Strategic Facilities Management System — Requirements [with Guidance for Use]
Introduction

0.1 General

The adoption of a Strategic Facilities Management System (SFMS) should be a strategic decision of an organisation. The design and implementation of an organisation’s SFMS is influenced by:

a) its organisational environment, changes in that environment, and the risks associated with that environment,
b) its varying needs,
c) its particular objectives,
d) the processes it employs,
e) its size and organisational structure.

It is not the intent of this Standard to imply uniformity in the structure of SFMS or uniformity of documentation. The SFMS requirements specified in this National Standard are complementary to requirements for FM services. Information marked “NOTE” is for guidance in understanding or clarifying the associated requirement.

This Standard can be used by internal and external parties, including certification bodies, to assess the organisation’s ability to meet customer, statutory and regulatory requirements applicable to the services, and the organisation’s own requirements.

0.2 Process approach

This National Standard promotes the adoption of a process approach when developing, implementing and improving the effectiveness of a SFMS, to enhance customer satisfaction by meeting customer requirements.

For an organisation to function effectively, it has to determine and manage numerous linked activities. An activity or set of activities using resources, and managed in order to enable the transformation of inputs into outputs, can be considered as a process. Often the output from one process directly forms the input to the next.

The application of a system of processes within an organisation, together with the identification and interactions of these processes, and their management to produce the desired outcome, can be referred to as the “process approach”.

An advantage of the process approach is the ongoing control that it provides over the linkage between the individual processes within the system of processes, as well as over their combination and interaction.

When used within a SFMS, such an approach emphasizes the importance of:

a) understanding and meeting the Demand Organisation’s requirements through integrated organisational and FM planning processes,
b) relationship between the integrated planning process and six pillars of the MSS,
c) the documentation associated with the six pillars of MSS and subject of certification assessments,
d) all of the above in the context of management levels; strategic, tactical and operational, and

continual improvement of processes based on objective measurement.
To preview the SFMS, the core process starts with the **Leadership** (see **5.**) approving policy, aligning facilities **planning** (see **6.**) to strategic objectives and ensuring requisite **support** (see **7.**) in the form of financial, human and technological resources is in place.

With the first three strategic pillars in place, the organisation can implement and control the **Operation’s** (see **8.**) processes to deliver the varied service lines in an integrated manner. **Performance Evaluation** (see **9.**) shall be used to monitor and ensure targets are being met. To complete the Performance Improvement cycle (see **10.**) – a review, comprising stakeholder surveys, facility studies and benchmarking, shall be undertaken to identify and implement improvement initiatives.

**NOTE** In addition, the methodology known as “Plan-Do-Check-Act” (PDCA) has been applied to Figure 1. PDCA can be briefly described as follows.

- **Plan**: establish the objectives and processes necessary to deliver results 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.

![Figure 1: Process-based SFMS](image-url)
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1 Scope

1.1 General

This National Standard specifies requirements for a SFMS where an organisation:

a) needs to demonstrate its ability to consistently manage its facilities effectively and efficiently to add value and support core business and meet statutory and regulatory requirements, and

b) aims to enhance customer satisfaction through the effective application of the system, including

c) processes for continual improvement of the system and the assurance of conformity to customer and applicable statutory and regulatory requirements.

NOTE 1 In this National Standard, the term “service” only applies to:
   a) service intended for, or required by, a customer,
   b) any intended output resulting from the service realisation and/or delivery processes.

NOTE 2 Statutory and regulatory requirements can be expressed as legal requirements.

1.2 Application

All requirements of this National Standard are generic and are intended to be applicable to all organisations, regardless of type, size and services provided.

2 Normative References

The following referenced documents are indispensable for the application of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies

a) ISO 18480 (1) (N72) Terms and Definitions

3 Terms and Definitions

For the purposes of this document, the terms and definitions given in ISO 18480 (1) (N72) and the following apply.

3.1 Operational Environment

“physical location where work is performed including corporate offices, airports, shopping centres etc.

NOTE: the definition of Workplace was only concerned with corporate occupier only where employee of demand organisation use the facility.

3.2 Delivery Organisation

Organisation, in-house or outsourced, which has a responsibility to deliver and/or manage the delivery of services to the Demand Organisation

NOTE: the definition of Service provider includes in-house provision but is still associated with external provision. Delivery Organisation is more neutral with no associations and thus preferred.
3.3 Lifecycle Replacement Budget
Budgets prepared to make provision for interval replacement of facility’s key systems and infrastructure including but not limited to electrical, air conditioning, fire, vertical transport, architectural, civil, structural and wet services. Planning horizons range between five and 20 years.

3.4 Soft services
Facility cleaning, hygiene, pest control, internal potted plants, waste management, landscaping maintenance and gardening. This includes any specialised cleaning such as high access.

3.5 Acquisition plan
A plan to acquire a facility or use thereof regardless of the funding models, whether purchasing, leasing, PPP, etc.

3.6 Workspace plan
A plan which seeks to improve workspace design, standards and/or optimisation for efficiency and productivity purposes. The work is at portfolio not facility level.

3.7 Green building programme
An initiative to meet a green building status for a portfolio of facilities. Includes measurement elements: management, indoor environment quality, energy, transport, water, materials, land use & ecology, emissions and innovation.
4 Context of the organisation and Industry

4.1 Understanding the SA Industry

4.1.1 Overview

The introduction of the SFMS is an acknowledgement that the local industry is lagging behind in its adoption, application and practice of facilities management. While FM was adopted and practiced as early as the 70s in the US and 80s in the UK, it was only in the late 90s that SA followed suit. South Africa can therefore be regarded as ‘late adopters’ hence the lag discussed earlier. The next two sections provides evidence of this and characterises the industry.

