Building solid FM foundations to help you achieve compliance

SFG20

DRIVING FACILITIES EXCELLENCE

If you think of building maintenance compliance like building a house, you can't start building the structure before you establish solid foundations.

To truly have the best chance of compliance you need to understand your assets, create your maintenance plan, and be able to evidence that you have carried out all your statutory tasks as a bare minimum. Compliance isn't easy but it can be simple if you take a structured approach and use the right tools to help you.

Building solid FM foundations are critical. But where do you start if you don't have an asset register? What do you do if your foundations aren't strong enough? What about effectively collaborating with all of your partners and stakeholders?

Where are you starting from?

Not every organisation has the same starting point – the history of your FM strategy will be impacting how well your foundations are set up. They most likely are not foundations that you have set up yourself.

If you have strong foundations, great – it's time to optimise. If you don't have strong foundations, there is some work to do, but this guide will walk you through how to do that.

You might be starting with these challenges:

Asset register not up to date

If your asset register is not up to date you can't be sure you are meeting statutory compliance. Without an up-to-date asset register you can't create maintenance regimes or plans for all of your assets.
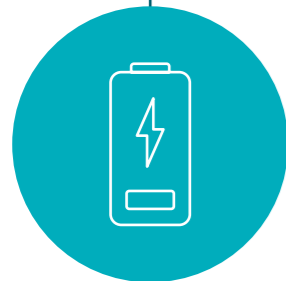
Not enough resource

Carrying out the required work becomes a challenge as resources are spread too thin to do everything that is needed.
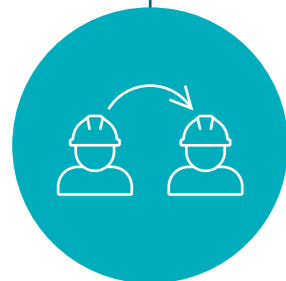
Messy changes between service providers

Handovers often come with a loss of information relating to your buildings. Ensuring proper handover can save you time, money, and ensure the foundations you have built are kept in place.

Budget allocated

Maintenance budgets are often competing against strategic priorities in the business – it can be hard to persuade decision makers to allocate sufficient funding to your estate, especially in a culture of funding cuts

Staying up to date with legislation

Staying up to date with changes in legislation and industry standards is a full time job if you are not using the SFG20 software, Facilities-iQ. Without enough resource, or funding this can be a challenge for any FM team.

Outdated ways of working

Some organisations are still using print out PDFs of the SFG20 standard. When the standard changes, the PDF becomes out of date. This risks you building foundations upon information that doesn't help you achieve compliance.

