safma

Conference & Exhibition
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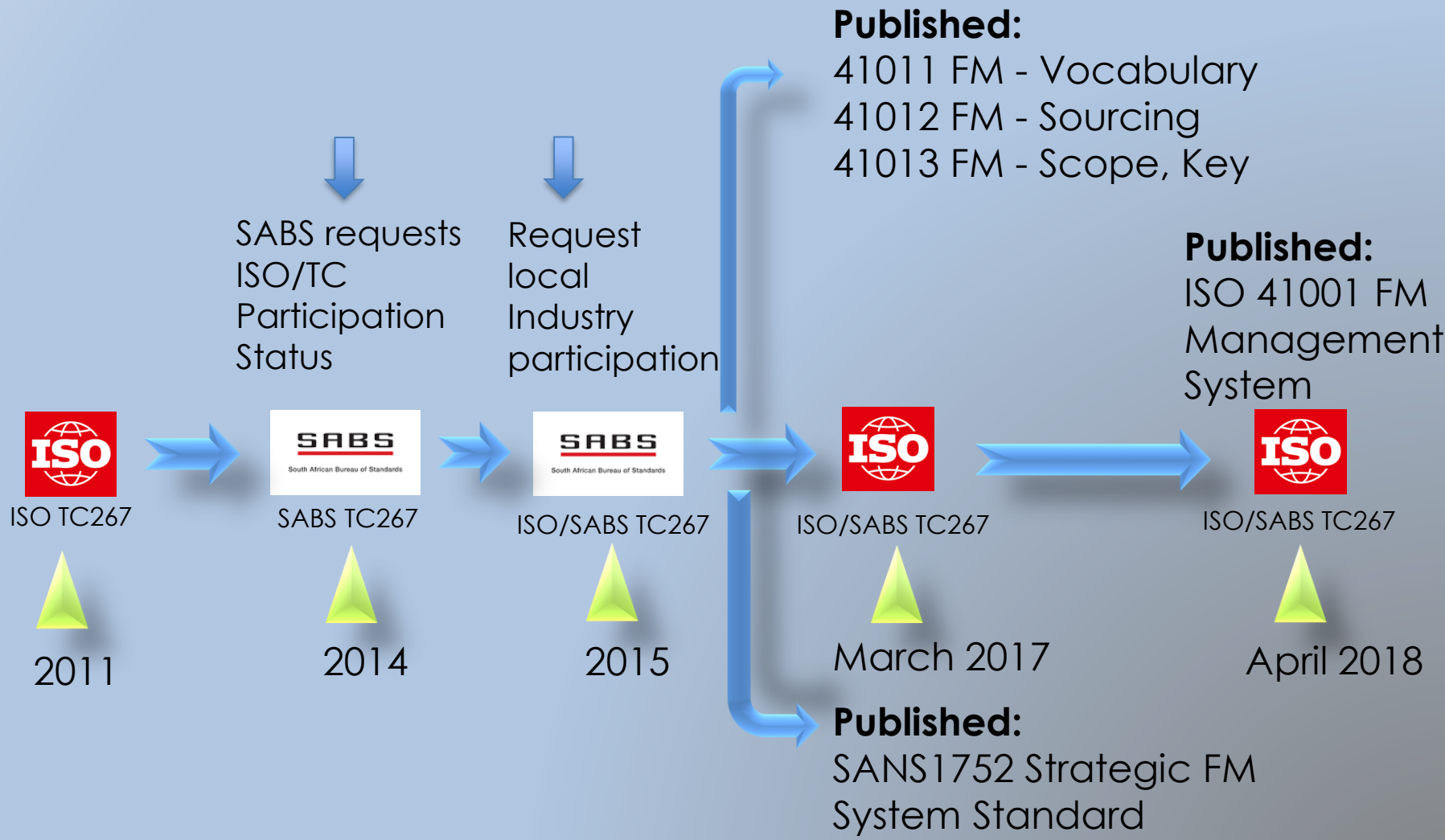
- Head of Academy for FM
- Chair: SABS Technical Committee (TC267) for FM

A4FM

Topics

- FM Standard – Overview
- ISO 41011 – Terminology
- ISO 41013 TR – Scope,Key Concepts &