4.1.2 Not a Highly Transparent Industry

Perhaps as the consequence of its lagging position, the industry is regarded as not Highly Transparent in terms of the JLL Global Real Estate Transparency Index 2010 below:

The purpose of the Index was to document the lag in terms of the level of transparency the industry should aim for and to indicate the progress already registered. The industry has shed more light on the real estate investment trust (REIT) sector than it has on corporate occupier sector, for instance. As generally accepted in the business environment, research and benchmarking are improvement and development instruments – and the industry still has much work to do to catch up to leading western nations.
4.1.3 Wave 2 Delivery Model

Perhaps as a consequence of being a developing economy, the industry is generally viewed as being at Wave 2 of development in terms of the evolution of the FM models, according to Figures 3. and 4. Figure 3 explains the different waves and associated delivery models and show below:

![Wave 2 Delivery Model Diagram](image)

Figure 3. Catalyst Corporate Finance: Facilities Management - Global M&A Overview, The impact of M&A on the evolution of FM models, 2013

The Catalyst Corporate Finance Global M&A Overview 2013 then presented the snapshot of where the industry was placed in the evolution of the FM models as shown in Figure 3:

![Wave 2 Delivery Model World Map](image)

Figure 4. Catalyst Corporate Finance: Facilities Management - Global M&A Overview, FM Development Worldwide
4.2 Positioning the SA Industry for the future

While the industry must accept the developing economy it operates in and globalisation is reality, it (the industry) must be proactive in asserting itself to further develop the economy and positively engage with globalisation. Failure to do this will adversely impact the industry in a number of ways, including:

a) colonisation of the industry wherein global interests are not reconciled with local and industry interests in respect of opportunities;
b) situation where the industry is always reactive to global trends without any input to protect local interests;
c) entrench existing power relations where the industry responds and not proactive in developing worldwide solutions and, as a result, it is not a decision maker nor influencer of decisions;
d) limited or no opportunities for the industry to punch above weight and ‘globalise’ beyond the African continent

The SFMS is but one of the initiatives to raise the FM bar and position the industry for the future.

4.3 Understanding the organisation and its SFMS

4.3.1 Overview

At organisation level, the SFMS is expected to improve the performance of the facilities management function in its support of the organisational strategy. While this strategic support role and its associated responsibilities has always been understood, the execution thereof can be improved upon by this National Standard as it provides building blocks and guidelines in this regard.

The SFMS shall form an integrated part of the organisation’s management system with specific focus on the second largest expense after payroll in typical organisations. It should result from and explicitly support:

— the organisational objectives and/or strategy;
— the organisational plan.

The SFMS shall comprise of several building blocks including but not limited to;

a) the facilities management policy (see 5.3);
b) the facilities management objectives (see Error! Reference source not found.);
c) the strategic facilities demand plan (SFMP);
d) the functional plans (see 6.4.1) and Facilities Management Service Delivery Plan (FMSDP) (see 8.2) which are implemented in:
— operational planning and control;
— supporting activities;
— control activities;
— other relevant processes.

The ultimate goal of the SFMS shall be to secure customer satisfaction, the customer being the Demand Organisation. The Demand Organisation, with all its various stakeholders, should express satisfaction that the organisation plan and objectives have been enabled and supported. The monitoring and measurements of the SFMS shall be clear in this regard.

Figure 1 shows the recommended roadmap to supporting the organisations and the relationship with the elements of the SFMS.

The scope of an organisation’s SFMS and the outputs from its facilities management activities should be used to set out the approach to enable the delivery of its organisational objectives.

The organisational objectives provide the overarching context and direction to the organisation’s activities, including its facilities management activities. The organisational objectives are generally produced from the organisation’s strategic level planning activities and are documented in an organisational strategic plan.

NOTE 1 The organisational plan can be referred to by other names, e.g. the corporate plan.

The principles by which the organisation intends applying facilities management to achieve its organisational objectives should be set out in a facilities management policy. The approach to implementing these principles should be documented in a strategic facilities management plan (SFMP).

NOTE 2 A strategic facilities management plan can be referred to by other names, e.g. a facilities management strategy.

The SFMP should document the relationship between the organisational objectives and the facilities management objectives, and should define the framework required to achieve the facilities management objectives.

The links between the organisational plan and the SFMP should be two-way, and should be developed through an iterative process. For example, the organisational objectives should not be developed in isolation from the organisation’s facilities management activities. Facilities capability and performance, as well as the outputs from facilities management activities (e.g. the facilities management plan(s)), are key inputs into establishing realistic and achievable organisational objectives.

4.1.1.1 In developing its SFMP, the organisation should:

a) consider the expectations and requirements of stakeholders;

b) consider activities that could extend beyond the organisation’s routine planning timeframe, and which should be subject to regular review;
c) clearly document the processes to establish its facilities-related decision-making criteria.

The SFMP should be a high level plan that contains the facilities management objectives. It should be used to develop the facilities management plan(s), which should set out the facilities level activities. The facilities management plan(s) can be cascaded in large organisations or in organisations with complex facilities portfolios.

4.1.1.2 All parts of the SFMS should be scalable, e.g. for small organisations, the organisational plan could be a single document that includes separate sections for:

a) the organisational objectives;

b) the SFMP;

c) the functional plans and FMSDP.

Alternatively, the organisational plan could be kept separate from the SFMP, which could include the facilities management plan(s) as a sub-section, or all three plans could be kept separately. While it is necessary to distinguish between the SFMP and the facilities management plan(s), it is not a requirement of this National Standard to create separate documents for each.

