

# Higher Education Facilities Management Association (HEFMA)

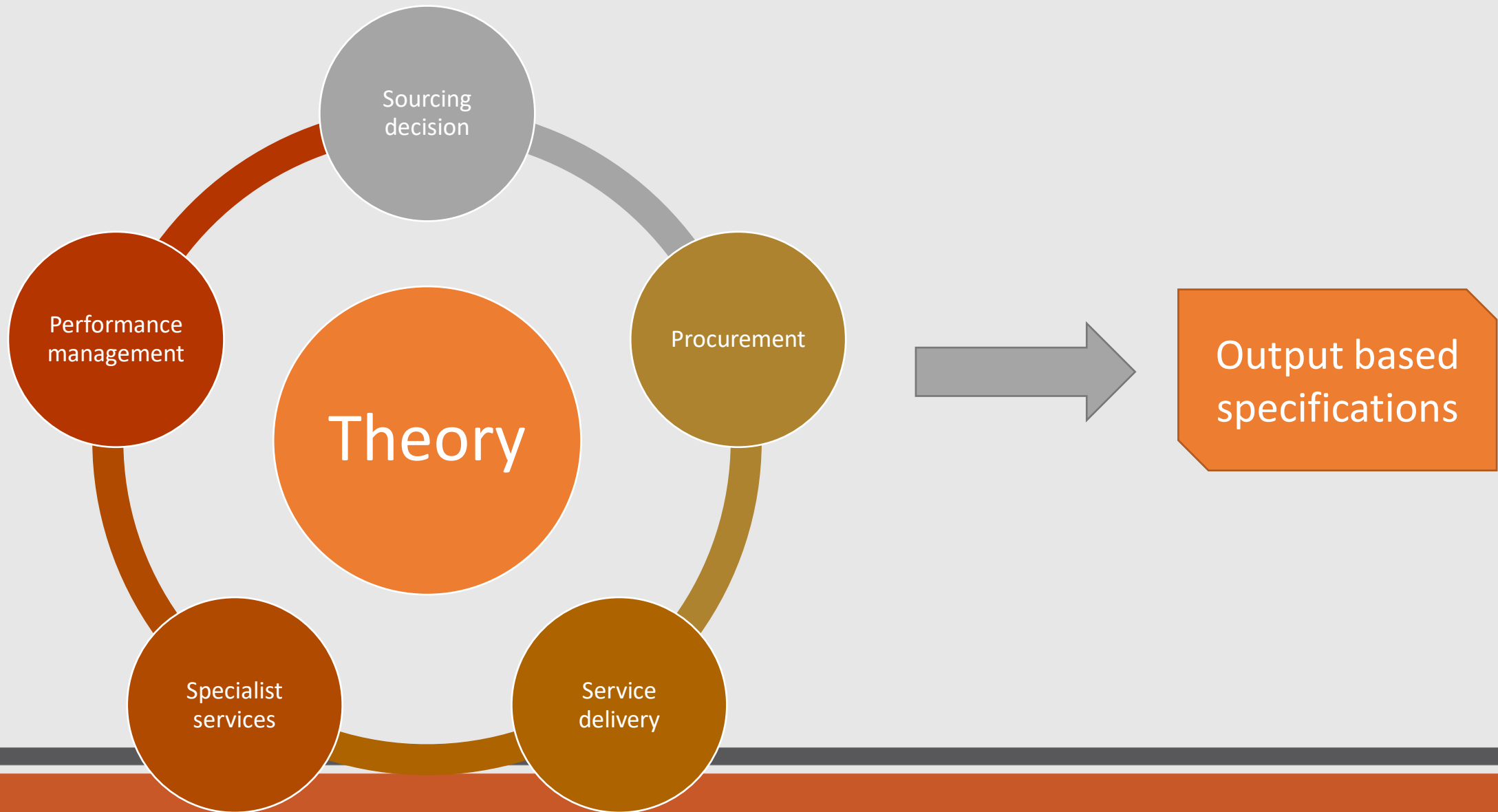
## 2022 Development Programme

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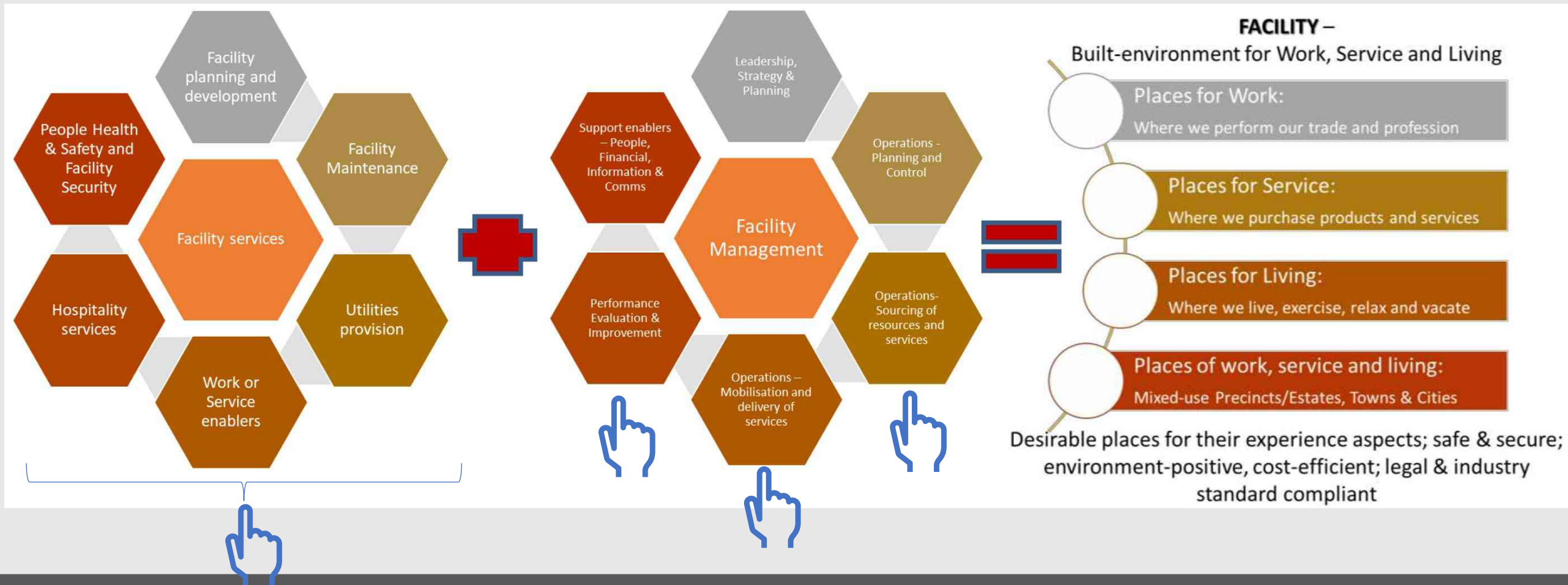
### FACILITY SERVICE AGREEMENTS: OUTPUT-BASED SPECIFICATIONS