Failure to make updates to FM systems

Updating your CAFM system in the past has been time consuming every time you need to make a change to your maintenance plan. This is no longer the case if you are using Facilities-iQ and an SFG20 integrated digital partner as your CAFM provider.
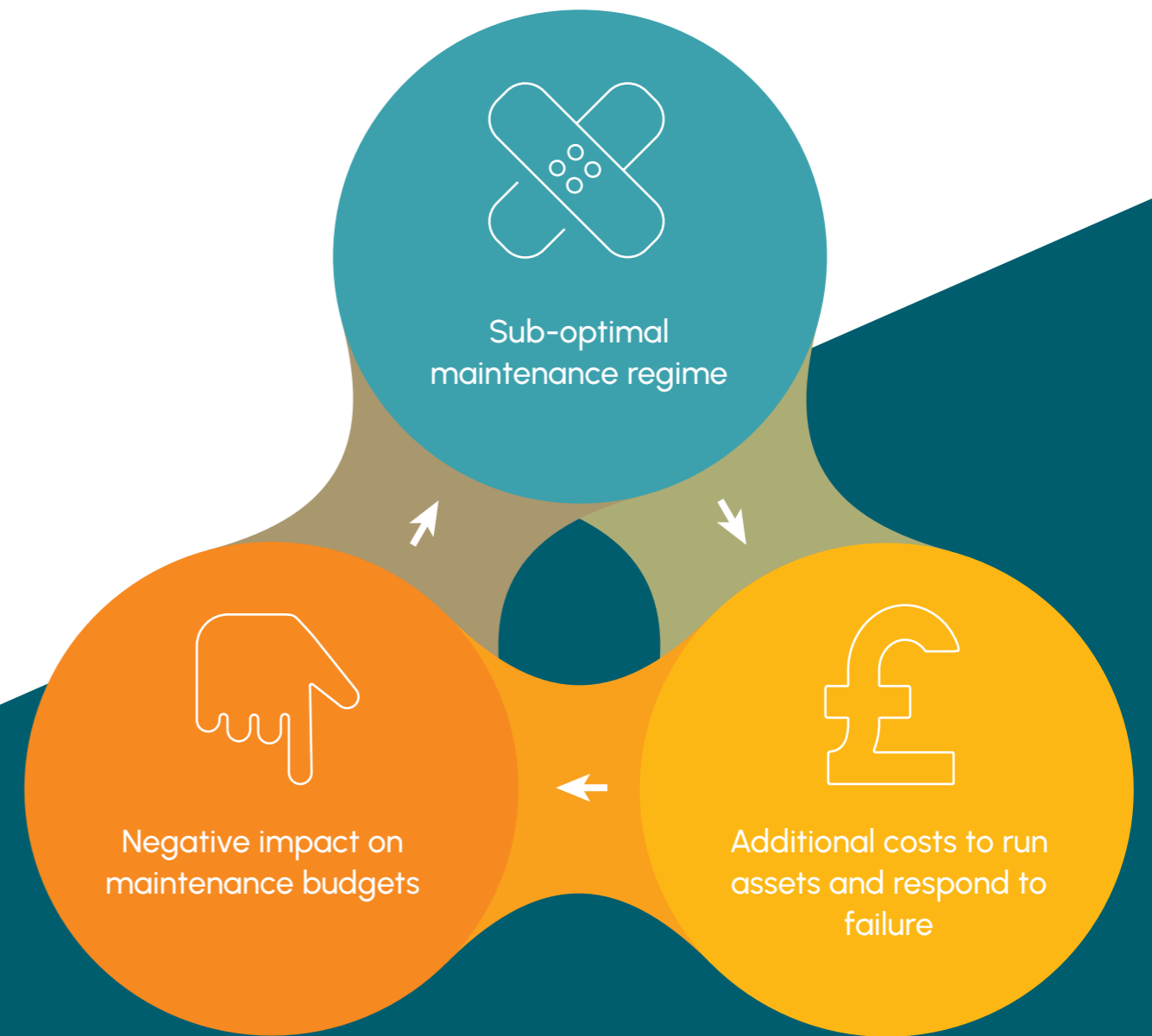
Organisations can get themselves in a perpetual cycle of doom if their foundations aren't right. It can lead to a vicious cycle of reactive maintenance which can increase risk and cost to your organisation.

Vicious Cycle of Reactive Maintenance

Reactive maintenance is about addressing repair and maintenance needs as they arise, without pre-scheduled plans. It's the "fix it when it breaks" approach, where actions are taken only after a failure has been detected. It is a straightforward strategy but comes with its challenges.

The vicious cycle of reactive maintenance starts when your maintenance regime is sub-optimal. This leads to inappropriate, insufficient, or simply no maintenance on assets which in the long term leads to additional costs and increased energy consumption in the absence of any maintenance.

Without monitoring and maintaining your assets you risk them breaking down unexpectedly which can mean paying a premium on call out fees and parts required to fix the asset. Impact is seen in both assets breaking down, and resource being pulled away from planned preventative maintenance activity. This results in higher cost, time wastage, and you enter the vicious cycle that is hard to break out of.

Sub-optimal maintenance regime

Negative impact on maintenance budgets

Additional costs to run assets and respond to failure

An ideal situation for an organisation is to complete more than just the statutory tasks. It would make for safer and more operationally effective assets, but this is often far from the reality. Your second priority after statutory tasks should be applying the correct level of maintenance to critical assets, using a risk based approach.