The concept of ensuring alignment and consistency between the organisational objectives, the facilities management policy, the SFMP, and the facilities management plan(s), should reinforce within the organisation that facilities level activities support the delivery of the organisational objectives. It is important that this alignment is communicated to ensure that stakeholders at all levels understand why facilities management activities are implemented.
4.4 Understanding the organisation and its context

4.2.1 When establishing or reviewing a SFMS, it is important to ensure that the approach is consistent and aligned with the external and internal contexts of the organisation, since these can significantly influence the design and scope of the SFMS.

4.2.2 Evaluating the organisation’s external context can include, but is not limited to, the following issues:

a) the social and cultural, political, legal, regulatory, financial, technological, economic, competitive and natural environment, whether National, national, regional or local;

b) key drivers and trends having impacts on the objectives of the organisation;

c) relationships with, and perceptions and values of, external stakeholders.

4.2.3 Evaluating the organisation’s internal context can include, but is not limited to, the following issues:

a) governance requirements;

b) organisational structure, roles, accountabilities and authorities;

c) policies, objectives, and the strategies that are in place to achieve them;

d) capabilities, understood in terms of resources and knowledge (e.g. capital, time, people, systems and technologies);

e) information systems, information flows and decision-making processes (both formal and informal);

f) relationships with, and perceptions and values of, internal stakeholders;

g) the organisation’s culture;

h) standards, guidelines and models adopted by the organisation;

i) the form and extent of contractual relationships;

j) risk management plans;

k) facilities management practices and other management systems, plans, process(es) and procedure(s);

l) integrity and performance of the facilities and facilities systems;

m) feedback from the investigation of previous facilities and facilities system failures, incidents, accidents and emergencies;

n) assessing the ability of the SFMS to achieve the intended outcomes of the organisational objectives
4.5 Determining the scope of the SFMS

4.3.1 The organisation should identify and review the stakeholders that are relevant to facilities management and the needs and expectations of these stakeholders.

4.3.2 Internal stakeholders can include the following:

a) employees within the organisation;

b) groups within the organisation, i.e. functional groups (e.g. engineering, accounting, maintenance, operations, purchasing, receiving, logistics) or other groups (e.g. safety delegates);

c) shareholders, management consortiums, owners.

4.3.3 External stakeholders can include the following:

a) customers, users, suppliers, Delivery Organisations and contractors;

b) non-governmental organisations, including civil society organisations, consumer organisations and the media with an interest in issues related to facilities management;

c) government organisations, government agencies, regulatory authorities, and politicians at all levels of government;

d) investors or taxpayers;

e) local communities;

f) those in society interested in social, financial, environmental or other forms of sustainability;

g) financial institutions, rating agencies, and insurers;

h) employee representatives.

4.3.4 Stakeholders’ needs and expectations should be documented and communicated. This may be captured in a statement of stakeholders needs within the SFMP and should reference any mandatory requirements, as well as the expectations of different stakeholder groups. The organisation should consider a means of tracking how current the information is, and the methods involved for its collection.

When engaging with stakeholders to determine their needs and expectations, the organisation can use the list of contexts given in 4.1 to frame the discussions.

One objective of facilities management is to enable the organisation to meet the service needs of the customers and users of its facilities(s). The organisation should measure the levels of service (see Error! Reference source not found.) that its facilities deliver, and analyse these against the requirements and expectations of its customers and users. A level of service review process can be a useful approach to understand the expectations of customers and users.

Stakeholders are likely to make judgments about the organisation’s facilities management and its facilities management outputs and outcomes, based on their
perceptions. These can vary due to differences in values, needs, assumptions, concepts and concerns, as they relate to the issues under discussion. Since the views of stakeholders can have a significant impact on the organisation’s facilities-related decisions, it is important that their perceptions are determined, recorded, and taken into account in the organisation’s decision-making process.

Understanding how facilities-related decisions are made is an important part of facilities management. The criteria for decision making are influenced by the needs of external and internal stakeholders, by the facilities management policy and by the risk attitude of the organisation. The external and internal stakeholders’ input to establishing decision-making criteria is important for setting priorities and resolving conflicting requirements. Decision-making criteria should be appropriate to the importance and complexity of the decisions being made. Decision-making criteria should be used to evaluate competing options to meet facilities management objectives and develop facilities management plans. The criteria can be expressed in a number of ways, to support quantitative, semi-quantitative or qualitative decisions. The processes to establish the decision-making criteria that guide facilities management should be clear and documented.

The level of detail needed when reporting to stakeholders will vary from one stakeholder to another, depending on the scope of the organisation’s activities and on the complexity of the facilities being managed. The detail should only disclose proprietary information as appropriate for the stakeholders receiving the information.

Stakeholders generally need to be informed about the decisions that can affect them and might need to provide input into decisions that can have an impact on them. Failure to both communicate and consult in an appropriate way about facilities management activities can in itself constitute a risk, because it could later prevent an organisation from fulfilling its objectives.

It is important that the terminology used in communicating with stakeholders is consistent and aligned with other functions in the organisation, and in accordance with legal requirements, where applicable.

This is particularly necessary when communicating financial information.

4.6 Determining the scope of the SFMS

In the initial development of the SFMS, the organisation should outline how it will establish, implement, maintain and improve the system. An initial review of the organisation’s current processes against the requirements of this National Standard will determine the areas that need to be developed to support the functioning of a compliant SFMS.

The SFMS should not stand alone. A factor of successful facilities management is the ability to integrate facilities management processes, activities and data with those of other organisational functions, e.g. quality, accounting, safety, risk and human resources. Where possible, existing business processes should be leveraged to avoid unnecessary new work and duplication of existing work and data. These interactions with the existing processes need to be clearly communicated to all involved.
Consideration should be given to how to prioritize what to develop first, as there is usually a limit on resources available. The review can guide the organisation in formulating plan(s) for implementing and prioritizing improvements to its SFMS.