Presenter:  
Craig Henry Pr Eng, AFP  
CER Facility Management (Pty) Ltd

# SESSION OUTLINE

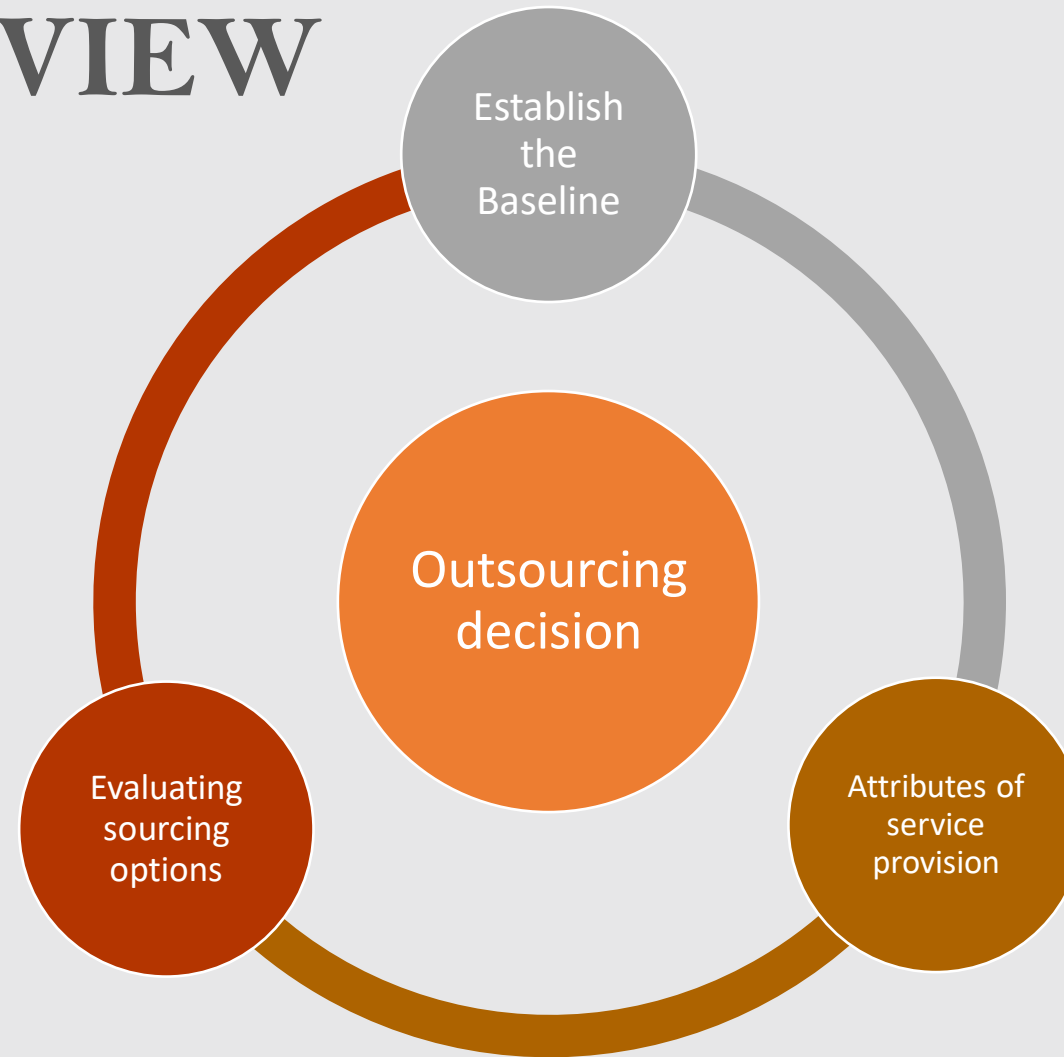


# INTEGRATED FACILITY MANAGEMENT OVERVIEW



# SOURCING DECISION

# THEORY OVERVIEW

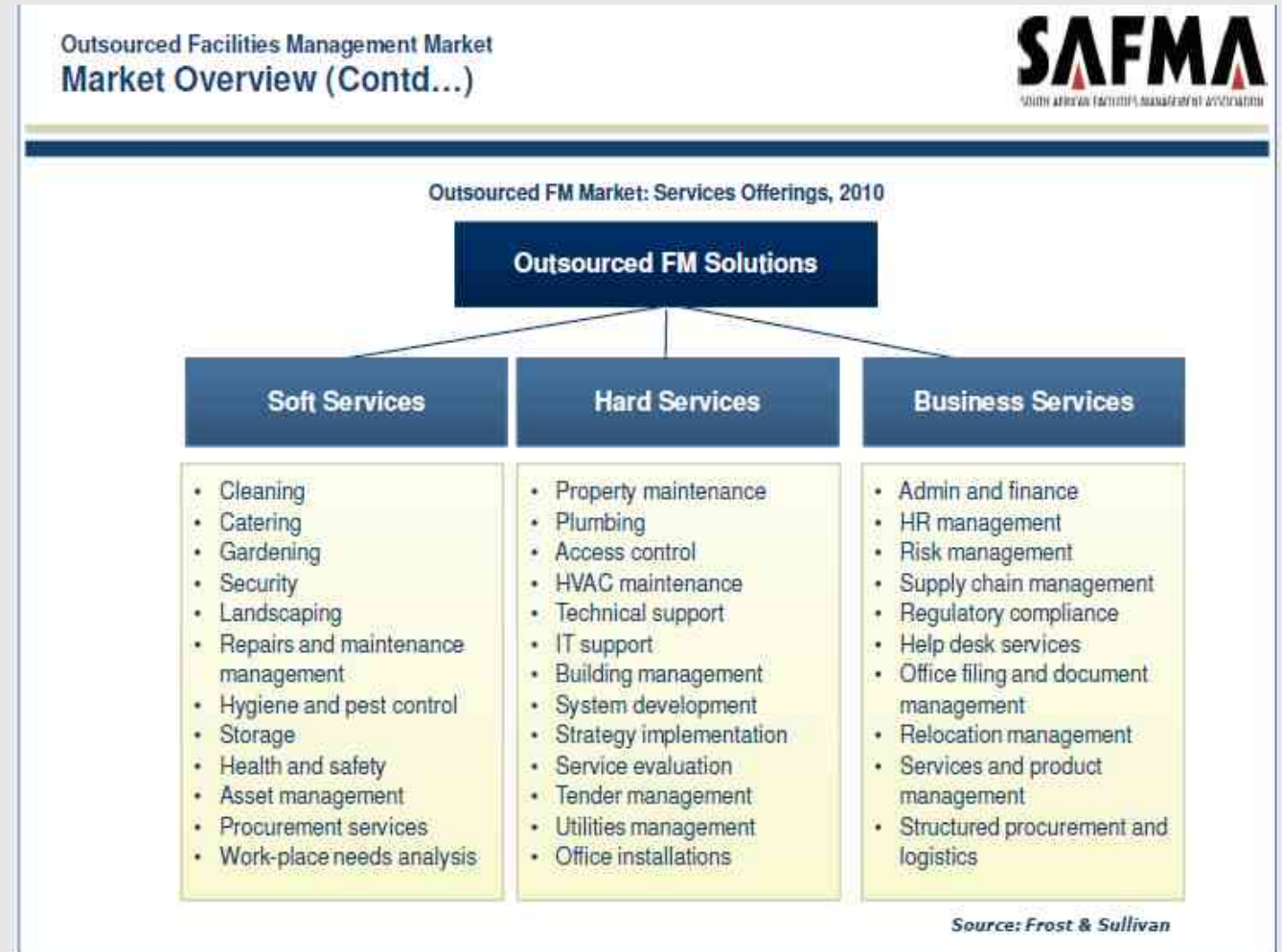


# ESTABLISH THE BASELINE

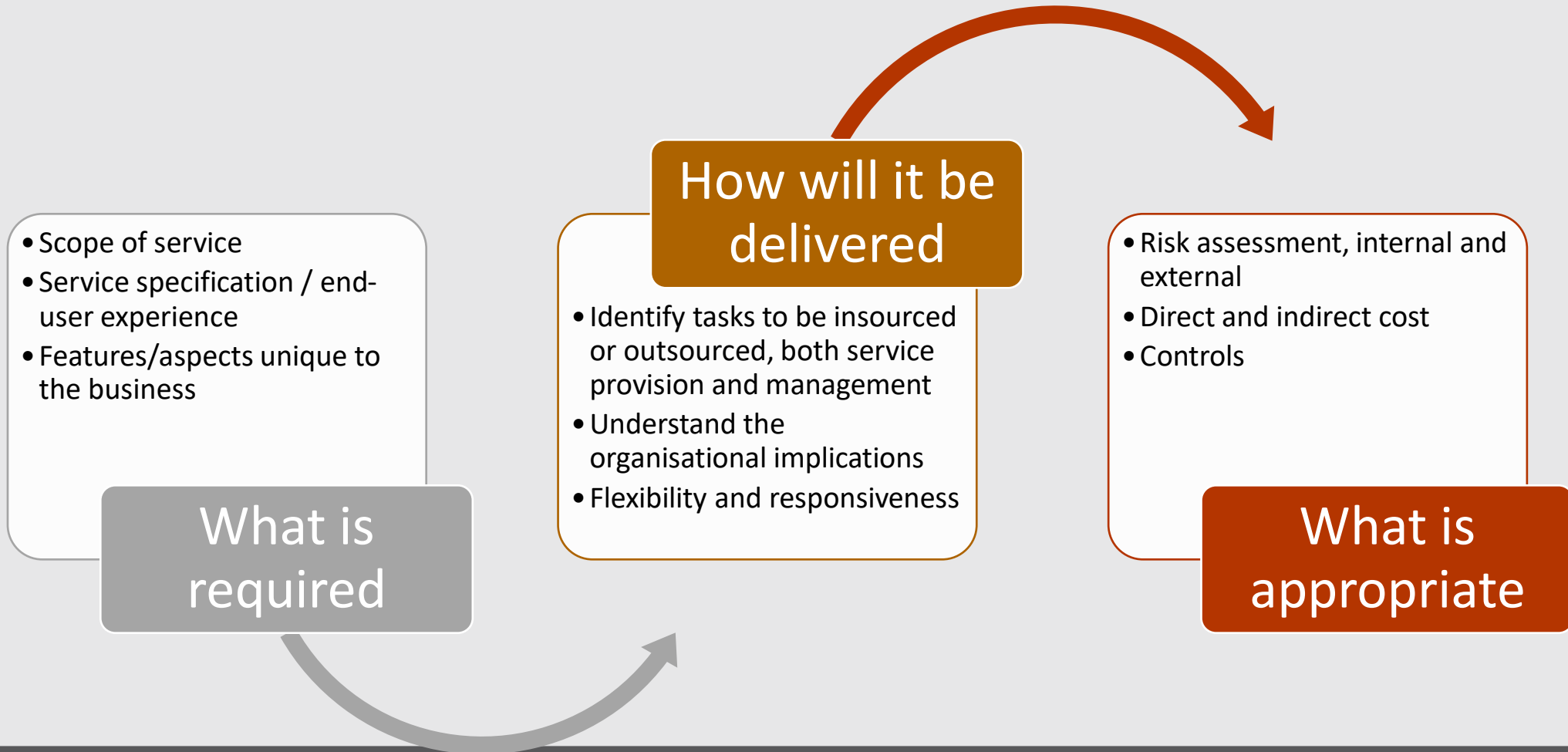


# ATTRIBUTES OF SERVICE PROVISION

- What is required?
- Potential scoping and grouping of services



# ATTRIBUTES OF SERVICE PROVISION

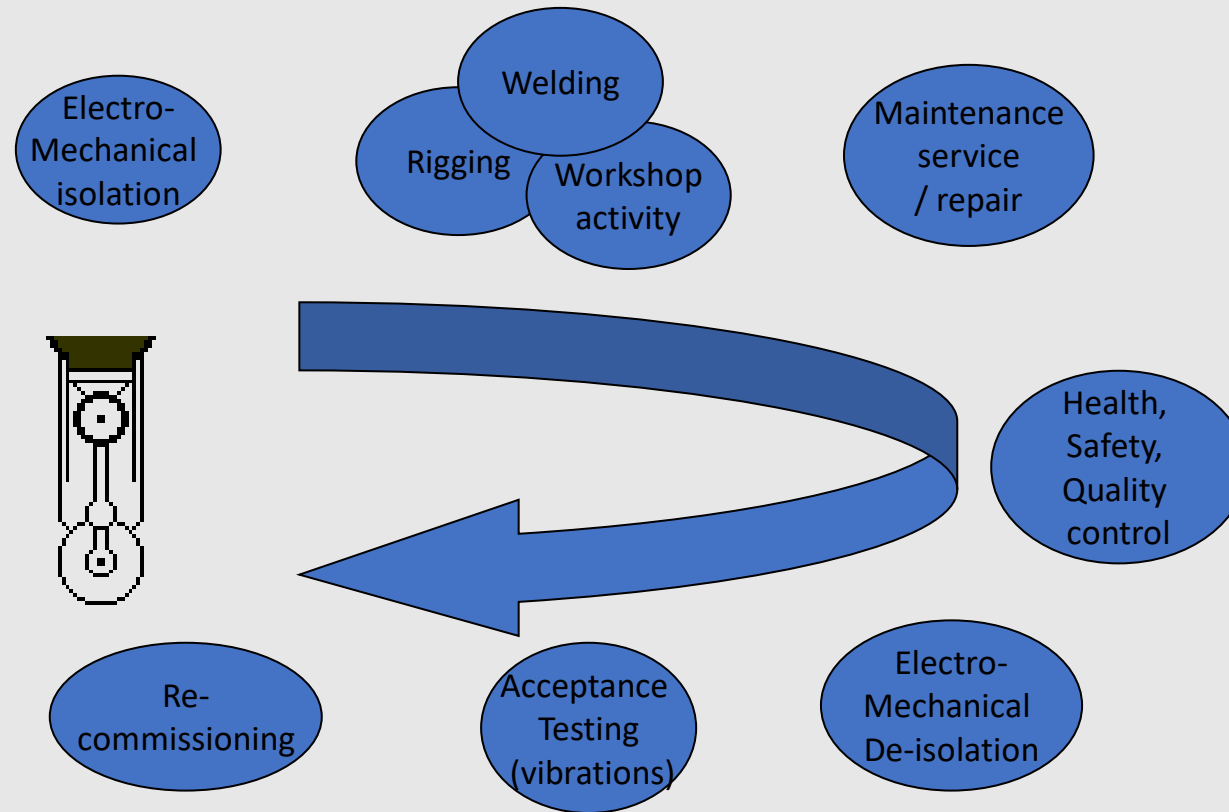




# SOURCING DECISION – EVALUATION MATRIX

Criteria Exp	Weight (%)	Score			
		1	3	6	10
Risk to service continuity when outsourced	25%	Low	Moderate	High	Very high
Competitive market related service quality when in-sourced	25%	Poor	Moderate	Good	Very Good
Effort and investment to establish the capability to in-source	20%	Very High	High	Moderate	Low
Regularity of service	10%	Annually	Quarterly	Monthly	Daily
Labour and supervisory resource intense	10%	Very High	High	Moderate	Low
Cost benefit when outsourced	10%	Very High	High	Moderate	Low

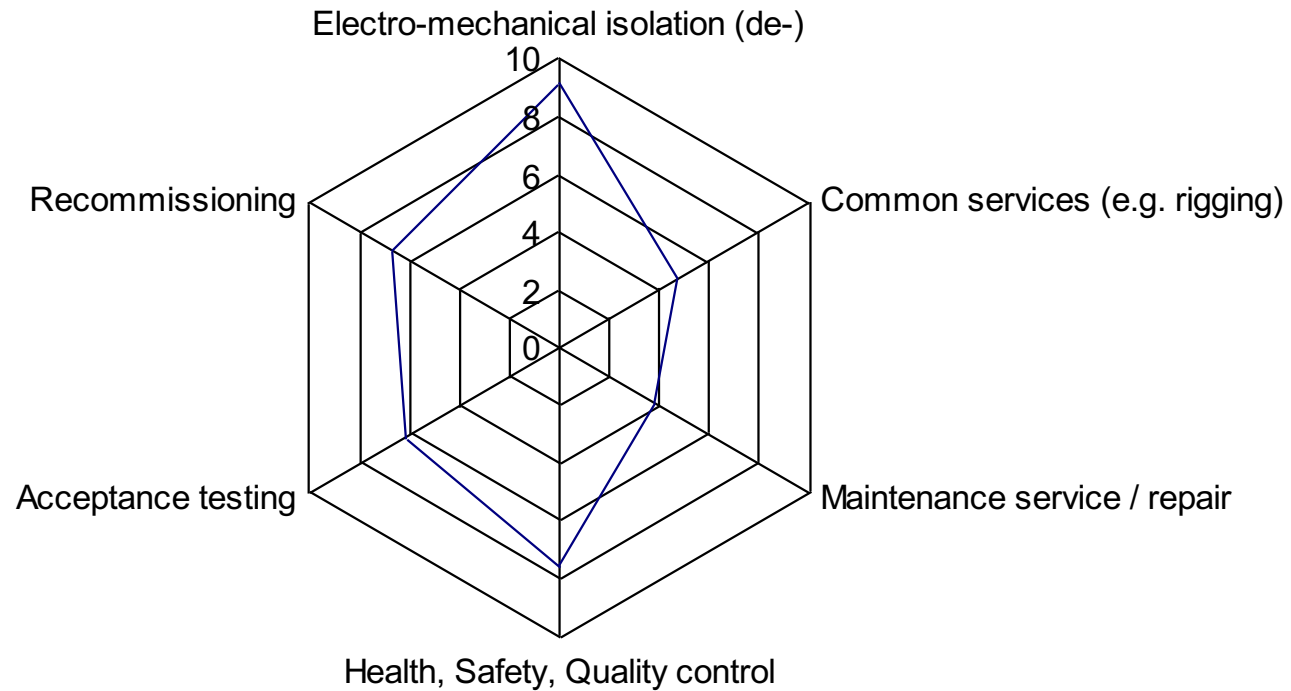
# CLASSICAL MAINTENANCE ACTIVITY EXECUTION



# SOURCING STRATEGY – CLASSICAL MAINTENANCE EXECUTION

IN-SOURCE / OUTSOURCE PREFERENCE SCORING							
	Risk to service continuity when outsourced	Competitive market related service quality when in- sourced	Effort and investment to establish the capability to in- source	Regularity of service	Labour and supervisory resource intense	Cost benefit when outsourced	Overall score
Electro-mechanical isolation (de-)	9	10	9	10	6	10	9
Common services (e.g. rigging)	7	3	2	10	3	5	5
Maintenance service / repair	5	3	2	10	1	3	4
Health, Safety, Quality control	9	9	9	10	2	1	8
Acceptance testing	7	3	10	10	3	4	6
Recommissioning	9	3	10	10	3	4	7