Consider your maintenance approach on assets that significantly impact the organisation. If that asset breaks down is the impact on operations, or health and safety significant? Regular servicing can prevent unexpected failures and save you time and money by ensuring assets are maintained throughout their lifecycle.

Using PDFs? You are falling off the standard

A common question we receive at SFG20 is 'can we download maintenance schedules as PDFs?' The important, and simple answer with Facilities-iQ is no.

Why? The SFG20 standard changes every month, with on average 800 schedule updates per year. If you have a print copy of a schedule it cannot update. You run the risk of falling off the standard and being non-compliant by failing to complete your statutory tasks.

The Building Safety Regulator has made a point of sanctions being their first step, not a last resort.

With the average fine of £150,000, it is costly to risk non-compliance.

We understand that PDFs is the old way of doing things, and you may like them because they are easy to use and easy to share. You may even have processes built around them, but that doesn't mean it is the best solution for you moving forward. In fact, Facilities-iQ has a simple solution for you to share SFG20 content.

If PDFs are your chosen way of sharing content, this can be challenging and take up a lot of your time as it means that you'll have to always ensure that you're circulating the most up-to-date version of information with your team.

As a solution to this, **Facilities-iQ enables you to create secure sharing links at the touch of a button** to share Maintenance Regimes (or parts of a regime) with authorised people only, **always under the latest accepted version of SFG20.**

Using sharing links in Facilities-iQ:

- Allows all users to see the latest, accepted version of the SFG20 standard, reducing your risk and helping you stay on top of ever-changing legislation

- Saves you time and money by removing the need to print, distribute and update PDFs

- Presents an eco-friendlier way to transfer information

- Provides audit trails, upholding accountability, quality control and compliance