An appropriate starting point is the establishment of a facilities management policy, which often helps to provide focus for the organisation and to identify its intentions. Following this, the organisation should develop its SFMP.

It is important to be aware of, and to clarify, any variations in terminology between this National Standard and the terminology used in the organisation’s common practice.

Compliance with all the requirements of this National Standard should be considered as achieving only the minimum starting point for an effective SFMS and should not be seen as the final goal.

5 Leadership

5.1 Leadership and commitment

Persons in top management and other relevant management roles throughout the organisation shall demonstrate leadership with respect to the SFMS.

EXAMPLE: This leadership and commitment can be shown by motivating and empowering persons to contribute to the effectiveness of the SFMS.

5.2 Communication

The organisation shall determine the internal and external communications relevant to the SFMS, including:

   a) on what it will communicate;
   b) when to communicate;
   c) with whom to communicate;
   d) how to communicate.

5.3 Management commitment

Top management shall demonstrate leadership and commitment with respect to the SFMS by:

   a) ensuring that policies and objectives are established for the business continuity management system and are compatible with the strategic direction of the organisation,
   b) ensuring the integration of the Facility management system requirements into the organisation’s business processes,
c) ensuring that the resources needed for the Facility management system are available,

d) communicating the importance of effective Facility Management and conforming to the SFMS requirements,

e) ensuring that the SFMS achieves its intended outcome(s),

f) directing and supporting persons to contribute to the effectiveness of the SFMS,

g) promoting continual improvement, and

h) supporting other relevant management roles to demonstrate their leadership and commitment as it applies to their areas of responsibility

NOTE: Reference to “business” in this National Standard is intended to be interpreted broadly to mean those activities that are core to the purposes of the organisation’s existence.

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

a) establishing an FM policy,

b) ensuring that SFMS objectives and plans are established,

c) establishing roles, responsibilities, and competencies for FM management, and

d) 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.

NOTE: These persons can hold other responsibilities within the organisation.

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

a) defining the criteria for accepting risks and the acceptable levels of risk,

b) actively engaging in exercising and testing,

c) ensuring that internal audits of the SFMS are conducted,

d) conducting management reviews of the SFMS, and

e) demonstrating its commitment to continual improvement.

5.4 Policy

Top management shall establish FM policy that:

a) is appropriate to the purpose of the organisation,

b) is derived from the strategy of the organisation

c) provides a framework for setting FM objectives,
d) includes a commitment to satisfy applicable requirements,
e) includes a commitment to continual improvement of the SFMS.
f) consistent with other policies and procedures of the organisation
g) consistent with the organisation’s overall risk management framework
h) complies with statutory and regulatory requirements
i) sufficient attention is given to the issue of sustainability – an enduring, holistic approach to economic activity, social progress and environmental responsibility

The SFMS policy shall

a) be available as documented information, be implemented and maintained
b) be communicated within the organisation,
c) be available to interested parties, as appropriate,
d) be reviewed for continuing suitability at defined intervals and when significant changes occur

Recommendations and guidelines for implementation:

a) FM policy drives the SFMS. FM policy is a means for top management to communicate to its managers, employees and stakeholders the organisation’s position and intentions re FM.

b) Top management should mandate the development and adoption of FM policy, the steps of which are typically:
   - identify the requirements of the organisational strategic plan of how this will be achieved through management of FM and the principles that will apply.
   - the policy must clearly define how it will facilitate, support and enable the achievement of the organisation’s vision, mission, business objectives and how it will align with
   - identify all statutory and all other elements of corporate governance requirements and develop a compliance statement for the policy
   - agree a draft FM policy at top management level that is aligned to corporate strategy
   - achieve an appropriate level of consensus about the FM policy after consultation with all stakeholders
   - ensure that the policy is readily understandable to all stakeholders
   - approve the FM policy at top management level and communicate it to all stakeholders ensuring that it is understood as a top management /Board mandate
   - check understanding and buy-in for FM policy at various levels throughout the organisation
   - ensure that FM policy remains relevant and meaningful by way of regular communication and review as well as continuous enforcement
5.5 Organisational roles, responsibilities and authorities

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

Top management shall assign the responsibility and authority for

a) ensuring that the management system conforms to the requirements of the National Standard, and

b) reporting on the performance of the SFMS to top management.

c) implementing and maintaining an FM strategy which is authorised by top management.

d) developing and implementing FM policy

6 Planning

6.1 The Strategic Management Process

Top management shall ensure that the organisation’s strategic management process includes facilities management planning in an interactive manner. This National Standard envisions a process wherein both the Organisational Plan and the Strategic Facilities Management Plan would be finalised virtually simultaneously. It is desirable to reduce the time which elapses between finalising organisational plan and commencing with the strategic facilities management plan.

Where justifiable, a ‘Strategy and Planning’ function shall be created within the Facilities Management Division or similar with expressed focus on being part of the organisation’s strategic management process and formulating the SFMP.

NOTE Facilities Management division can be referred to by other names, e.g. corporate real estate services, workplace management.