# SOURCING STRATEGY – CLASSICAL MAINTENANCE EXECUTION



1 – 4, Outsource

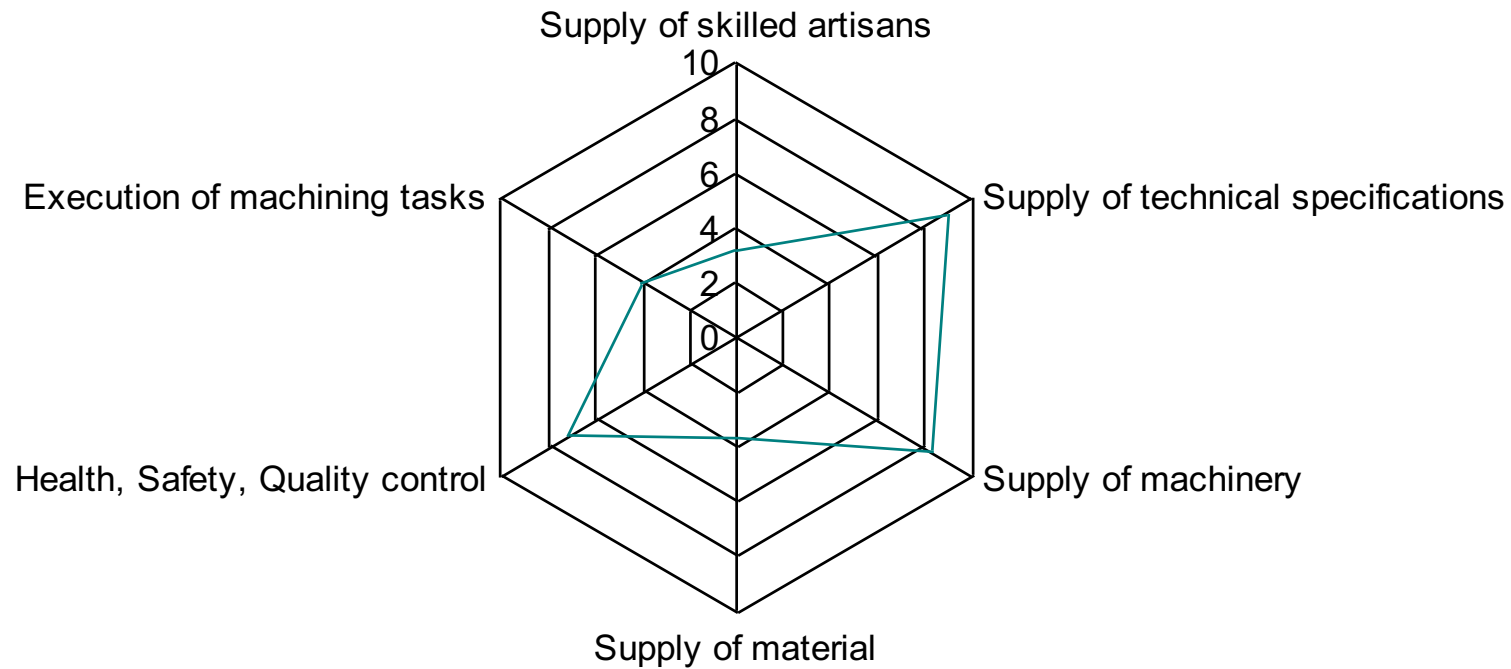
5 – 7, Combination

8-10, In-source

# SOURCING STRATEGY – CLASSICAL MAINTENANCE EXECUTION – WORKSHOP MACHINING

	IN-SOURCE / OUTSOURCE PREFERENCE SCORING						
	Risk to service continuity when outsourced	Competitive market related service quality when in- sourced	Effort and investment to establish the capability to in- source	Regularity of service	Labour and supervisory resource intense	Cost benefit when outsourced	Overall score
Supply of skilled artisans	3	3	2	3	6	4	3
Supply of technical specifications	8	10	10	4	10	10	9
Supply of machinery	10	10	1	10	10	10	8
Supply of material	3	3	2	10	4	4	4
Health, Safety, Quality control	6	10	9	10	2	1	7
Execution of machining tasks	3	3	4	10	3	4	4

# SOURCING STRATEGY – CLASSICAL MAINTENANCE EXECUTION – WORKSHOP MACHINING



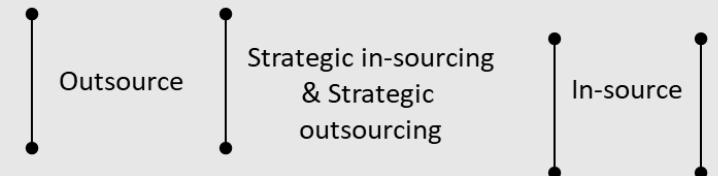
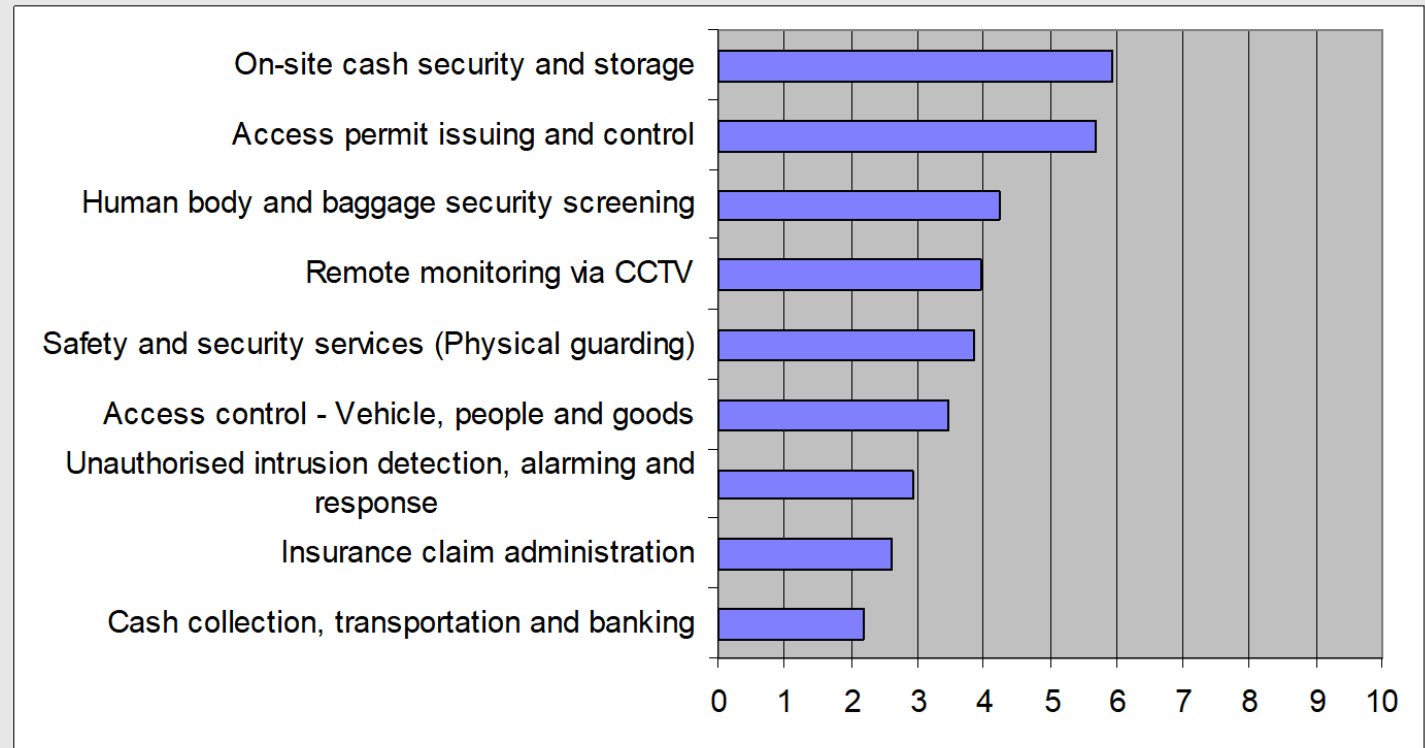
1 – 4, Outsource