- Allows you to tender and compare quotations on a like-for-like basis

- Removes effort from heavy manual input, enhancing work efficiency and saving precious time
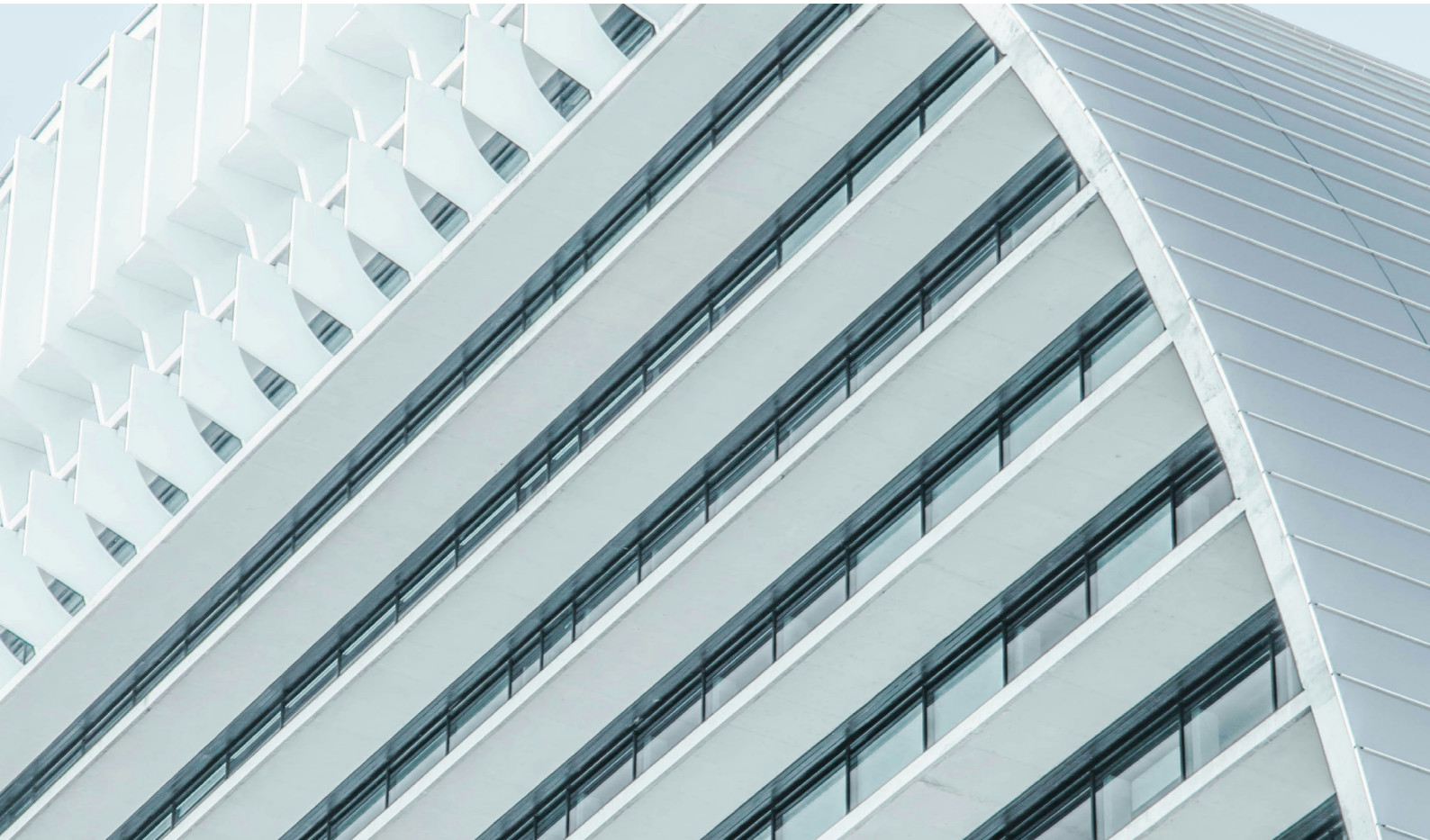
What's wrong with a PDF?	Why does it matter?
They do not allow teams to collaborate	There is no mechanism for approval or sign off
They require printing, filing, manually updating and distributing after every update	Huge working inefficiencies – wasted time, money and effort.
They only offer a snapshot of one moment in time – the standard changes	By using static content you open yourself up to out of date guidance and unwittingly fall off the SFG20 industry standard
Confidential information about assets can easily be seen and accessed by the wrong recipients	They contain site specific, confidential information which should not be shared outside of your organisation. You have less control over who is accessing the information
Printing is both costly and bad for the environment	Wastage of money and negative impact on your carbon footprint
They do not provide an audit trail	You are required to hold an audit trail from design through to disposal of your assets to maintain the golden thread of information

We had an old system that was heavily paper based but obviously we live in the digital age now, so when I joined the trust in 2018, I quickly realised the system was lacking in a lot of the features that modern organisations really need to be working with.

That started the journey to getting a CAFM, but when I was asked to keep up with legislation as well, I knew I couldn't do it all myself - that's a full-time job!

Rather than pay someone to keep on top of all those HTMs, HBNs, legislation etc, I thought there must be solutions out there which provide that service at a fraction of the cost that you would pay someone full-time, so let's do some research - and that's where the journey started that led me to SFG20 ultimately.

SFG20 gives us easy access to all compliance information quickly and the technical bulletins we get monthly keep us up to date so we can quickly jump into the system, find any sort of schedule changes and adopt them as quickly as possible. We conduct internal meetings to make sure that we have the capacity to handle those changes if necessary, but SFG20 allows us to be on the pulse.

Mathew Houghton,
NHS Sheffield

Check out the full conversation with Mathew Houghton.

PDFs are not the only way people are falling off the standard

You may be falling off the standard if you are manually inputting SFG20 content into your CAFM. FM systems are often infrequently updated because the process of doing so is a cumbersome, manual and time consuming process.

As a result, building owners are exposing themselves to the risks of non-compliance because their plan does not contain the tasks required to comply with the most recent legislative requirements.

By choosing an SFG20 Digital Partner, users benefit from a seamless flow of data into their operational systems, meaning they need never worry about non-compliance again and save significant time by eliminating the need to manually update their FM systems.

Never fall off the SFG20 standard again!

By choosing a provider that is part of the SFG20 Digital Partner Programme, the issues with manual imports and data entry become a thing of the past. Our API allows SFG20 updates to flow into our digital partners' FM systems.