  Benefits
- ISO 41012 – Sourcing
- SANS1752 – Strategic FM System Standard
- SAFMA Self-Declaration Process

FM Standards Roadmap

Published:
41011 FM - Vocabulary
41012 FM - Sourcing
41013 FM - Scope, Key

Published:
ISO 41001 FM
Management
System

SABS requests
ISO/TC
Participation
Status

Request
local
Industry
participation

ISO TC267

SABS
South African Bureau of Standards

SABS TC267

SABS
South African Bureau of Standards

ISO/SABS TC267

ISO

ISO/SABS TC267

ISO

ISO/SABS TC267

2011

2014

2015

March 2017

April 2018

Published:
SANS1752 Strategic FM
System Standard

Why an FM Standard?

- FM International best practise
- Standard terminology
- Benchmarking
- Enhanced industry maturity
- Grow industry
- User Satisfaction

ISO Roadmap

ISO/TC267 – Advisory Group 1: Road Map

- Development of FM Strategy – ISO41014

- Influencing behaviours for improved FM outcomes & user experience – ISO 41015

- Government Procurement of FM

- Etc

ISO 41011- Terminology

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Definitions

European Committee for Standardisation (CEN)
FM as provided by CEN and ratified by BSI (British Standards) in the 1990s:
"Facilities management is the integration of processes within an organisation to maintain and develop the agreed services which support and improve the effectiveness of its primary activities".

IFMA (International Facility Management Association)
"Facility management is a profession that encompasses multiple disciplines to ensure functionality of the built environment by integrating people, place, process and technology".

ISO 41011(International Standards Organisation)
Facility Management is an organizational 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".

ISO 41013 – Scope, Key Concepts and Benefits

- **Scope of FM**

- **Business process**
- Core business/primary activities and separating the support processes
- Assigning support processes to FM

- **Key concepts in FM**
  - FM model
  - Broad scope of FM and facility services

- **Purpose and benefits of FM**
- Productivity
- Impact on people
- Risk mitigation
- Sustainability
- Identity
- Cost and quality

ISO 41012 - Sourcing

Why relevant to your organisation

- Improved SLAs lead to improved service delivery

    - *You can make any agreement work in practice if you ignore the cost in time and poor service delivery.*

- Standardisation / Terminology

- Best practice

ISO 41012 - Sourcing

A. History and Context

B. Content of 41012

   B.1 Terminology

   B.2 Sourcing / Due diligence

        - Process flow chart

   B.3 SLAs

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ISO 41012 - Sourcing

A. History & Context

- Part of ISO 41000-suite of FM standards
- Some 40 nations participate
- Process
  - NWIP   - 2013
  - Working Draft
  - Committee Draft   - 2015
  - Draft International Standard - 2016
  - Approval
  - Publication   - 2017

ISO 41012 - Sourcing

- What is it about?

- Sourcing

  Established international best practice re:
  - Due diligence in decision-making re sourcing
  - Service Level Agreements
  - User-friendly and useful standard

ISO 41012 - Sourcing

B. Table of Content

B.1 Terminology

- FM terms and definitions

- Professionals speak the language

- Some examples

ISO 41012 - Sourcing

B.1. Terminology - Terms and definitions

- **Service level agreement**

document which has been agreed between the demand organization and the service provider on performance, measurement and conditions of services delivery

- **Outsource**

process of procuring an external service provider to deliver and/or manage a range of services