5 – 7, Combination

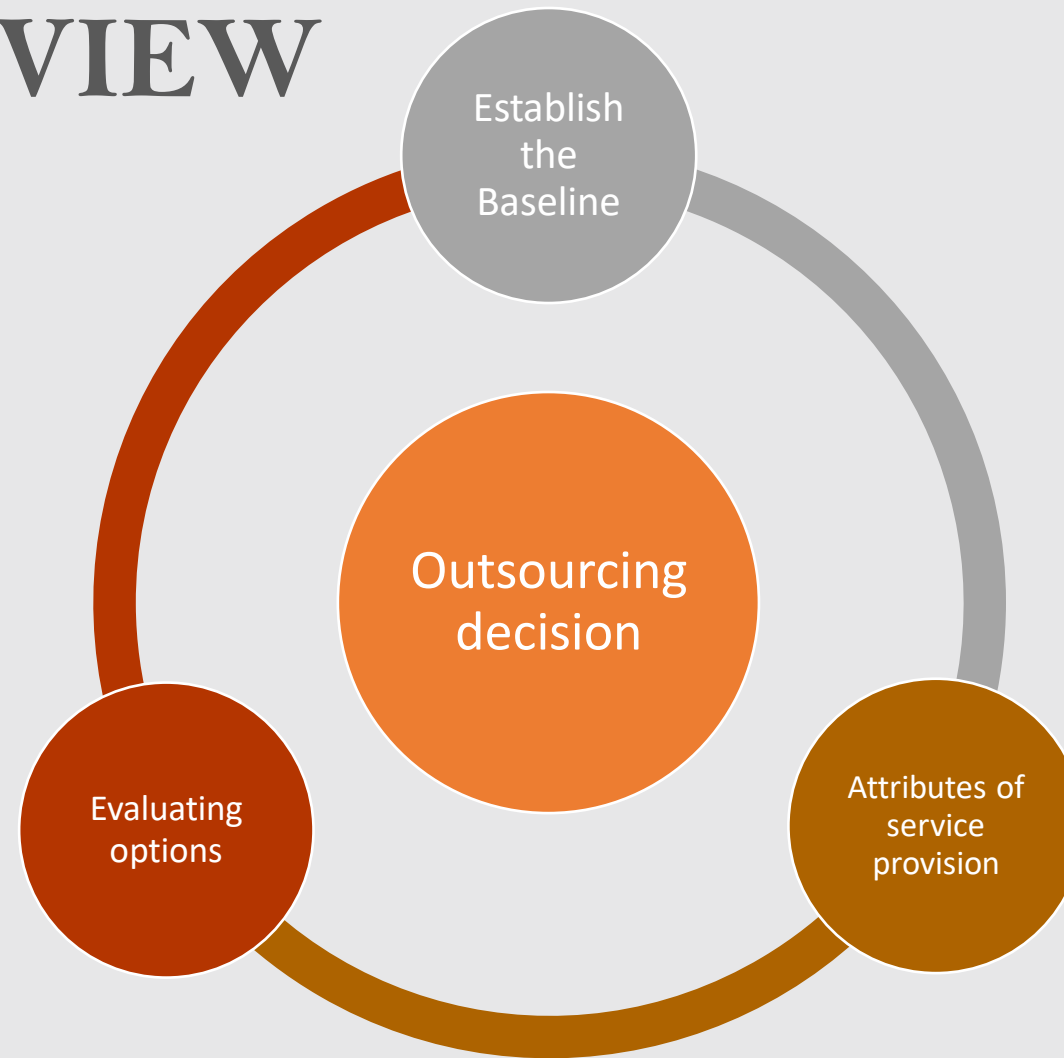
8-10, In-source

# SOURCING STRATEGY DECISION

- Options evaluation for security services



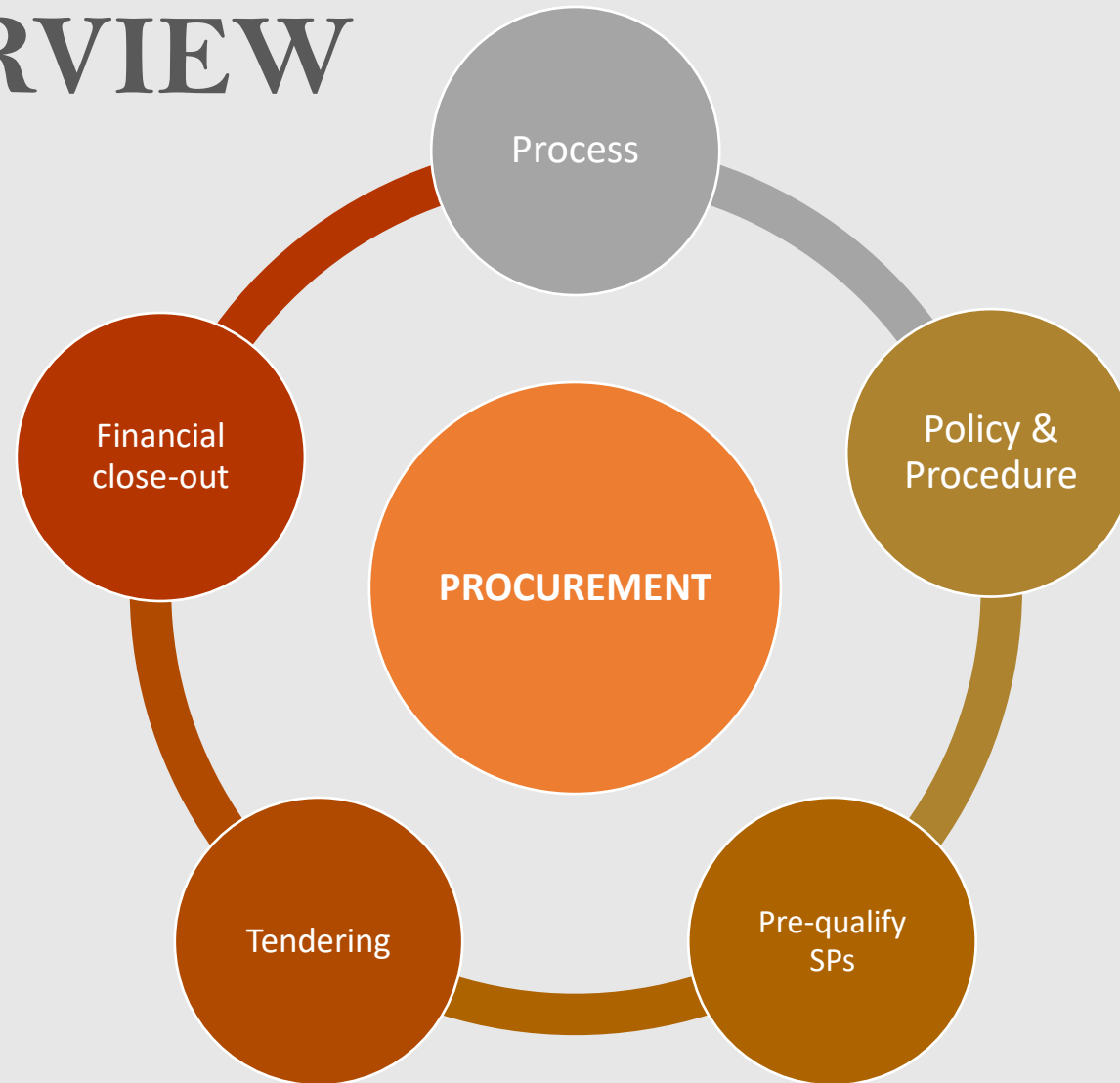
# THEORY OVERVIEW



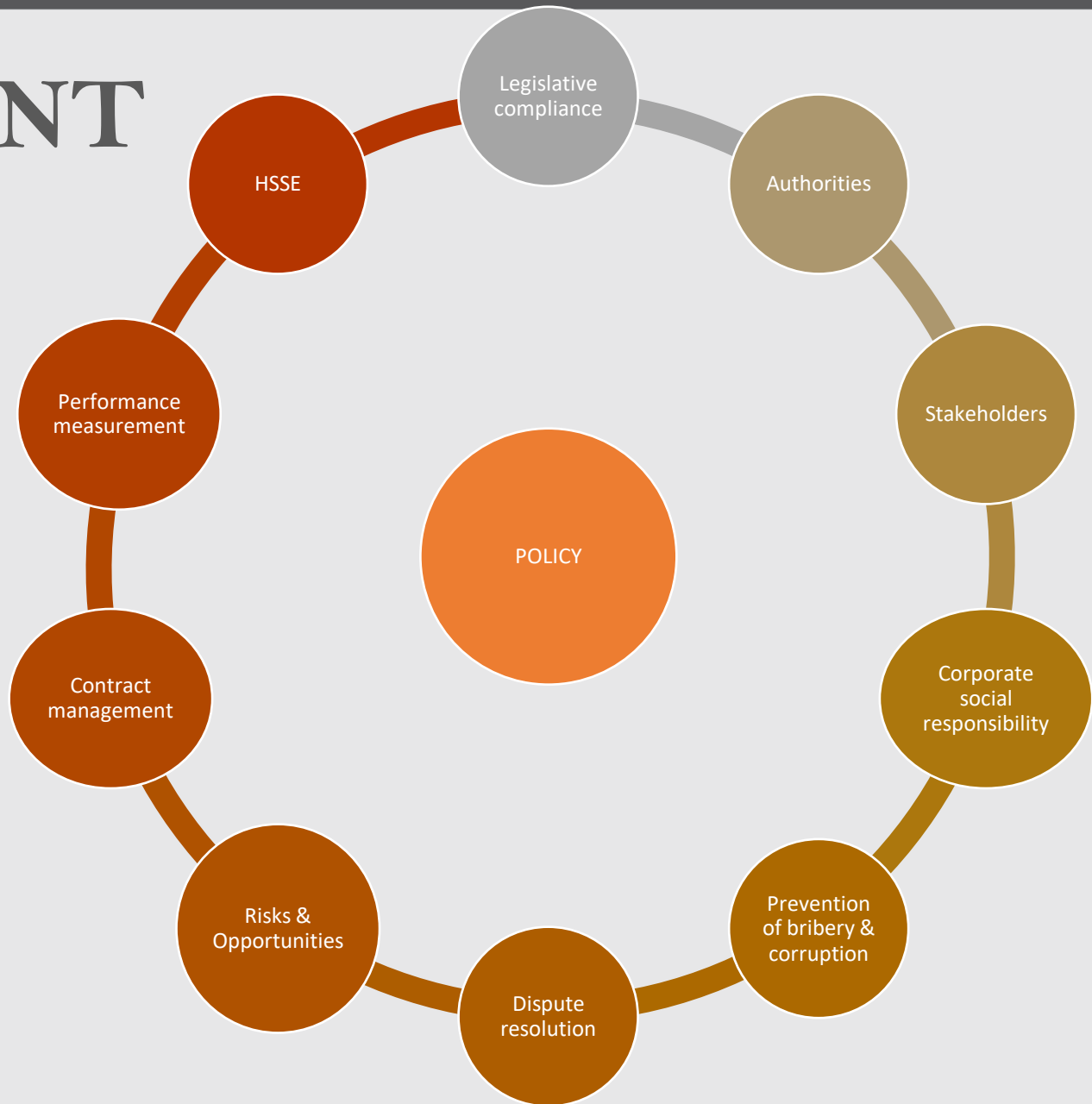


# PROCUREMENT

# THEORY OVERVIEW



# PROCUREMENT POLICY



# PROCUREMENT PROCESS

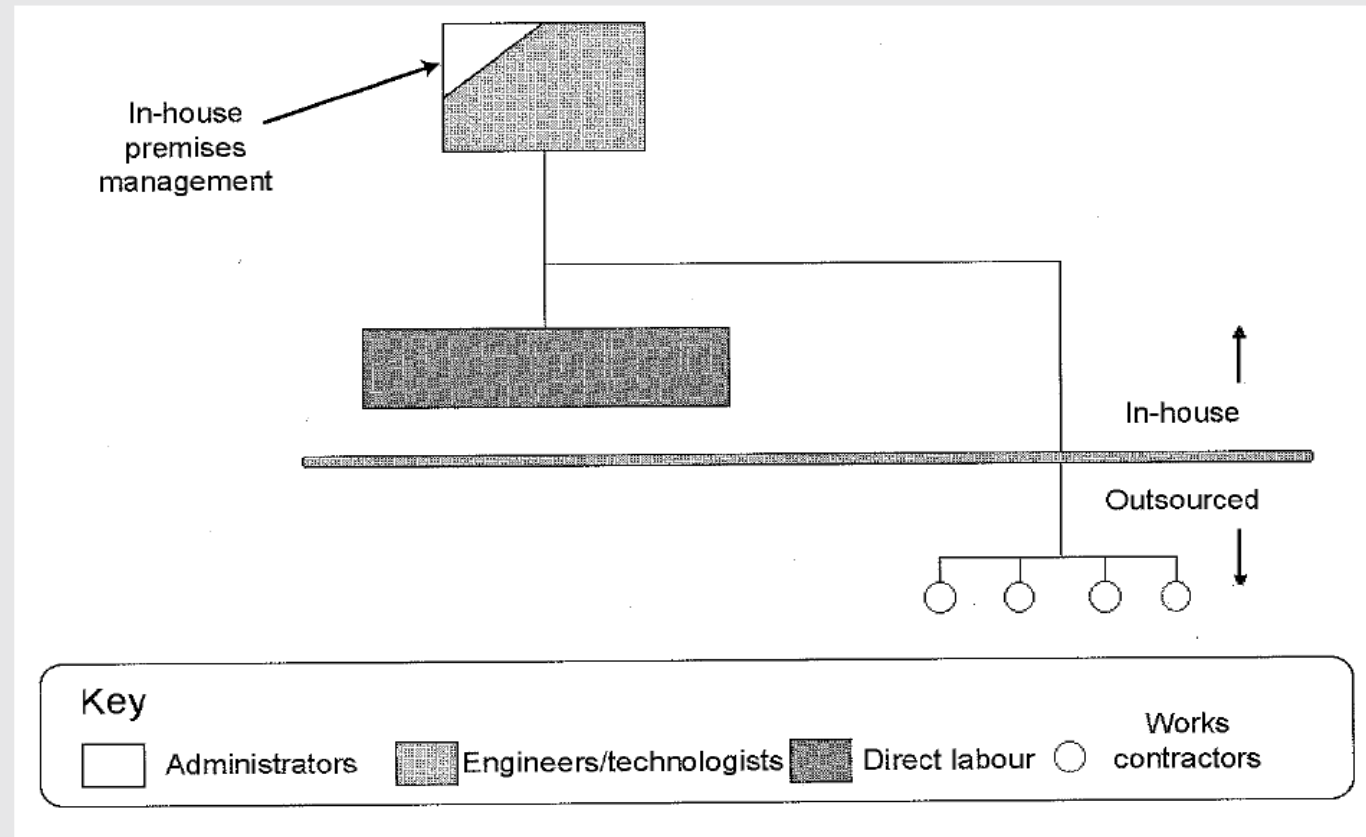


# OPTIONS FOR SERVICE DELIVERY

- Single contracts
- Bundled service contracts
- Managing Agent
- Managing Contractor
- Total facility management under a lump sum contract

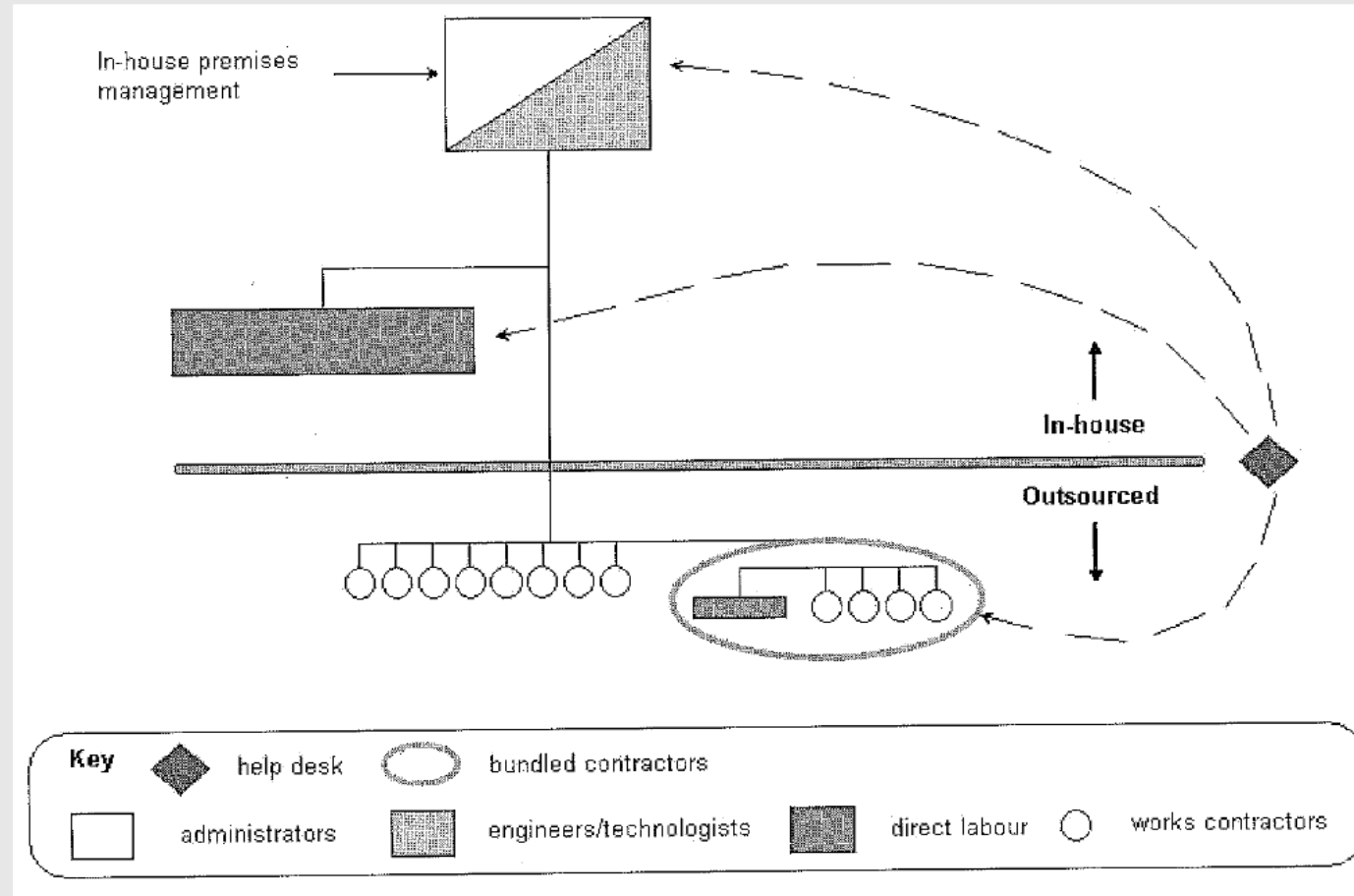
# FACILITY SERVICES OUTSOURCED – SINGLE CONTRACTS

- Facility management is insourced
- Each service is outsourced to a single contractor



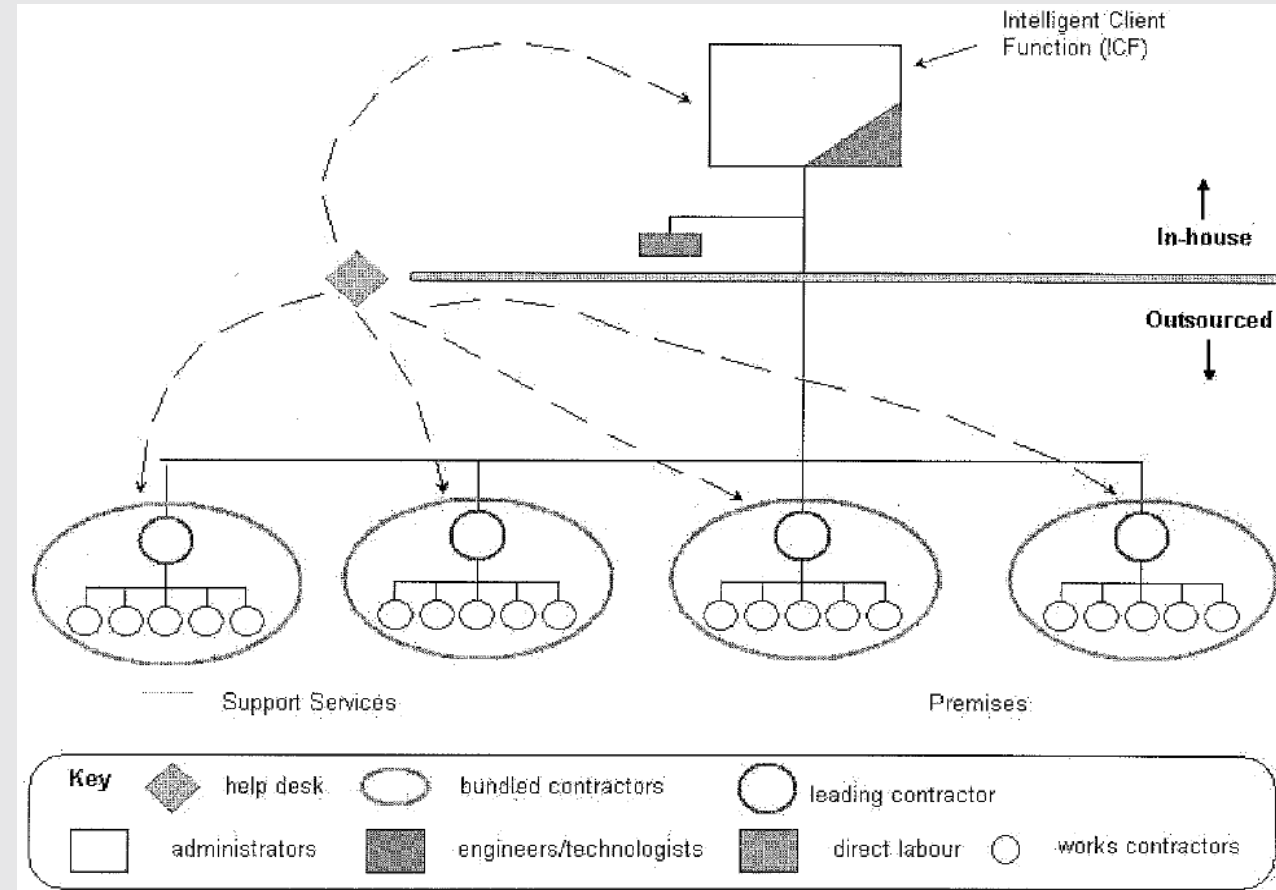
# FACILITY SERVICES FULLY OUTSOURCED – SINGLE OR BUNDLED SERVICE CONTRACTS

- Facility management is insourced
- Each facility service is outsourced to a single contractor
- Several facility services are grouped or bundled, and outsourced to lead contractor