SFG20 Digital Partners use an API that removes the need to import or enter data manually. As soon as updates are made to SFG20 content, users are notified and can choose when to accept updates. Accepted updates will flow directly into other connected FM systems. The API ensures that integration partners receive accepted updates to SFG20 maintenance schedules automatically, meaning users never risk falling off the SFG20 standard.

Complex maintenance tasks are broken down into straightforward steps which are easy to integrate with our digital partners' systems.

You can see all of the digital partners on the SFG20 Digital Partner Page.

Is your current FM system provider not a Digital Partner yet?

Contacting your FM system provider is essential because it lets them know that you (their customer or potential customer) would like to benefit from this integration as soon as possible.

Many of you contact us to ask this information, but we do not dictate the pace of our Partner's development cycles. Only you, the customer, can do that by demonstrating your urgent need for the product.

If you want to improve your efficiency, retain control, and achieve compliance, choosing an SFG20 Digital Partner is your best option.

3 Steps to establishing a solid FM foundation

Step 1
Update your asset register

An accurate and up-to-date asset register is the cornerstone of effective building maintenance. It serves as the blueprint where you can plan and execute all your maintenance activities from. However, the challenge lies in the fact that many facilities operate with outdated, inaccurate or, in some cases, non-existent asset registers. This oversight can lead to inefficiencies, increased costs, and compliance risks.

Understanding the full inventory of a building's assets allows for more strategic maintenance planning. It ensures that all necessary maintenance activities are accounted for and scheduled appropriately, reducing the risk of unexpected failures or compliance issues.

Often organisations find themselves with outdated asset registers which can lead to a reactive maintenance approach, where issues are addressed only after they arise. This not only increases the risk of non-compliance but also results in higher maintenance costs and potential downtime.

With an accurate asset register, FMs can shift from an overly reactive approach to a proactive maintenance strategy. This allows for the identification of maintenance needs before they become critical, ensuring that the building remains compliant with all relevant regulations and standards.

Meticulous documentation and record-keeping are vital for demonstrating compliance in the event of an audit or legal challenge. This includes keeping detailed records of maintenance activities, audits, training, and any incidents or non-compliance issues.

To get started, use the SFG20 asset register checklist:

Does your asset register contain:

- Asset location, detailed by building, floor, room number, room name
- Links to CIBSE Guide M estimated economic life, so you can project future capital cost for replacement and plan for that replacement
- Assets mapped to the relevant SFG20 maintenance schedules
- Refrigerants used in systems recorded eg DX unit
- Pressure of pressure vessels recorded
- Photographic evidence of each assets conditions

> If an asset register is over 80% correct then that's generally considered good within industry. Unfortunately, we've come across instances where entire buildings and systems have been missing from asset registers.

Paul Bullard,
SFG20 Product Director

Step 2
Create a comprehensive maintenance plan

It isn't an easy task to work out how to maintain each asset in a compliant and optimal way. It is time consuming and trying to do it yourself will take over your job! You need to create a maintenance plan that aligns with current legislation and the specific needs of your buildings and your organisation.

Staying up to date with the latest legislation is crucial for compliance. A comprehensive maintenance plan includes all relevant statutory tasks for that facility as a bare minimum. By adopting the SFG20 standard, FMs can build a maintenance plan that meets legal requirements and optimises the lifespan of their assets. The SFG20 standard is created and upheld by a team of technical authors. The library is extensive covering more than 70 asset types.

Many FMs find themselves trapped in a cycle of reactive maintenance, which can divert resources away from planned preventative maintenance activities. By creating a comprehensive maintenance plan, FMs can break this cycle, allocating resources more effectively and ensuring that maintenance activities contribute to overall compliance.

Conducting regular compliance audits and risk assessments can help facilities identify potential areas of non-compliance before they become issues. These assessments should be thorough, covering all aspects of the legal frameworks that apply to your assets.

Step 3
Stay up to date

Once you have a comprehensive maintenance plan in place, that's not the end of the road. You must stay up to date in all aspects of FM. Ignorance won't hold up in a court of law – you must be informed with the latest information.

