

SFG20

BESA

BUILDING ENGINEERING
SERVICES ASSOCIATION

SFG20 / HTM: AUTOMATING MAINTENANCE PLANNING

Hosted by **Roger Kennedy, Steve Tomkins & David Tattersall**

THURSDAY 25TH MARCH 2021

POWERED BY  **BPD ZENITH**

SFG20 / HTM: AUTOMATING MAINTENANCE PLANNING

SFG20



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SFG20 / HTM: AUTOMATING MAINTENANCE PLANNING



AGENDA

- 🌀 Welcome
- 🌀 BPD Zenith
 - CAFM Landscape*
- 🌀 SFG20 (BESA)
 - Introduction/Advantages & Benefits*
- 🌀 SFG20 in FM (Optimum)
 - Manual Entry/Contractual Compliance*
- 🌀 SFG20 - CAFM Integration (BPD)
 - Automation Benefits*
- 🌀 Next Steps



BPD ZENITH

Roger Kennedy

Business development Manager, EMEA
BPD Zenith



BPD ZENITH

BPD INTRODUCTION & CAFM LANDSCAPE



Offshore Wind & Renewables



Facilities Management



Public Sector



Transportation



Oil & Gas



Manufacturing



Life Sciences



Power Generation & Utilities

BPD ZENITH



BPD ZENITH

POWERED BY  BPD ZENITH

- Over 26 years of Enterprise Asset Management & CAFM experience
- Clients in every industry, on every continent
- Platinum IBM Business Partner
- Award winning Solutions and Services

SFG20



IBM Maximo®

Industry Accelerators

Cloud Solutions

MAXI CLOUD

Mobile Solutions

Asset Health Monitoring

loveyourasset

Asset Performance Management

API Integration

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IBM Beacon Award Winner



IBM Watson IoT Award Winner

maximoworld

Awards

MaximoWorld Award Winner



- BIM Modelling
- Int/Ext 3D Mapping
- Smart Building EAM
- AI (Artificial Intelligence) Solutions



SFG20

WHERE IS CAFM TODAY?

FM Maturity Curve



Maintenance is seen as an **expense**

Maintenance is an **investment**



SFG20

Steve Tomkins

Service Solution Manager
SFG20/BESA

POLL

SFG20

SFG20 ADVANTAGES & BENEFITS

SFG20

BESA

BUILDING ENGINEERING
SERVICES ASSOCIATION

SFG20

the world of
building
maintenance
just got simpler

Steve Tomkins

C.Eng MCIBSE MIMechE MIAM

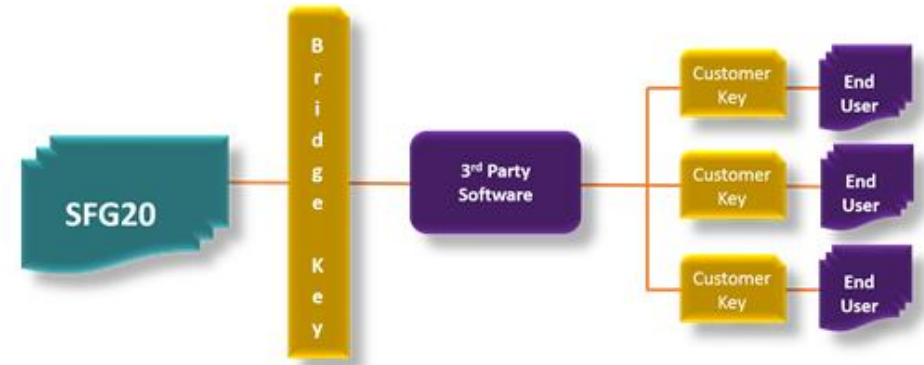


BPD ZENITH

Software Integration

Using an approved SFG20 API partner can save time and effort while reducing the risk of potential errors in data when manually integrating information into your operating software solution.

Our API solution can provide the latest updates simply and easily to your operating system ensuring you stay compliant and using the latest industry best practise from SFG20.



The SFG20 API is an initiative to help streamline the FM sector. It provides a common platform to allow CAFM and third party FM software providers the opportunity to integrate SFG20 directly into their systems.