# FACILITY SERVICES FULLY OUTSOURCED - BUNDLED SERVICE CONTRACTS

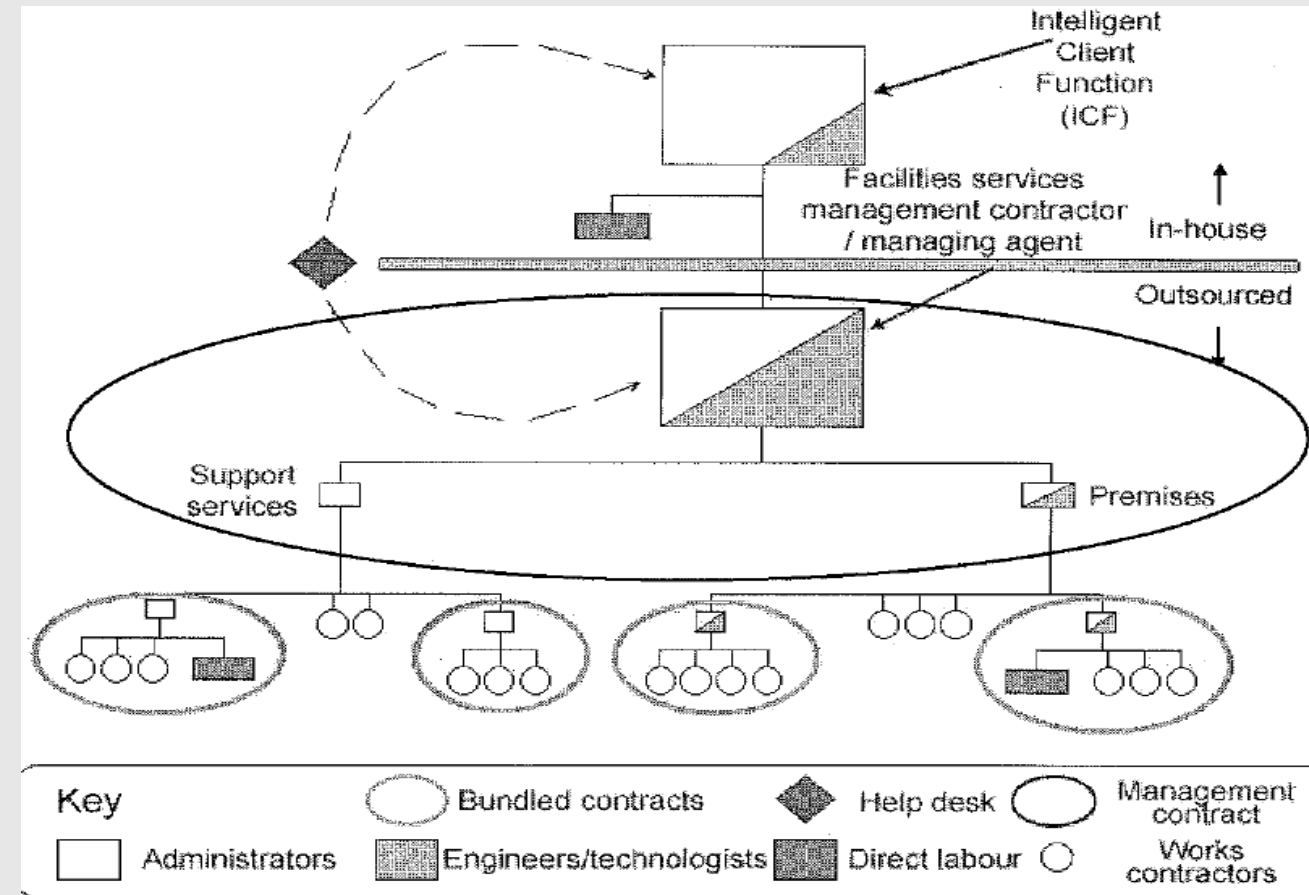
- Facility management insourced
- Several facility services are grouped or bundled, and outsourced to lead contractor



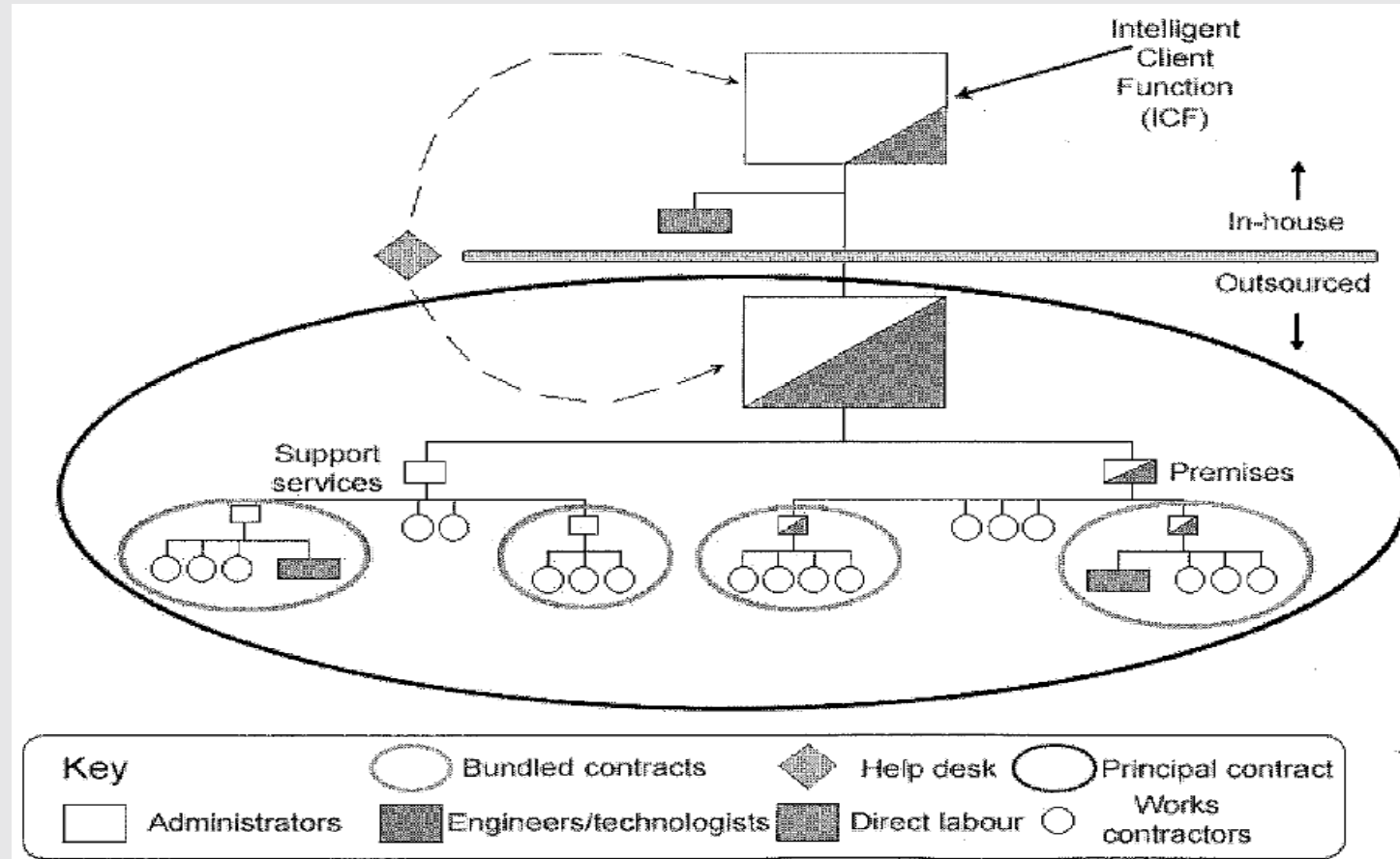


# TOTAL FACILITY SERVICES AND MANAGEMENT OUTSOURCED – MANAGING CONTRACTOR OR AGENT

- Managing Agent:
  - Typically, an interim model where the organisation does not have the management competence.
  - Service contractors are contracted to and paid by the organisation
- Managing contractor
  - Delivers certain services directly, and subcontracts others
  - Sub-contractors contracted directly by managing contractor
  - Open-book accounting



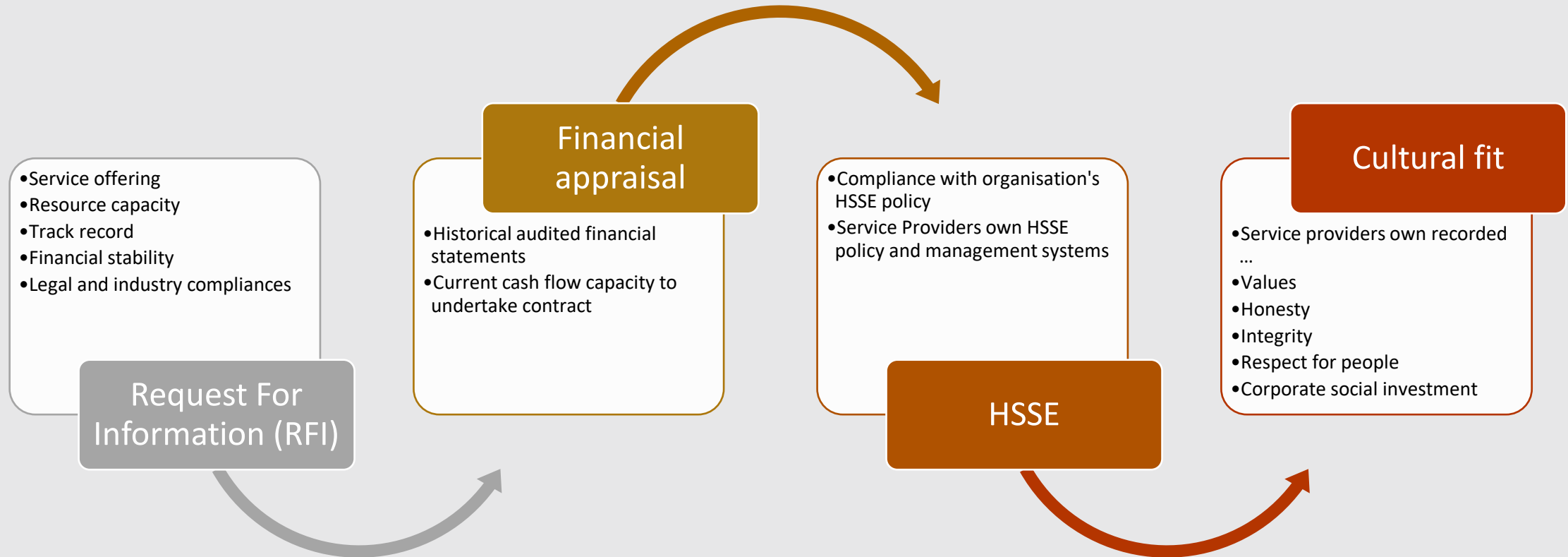
# TOTAL FACILITY SERVICES AND MANAGEMENT OUTSOURCING – LUMP SUM CONTRACT



# PRE-QUALIFICATION OF SERVICE PROVIDERS

# PRE-QUALIFICATION

*Capability = Competence + Skill*  
*Capacity = Financial + Resources*



# REQUEST FOR PROPOSAL/TENDER

**Output specification:** Defines measurable standard, and allows SP discretion on best mechanism to achieve

**Input specification:** Defines how the service will be rendered leaving minimal discretion to the SP

- What, where and timing of services
- Legislative compliance
- External standards and/or best practice
- Internal standards and procedures
- Minimum performance thresholds

Service  
specification

Service Level  
Agreement

- Scope , application and timing of services
- Service specifications
- Roles and responsibilities
- Operational procedures
- Performance reporting
- Change control
- Pricing