- **Out task**

provision of a single service from an external provider

ISO 41012 - Sourcing

B.1. Terminology - Terms and definitions

- **Demand**

stated requirement for a service or goods to be delivered

- **Specification**

detailed description of the essential performance and/or technical requirements for services or goods and processes set out by the demand organization to make clear to the service provider the requirements to be met
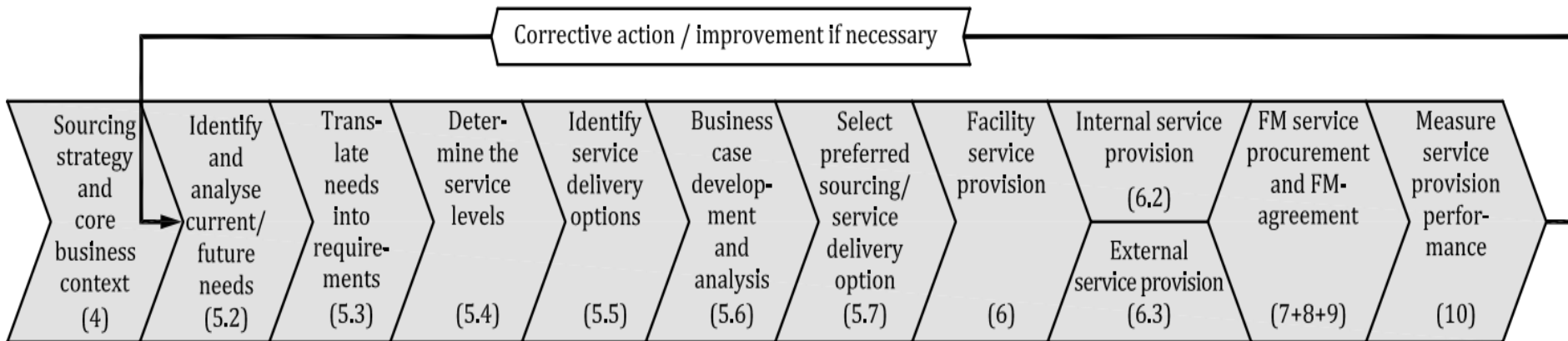
- **Service level**

complete description of requirements of a product, process or system with their characteristics

ISO 41012 - Sourcing

B.2 Sourcing / Due diligence

- Sourcing = procurement
- Requires due diligence
- 41012 provides a Work flow process to guide us

Corrective action / improvement if necessary

| Sourcing strategy and core business context (4) | Identify and analyse current/ future needs (5.2) | Trans- late needs into require- ments (5.3) | Deter- mine the service levels (5.4) | Identify service delivery options (5.5) | Business case develop- ment and analysis (5.6) | Select preferred sourcing/ service delivery option (5.7) | Facility service provision (6) | Internal service provision (6.2) / External service provision (6.3) | FM service procurement and FM- agreement (7+8+9) | Measure service provision perfor- mance (10) |

ISO 41012 - Sourcing

B.2 Sourcing / Due diligence

- 41012 provides a Work flow process to guide us

1) Sourcing strategy & understanding core buss. context
2) Id & analyse current & future DO needs & expectations
3) Translate needs into requirements
4) Determine the service levels
5) Identify service delivery options
6) Business case development and analyses
7) Select preferred sourcing /service delivery option
8) Facility service provision
   - Internal
   - External

ISO 41012 - Sourcing

B.2 Sourcing / Due diligence

- Phases for development of a FM agreement   and RFI / RFP-process

1)   Preparation phase
2)   Pre-qualification phase (RFI)
      - Criteria
3) Proposal -phase (RFP)
      - Criteria
4) Agreement preparation phase
5) Signature phase
6) Implementation phase

ISO 41012 - Sourcing

B.2 Sourcing / Due diligence

6. Implementation of FM agreement

i) Mobilization – All preparation, transition, mobilisation of all resources, systems, data, authorizations & procedures prior to taking full responsibility for the services to be delivered as per agreement

ii) Validation - confirm the validity of the information provided to build the agreement. Adequate testing of information exchange mechanisms necessary to ensure the required output.

iii) Operational phase

ISO 41012 - Sourcing

B.2 Sourcing / Due diligence

6. Implementation of FM agreement

iii) Operational phase
    a) Implementation and stabilization
    b) Optimization
    c) Preparation for terminating the agreement

ISO 41012 - Sourcing

B.3 SLAs

Document agreed between the demand organization & service provider on performance, measurement and conditions of services delivery.

ISO 41012 covers:

- Main Characteristics of SLAs
- Service Level Specification
- Performance Metrics
- SLA Structure
- Quality
- Key Attributes of SLAs
- Risk Analysis

ISO 41012 - Sourcing

ISO 41012 covers: <u>Service Level Specification</u>

The SLS provides specific, measurable, attainable realistic and timely (SMART) performance measures and expectations on the contractual agreement.

Each SLS composed of:

- A definition of the metric and what is being measured
- A description of the reason for measuring the metric
- A description of the method and process for capturing the data
- A statement of the timing interval for measurement

ISO 41012 - Sourcing

ISO 41012 covers: <u>Performance metrics</u>

Define performance measurement criteria and targets e.g. quality, quantity, compliance, cost, frequency and timeliness.

