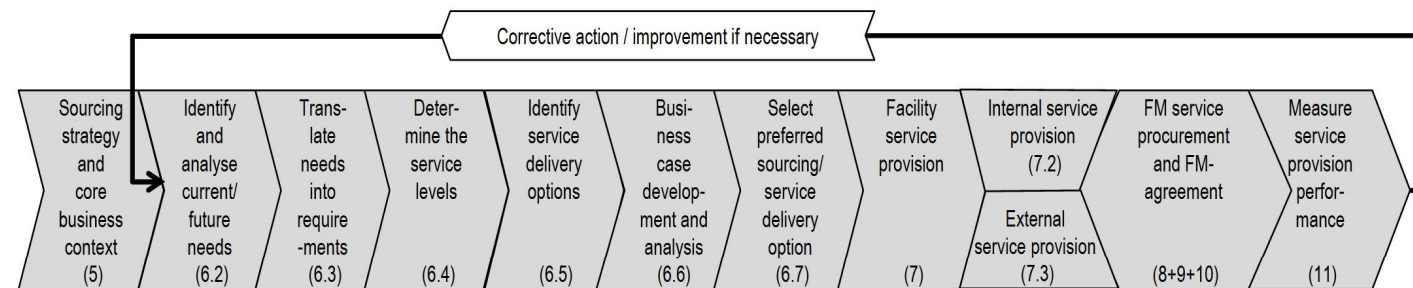
# ISO 41018 – FM POLICY SHOULD GUIDE THE FOLLOWING

- Business processes and activities, including roles, responsibilities and accountabilities
- Relationships with interested parties
- Planning, organizing and controlling functions and activities within the facility
- Identifying operating risks, hazards and response activities for all facility services
- Emergency preparedness and response
- Measuring the effectiveness of FM activities and processes
- Continual improvement.

# ISO STANDARDS

## FACILITY MANAGEMENT – GUIDANCE ON STRATEGIC SOURCING AND DEVELOPMENT OF AGREEMENTS (ISO 41012: 2017)

# SOURCING PROCESS IN FM



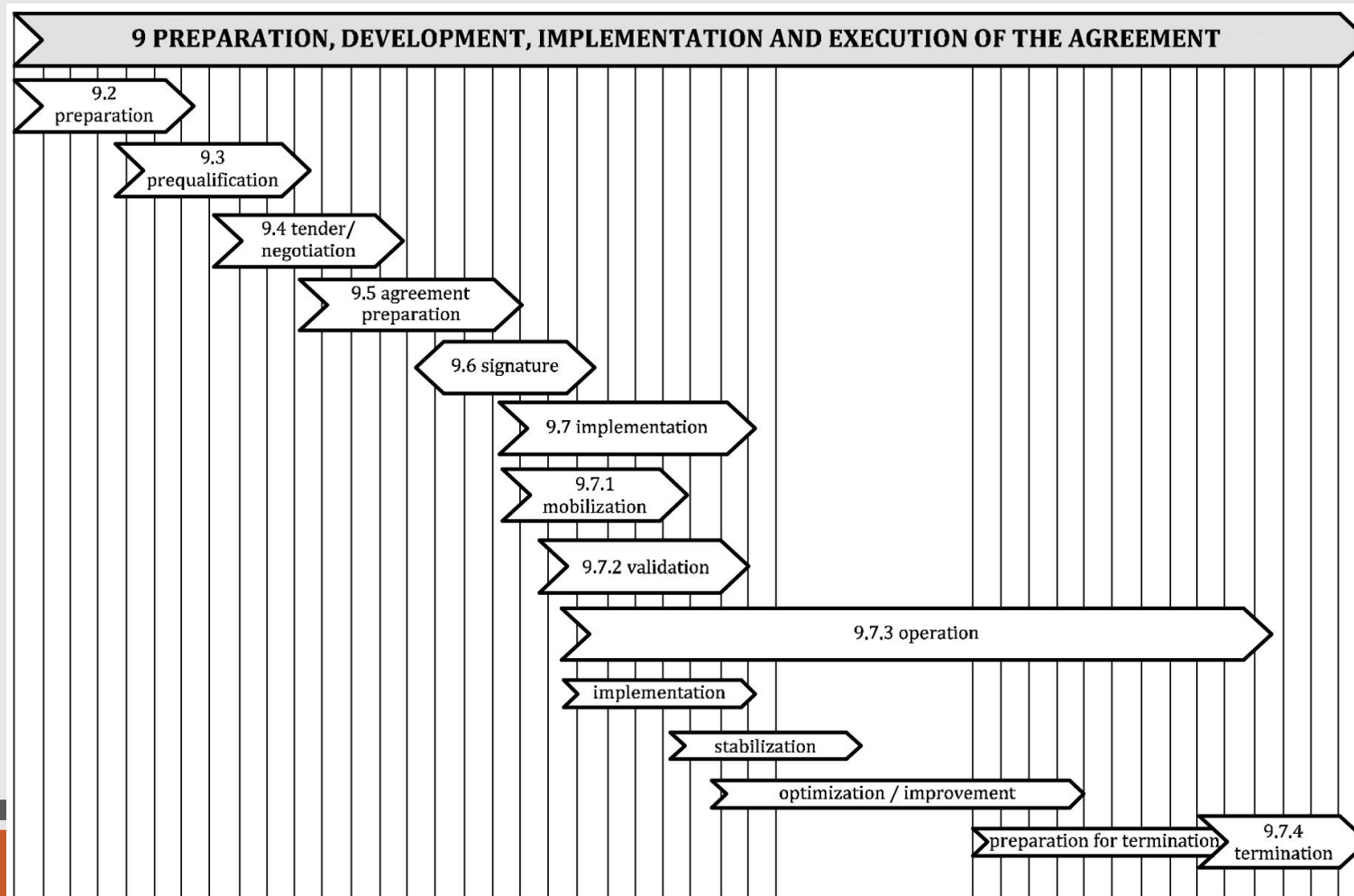
<b>Understand business context and strategies</b>	<b>Identify current and future facility needs and expectations of the demand organization</b>	<b>Determine what needs to be delivered, where and how often</b>	<b>Specify criteria and parameters</b>	<b>Market research</b>	<b>Establish business case</b>	<b>Select and recommend preferred sourcing alternative</b>	<b>Develop service level agreement (SLA)</b>	<b>Follow-up, monitor and verify service provider deliveries</b>
<b>Align service strategies to business strategy including environmental, social responsibilities, legal, economic, and political issues</b>		<b>Define strategic goals to be achieved (cost, quality, etc)</b>	<b>Identify expected measurable output (quality levels)</b>	<b>Determine cost and risk baseline</b>	<b>Financial issues</b>	<b>Implement recommendation</b>	<b>Develop overall FM service provision agreements</b>	<b>Data collection and report on facility services to buyer organization</b>
			<b>Define performance indicators and targets for each service</b>		<b>Define Investment strategy</b>	<b>a) internal (define required competence level, allocate resources, organize)</b>	<b>Incorporate required contract clauses</b>	<b>Compare delivery to service requirements</b>
					<b>Estimate costs</b>	<b>b) external (negotiate, sign agreement)</b>	<b>Document performance criteria</b>	<b>Identify and implement corrective actions</b>
					<b>Pricing strategy</b>		<b>Execute FM agreement</b>	
					<b>Risk analysis</b>			
					<b>Organization needs</b>			
					<b>Project strategy</b>			