6.2 Planning horizons

The Facilities Management function shall align to two planning horizons for completeness and effective planning:

a) Organisation’s planning horizon of 3-5 years

b) Facility Lifecycle planning horizon of between 5 and 20 years. This is a horizon that is not usually shared with business and responsible for emergence of backlog maintenance, inter alia. It is an acknowledgement that significant capital replacements and/or investments can only be realised if planned for in advance. Advising business only a year in advance, sometimes months, that major facility systems and infrastructure such as vertical transport and electrical must be replaced is viewed as poor management and leads to budget rejections.
6.3 Planning for Competitive Advantage

The importance of facilities management within organisations rests in the inherent responsibilities of the function, which include but are not limited to:

a) acquiring, creating and maintaining enabling physical work environments and thus contributing to productivity and corporate image

b) acquiring, creating and maintaining income generating facilities

c) managing related costs only second the people costs in size and impact on organisations

d) managing biggest carbon footprint contributors (facilities) impacting organisation’s sustainability performance

e) managing assets which are central to creating competitive advantage in the market place

Accordingly, the Strategy and Planning function shall be responsible for identifying organisation’s sources of competitive advantage and then enacting appropriate initiatives to support the organisation. The identification of these sources of competitive advantage will be easier in a collaborative and interactive strategic management process.

NOTE ‘Strategy and Planning’ function can be a department within Facilities Management division, an individual or even a competency within existing personnel. What is important is fulfilment of role at least annually.

To illustrate the point, below is the indicative interaction between sources of competitive advantage, possible FM initiatives and ultimately the organisational benefits that would accrue. This Table 1 below is informed by the 2007 Journal of Corporate Real Estate, Vol. 9 on Corporate real estate and competitive strategy by Bas P. Singer, Bart A.G. Bossink, Herman J.M. Vande Putte. It has been expanded upon to extend to the “services” element of Facilities Management beyond the “Built” and structural element. The application has also been raised to portfolio and strategic level.

<table>
<thead>
<tr>
<th>Sources of Competitive Advantage</th>
<th>Possible FM initiatives</th>
<th>Organisational Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Cost</td>
<td>Portfolio Standardisation, Portfolio Optimisation</td>
<td>Economies of scale</td>
</tr>
<tr>
<td>Differentiation</td>
<td>Standardisation, Value Based and Combination</td>
<td>Communicates differentiating image, culture, vision, et cetera</td>
</tr>
</tbody>
</table>

Table 1: Relationship between competitive strategy and FM.

NOTE List of sources of competitive advantages, possible FM initiatives and organisational benefits are not meant to exhaustive but indicative only.

Portfolio standardisation refers to universal specifications to both services and facilities, this to realise economies of scale.
Value-based initiatives are those seeking to communicate a specific message, vision, image and/or culture. An example is designing a workspace that reinforces transparency and collaboration and creativity.

The combined initiatives refer to a combination of Value Based – and Standardisation initiatives.

6.4 The 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.

NOTE Facility Lifecycle activities and functional plans will be used interchangeably in the document. Of utmost importance is comprehensiveness to cover all facets in the lifecycle of a facility during the planning process. Responsibility, expertise and ownership of execution may rest elsewhere with the organisation.

The plan shall comprise various functional plans with focus squarely at whole facilities portfolio level. This focus will differentiate the SFMP from subsequent delivery plan(s). See Annex A.

![Facility Lifecycle Activities](image)

![Strategic Facilities Management Plan (SFMP)](image)

6.4.1 Functional FM 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
6.4.2 The Principles of Strategic Facilities Planning

In other to accelerate catching up to leading FM industries, two principles are of paramount importance and must be observed in the development of the SFMP or strategic facilities planning:

a) Bold portfolio level planning and targets must be set to demonstrate the strategic importance of FM to the organisation. Strategic performance metrics relevant to top management are important and include but not limited to:
   — Bottom line impact
   — Productivity, satisfaction and/or cultural impact
   — Sustainability performance
   — Risk mitigation / governance / statutory compliance
   — Service and project delivery performance
   — Long term budget consistency. No-surprises budgets

b) Strategic agility to anticipate and respond to organisational expectations to earn a competitive edge.

7 Support

7.1 Resources

The organisation shall determine and provide the resources needed for the establishment, implementation, maintenance and continual improvement of the SFMS. Accordingly, a resources plan shall be formulated alongside the SFMP and in line with Policy.

The strategic facilities management plan will be used to determine requirement for human, financial and technological resources.
7.1.1 Human resourcing process

First and foremost, an exercise shall be undertaken to determine critical functions for dedicated in-house and appropriate functions for outsourcing.

The in-house resources shall be determined in terms of competencies see 7.2 and quantities for all functional plans.

Currently available resources shall be mapped out under each functional area or competency.

A gap analysis shall be determined for each functional area or competency.

Options for resourcing shall be determined, either internal resourcing which requires recruitment or external resourcing which may include insourcing or consultants.

7.1.2 Technological resourcing process

Based on in-house and outsourcing model discussed above (HR), requirement for computer-aided facilities management (CAFM) shall be determined. For the sake of clarity, CAFM includes computerised maintenance management system (CMMS).

7.1.3 Financial resourcing process

The different functional plans of the SFMP shall be used as the basis for budgeting. The Human and Technology Resources will complete the process.

Two budgets shall be prepared as follows:

a) Strategic Facilities Budget shall be in line with the business planning horizon of 3-5 years.

b) Life Cycle Replacement Budget shall be in line with the projected facility lifespan, may vary between five and 20 twenty years.

7.2 Competence

The organisation shall:

a) determine the necessary competence of person(s) doing work under its control that affects its facilities management performance;

b) ensure that these persons are competent on the basis of appropriate education, training, or experience;

c) where applicable, take actions to acquire the necessary competence, and evaluate the effectiveness of the actions taken;
d) retain appropriate documented information as evidence of competence.