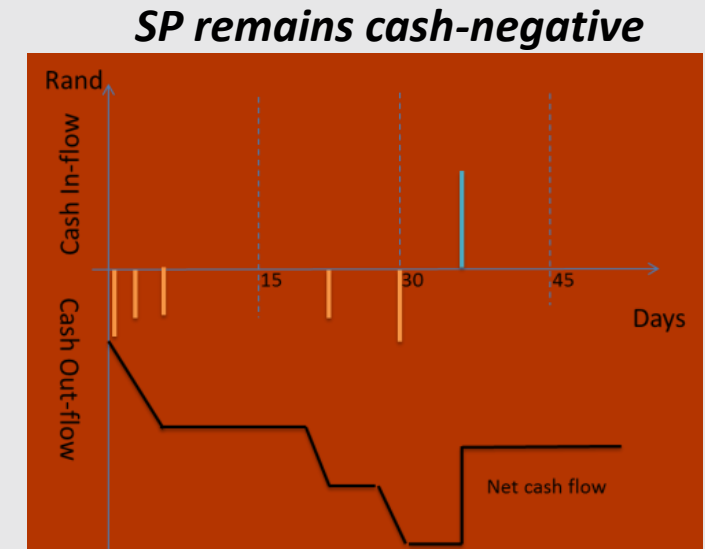
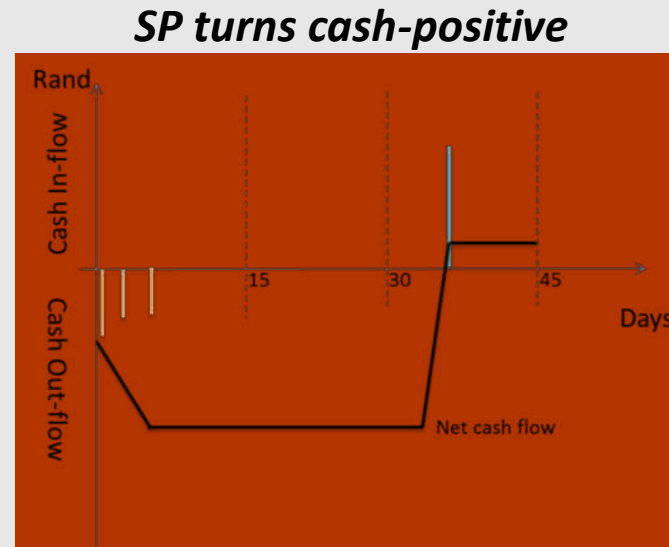
- Contract term
- Standard commercial terms

Contract

# T&CS IMPACT ON PRICING – PAYMENT TERMS

## CASH FLOW:

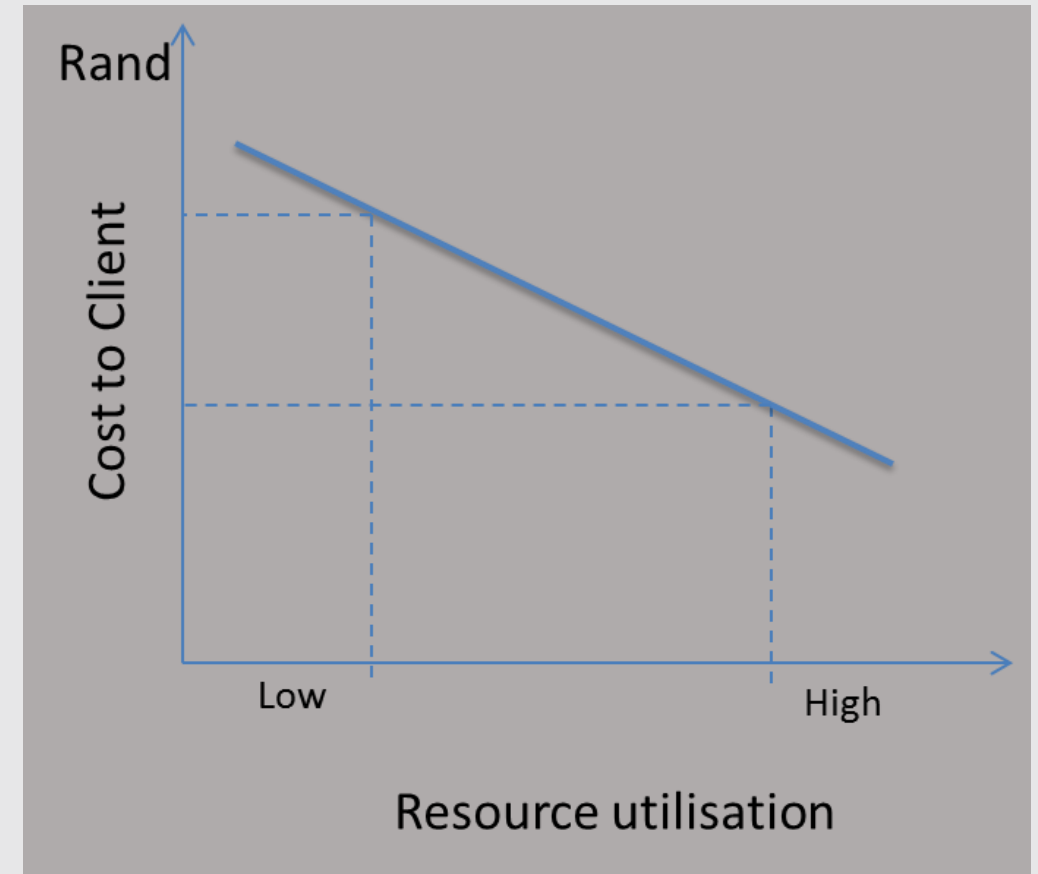
- Service provider is typically in negative nett cash flow for 30 to 60 days until first payment is receipted



# T&CS IMPACT ON PRICING – RESOURCE AVAILABILITY

## RESOURCE UTILISATION:

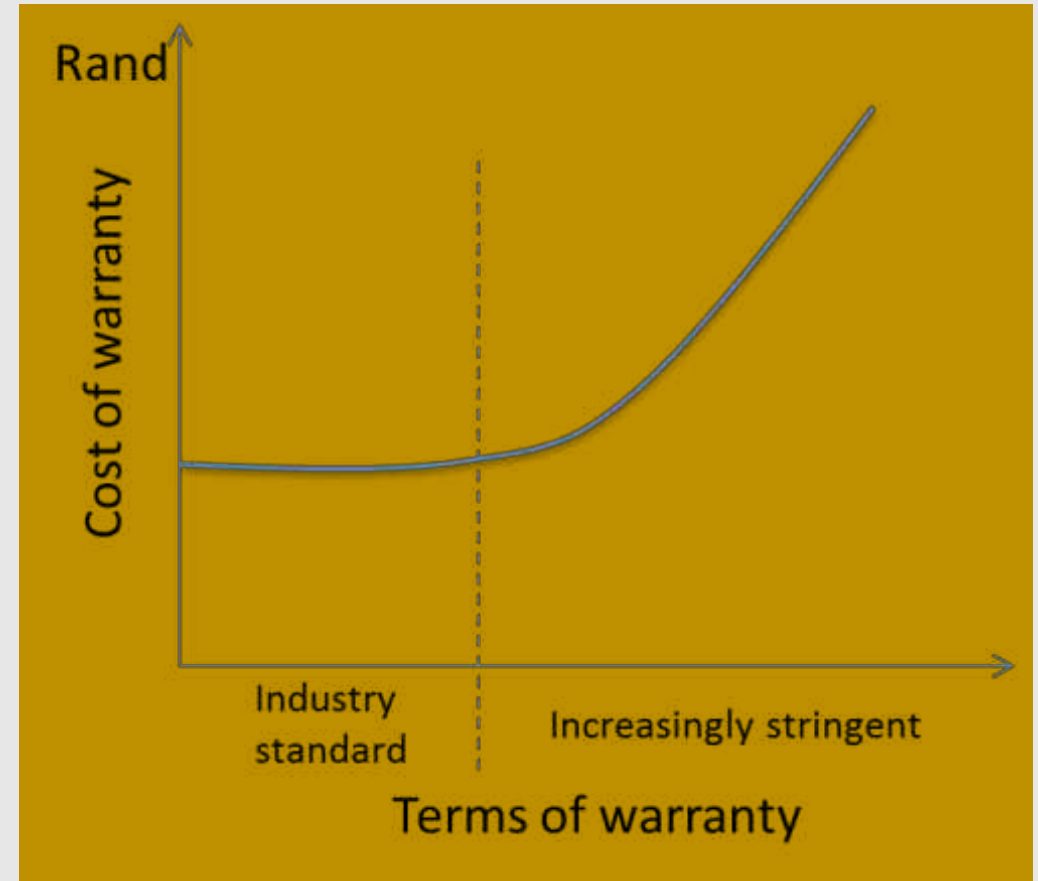
- Utilisation of a resource refers to the percentage of time a resource can be productively deployed or sold.
- 100% utilisation implies all the resource's capacity is deployed or sold.
- A fully utilised resource implies all costs are fully recovered and the price is competitive
- Where the utilisation reduces, the contractor will bear un-recovered cost and to off-set this cost, will increase the price to recover costs.



# T&CS IMPACT ON PRICING – WARRANTY / GUARANTEE

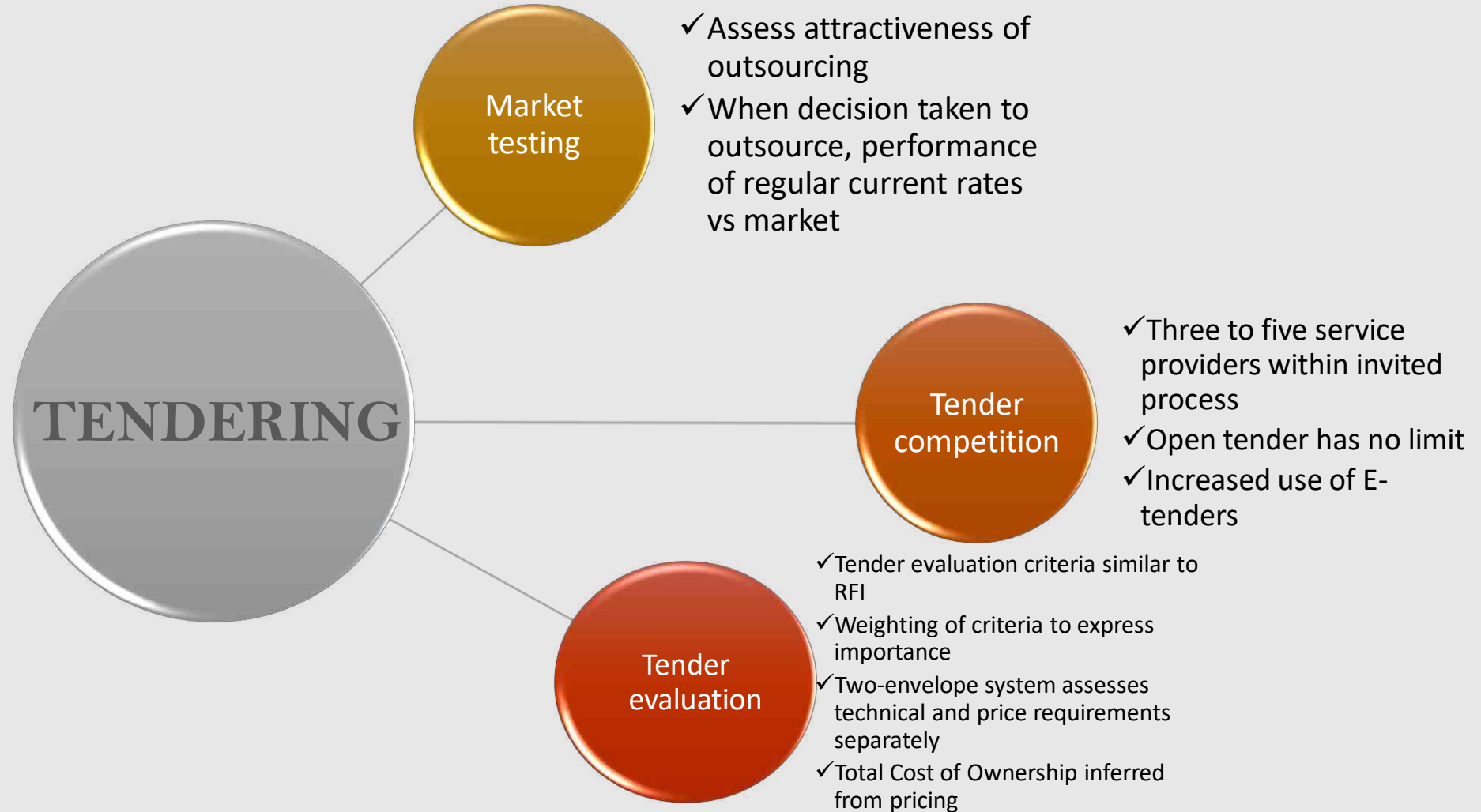
## WARRANTY DEMANDS:

- warranty is a form of insurance guaranteeing the contractors performance, whether for labour, materials or equipment.
- warranty always comes at a cost because the Contractor allows for a possible future event where he may need to correct at own cost.
- Generally, a standard industry warranty is applicable; however, should higher or more stringent warranties be demanded, the Contractor will increase his price.





