



**REPORT ON THE
DEVELOPMENT OF A STRATEGY
FOR THE
HIGHER EDUCATION FACILITIES MANAGEMENT ASSOCIATION**



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1. INTRODUCTION

The HEFMA Executive has tasked Wilconox to facilitate a process in order to formulate a strategy for the Higher Education Facilities Management Association (HEFMA) going forward.

The first phase of engagement with HEFMA was an exploratory workshop with The Executive Committee held in April 2015 to formulate an understanding of key fundamentals which was followed by a planning workshop with the Institutional Forum representatives during May 2015.

This interaction was followed by a review session with the Exco on 9 July 2015 to build on previous deliberations and action.

Details of the outputs of each of the phases are contained in Annexure 1.

2. HEFMA VISION, MISSION AND VALUES

2.1 Previous Mission

The mission of HEFMA as published on the website reads as follows:

To develop and maintain high quality standards in the management, maintenance, operation, planning, utilization and development of the physical infrastructure of higher education institutions. To promote professional ideals and standards that would assure the best academic environment; and to engage in such other related activities as may be desirable or required to fulfil the objectives of the organization. To provide the best professional information to Higher Education through constant education and resource mobilisation.

2.2 Previous Values

It is also stated that HEFMA subscribes to the following values:

- HEFMA is organized and operated exclusively for charitable and educational purposes. No part of the net earnings of the organization shall inure to the benefit of, or be distributed to its directors, officers, other private individuals, or organizations organized and operated for profit.
- The organization shall be authorized and empowered to pay reasonable compensation

2.3 Updated Vision, Mission and Values

The Executive Committee undertook a detailed review of the vision, mission and values in the light of issues identified at the previous interactive forums.

2.4 Vision

After extensive debate, the following Vision was drafted:

An Association of choice for higher education institutions in Southern Africa, for the enhancement of best practice in facilities and infrastructure management.

2.5 Mission

Following on detailed discussion, the following mission was agreed upon:

To empower Facilities Managers to develop, maintain and sustain high quality facilities and infrastructure for Higher Education Institutions.

2.6 Values

Following on the determination of the revised vision and mission, the following set of five core values were developed to enhance and accentuate the achievement of living up to the vision and mission:

i. Professionalism

Professionalism embraces proficiency, competency and reliability in all that is undertaken and encompasses having a sound knowledge of what is done and ensuring that it is done right the first time. It is a core value that is unique and makes the Association wanting to do a little more, to do something different, and that something is everything.

ii. Ethical Integrity

Ethical values embrace Integrity. One of the biggest challenges facing ethical integrity is "reporting"- the fear by leaders that their leadership positions or image would be badly reflected by a poor report. The difference between standards and actual practise is a challenge to ethics and also to leadership. The system is sometimes blamed because it appears to force unethical reporting and practises. While the system does provide certain pressures on the leader, ethical integrity is a human character and this moral responsibility lies with leadership and cannot be shifted.

All stakeholders must understand the ethical standards expected of them and a code of ethics and conduct should be included in the Associations policies. Compliance with the ethical code should be reviewed annually by the leadership as part of their appraisal process and updated to reflect new circumstances that develop.

iii. Sustainability

The Association needs to subscribe to principles of sustainability at the highest levels: from mitigating environmental impacts and actively engaging with our communities. Sustainability is so important that all parts of SADC meet the stringent standards of ISO 14001, the internationally-recognized environmental management standard.

The Association therefore needs to be committed to core sustainability principles in all facets of planning and operations so that all environmental impacts can ensure a healthy community and contribute to global solutions. This includes all issues around Energy Management, Carbon Management, Water Management, Waste Management and Environmental Planning

iv. Education

Given the fundamental purpose of the Association, an underlying belief statement needs to embrace a concept of “*With education, anything is possible*”.

The Association resides within a community of students, staff, and faculty in which cross-cultural and international knowledge, attitudes, experiences and action are part of the present and a heritage for the future. This principle is therefore intended to develop a world view, see and analyze issues from various perspectives, understand the broad range of human experience and recognise the diversity within an integrated society.

v. Quality

Quality based performance is proficiency in our professional vocation and competency in whatever is done and reliability an output of actions taken. It is the recognition of our services to our stakeholders and the respect gained as a result of leadership and operational readiness attained through perseverance and determination. Quality and performance thereof, not only is a commitment to zero defect but is also a continuous improvement through productivity.