This starts with education and training, ensuring that all staff, from management to maintenance personnel, are educated on compliance requirements and best practices. This includes training on the use of the SFG20 industry standard and understanding the legal implications of their work. You should be aiming to build a culture of compliance, which requires an ongoing commitment to education and engagement at all levels of your organisation.

The path to compliance is full of challenges, from the complexities of legal and regulatory landscapes to the practicalities of implementing new maintenance strategies and technologies. These challenges also present opportunities for growth and improvement. By adopting a strategic approach to compliance, FM teams can improve operational efficiencies, reduce risks, and enhance the overall value of assets.

Maintenance regimes and how to use them effectively

What is a maintenance regime?

A Maintenance Regime is a Facilities-iQ feature that allows you to organise and tailor schedules to suit your way of working. You can then share these regimes out to colleagues, technicians or engineers out in the field via sharing links. Regimes are often used to organise schedules by specific factors, such as budget, location, or contract.

Regimes can be shared with others via secure sharing links for the purposes of providing a specification for a tender or for completion of works. They are an excellent solution for maintaining a Golden Thread of information about a building.

How does a maintenance regime differ from a maintenance plan?

A Maintenance Regime differs from a plan in that a plan assigns resources to a specific date for each task, whereas a regime will state what tasks need to be carried out, how often and by whom in terms of skill set.
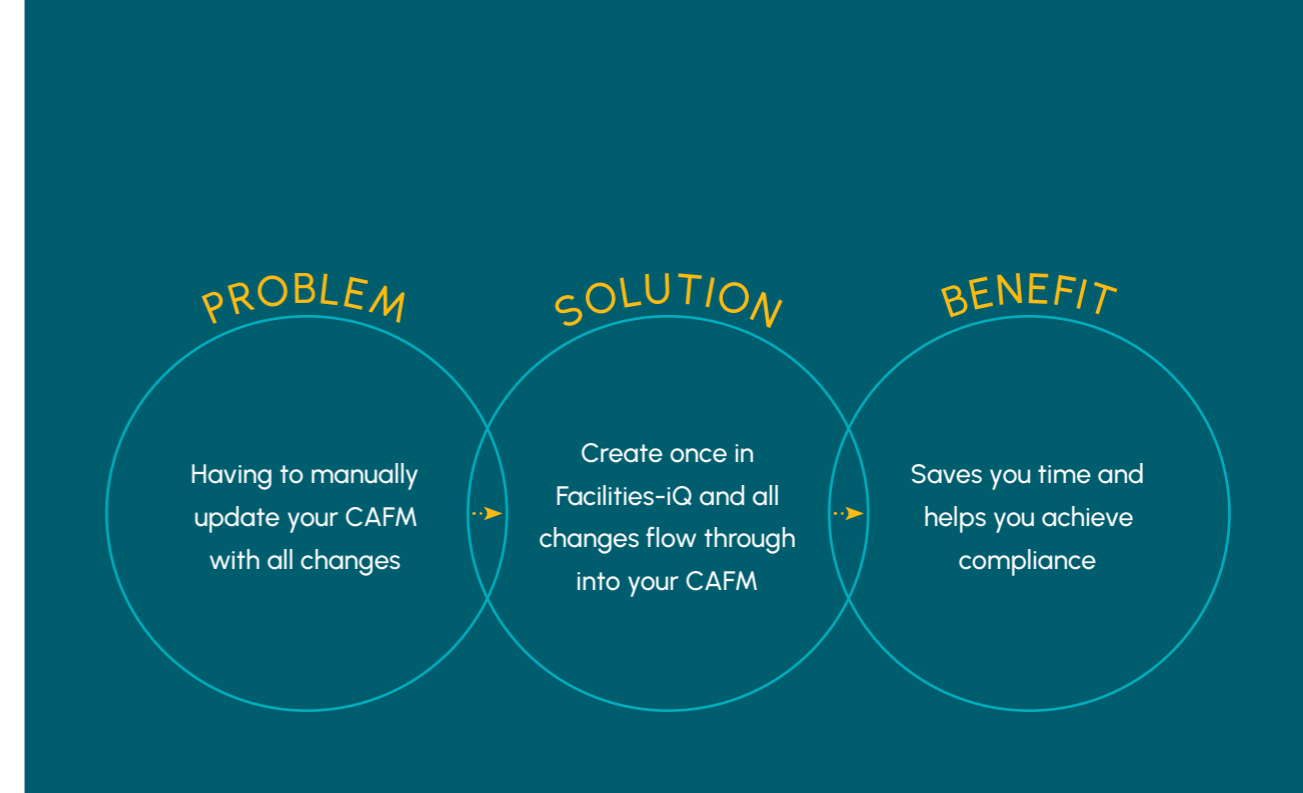
This includes all of the relevant task instructions, frequencies, skill sets and criticality that are needed to build your maintenance plan.