For purposes of guidance, the following are the extent core FM competencies critical for effective SFMS at one point or another. These will be part of the management structure or contracted in as and when required, depending on the circumstances:

a) Strategic Planning — development and monitoring of SFMP and workspace planning
b) Client Relationship Management (CRM) — Plans and processes to communicate with internal and external stakeholders
c) Operations and Maintenance — Building operations and maintenance, occupant services
d) Real Estate/Property Management — Real estate planning, acquisition and disposition
e) Emergency Preparedness and Business Continuity — Emergency and risk management plans and procedures
f) Environmental Stewardship and Sustainability — Sustainable management of built and natural environments
g) Finance and Business — Schedules, budgets, financial analyses, procurement
h) Project Management — Oversight and management of all related projects and contracts
i) Quality — Best practices, process improvements, audits and measurements
j) Technology — Facility management technology, workplace management systems

NOTE Applicable actions can include, for example, the provision of training to, the mentoring of, or the reassignment of currently employed persons; or the hiring or contracting of competent persons.

7.3 Awareness

Persons doing work under the organisation’s control shall be aware of:

a) the facilities management policy;

b) their contribution to the effectiveness of the SFMS, including the benefits of improved facilities management performance;

c) the implications of not conforming with the SFMS requirements.
8 Operation

The diagram below indicates the high-level process that will be required to deliver the required services, and each activity is described in more detail in the paragraphs below:

8.1 Operational planning and control

The Delivery Organisation shall plan, implement and control the processes needed to meet requirements, and to implement the actions determined in Error! Reference source not found., by:

a) establishing criteria for the processes;

b) implementing control of the processes in accordance with the criteria;

c) keeping documented information to the extent necessary to have confidence that the processes have been carried out as planned.

The Delivery Organisation shall control planned changes and review the consequences of unintended changes, taking action to mitigate any adverse effects, as necessary.

The Delivery Organisation shall ensure that outsourced processes are controlled.

8.2 Demand Organisation Requirements

NOTE: In instances where the Demand Organisation has developed a Strategic Facilities Management Plan or other plans related to Facilities Management such as those described in ‘Guidelines for the Development of FM Plans - SANS XXXXX’, such a plan shall form the basis of the Delivery Organisation’s planning (Facilities
Management Service Delivery Plan (FMSDP)) for service mobilisation and delivery. However, if such plans are not offered, the service organisation itself should develop such a plan based on the specifications provided in paragraphs 8.2.1 and 8.2.2 below.

For purposes of clarity and avoidance of duplication among the SFMP, FMSP and functional plans, please see Annex A.

8.2.1 Determination of Requirements Related to the Facilities Services

The Delivery Organisation shall determine

a) requirements specified by the Demand Organisation, including the requirements for delivery and post-[service] delivery activities,

b) requirements not stated by the Demand Organisation but necessary for specified or intended use, where known,

c) statutory and regulatory requirements related to the services and

d) any additional requirements determined by the Demand Organisation.

8.2.2 Review of Requirements Related to Facilities Services

The Delivery Organisation shall review the requirements related to the Facilities Services. This review shall be conducted prior to the Delivery Organisation’s commitment to supply a Facilities Service to the Demand Organisation (e.g. submission of tenders, acceptance of agreements, contracts or orders, acceptance of changes to agreements, contracts or orders) and shall ensure that:

a) Facilities Services requirements are defined,

b) agreement, contract or order requirements differing from those previously expressed are resolved, and

c) the Delivery Organisation has the ability to meet the defined requirements.

Records of the results of the review and actions arising from the review shall be maintained.

Where the Demand Organisation provides no documented statement of requirement, the Demand Organisation’s requirements shall be confirmed by the Delivery Organisation before acceptance.

Where Facilities Services requirements are changed, the Delivery Organisation shall ensure that relevant documents are amended and that relevant personnel are made aware of the changed requirements.
8.3 Services Mobilisation

8.3.1 Services Mobilisation Planning

The Delivery Organisation shall plan and control the Mobilisation of Facilities Services.

During the Mobilisation planning, the Delivery Organisation shall determine

a) the Set-up stages,

b) the review, verification and validation that are appropriate to each Mobilisation stage, and

c) the responsibilities and authorities for Mobilisation.

The Delivery Organisation shall manage the interfaces between different groups involved in Mobilisation to ensure effective communication and clear assignment of responsibility.

Planning output shall be updated, as appropriate, as the Mobilisation progresses.

8.3.2 Services Mobilisation Inputs

Inputs relating to Facility Services requirements shall be determined and records maintained. These inputs shall include:

a) functional and performance requirements,

b) applicable statutory and regulatory requirements,

c) where applicable, information derived from previous similar Configurations and Set-ups, and

d) other requirements essential for Mobilisation of Facilities Services.

These inputs shall be reviewed for adequacy. Requirements shall be complete, unambiguous and not in conflict with each other.

8.3.3 Services Mobilisation Outputs

The outputs of Mobilisation shall be provided in a form that enables verification against the Mobilisation input and shall be approved prior to release.

Mobilisation outputs shall:

a) meet the input requirements for c,

b) provide appropriate information for sourcing, production [service repeatability] and for service provision,

c) contain or reference product acceptance criteria, and
d) specify the characteristics of the [service] product that are essential for its safe and proper use.

8.3.4 Services Mobilisation Review

At suitable stages, systematic reviews of Mobilisation shall be performed in accordance with planned arrangements

a) to evaluate the ability of the results of Mobilisation to meet requirements, and
b) to identify any problems and propose necessary actions.

Participants in such reviews shall include representatives of functions concerned with the Mobilisation stage(s) being reviewed. Records of the results of the reviews and any necessary actions shall be maintained.