*"Coming together is a beginning;
keeping together is progress;
working together is success."*

Henry Ford



A solution to provide dynamic updates saving time, cost, effort and resources.

SFG20 technical update

[View this email in your browser](#)

SFG20 TECHNICAL NEWS

LATEST UPDATES FROM SFG20

Summary of Key Changes

Please find below a summary of new technical and/or legislative updates which are due to go live on SFG20.

For more detailed information, please [log in](#) and click technical updates at the top of the screen.

TECHNICAL BULLETINS

INFORMATION CONCERNING THE FOLLOWING IS AVAILABLE ON THE WEBSITE:

1. PD ISO/CIE TS 22012:2019

Light and lighting. Maintenance factor determination. Way of working

This document, published on 13 February 2019, is the UK implementation of ISO/CIE TS 22012:2019 and specifies a standardised way of working

Reference Number	Main Category	Sub Category	Legislation Description	URL	Reason for Change	Additional Information concerning Change, if applicable	Date
1	Legislation		Clean Air Act 1993	www.legislation.gov.uk/ukpga/1993/11/introduction			
2	Legislation		Climate Change Act 2008	www.legislation.gov.uk/ukpga/2008/27/introduction			
3	Legislation		Climate Change and Sustainable Energy Act 2006	www.legislation.gov.uk/ukpga/2006/19/introduction			
4	Legislation		Control of Pollution Act 1974	www.legislation.gov.uk/ukpga/1974/40/introduction			
5	Legislation		Control of Pollution (Amendment) Act 1989	www.legislation.gov.uk/ukpga/1989/14/introduction			
6	Legislation		Disability Discrimination Act 1995	www.legislation.gov.uk/ukpga/1995/50/introduction			
7	Legislation		Disability Discrimination Act 2005	www.legislation.gov.uk/ukpga/2005/13/introduction			
8	Legislation		Electricity Act 1989	www.legislation.gov.uk/ukpga/1989/29/contents			
9	Legislation		Energy Act 1983	www.legislation.gov.uk/ukpga/1983/25/contents			
10	Legislation		Energy Act 2008	www.legislation.gov.uk/ukpga/2008/32/contents			
11	Legislation		Environment Act 1995	www.legislation.gov.uk/ukpga/1995/25/contents			
12	Legislation		Waste (England and Wales) Regulations 2011	www.legislation.gov.uk/uksi/2011/988/contents/made			
13	Legislation		Factories Act 1961	www.legislation.gov.uk/ukpga/Eliz2/9-10/34/contents			
14	Legislation		Fire-Precautions Act 1971	www.legislation.gov.uk/ukpga/1971/40/contents	Legislation Revoked/Withdrawn	Replaced with Regulatory Reform (Fire Safety) Order 2005 - Item 90	01/04/2006
15	Legislation		Fire and Rescue Services Act 2004	www.legislation.gov.uk/ukpga/2004/21/contents			

- Ongoing schedule version revisions
- Circa x70 new schedules April 21- May 21

Specialist Service Sets

- Healthcare – HTM aligned
- Access Equipment & Lifts
- Building Fabric
- Catering
- Management Tasks
- Mechanical Handling Equipment
- Operational
- Security & Surveillance
- Workshop Equipment



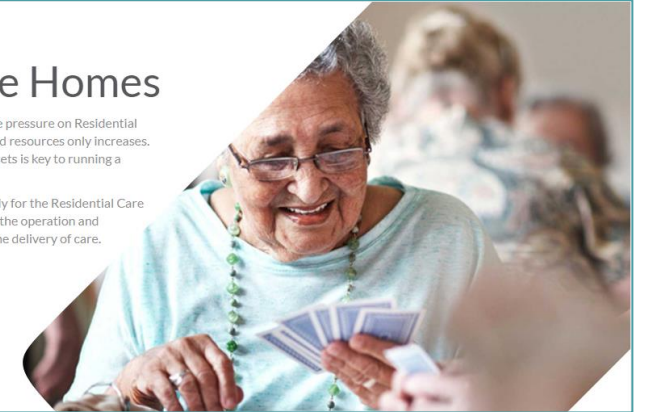
- **SFG30**
Mothballing & Reactivation

Functional Sets

Residential Care Homes

As the population ages and people live for longer the pressure on Residential Care Homes to provide outstanding care with limited resources only increases. Controlling costs and extending the useful life of assets is key to running a successful and profitable Home.