3. DEVELOPMENT OF ACTION PLANS

In order for any strategic plan to be successful it needs to be followed up with an action plan where the deliverables around the strategic focus areas are clearly defined, documented and aligned to the vision, mission and values of the Association.

A champion for the overall implementation of the action plans needs to be identified as well as the allocation of specific initiatives to individuals who will need to be responsible for determining a high level plan for the planning and achievement of each initiative.

The President of HEFMA is charged with the overall ownership of the strategic plan. Various Executive Committee members are responsible for identified aspects as contained in the plan with other members being co-opted to work within special interest groups under the direction of the designated Exco members.

This high level plan covers the following headings:

- Define the current scenario.
- Define the desired scenario.
- Define the steps and timelines required to achieve the desired scenario.
- Define the necessary resources (monetary and human) required.

The following table reflects the basis of the actions to follow:

STRATEGIC FOCUS AREA 1: FACILITIES MANAGEMENT SCOPE DEFINITION:			
Current scenario	Desired scenario	Steps to be taken	Resources
Determine the services undertaken within Institutions under the banner of Facilities Management.	A standardised selection of services applicable to most Institutions.	Undertaking of a survey at CPUT; NMMU; TUT; UJ; UKZN using the check sheet at Annexure 2 as a base.	
	Have a directory of scope definitions for facilities management available for all institutions.	Directory to be available to all institutions and members. Directory to be updated as required.	
	Moving away from mere service delivery to the addition of a holistic value proposition.	Exchange of ideas between institutions as to how value can be added,	
STRATEGIC FOCUS AREA 2: COLLABORATION:			
Current scenario	Desired scenario	Steps to be taken	Resources
Limited collaboration, both within HEFMA and with external associations and bodies.	Enhanced collaboration internally within HEFMA and institutional members.	Create forums and opportunities for exchange of ideas and interaction regarding facilities management issues.	
	External collaboration with statutory bodies, government departments, DOHET Via a formalised recognition structure.	Establishment of formalised ties with statutory and other public sector organisations.	
	The creation of closer ties with other professional bodies and associations within the built environment disciplines such as SAFMA, GBCSA, SAPOA and the like.	Active engagement with these associations and organisations and participation in seminars, conferences and the like.	
	Creating an environment where established institutions provide assistance and support to smaller emerging institutions via structures, processes and policies within HEFMA.	Encouragement of skills and knowledge transfer from established institutions to smaller bodies.	
	Business partnerships.	Development of strategic partnerships with commercial entities (suppliers, service providers etc) to the overall benefit of the association.	
	Maintaining close ties with international higher education facilities	Continued collaboration and exchange of ideas with institutions and	

	management associations through existing MOU's with APPA, TEFMA and AUD	associations from other countries.	
STRATEGIC FOCUS AREA 3: COMMUNICATION:			
Current scenario	Desired scenario	Steps to be taken	Resources
Limited structured communication platforms in place with the exception of the annual conference.	Formal channels for both internal and external communication to be established.	Establishment of forums specifically aimed at creating communication platforms.	
	Social media to be utilised.	Special interest group to be established to undertake this task.	
	Enhanced website needs to be developed.	Website to be updated and enhanced regularly.	
	Benchmarking.	Regular benchmarking exercises to be carried out across the spectrum of institutional members.	
STRATEGIC FOCUS AREA 4: TRAINING AND PROFESSIONAL DEVELOPMENT:			
Current scenario	Desired scenario	Steps to be taken	Resources
Limited training opportunities in place.	Creation of special interest groups or subject matter specialists.	Champions for special interest groups need to be sourced.	
	One day specialist workshops to be conducted.	Subject matter for workshops to be determined and project leaders identified.	
	Creation of a platform for interaction around topical FM related issues from time to time e.g. the current load-shedding scenario.	Subject matter to be determined and project leaders identified.	
STRATEGIC FOCUS AREA 5: GROWTH:			
Current scenario	Desired scenario	Steps to be taken	Resources
HEFMA membership and support structures have remained stagnant for a number of years.	Targeted institutions within South Africa and SADC region.	Institutions to be identified and approaches made.	
	Other higher education institutions such as FET Colleges and Private Universities.	Institutions to be identified and approaches made.	
	Consideration of a full time HEFMA office with a paid resource.	To be considered by Exco.	
	Focus on increased number sponsors and business partners.	Sponsors to be identified and approached.	

ANNEXURE 1: OUTPUTS FROM THE WORKSHOPS CONDUCTED

EXECUTIVE COMMITTEE WORKSHOP

The following series of questions were put and debated at the Executive Committee Workshop held at the Protea Hotel OR Tambo Airport on 7 April 2015.