Why do you need a maintenance regime?

One of the greatest advantages of setting up Maintenance Regimes in Facilities-iQ is their ability to save you time as it removes the need to make manual imports and/or adjustments to your CAFM. Fundamentally, Maintenance Regimes can be used to organise schedules by specific factors, such as location, industry or contract in a way that's entirely bespoke to you.

For example, you might group multiple sites in one regime if they are all in a similar area such as London and handled by the same contract. However, if you have multiple sites across the UK with multiple budget owners, then you could decide to set up a regime for each budget owner to provide them with control over when to implement SFG20 updates.

Why do you need a maintenance regime?

PROBLEM

SOLUTION

BENEFIT

PROBLEM	SOLUTION	BENEFIT
Building handover is not a smooth process. You might get lots of information but not in one place	Create your maintenance regime using Facilities-iQ smart search	Saves you time
Tendering processes – how do you know you are comparing apples with apples?	Use regime to create a clear specification	More efficient way of running a tender and has the potential to save you money
Loss of building information at the end of a contract	Facilities-iQ maintenance regimes can be transferred	Saves you time and maintains the golden thread of information to achieve compliance
Staying on top of legislation changes that are relevant to you	Create regime, tailor and receive automated update notifications, compare side by side and choose when to implement	Saves you time and helps you achieve compliance

PROBLEM

SOLUTION

BENEFIT

PROBLEM	SOLUTION	BENEFIT
Having to manually update your CAFM with all changes	Create once in Facilities-iQ and all changes flow through into your CAFM	Saves you time and helps you achieve compliance

How do maintenance regimes work?

You can build Maintenance Regimes in Facilities-iQ in such a way that reflects your estate structure and/or maintenance responsibilities. Whether you'd like to base it around your organisation, contracts, service-level delivery or something else, your Maintenance Regime(s) can be as complex or as simple as you wish.

Adding a Facility or several via the "Add Facility" button as your starting point can be a useful way to organise your folders. You can choose to add the address, location information and images of your facilities as well as key contact information to help other team members.

If you'd like to go into more detail, you can then divide your Facilities into sub-folders pertaining to Space (i.e. buildings, rooms or outdoor areas), Floors and schedules for each.

Or, you can simply go in and add schedules or Systems directly into each of your starting Facility folders – it's entirely up to you.

Once you've built your regime, you have the option to choose which schedules to include and can tailor your chosen content (a new schedule code reference will always be generated if you've tailored your schedule). Additionally, you can manage any changes to the content of your Maintenance Regime(s) in line with updates via the "Actions" area found on the left-hand-side panel underneath "Home".

For more information on maintenance regimes, check out the complete guide to maintenance regimes.

Working effectively with partners – digital sharing

You need to share your maintenance regimes with partners, and it has been a pain point for a long time. But now, it is simpler than ever, and it's not through emailing a PDF!

You need to:

- Work collaboratively
- Work efficiently
- Stay on top of ever-changing legislation
- Work sustainably
- Mitigate your risk
- Provide audit trails
- Work securely

In today's digital world, you can now share, collaborate and update your stakeholders at the click of a button. The SFG20 API allows the latest version of your maintenance regime to flow into your FM operating systems, meaning no more manual updates or falling off the latest version of the SFG20 standard.