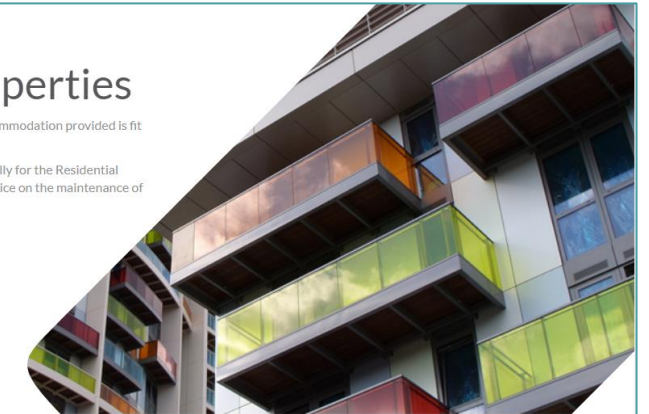
SFG20 has created a set of task schedules specifically for the Residential Care Home sector which provide guidance and advice on the operation and maintenance of the specialised equipment used in the delivery of care.



Residential Properties

It is the landlord's responsibility to ensure the accommodation provided is fit for purpose, safe and well maintained.

SFG20 has created a set of task schedules specifically for the Residential Properties sector which provides guidance and advice on the maintenance of both structural elements and interior appliances.



Benefits of SFG20's Resource Models

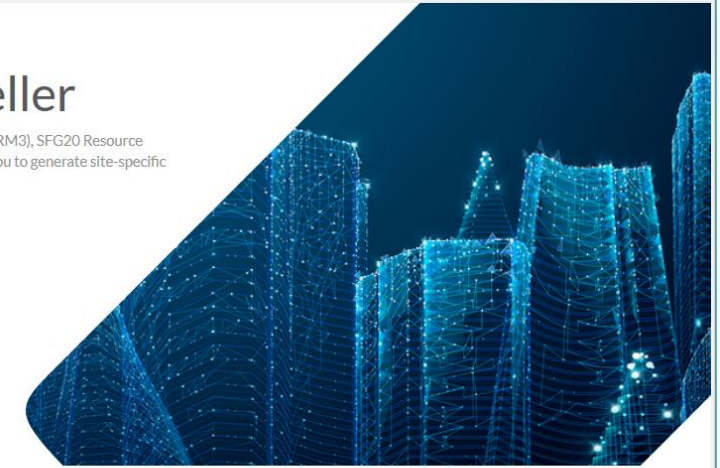
- Improve cost certainty providing cost control / flexibility
- Visibility of budget forecasting vs standards
- Highlight variance to the SFG20 industry norms
- Provision for unforeseen e.g. asset verification work
- Benchmarking of regional costs and resource levels

Supporting External Analytics

- Assists Operational Planning (Maintenance down time/ Asset Uptime)
- Data Analytics Prediction Vs Actual
- Identification of Improvement Opportunities

Resource Modeller

Aligned to the RICS's new rules of measurement (NRM3), SFG20 Resource Modeller is an online, dynamic service that allows you to generate site-specific annualised maintenance cost in 6 simple steps.



Cost and resource model your maintenance requirements

Resource Modeller has been developed for SFG20 subscribers to estimate the annualised cost of maintenance, along with quantifying the actual planned preventative maintenance labour loading resource level.

Cost and resource model maintenance service level options across:

1. Asset groupings (e.g. HVAC, electrical, plumbing etc)
2. Individual assets (AHU, lifts etc)
3. Site level
4. Building level

Resource Modeller will also show you the annualised costs / times split down by legal compliance (red tasks); function critical (amber tasks), discretionary PPM service levels (green tasks).