# EXAMPLES OF TRANSLATING NEEDS TO REQUIREMENTS

**Table A.1 — Examples of translations of needs into requirements for different types of services**

Type of service	Need	Requirement	Specification	Remark
Strategic example – Strategic planning	Portfolio consolidation	Reduce office space by $X$ %	Implement a comprehensive, space utilization study, including analysis of workplace density, occupancy levels and workplace design solutions.	A utilization study will provide base data which can be developed into options which integrate functional requirements, optimized occupancy levels / sharing ratios and workstation design
Tactical example – Project management	Increase manufacturing capacity for service or product by $X$ %	Extend existing manufacturing facility to accommodate increased production	Extend existing manufacturing hall “A” construction and infrastructure to increase floor area by 200 m <sup>2</sup> including an additional loading dock. Incorporate appropriate supply chain implications	Detailed design requirements will be incorporated within a stand-alone project management or comprehensive FM agreement
Tactical example – Security project	Increase security	Implement access control systems	Add CCTV and electronic identity / badge readers at building perimeter access points	Alternative options for security systems installation or integration should be considered and compared. Specification will be dependent on evaluation, selection and contract criteria
Operational example – Vehicle fleet operations	To maintain an optimally sized fleet of vehicles to accommodate organization requirements and CSR objectives	Provide appropriate type and quantity of vehicles based on demand metrics	Adjust size of cars fleet by purchasing $X$ pick-ups and $X$ vans	Investigate outsourcing of transport services

# PROCESS FOR PREPARATION AND DEVELOPMENT OF AGREEMENTS



# ISO STANDARDS

FACILITY MANAGEMENT –  
IMPROVING BEHAVIOUR FOR  
IMPROVED FACILITY OUTCOMES  
(ISO 41015: UNDER-DEVELOPMENT)

# CULTURE SHAPES BEHAVIOUR

- Organizational culture defines patterns of behaviour around which business is accomplished.
- Culture shapes behaviour and incorporates values, beliefs, assumptions, social norms, and methods and behaviours for interacting with other individuals, groups and external entities.