- budget compliance/ variance;
- response times (e.g. emergency, urgent, and routine work);
- work completion rates / productivity rate
- amount of proactive versus corrective (i.e. reactive) work;
- preventive maintenance compliance;
- safety inspection and testing compliance;

What you can't measure you can't be managed
-    Drucker

ISO 41012 - Sourcing

ISO 41012 covers: <u>SLA Structure</u>
– close to 100 recommendations listed

ISO 41012 - Sourcing

ISO 41012 covers: <u>Quality</u>

Selection of performance measures KPIs / CSFs (for measuring of effectiveness :

- quality – measured performance comparable to the descriptions & agreed services levels
- customer satisfaction (clients and or end-users);
- compliance to regulations – statutory & governance
- cost – cost measurements of each service should relate to the agreed service level / timeliness
- response times & times to complete services in accordance with agreed upon service levels
- performance-based remuneration systems

ISO 41012 - Sourcing

ISO 41012 covers: <u>Key attributes</u> of successful SLAs

- define the scope of the services
- define the boundary conditions and parameters
- establish the level of service - quality of the output
- establish the way in which the services are provided
- provide performance measurement criteria and targets
- define acceptable delivery times & possibly cost of delivery
- establish conflict or gap resolution processes
- describe how to deal with non-compliance - agreed procedures & results

ISO 41012 - Sourcing

Comprehensive risk analysis

- data / inventory on portfolio / assets,
- information on initial and long-term cost implications,
- capacity and competences resources, including funding,
- health, safety and environment,
- fire safety,
- security,
- ICT system, hardware & communication technology / integration,
- coordinated disaster recovery planning
- legislative and regulatory compliance,
- business continuity planning & management
- corporate governance requirements

ISO 41012 - Sourcing

SLA must provide

- Information re response times for various work priorities

- Target times for deficiency / service interruption or resolution

- Processes and guidelines for problem escalation

- Mechanisms for managing expectations & communication

- Criteria for periodic reporting of performance

- Long-term guidance to enable continuous improvement

# ISO 41012 - Sourcing

- Questions
- End

What is SANS 1752?

- South African National Standard
- Prepared by National Committee SABS/TC 267
- According to SABS and WTO/TBT rules
- Approved by SABS
- Strategic Facilities Management System Standard – not just a management system

Why SANS 1752?