6 simple steps to accurate maintenance modelling

1. Enter the building information including the name, region, Function, date, GIFA, and number of floors
2. Using the simple drop-down lists, select the appropriate schedules for the modelled assets
3. Insert model asset quantities (provisional /actuals) and adjust for any task working restrictions (in hours/ out of hrs)

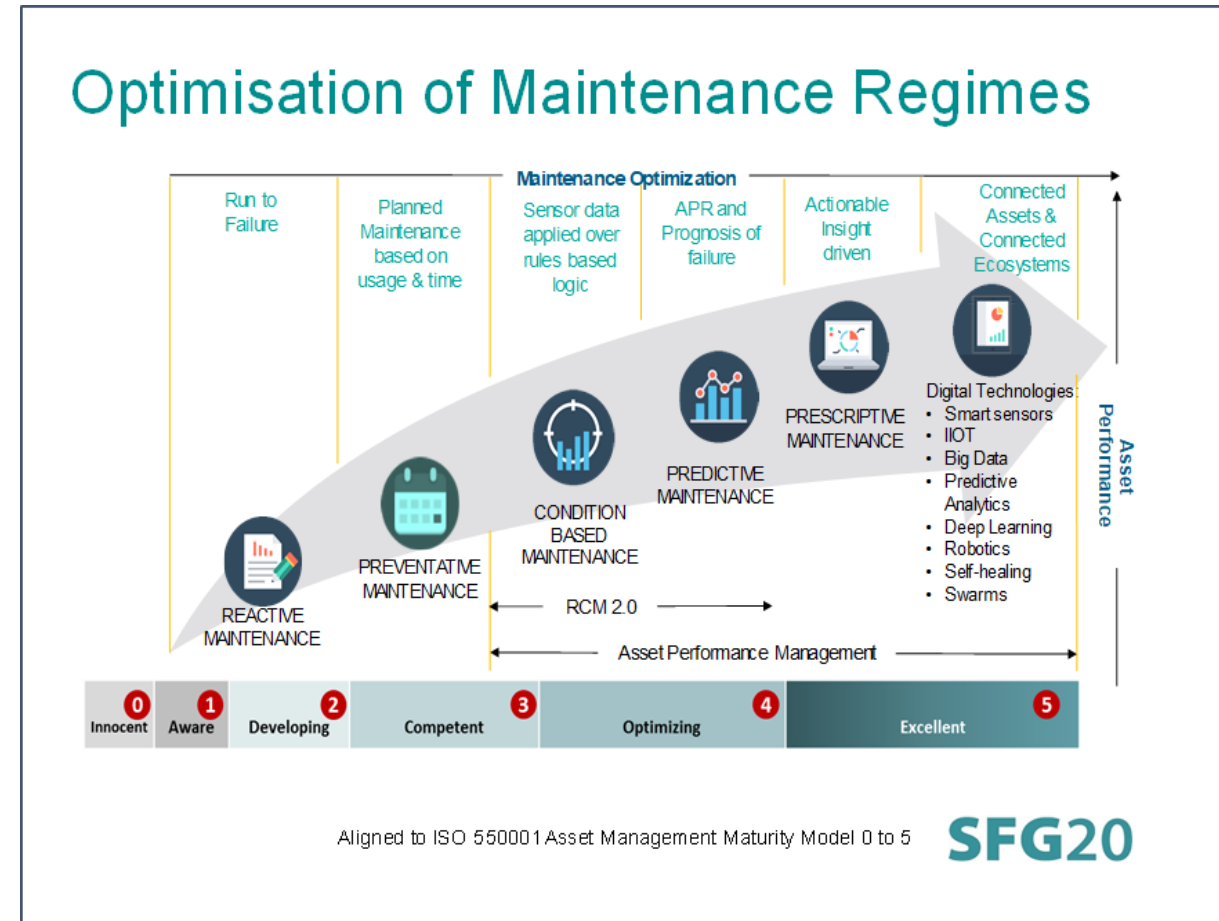
Optimising SFG20 Maintenance Service Model