1. What are the typical, likely or unlikely scenarios that could unfold over the next 12 to 36 months on the facilities management landscape particularly as they relate to HEFMA?
2. In your view, what is the objective or purpose of HEFMA?
3. Who and what is your market?
4. Based on the scenarios that evolve and your purpose, what is HEFMA doing well and what are you not doing well?
5. Where are the major gaps where things are not going well?
6. Where would you like to see HEFMA in 5 to 10 years time?

Details of the outputs from these discussions are tabulated below:

Question 1
What are the typical, likely or unlikely scenarios that could unfold over the next 12 to 36 months on the facilities management landscape particularly as they relate to HEFMA?
<ul style="list-style-type: none"> • Funding for maintenance becoming minimal and expectancy of performance being high • Backlog maintenance rising (long term consideration for new buildings) • Minimum funding for facilities • Taking away positions meant for maintenance for academic activities • Lack of interest in HEFMA activities because of funding <ul style="list-style-type: none"> ○ Perception of value for money return ○ Is our service to community relevant to the client base ○ Activities are; Conference, AGM, Institutional Forum, Training in process ○ Website ○ Reduction of Institutional members / Institutions of Higher Learning in HEFMA activities ○ Participation in HEFMA activities going down • No availability of member standing for positions as HEFMA Exco members <ul style="list-style-type: none"> ○ Honorarium? ○ Time challenges ○ 3 x Presidential seats get to travel overseas • Legislation impacting on infrastructure • Proliferation of technology in infrastructure <ul style="list-style-type: none"> ○ DALI lighting systems ○ Artificial intelligence on lifts ○ Opportunity should be recognised • Energy saving <ul style="list-style-type: none"> ○ Current standing on ESKIM situation ○ Opportunities to be identified
Question 2
In your view, what is the objective or purpose of HEFMA?
<ul style="list-style-type: none"> • Bring together institutions of Higher Learning to deal or discuss facilities management in Higher Education

- Sharing ideas about how to deal with similar and different institutional maintenance and facilities challenges
- Benchmarking locally and with international partners
- Collaborate within the sector as much as we can
- Organise workshop and conferences for members and institutions to learn about the latest in facilities management (SAFMA, June 2015, SHECASA, PRISA, GBCSA, PURCO)

Question 3

Who and what is your market?

- Institutions of Higher Learning in South Africa and SADC countries
 - Language barriers to be kept in mind
 - Unpack the benefits of SADC
 - Ensure to include the benefit pack with invites
- Individual members who are interested in what HEFMA stands for (not from the sector members)
- Other organisations with the same ideals and objectives as HEFMA; local and international (Business Associates)

Question 4

Based on the scenarios that evolve and your purpose, what is HEFMA doing well and what are you not doing well?

- Doing well in mobilising institutions within and without S A (almost all institutions (SA) are members of HEFMA) and Universities, Swaziland, Lesotho, Namibia
 - Safako Makgato University (ex Limpopo, Garankuwa; demerged)
- Conferences (arrangements) are well attended in our own standards
- Individuals within the Exco who are committed
- Not doing enough for the membership
- Not reaching out to institutions within SA and membership as Exco (only see most during conferences)
- Not reaching out to the SADC institutions as expected

Question 5

Where are the major gaps where things are not going well?

- Not taking initiatives as Exco
- Developing training programmes for members (free)
 - Collaboration with other associations
 - Universities to host on HEFMA funds full or subsidise
 - Application for RHDV funding
- Sending members to international conferences (TEFMA cofounded sponsoring – could link to studies) Presentation on lessons learned is expected
 - Application process
 - Possibly enhancing personal education to Masters or PHD
 - Feedback on presenting their experience to conference

Question 6

Where would you like to see HEFMA in 5 to 10 years time?