The API is freely available to relevant parties, users are notified of updates to the SFG20 standard and can choose when to implement the updates. This puts you in control. With just a click of a button, your content can be updated to ensure you are carrying out the maintenance in line with the latest SFG20 standard. There is no better way to work with the standard and keep your buildings compliant and running efficiently.

The API comes at no cost to you. SFG20 provide support with the integration process to make it effortless – we believe it is important the whole industry can achieve compliance with the SFG20 industry standard.
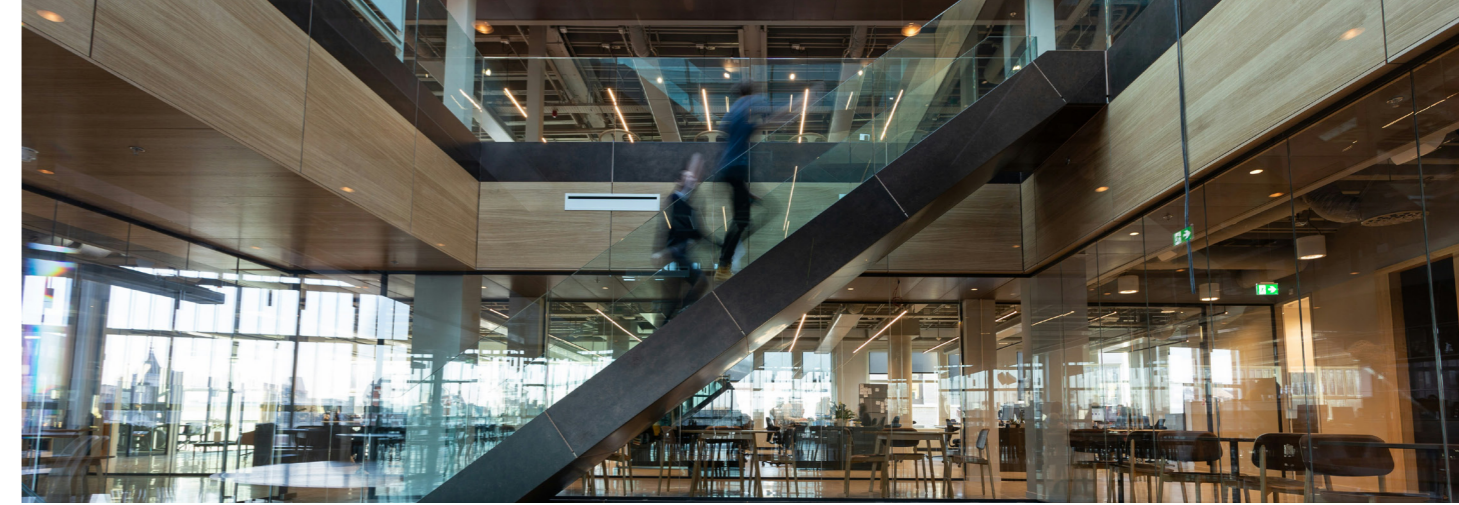
You can easily create sharing links, select who you want to share information with, and choose how long they can view it for. Sharing links can be sent to the intended recipient by email to access the data. Secure sharing links make your life much easier and allow you to:

1. Tender and compare apples with apples

2. Share task instructions with a defined group

3. Share the latest accepted version of SFG20 in your organisation

This is further enhanced through the SFG20 companion mobile application to:

1. Allow engineers in the field to confirm completion of daily checks (for your golden thread of information)

2. Remove manual updating, filing, and printing of the SFG20 standard (keeping you compliant, whilst removing print costs and reducing carbon use)

FACILITIES

NEW from SFG20, Facilities-iQ, a new smart software solution to intelligently manage your building maintenance compliance. The best way to access and use SFG20, the industry standard for building maintenance.

SFG20

DRIVING FACILITIES EXCELLENCE

Demo Facilities-iQ with one of our experts today

info@sfg20.co.uk   01768 860 459   sfg20.co.uk   SFG20