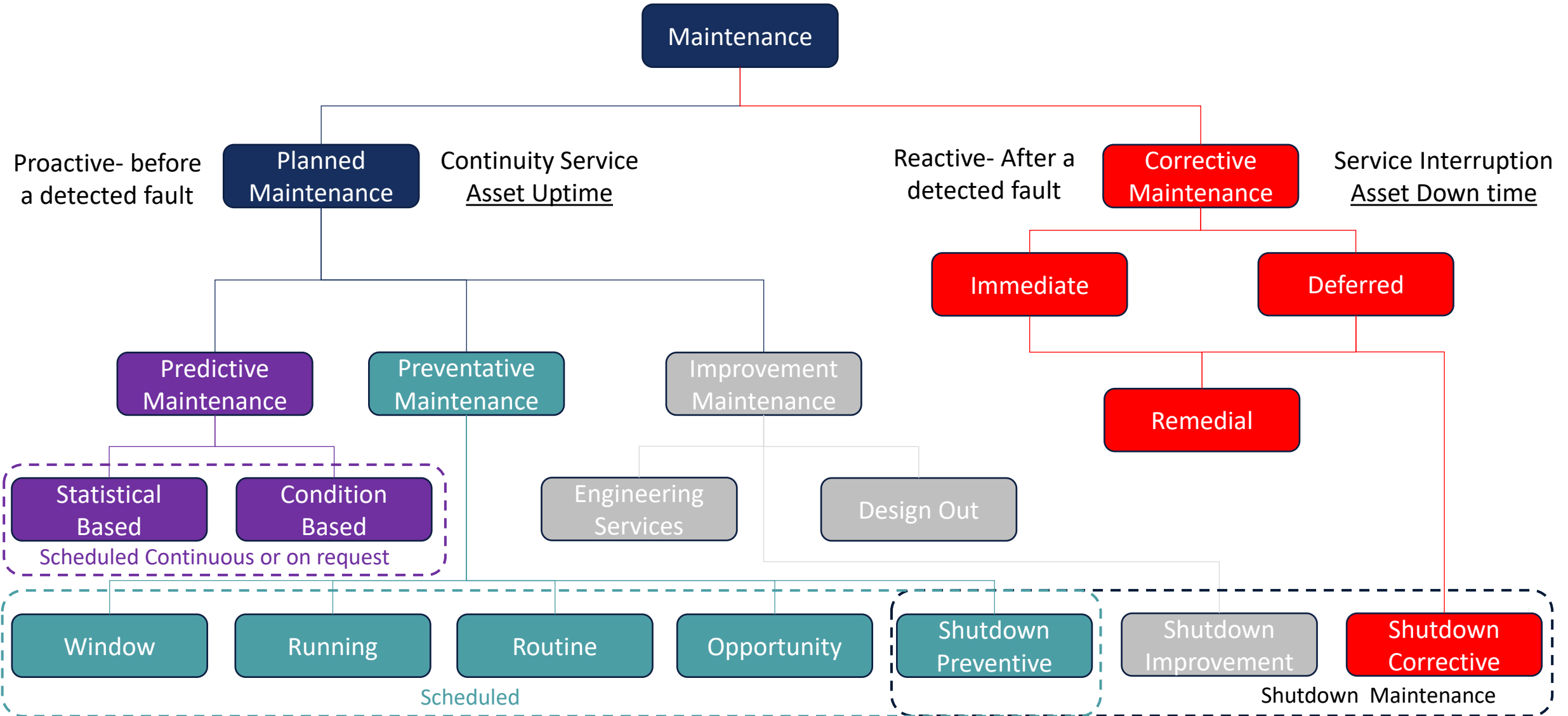
SFG20 is committed to evolving maintenance standards from time based planned maintenance into **condition /risk based and predictive maintenance**, for selective asset types (e.g. to support sensors and monitoring of BMS and customer experiences).

Clients will continue to seek innovative ways of optimising the maintenance regimes. So SFG20 will evolve and support the likes of **business focused maintenance and energy / carbon reduction initiatives**.

It is important to retain a controlled version of SFG20 maintenance common standards, and update building models – to incorporate any optimising of the maintenance activities and how this impacts on the resource cost models.

The roadmap for optimising SFG20





The Benefits of SFG20



SFG20

The definitive industry standard for planned maintenance

Completely unique, SFG20 is the essential tool for;

- facilities managers
- building owners
- engineers
- contractors
- consultants
- *designers*

Standardisation

Enabling you to stay compliant

Qualify and defends budgets

Save energy - properly maintained

Saves money - managed maintenance

- Legislation and best practice reviewed on an on-going basis by SFG20 Technical Team
- Technical Bulletins - keep you informed and up to date
- Schedules are frequently reviewed and amended as required, to keep you compliant



Facilitates compliance

Aids cost control

STATUTORY/LEGAL

To ensure legal compliance

MANDATORY

Business Critical (To ensure sector/organisation compliance)

Please note, you cannot assign a Red Task. Pink is your Red.