8.4 Facilities Services Delivery and Operations

8.4.1 Control of Facilities Services Provision

The Delivery Organisation shall plan and carry out Facilities Services provision under controlled conditions. Controlled conditions shall include, as applicable

a) the availability of information that describes the characteristics of the facilities services,
b) the availability of work instructions, as necessary,
c) the use of suitable equipment,
d) the availability and use of monitoring and measuring devices,
e) the implementation of monitoring and measurement, and
f) the implementation of release, delivery and post-service delivery activities.

8.4.2 Validation of processes for Facilities Services Provision

The Delivery Organisation shall validate any processes for facilities services provision where the resulting output cannot be verified by subsequent monitoring or measurement. This includes any processes where deficiencies become apparent only after the service has been delivered.

Validation shall demonstrate the ability of these processes to achieve planned results.

The Delivery Organisation shall establish arrangements for these processes including, as applicable

a) defined criteria for review and approval of the processes,
b) approval of equipment and qualification of personnel,
c) use of specific methods and procedures,
d) requirements for records, and
e) revalidation.

8.5 Sourcing and Outsourcing

8.5.1 Sourcing Processes

The Delivery Organisation shall ensure that sourced services conforms 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.

8.5.2 Sourcing Information

Sourcing information shall describe the service to be sourced, including where appropriate

a) requirements for approval of services, procedures, processes and equipment,
b) requirements for qualification of personnel, and
c) quality management system requirements.

The Delivery Organisation shall ensure the adequacy of specified sourcing requirements prior to their communication to the supplier.

8.5.3 Verification of Procured and Outsourced Services

The Delivery Organisation shall establish and implement the inspection or other activities necessary for ensuring that sourced services meets specified sourcing requirements.

Where the Delivery Organisation or its customer intends to perform verification at the supplier's or Delivery Organisation's premises, the Delivery Organisation shall state the intended verification arrangements and method of Service Mobilisation in the sourcing information.
Where a Delivery Organisation chooses to outsource any process that affects product conformity with requirements, the Delivery Organisation shall ensure control over such processes. Control of such outsourced processes shall be identified within the FM management system.

8.5.4 Sourcing of energy services, products, equipment and energy

When sourcing energy services, products and equipment that have, or can have, an impact on significant energy use, the Delivery Organisation shall inform suppliers that sourcing [procurement] is partly evaluated on the basis of energy performance.

The Delivery Organisation shall establish and implement the criteria for assessing energy use, consumption and efficiency over the planned or expected operating lifetime when procuring energy using products, equipment and services which are expected to have a significant impact on the Demand Organisation’s energy performance.

The Delivery Organisation shall define and document energy purchasing specifications, as applicable, for effective energy use.

8.6 Risk Management

The Delivery Organisation should implement those processes and actions needed to address the Demand Organisation’s Facility Management risks. This should be done by establishing the criteria for risk management processes, controlling implementation of these processes based on the defined criteria, and keeping documentation that demonstrates the risk management processes have been executed as planned.

The Delivery Organisation should have the capability to determine emerging risks and to consider their impacts on service delivery objectives. The Delivery Organisation’s management system should enable the Delivery Organisation to consider and plan changes that affect Facilities Management services with sufficient time to act if required.

Implementation should involve an iterative process to achieve a balance between cost, risk and performance, to resolve conflicts between what is planned and what can be achieved, while taking into account the constraints faced by the Demand Organisation.

8.6.1 Business Impact Analyses

The Delivery Organisation shall establish, implement, and maintain a formal and documented evaluation process for determining continuity and recovery priorities, objectives and targets. This process shall include assessing the impacts of risks occurring that support the Delivery Organisation’s products and services.

The business impact analysis shall include the following:

a) identifying activities that support the provision of products and services;
b) assessing the impacts over time of not performing these activities;

c) setting prioritized timeframes for resuming these activities at a specified minimum acceptable level, taking into consideration the time within which the impacts of not resuming them would become unacceptable; and

d) identifying dependencies and supporting resources for these activities, including suppliers, outsource partners and other relevant interested parties.

8.6.2 Risk assessment

The Delivery Organisation shall establish, implement, and maintain a formal documented risk assessment process that systematically identifies, analyses, and evaluates the risk of disruptive incidents to the Delivery Organisation.

NOTE This process should be developed in accordance with SANS 31000.

The Delivery Organisation shall:

a) identify risks of disruption to the Delivery Organisation’s prioritized activities and the processes, systems, information, people, assets, outsource partners and other resources that support them,

b) systematically analyse risk,

c) evaluate which disruption related risks require treatment, and

d) identify treatments commensurate with business continuity objectives and in accordance with the Delivery Organisation’s risk appetite.

NOTE The Delivery Organisation must be aware that certain financial or governmental obligations require the communication of these risks at varying levels of detail. In addition, certain societal needs can also warrant sharing of this information at an appropriate level of detail.

8.7 Service Delivery Review

The organization shall on a regular basis review its service delivery in order to ensure that:

a) Service Delivery addresses the demand organization’s requirements.

b) Mobilization of new / additional services are aligned with the Demand organization’s changing requirements.

c) Service Delivery remains compliant with relevant statutory requirements.

d) Sourcing and outsourcing strategies are aligned with the Demand organization’s changing requirements and / or changes in the relevant industry.

e) Risks identified are addressed through changes in Service Delivery processes or levels where applicable.
9 Performance Evaluation

9.1 Monitoring, measurement, analysis and evaluation

The organisation shall determine:

a) what needs to be monitored and measured;

b) the methods for monitoring, measurement, analysis and evaluation, as applicable, to ensure valid results;

c) when the monitoring and measuring shall be performed;

d) when the results from monitoring and measurement shall be analysed and evaluated.

The organisation shall evaluate:

a) The effectiveness of the SFMS, financial and non-financial.

b) The performance of the facilities

c) On the effectiveness of the processes for managing risks and opportunities.