- Well known organisation in Higher Education sector with a huge following
 - Conference attendance
 - SADC following enhanced
 - Website activities enhanced and more used
 - Benchmarking participation (web enter may make it easier)
- With programmes which promote membership's knowledge about facilities management and latest trends which help them to do things differently

- Sizable presence of SADC institutions within HEFMA
- All institutions within SA should become members of HEFMA
 - FET colleges?? Now under Minister of Education's portfolio (DHET)
 - Will on the current constitution of HEFMA
 - The title of our Association content this – HEFMA (Higher Education)
- As 1st organisation consulted by DoHET for anything infrastructure wise
- Acknowledgement of various tiers within HEFMA relating to experience and or qualification
- Developing and setting the standards within FM along with SABS (Lazarus)
- Institute to develop FM professionals (Marcel)
- Stratplan should ensure that continuity between incumbents – retention of experience and historical knowledge
- Archiving the history of HEFMA as from the days of TIMCON

Additional discussion points

- HEFMA should become the catalyst of and platform for collaboration between institutions on all matters relative to facilities management
- HEFMA should be collaborating with and influencing HESA on all infrastructure and facilities management related issues
- HEMIS reporting to be embraced more by HEFMA
- Academic vs. non-Academic spend needs to be monitored. Currently sitting at 1:35 where the accepted ratio is 1:15
- HEFMA Subscriptions need to ensure value for money
- The question of “what's in it for me” needs to be answered to members
- International links need to be strengthened
- Need to get more volunteers to come forward for Exco involvement
- Benchmarking needs to be revived
- More emphasis needs to be placed on collaboration with other associations

INSTITUTIONAL FORUM WORKSHOP

A Strategic Planning Workshop with members of the Executive Committee as well as Institutional Forum representatives was conducted at the Mangosuthu University of Technology on 25 May 2015.

The first session consisted of an open-ended “brain-storming” discussion around where the participants saw HEFMA currently and where they would like to see the Association going.

The following headline issues around the purpose of HEFMA evolved from these discussions:

1. To be the Knowledge Centre of FM related issues for and on behalf of its members
2. To provide education to its members
3. For the facilitation of networking
4. To facilitate interaction between institutional members
5. To administer FM issues for and on behalf of higher education institutions in S A and the SADC region
6. Central administrator of common FM related issues within the higher education fraternity
7. Determination of best practice via benchmarking and comparative exercises
8. To provide for the representation of FM issues at DOHET
9. To collaborate with industry sector peers, government and associations regarding FM issues.

10. To facilitate training in the form of workshops and conferences

The next round of participative work-shopping consisted of dividing the participants into three focus groups with the purpose of exploring what the purpose and objectives of HEFMA are and what the association should be focussing on over the next one to three years in order to define its correct position.

Each group was required to provide feedback, the outputs of which are as follows:

Group 1 Feedback
<ul style="list-style-type: none"> • Define facilities management in the context of HEFMA. • Define what the scope should be and what statutory services should be the point of focus. • Define best practice within HEFMA that the association would want to be identified with e.g. funding, benchmarking staff organograms / organisational structures. • What level of influence does HEFMA wield, how do we influence key stakeholders such as Department of Higher Education and Training, Local Authorities, HESA etc to unlock funding? • Can the association leverage on its vision and mission to achieve the desired level of influence? • HEFMA should be the platform for internal knowledge sharing through structured professional development. • Institutional Members Forum should be convened quarterly i.e. four meetings per year. • Identify Universities within the SADC region and seek to have representation. • Enhance attendance and participation levels within HEFMA. • Make inroads into new Universities and those in rural areas that are not in the HEFMA fold. • HEFMA should, given its professional status, influence and reach should be determining DOHET funding priorities per funding cycle. • HEFMA should be the “go to” entity for any FM related matters affecting member institutions.
Group 2 Feedback
<ul style="list-style-type: none"> • HEFMA should strive for significant recognition within the higher education sector in South Africa and the SADC region as well as internationally. • The office of President should assume responsibility for articulating the HEFMA vision and mission and liaison with structures such as HESA, DOHET etc. • Attaining the envisaged level of recognition will largely be dependent on the association’s value proposition and perception of value-add by external stakeholders. • HEFMA should be charting the way / providing direction and potential solutions within the higher education FM sector in S A on critical matters such as load-shedding for example. • The primary role of HEFMA and member institutions is to provide support to the academic project comprising teaching, learning and research. • There should be recognition of the strategic primary role played by FM in member institutions and acceptance that FM is not secondary or subservient to academia but critical for academia to fulfil its learning, teaching and research mandate. • Focus should be on development of standards common to member institutions through workshops, benchmarking etc • Focus on gaining exposure and international recognition through technology use.
Group 3 Feedback
<ul style="list-style-type: none"> • Need for gender equality / balance within HEFMA structures. • Need for knowledge repository / shared portal accessible to member institutions.