OPTIMAL

Functional Critical and Industry Best Practice

DISCRETIONARY

Non-Critical Maintenance

- Identify maintainable assets
- Create Service Models
- Colour-coded critical ratings – highlighting statutory vs. discretionary activities
- Provides the benchmark for optimum maintenance, avoiding over or under maintaining of assets

Colour coded for informed decisions

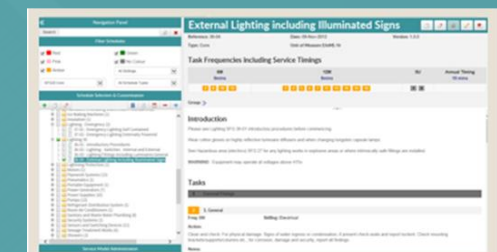
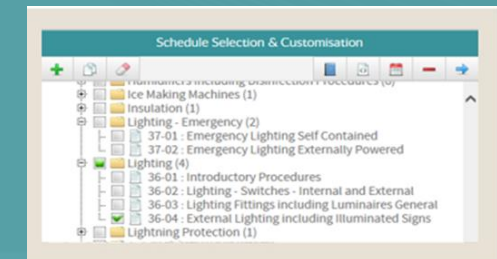
Fully customisable

Reducing replacement costs

Measurable ROI

Customisation

- Over 1,000 'core' schedules (plus specialist service sets) are all customisable to your needs:
 - Amend task critical rating, skilling's and frequency
 - Create new bespoke schedules
 - Add notes
- Customisation can assist in tenders and for monitoring contractors where you have specific requirements



SFG30
Mothballing & Reactivation

End of Life

- ✓ Mothballing
- ✓ Reactivation
- ✓ Hand back
- ✓ Salvage

Asset Lifecycle

Clients Requirement

- ✓ EIR/AIR specify SFG20 use cases
- ✓ Contracts procured using SFG20

Acquire

BIM
IFC
ISO 19650
COBie

Project Teams (New/Legacy)

- ✓ BIM model
- ✓ Common language (unify 3D, 5D, 7D)
- ✓ Asset mapping (BIM into FM lifecycle)
- ✓ Product data sheets (with SFG library)
- ✓ Documents / specs - cladding and fire rated (from a whole system safety view)

Dispose

Design

Workplace / Space

- ✓ Safety compliant (COVID)
- ✓ Occupancy Monitoring
- ✓ Asset History and Analyse
- ✓ Optimising by CBM/EFM
- ✓ Documentation / audits
- ✓ Assurance of conformity

Renewals

Sustain

Environment (6D)

- ✓ Safety information display
- ✓ Energy / CO2 reductions
- ✓ Condition monitoring
- ✓ Maintenance optimising
- ✓ Sustainability measures

nrm1
nrm3
UNICLASS
SFG20
CIBSE Guide M

Unification of industry data classifications

Construct

As Built Handover

- ✓ BIM documents / O&M
- ✓ Asset Registers to SFG20 plus attribute (LOD/LOI)
- ✓ Commissioning controls
- ✓ Safety information audit (as Hackett Regulations)

Soft Landings

Operational Handover
(BIM into Operation)

Operating Asset Handover

Operate and Maintain



SFG20 IN FM

David Tattersall
Service Solution Manager
Optimum Group Services



SFG20 IN FM

Manual Entry

**Contractual
Compliance**

SFG20 IN FM

Manual Entry

Very labour intensive, open to human error if not fully concentrating due to mundane nature of data entry.

Took 2 resources 2 weeks to enter approx. 425 SFG20 Instructions manually which was a cost to the business.

We will have to undergo a similar process whenever updated SFG20 Instructions are published.

Automating this with a direct link to SFG20 will remove all manual data entry, and systems can be set-up for handling of updated SFG20 instructions.