The organisation shall ensure that its monitoring and measurement enables it to meet the requirements of 4.4.

The organisation shall retain appropriate documented information as evidence of the results.

Strategic performance metrics are to be clearly defined and agreed between top management and the Delivery Organisation, along with the agreed measure and level of success to be achieved. They should include financial and non-financial indicators as show below in this indicative metrics table:

<table>
<thead>
<tr>
<th>Strategic Performance Metrics</th>
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<tbody>
<tr>
<td>Customer</td>
</tr>
<tr>
<td>Customer satisfaction</td>
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<tr>
<td>Cultural Impact</td>
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<td>Operational Performance</td>
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<td>Service / Project Delivery</td>
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<tr>
<td>Technology / Knowledge</td>
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<tr>
<td>systems</td>
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</table>
9.2 Internal audit

The organisation shall conduct internal audits at planned intervals to provide information on whether the SFMS conforms to:

a) the organisation’s own requirements for its SFMS;
b) the requirements of this National is effectively implemented and maintained.

The organisation shall:

a) plan, establish, implement and maintain an audit programme(s) including the frequency, methods, responsibilities, planning requirements and reporting, which shall take into consideration the importance of the processes concerned and the results of previous audits;
b) define the audit criteria and scope for each audit;
c) select auditors and conduct audits to ensure objectivity and the impartiality of the audit process;
d) ensure that the results of the audits are reported to relevant management
e) retain documented information as evidence of the implementation of the audit programme and the audit results.

9.3 Management review

Top management shall review the organisation’s SFMS, at planned intervals, to ensure its continuing suitability, adequacy and effectiveness.

The management review shall include consideration of:

a) the status of actions from previous management reviews;
b) changes in external and internal issues that are relevant to the SFMS;
c) information on the Facilities Management performance, including trends in:
   — nonconformities and corrective actions;
   — monitoring and measurement results;
   — audit results;
d) opportunities for continual improvement.

The outputs of the management review shall include decisions related to continual improvement opportunities and any need for changes to the SFMS.

The organisation shall retain documented information as evidence of the results of management reviews.
9.4 Improvement

9.4.1 Nonconformity and corrective action

When a nonconformity occurs, the organisation shall:

a) react to the nonconformity and, as applicable:

b) take action to control and correct it;

c) deal with the consequences;

d) evaluate the need for action to eliminate the causes of the nonconformity, in order that it does not recur or occur elsewhere, by:
   — reviewing the nonconformity;
   — determining the causes of the nonconformity;
   — determining if similar nonconformities exist, or could potentially occur;

e) implement any action needed;

f) review the effectiveness of any corrective action taken;

g) make changes to the SFMS, if necessary. Corrective actions shall be appropriate to the effects of the nonconformities encountered. The organisation shall retain documented information as evidence of:
   — the nature of the nonconformities and any subsequent actions taken;
   — the results of any corrective action.

10 Performance improvement

10.1 Nonconformity and corrective action

When a nonconformity occurs, the organisation shall:

a) react to the nonconformity and, as applicable:
   — take action to control and correct it;
   — deal with the consequences;

b) evaluate the need for action to eliminate the causes of the nonconformity, in order that it does not recur or occur elsewhere, by:
   — reviewing the nonconformity;
   — determining the causes of the nonconformity;
— determining if similar nonconformities exist, or could potentially occur;

c) implement any action needed;

d) review the effectiveness of any corrective action taken;

e) make changes to the SFMS, if necessary. Corrective actions shall be appropriate to the effects of the nonconformities encountered.

The organisation shall retain documented information as evidence of:

a) the nature of the nonconformities and any subsequent actions taken;

b) the results of any corrective action.

10.2 Continual improvement

The organisation shall continually improve the suitability, adequacy and effectiveness of the SFMS by implementing the following mechanisms:

a) stakeholder surveys;

b) facility studies including condition audits, workspace use studies,

c) benchmarking
Annex A – Scope of The Plans: SFMP and FMSDP

Facility Lifecycle Activities

- Acquire & Optimise
- Service* & Operate
- Maintain^
- Dispose
- Monitor & Measure

Comply with Statutes, Regulation & Stakeholders Expectations

Strategic Facilities Management Plan (SFMP)

- Acquisition plan
- Workspace plan
- Green building programme
- Portfolio Service* & Operation plans
- Portfolio Maintenance^ plans – Mission critical, Other Green building programme
- Portfolio Disposal plan
- Condition / Backlog / Compliance Management plan

Facilities Management Service Delivery Plan (FMSDP)

- Implementation Plan
- Design Plans
- Project Plans
- Resources Plan
- Facility Service* & Operation Schedules
- (Facility type, Client, Criticality)
- Resources Plan
- Project Plans
- Facility Maintenance^ Schedules
- (Facility type, Client, Criticality)
- Resources Plan
- Project Plans
- Implementation Plan
- Facility Maintenance^ / Service Schedules
- (Facility type, Client, Criticality)
- Project Plans

* Soft, workplace, project, guarding, ambassadorial, helpdesk and other business support services
^ Maintenance includes technical services electrical, hvac, vertical transport, fire and non-technical, architectural, civil, structural and wet services
Note: Stakeholder Relationship Management cuts across all plans and sub plans
Bibliography

i. Green Building Council of South Africa – Assessment criteria for new builds and existing buildings

ii. JLL Global Real Estate Transparency Index 2010


v. SANS 55000/1/2 – Asset Management

vi. SANS 9001:2008 – Quality Management

vii. SANS 31000 – Risk Management

viii. SANS 22301 – Business Continuity

ix. OSHAS 18001 – Occupational Health and Safety Management

x. SANS 50001 – Energy Management