# INSIGHTS TO HELP DEFINE CULTURE:

- Physical work environment including workspace, collaboration space, and social interaction areas
- Physical use of the work environment such as quiet areas, restricted access
- Organisational structures and processes
- Organizational strategies, goals and philosophies
- Employee shared values, perceptions, and assumptions
- Management and communication styles

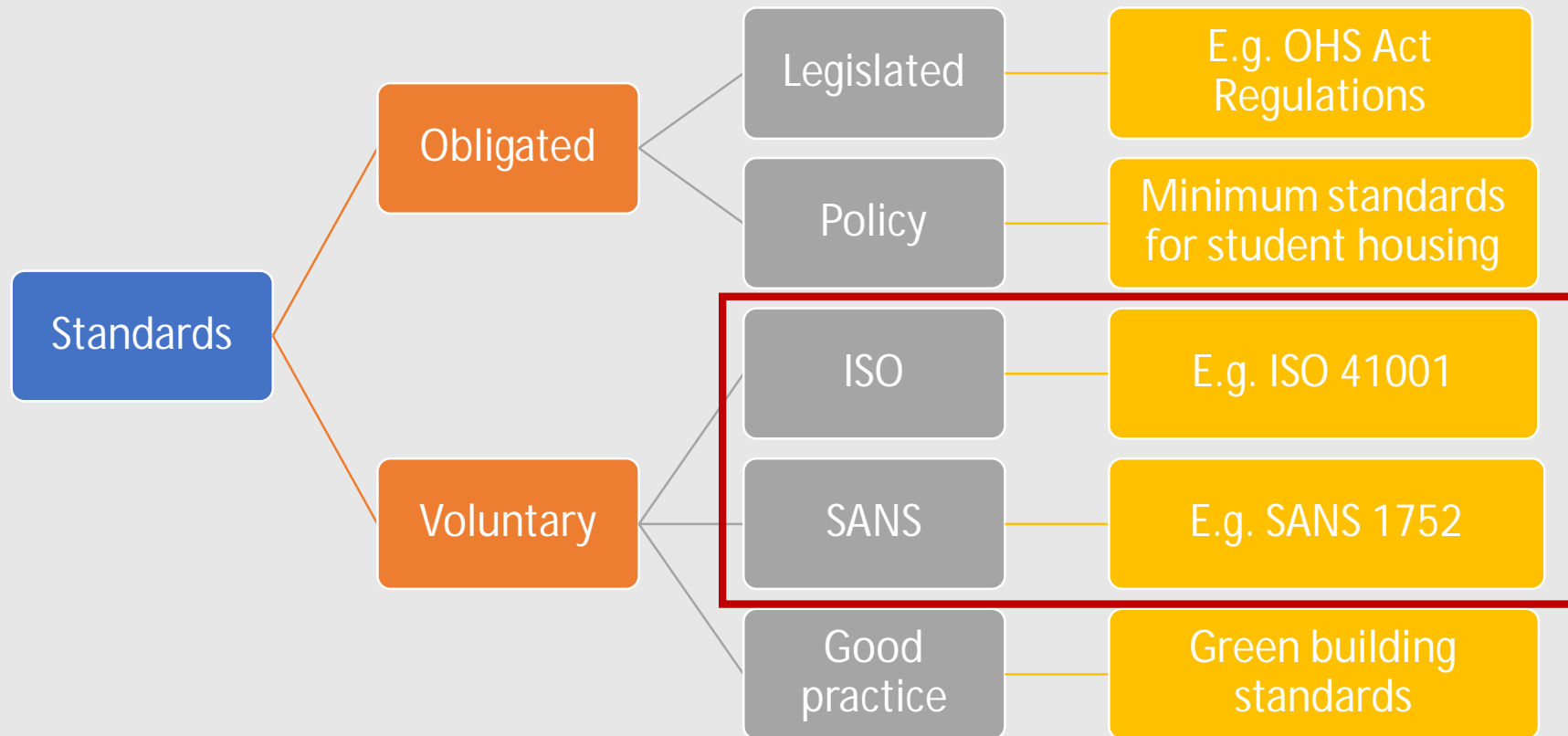
# APPROACH TO DESIRED BEHAVIOUR SUPPORTIVE TO FM PRIORITIES

- Define desired behaviours that align with the organizational culture to improve performance of the FM priorities
- Identify behaviour gaps limiting higher performance of the FM priorities
- Engage cross-organizationally to define goals that will support the desired behaviours to mitigate and alleviate the behaviour gaps

# APPROACH TO DESIRED BEHAVIOUR SUPPORTIVE TO FM PRIORITIES

- Determine motivators that align with the culture (penalties, incentives, persuasion, etc.)
- Manage communication so the intended message is received
- Measure and track desired behaviour goals and performance metrics

# FM STANDARDS



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