SFG20 IN FM

It is essential that we can demonstrate to our clients that we are adhering to the SFG20 specification.

Using the Job Plan Tasks section of Maximo and mirroring with the SFG20 Tasks, our engineers are required to complete each task and we can then report on this and demonstrate our compliance to specification.

**Contractual
Compliance**

Manual Entry



IBM Maximo[®] SFG20 - CAFM INTEGRATION

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Paul Irving

Product Development Lead,
Global
BPD Zenith



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SFG20

SFG20 - CAFM INTEGRATION

IBM Maximo

IBM Maximo®

- Leading Asset Management Solution
- Stores information on:
 - Assets and Locations
 - Maintenance Schedules
 - Predefined Work Instructions
 - Work Orders

SFG20

SFG20

- Library used by Service Providers to:
 - Maintain Assets
 - Carry out maintenance tasks
- By providing information on:
 - Maintenance Schedules
 - Predefined Work Instructions

The issue

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- SFG20 will dynamically update their library as legislation changes
- Updates to Maximo have so far been manual, and can be an demanding task
- Failing to update the maintenance schedules in Maximo could result in non-compliance
- To manually update 425 Job Plans in Maximo it took Optimum ~150 working hours

OUR SOLUTION...

- **Schedule** a regular update check to the SFG20 interface and identify changes
- **Create new Job Plans** in Maximo, ready to be used against Maintenance Schedules
- **Update existing Job Plans** in Maximo using the built in revision functionality and notify a predefined group of users about the changes for their approval
- **Flexible Approach** to managing updates and mappings, controlled from within Maximo
- No requirement for opening firewall ports or allowing incoming connections*



OUR SOLUTION...

Job Plan: 01-01-12M Heat Exchangers - Coils Organization:
 Revision: 0
 Status: DRAFT
 Template Type: Maintenance
 Duration: 2:00
 Default WO Class:
 WO Priority:
 Interruptible?

IBM Maximo®

SFG20
 Core

01-01 Heat Exchangers - Coils
 Date: 02 Dec 2015
 Version: 2
 Unit of Measure: Nr

Summary	
Frequencies	Tasks
1M (Month) 5 mins	11
6M (Months) 5 mins	17 4
12M (Months) 120 mins	12 13 14 19 20 21 22 3 5 6 7 8 9 15 18
Annual Timing	190 mins

Display Order	Tasks
1	Water to Air
2	Drain pans Criticality: Amber Frequency: 12M Skill Set: Mechanical Action: Inspect for corrosion and clear obstructions (if any) in condensate drain piping on cooling side. Notes: Check that condensate traps on cooling coils are filled with water.
3	Coils
4	Coil vent Criticality: Amber Frequency: 6M Skill Set: Mechanical Action: Check operation, condition of filters and sight glasses. Notes:

SFG20 Details

SFG20 Code: R SFG20 Update Date: 2015-12-02

Job Plan Tasks 1 - 4 of 22

Sequence	Task	Description	Nested Job Plan	Duration	Meter	Appointment Required?	Include in Schedule?	SFG20 Class
10	***Water to Air***			0:00		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
20	Drain pans			0:00		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Amber
30	***Coils***			0:00		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
40	Coil vent			0:00		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Amber

BENEFITS SUMMARY

SFG20 Features

- Proven/Standardised PM Schedules
- Adheres to legal standards
- Consistently Updated

CAFM/SFG20 Integration Enhancement

- Automation of manual entry
- Certification/Compliance built-in
- Configure/Automate Work Orders/Strategy Planning/Reporting

SFG20 Benefits

- Reduce Downtime
- Reduce Resource Req
- Improve Accuracy
- Ensure Compliance
- Audit Ready



NEXT STEPS

SFG20 / HTM:
AUTOMATING MAINTENANCE PLANNING

SFG20



Get in touch today...



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- BPD FM Webinar Series
 - *IoT*
 - *AI*
 - *Analytics*
 - *Space Management*
- SFG20&30/HTM Implementation
- CAFM Integration



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THANK YOU FOR JOINING US!



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SFG20 / HTM:
AUTOMATING MAINTENANCE PLANNING

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Quick Contact - Point Your Camera Here:



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