# TENDERING



# FINANCIAL CLOSE

## Pre-contract meeting

- Mobilisation schedule
- Resources to be deployed, people, equipment and sub-contractors
- Insurances
- Bank details

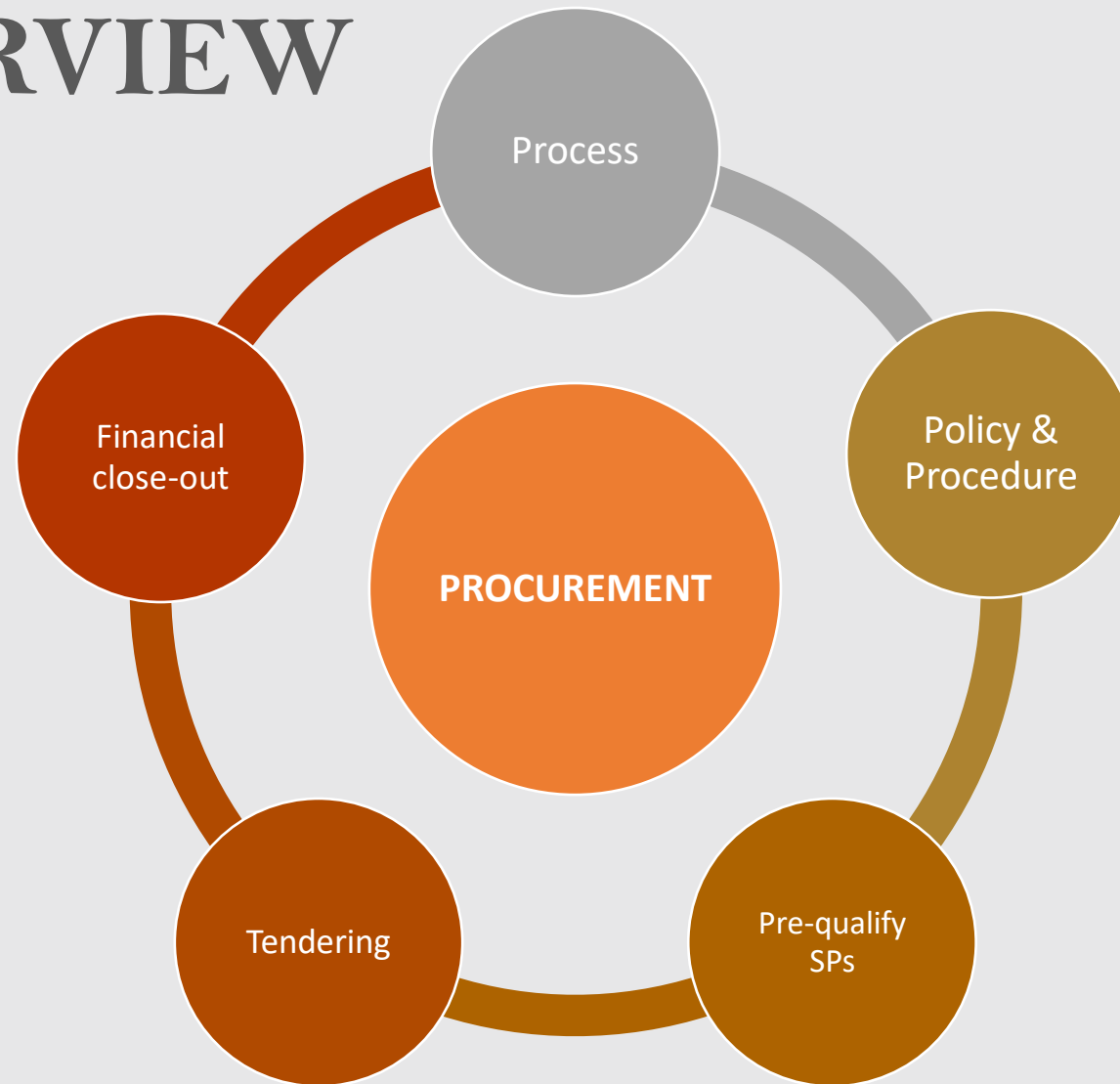
## Operational considerations

- Organisation's assurance of SPs readiness to transition
- Seamless transition from old SP to new SP

## Contract award

- All preceding matters concluded, contract can be signed
- Unsuccessful tenderers are notified

# THEORY OVERVIEW





SERVICE DELIVERY

# THEORY OVERVIEW



# INTERNAL CUSTOMER AS END-USER

- End-users must be recognised as the customer
- Relationship must be managed professionally, whether provided in-house or external provider
- Require clear definition of required services and interfaces:
  - Without....Conflicts because of differences in expectation
  - Without....Difficulty to show success
- Need to understand relative influence of end-users

# IN-HOUSE TEAM

- When outsourced, the contract defines terms; when in-sourced policy and procedure should define relationship
- In-house team must operate in same manner and performance level as service provider
- Biggest threat to in-house team is complacency with attitude of poor performance will be tolerated and go unpunished
- Starting point and constant reinforcing is a common goals, service charter and internal Service Level Agreements
- SLAs should not be regarded as unchanging but to seek continuous improvement

# MOBILISATION PLANNING

- Mobilisation is the activity of readying to start service delivery
- As much as its the provider's responsibility, the organisation remains accountable for a problem-free transition
- Typical information requirements:
  - Scope of services , service standards and performance level
  - HSSE compliance
  - Operational processes and procedures
  - Management information and reporting
  - Performance management
  - Valuation and payment



# MOBILISATION PLANNING

## Mobilisation plan

- Activity schedule must detail tasks, dependency and timing
- Check existing service provider, transition must be seamless or without disruption
- Perform risk assessment to mitigate

## Supply side considerations

- Sub-contracting only with approval
- Reliable up to date reporting to identify future problems
- Leading indicators of performance is in supply side

## Business continuity

- Managing recovery should normal operations be disrupted
- Service provider change has risk, hence essential to assess risk and opportunity
- Consider the exiting and entering providers as they present different risks

# MOBILISATION PLANNING

Operational  
resources and  
processes

- Service provider to define their executing and quality control procedures
- Declare their executing resources
- Declare their management and supervision resources
- Organisation must monitor provider's compliance with their own commitments as a overseer

Management  
information

- Successful management depends on reliable up to date information to know extent of provider's success

# CONTRACT MANAGEMENT

## Contract Terms and Conditions (T&Cs)

- Definition of standard commercial terms adopted by the organisation
- Changes to standard T&Cs

## Contract administration

- Roles and responsibilities
- Contract Manager assigned for each contract
- Help Desk or central coordination for all issues/requests
- Scheduled meetings to deal with operational and tactical matters
- Payment validation, approval and processing
- Change control procedure for dealing with any change to scope, standards, and generally all T&Cs

# CONTRACT MANAGEMENT

## Cost control

- Costs must be systematically monitored and controlled
- Cost limits will be set for various cost segments against which actual is reported

## Performance reviews

- Formal meetings with documented outcomes
- End-user performance review
- Financial review
- HSSE review
- Service provider's own management system
- Risk identification and mitigation

# THEORY OVERVIEW



# SPECIALIST SERVICES

# THEORY OVERVIEW



# DEFINITION OF SPECIALIST SERVICES

- There is no specific definition of a specialist service
- Organisation criteria will determine specialist service
- As much as each service demands consideration to regards requirements, performance standards and costs; there are services that demand special consideration.



# CRITERIA TO CONSIDER

Criteria	Considerations
Service failure or material deficiency	Impact on mission-critical business processes and systems, i.e. failure or deficiency will have immediate and detrimental impact on ongoing operations and services of the business
	Consequential losses and recovery time associated with: <ul style="list-style-type: none"><li>• Breach</li><li>• Theft or other malicious acts on company, client and personal data and information; and physical assets</li></ul>
	Consequential reputational harm or damage

# CRITERIA TO CONSIDER

Criteria	Considerations
Exploiting full potential of services	Services inclusive of technology, people and other resources has an inherent maximum potential that can be left dormant if not focused upon and consciously exploited
Rate of technological changes and the associated risks and opportunities	The technology in question may not be the company's core technology and therefore is not focused on tracking technology movements.
	Complexity of technology required corresponding specialised knowledge and skills
	Maintaining equipment and other support resources to exploit or leverage technology changes
	Maintaining personnel whose skill is constantly updated in accordance with technology changes

# CRITERIA TO CONSIDER

Criteria	Considerations
Responsiveness to meet demand	Responsiveness to supply goods or service supportive to the dynamic demands placed on the company's core services
	Responsiveness to develop and implement solutions on demand
Rate and impact of environment changes	Diversity and level of threats to the company core and support operations; and associated response measures
	Diversity and complexity of local and global Laws, Acts, Standards, etc.

# TYPICAL SERVICES CONSIDERED

## SPECIALIST SERVICES

- Information and Communications Technology (ICT) related services includes the provision, operation, maintenance of support of:
  - Provision, operations and maintenance of ICT infrastructure including computers, data centres and networks
  - Software/application packages to enable business processes, management decision making and support.
  - Performance and security of the organisations data and information, and it business processes

# TYPICAL SERVICES CONSIDERED SPECIALIST SERVICES

- Health-case services that supports clinical services
  - Maintenance of clinical systems such as medical diagnostic equipment, sterilisation equipment, etc.
  - Patient transport services
  - Information systems and services
  - Administrative systems and services
  - Practice management systems and services

# TYPICAL SERVICES CONSIDERED SPECIALIST SERVICES

- Security and protection services for the safeguarding and protection of people and company assets
  - Detect, deny and prevent unauthorised entry or intrusion
  - Initiating appropriate response to security threats
  - Provision of accurate data and information for analysis
  - Provide evidence to support criminal prosecutions

# TYPICAL SERVICES CONSIDERED SPECIALIST SERVICES

- Custodial services for the containment of persons that pose a threat and has committed criminal acts:
  - Reception services
  - Post-charge administration, e.g. fingerprinting
  - Drug testing
  - Detainee care and catering
  - Forensic medical services
  - Interpreter services
  - Identity parade

# TYPICAL SERVICES CONSIDERED SPECIALIST SERVICES

- Professional services including:
  - Accounting
  - Law
  - Architectural and engineering
  - Recruitment
  - Travel
  - Insurance

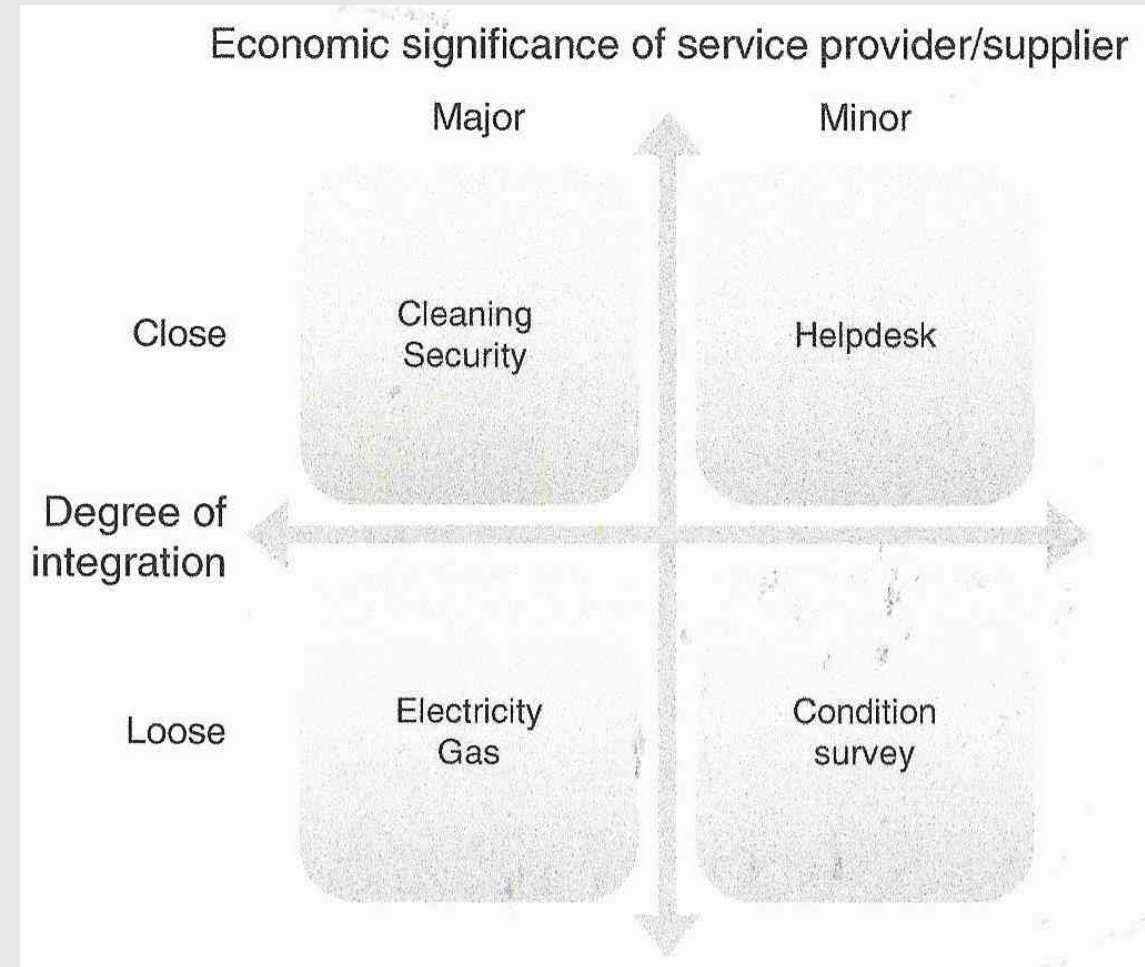


# CONSIDERATIONS WITH CONTRACTING SPECIALIST SERVICES

- Risk management and mitigation through insurance and indemnities
  - Essential to understand the service and define the service requirements, else the service will not be provided as expected
  - No outsourcing before all risks are identified, assessed and mitigated
  - All interfaces must be identified between processes, people technology, etc; and managed
  - Maintain close oversight over service provider to assure performance of responsibilities
  - Risk consequence of service provider failure could be achieved through service provider indemnity or insurance
  - Where risks cannot be adequately mitigated through above it is critical to assess the providers financial and social standing before contracting

# IMPORTANCE BASED ON INTEGRATION AND ECONOMIC SIGNIFICANCE

- Relationships, controls and incentives will differ based on the importance of the service providers regards:
  - Integration with the company's processes, people, technologies, etc,
  - Upside and downside impact on the organisation based on service provider's performance
- Collaborative / Partnering agreement typically needed where close integration is required, under both major and minor economic significance



# PARTNERING <-> COLLABORATIVE RELATIONSHIPS

- Intelligent procurement seeks to combine competition and cooperation to achieve optimal benefits
- Relationships must be open and supportive, even-handed, mutual respect and encourages continual improvement

# PARTNERING

- Criteria

- Collaborative approach is best mechanism to deliver cost reduction, improved quality and innovative solutions
- Market is poorly developed or highly specialised and requirements are complex and continuously developing
- Benefits are maximised when objectives of the company and service provider are aligned

# PARTNERING

- Form of contracting
  - Framework agreements – Covers a number of contracts over a specific period having defined deliverables
  - Partnering charters – outlines the company's philosophy, commitments and goals of the arrangement and includes:
    - Roles and responsibilities
    - Lines of communication
    - Ways of overcoming problems

# PARTNERING

- Risk, reward and opportunity
  - Identified risks must be recorded, assessed and mitigated
  - Reward for service provider is payment that matches performance
  - Rewards for the company is best value in achieving the end-user experience
  - Gain sharing is a arrangement where cost savings can be shared in a pre-agreed manner and where incentives apply for performance exceeding certain level.