- Tailor-made for wider FM industry in SA

- Guide local industry towards greater maturity

- Clarity in the marketplace re FM

- ISO standards adopted by SABS as SANS standards if it suits SA conditions

- Current version of ISO 41001 deemed less suitable for local application

Strategic Facility Management System – SANS 1752
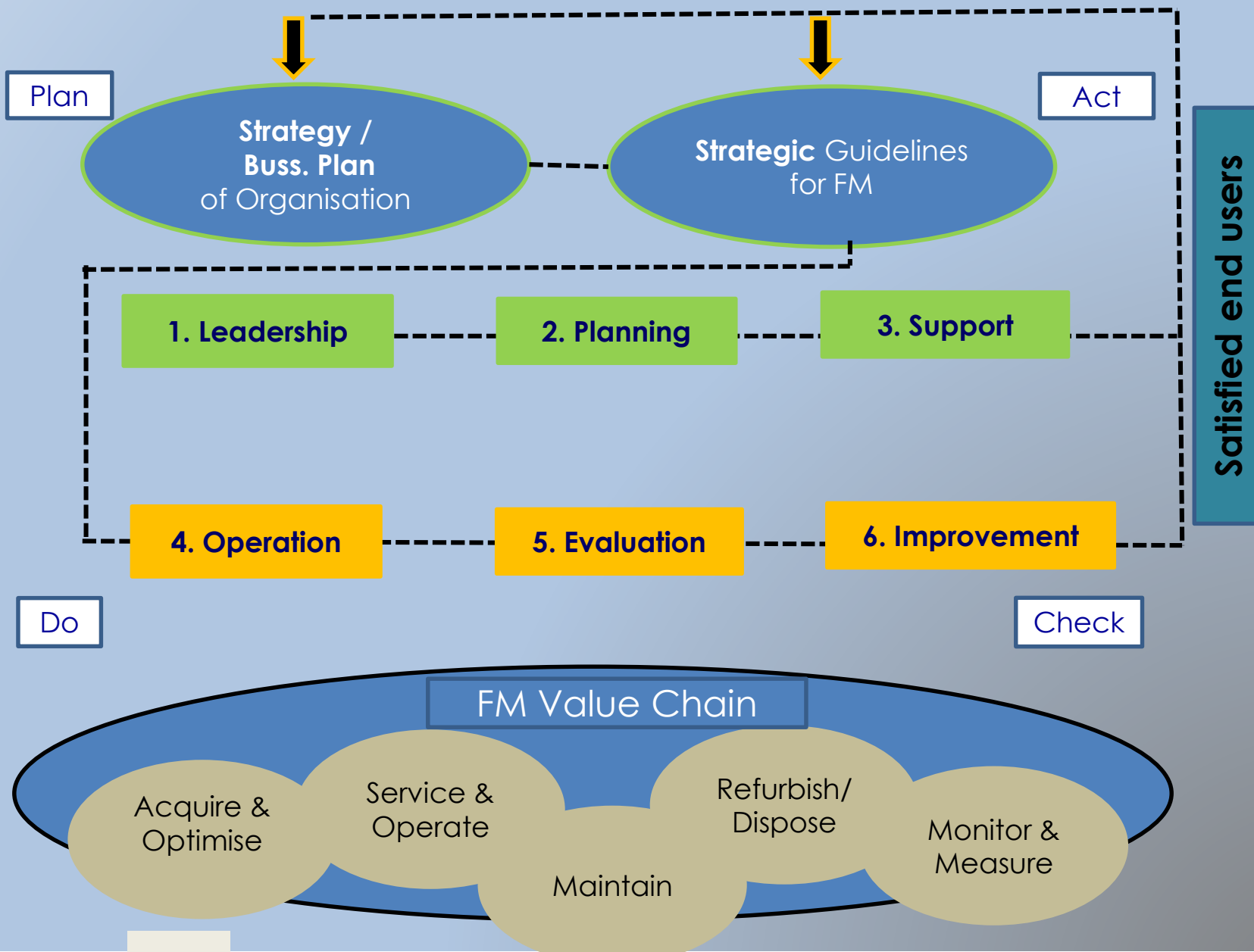
What are the deliverables?

Demand Function		Delivery Function	

Pillar	Deliverable	Pillar	Deliverable
Leadership	FM Policy	**Operations**	Operational Plans
Planning	Strategic FM Plan	**Evaluation**	SMART KPI's
Support	Resources Plan	**Improvement**	Reports & Studies

Definitions

- **demand organisation**
  - *entity* which has a *need* and the authority to incur costs to have *requirements* met.

    ISO 41011

- **delivery organisation**
  - *organization, in-house or outsourced, that is responsible for delivering or managing (or both) services to a demand organisation.*

    SANS 1752

- **organisation**
  - *person or group of people that has its own functions with responsibilities, authorities and relationships to achieve its objectives.*

    ISO 41011

What next- Conformity Assessment

1st Party Assessment

2nd Party Assessment

3rd Party Assessment

Self-Declaration

(User) Attestation

Certification

ISO/IEC 17050 Conformity assessment – Supplier's declaration of conformity

Accreditation Process

SAFMA Policy
Assessment of Self Declaration

Objectives:
-To create market confidence in the process of self-declaration.
-To verify and confirm the Self Declaration of member companies in terms of the SANS 1752 standards for Facilities Management in the interim while certification bodies and guidelines are being put in place.

Scope:
All Member organisations of SAFMA can apply for verification of Self-Declaration to ensure compliance to SANS 1752:2017
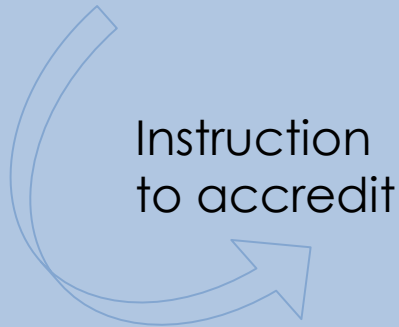
SANAS Accreditation Process

Self-Declaration Process

Questions?