- Leverage on institutional members to fulfil knowledge dissemination role within individual institutions to enhance HEFMA profile and level of recognition.
- Greater focus on credibility of FM units within member institutions which in turn will enhance profile and credibility of HEFMA.
- Need for creation of FM standards applicable across the board within member institutions.
- Focus on and enhance role of FM units in providing advisory services in such matters as procurement, vendor accreditation etc.
- Need to enhance engagement and collaboration with local authorities.
- Establish subject matter specialists / knowledge hubs on different aspects of FM within member institutions to provide FM support to smaller, under-capacitated member institutions.
- Define HEFMA's value proposition and promote active participation in HEFMA activities amongst membership.

The group feedback sessions were followed by a general session with the consolidation of issues and the establishment of priorities being the major focus.

The outputs from this session resulted in a grouping of issues into the following five major strategic focus areas:

1. Facilities Management Scope Definition
2. Collaboration
3. Communication
4. Training and Professional Development
5. Growth

The detail contained within each of these categories is tabulated as follows:

Facilities Management Scope Definition
<ul style="list-style-type: none"> • Packaging of what sits within FM at member institutions. • Attention to be given to moving away from mere service delivery to the adding of a holistic value proposition. • HEFMA to be the catalyst of a more influencing role for FM in order to enhance credibility as a professional association. • Provision of leadership in terms of providing FM best practice.
Collaboration
<ul style="list-style-type: none"> • Enhanced collaboration internally within HEFMA and institutional members. • External collaboration with statutory bodies, government departments, DOHET via a formalised recognition structure. • The creation of closer ties with other professional bodies and associations within the built environment disciplines such as SAFMA, GBCSA, SAPOA and the like. • Creating an environment where established institutions provide assistance and support to smaller emerging institutions via structures, processes and policies within HEFMA. • Raising the profile of HEFMA at government level through interaction between the President and the Minister of Higher Education and Training.
Communication
<ul style="list-style-type: none"> • Formal channels for both internal and external communication to be established.

- Targeted stakeholder specific communications to be developed.
- Social media to be utilised.
- Enhanced website needs to be developed.

Training and Professional Development

- Creation of special interest groups or subject matter specialists.
- Rationalised approach to training to be developed.
- One day specialist workshops to be conducted.
- Creation of a platform for interaction around topical FM related issues from time to time e.g. the current load-shedding scenario.

Growth

- Targeted institutions within South Africa and SADC region.
- Targeted growth via DOHET.
- Other higher education institutions such as FET Colleges and Private Universities.
- Consideration of a full time HEFMA office with a paid resource.
- Focus on increased number sponsors and business partners.

EXECUTIVE COMMITTEE REVIEW

An Executive Committee Workshop was held on 9 July 2015 with the objective being to review of the strategic objectives as well as to re-visit the vision, mission and values of the Association.

ANNEXURE 2: LISTING OF GENERIC FACILITIES MANAGEMENT SERVICES

Technical Infrastructure Services	
Access Control Systems	
Air-Conditioning Systems	
Audiovisual	
Boilers	
Building Information Technology	
Building Maintenance & Repair	
Building Signage	
Ceilings & Partitioning	
Compactors	
Construction	
Data Cabling	
Electrical & Lighting	
Energy & Utility Management	
Fire Detection	
Health & Safety Audits	
Internal Signage	
Lifts & Escalators	
Lubrication Maintenance	
Mechanical Services	
Meter Reading	
Planned Maintenance Strategies	
Plumbing	
Pressurised Gas	
Re-lamping	
Security Systems	
Water Treatment	

Non-Technical Infrastructure Services	
Access Control & CCTV	
Furniture Management	
Gardening & Landscaping	
Guarding Services	
Hygiene	
Interior Plants	
Painting	
Parking	
Pest Control	
Relocation Management	
Security / Risk Management	
Space Planning & Interior Design	
Sport & Recreation	
Sterile Services	
Storage	
Tenant Installation & Management	
Waste Management	
Business Support Services	
Archiving & Paper Storage	
Asset Management	
Budgeting	
Car Wash	
Catering	
Chauffeur Services	
Client Brief Writing	
Conference Facilities	
Contracts & Accounts	
Courier Services	

Crèche	
Distribution Services	
Document Management	
Environmental Impact Management	
Filing Systems	
Florist & Concierge	
Inventory Control	
Laundry	
Mailroom & Postal Services	
Messenger, Transport & Taxis	
Non-core Procurement	
OHS Act Management & Consultancy	
Printing, Photocopying & Faxing	
Project Management	
Reception	
Stationery, Consumables & Office Supplies	
Switchboard & PABX	
Technical Library	
Telecommunication	
Vending Supplies	
Video Conferencing	
Travel	