# PARTNERING

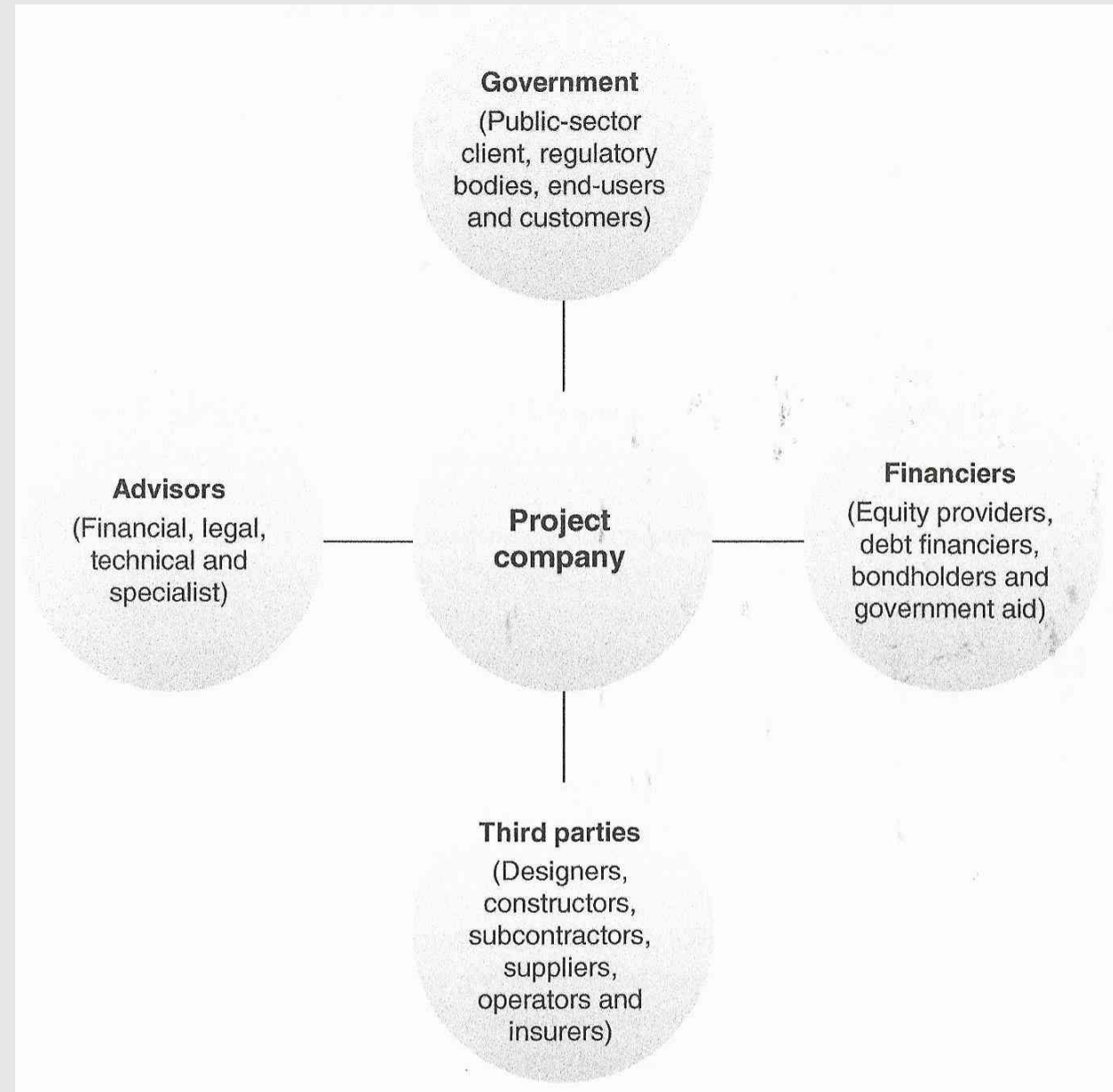
Partnering	Traditional
<ul style="list-style-type: none"><li>• Innovative, not so well-developed</li><li>• Ability to negotiate on price</li><li>• Close interaction between parties</li><li>• Quality improvement possible</li><li>• Proactive service provider response</li><li>• Disputes less likely Long-term benefits</li></ul>	<ul style="list-style-type: none"><li>• Established, well-developed</li><li>• Difficult to negotiate on price</li><li>• Arm's-length relationship</li><li>• Quality likely to be minimum specified</li><li>• Reactive service provider response</li><li>• Short-term gains</li></ul>

# PUBLIC PRIVATE PARTNERSHIPS (PPPS)

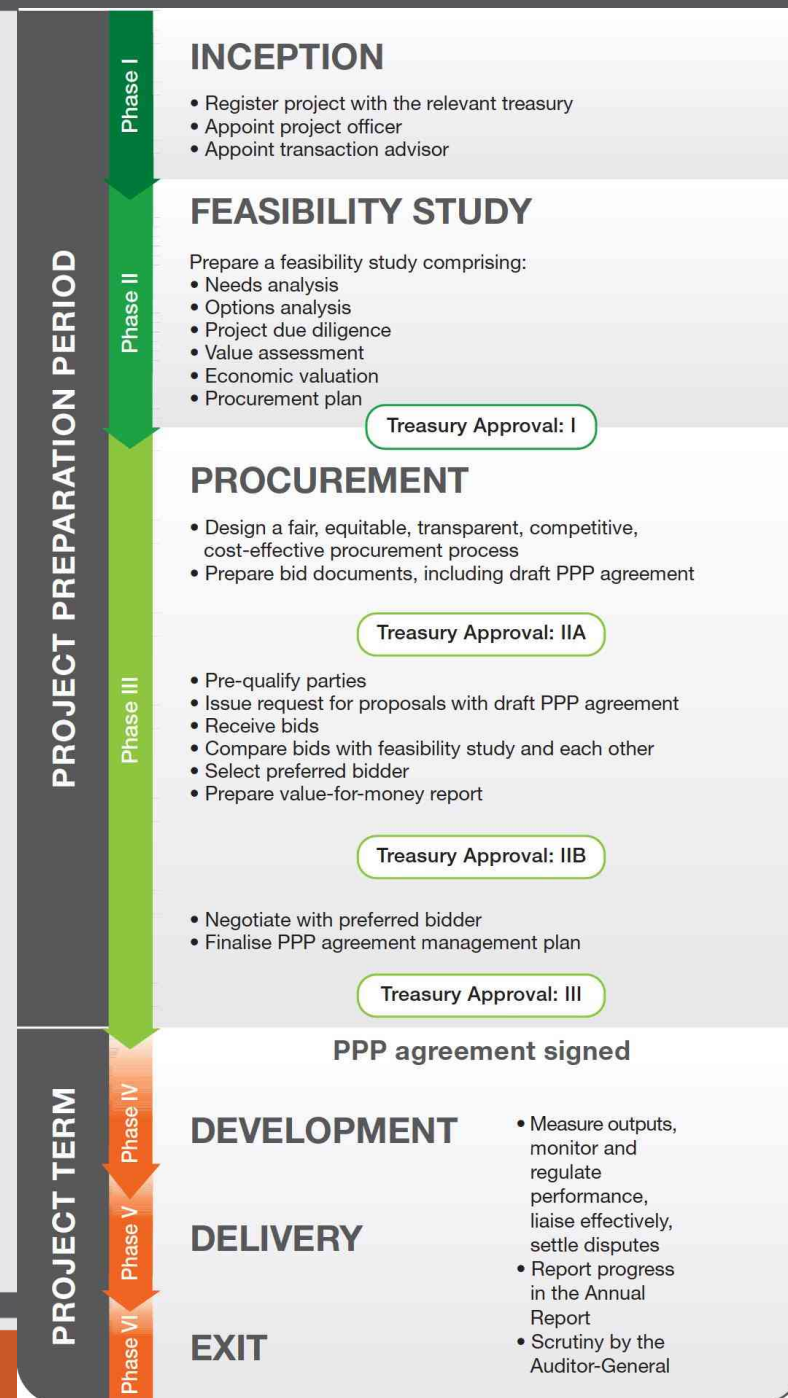
Typical contracts	
BOOT	Build, own, operate and transfer;
BOR	Build, operate and renewal of concession;
BOT	Build, operate and transfer;
BRT	Build, rent and transfer;
BTO	Build, transfer and operate;
DBFO	Design, build, finance and operate;
DCMF	Design, construct, manage and finance;
MOT	Modernize, operate and transfer;
MOOT	Modernize, own, operate and transfer; and
ROT	Rehabilitate, own and transfer.



# PPPS – PARTIES



# PPP PROJECT LIFECYCLE PER SA'S NATIONAL TREASURY REGULATION 16



# PPP REGISTERED PROJECT AS AT MAY 2019 - EXAMPLE

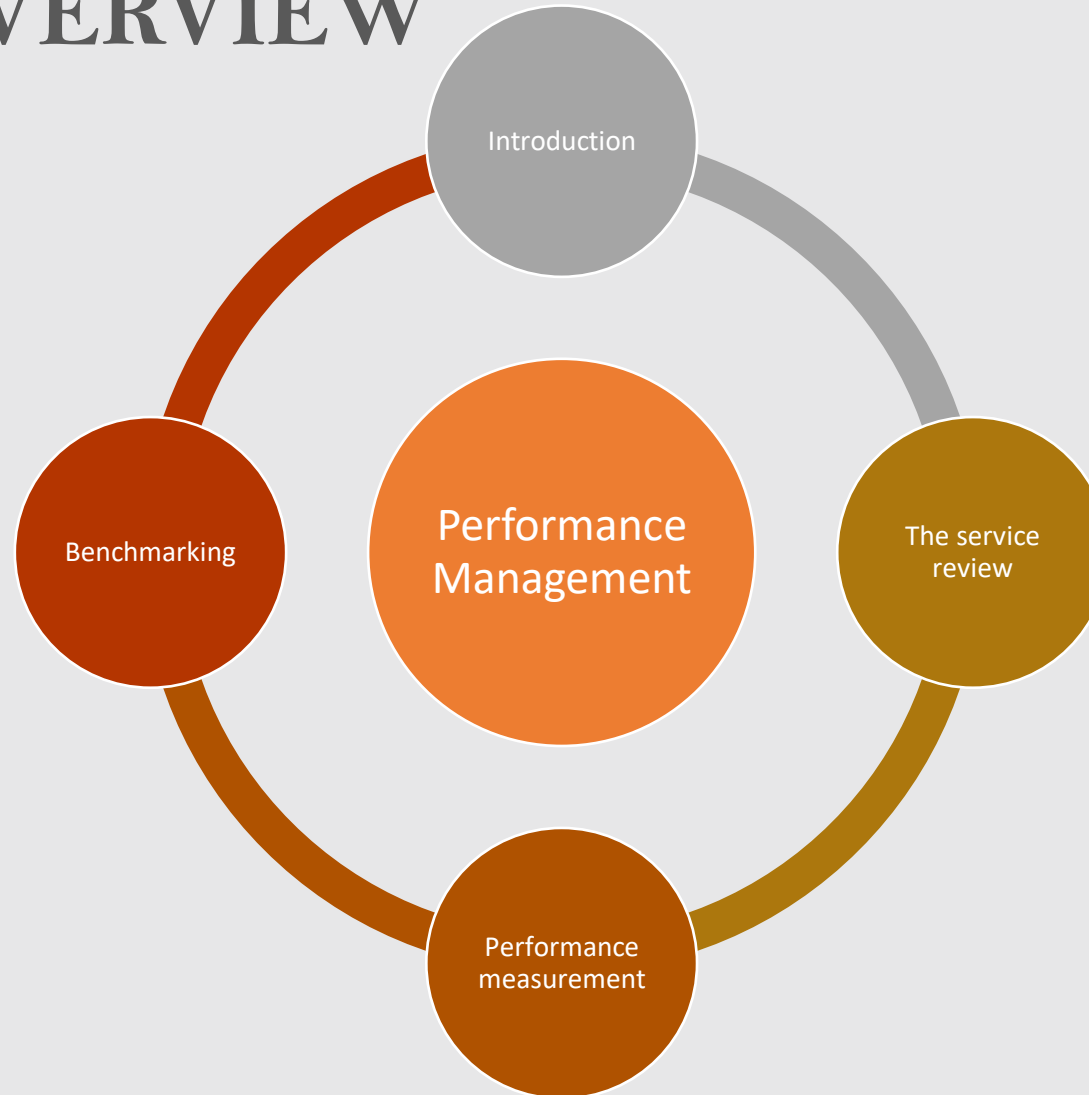
PROJECT NO.	NATIONAL DEPARTMENTS	PROJECT OFFICER	PROJECT	STATUS	TRANSACTION ADVISOR
N066	Rural Development and Land Reform	Rendani Sadiki 012 312 9300	Office Accommodation	Procurement	J Maynard SA Pty Ltd
N111	Dept. of Transport	Mlungisi Maphanga 071 680 6217	Fleet Management	Procurement	Internal
N121	Department of Science and Technology	Pertunia Mphato 2712 843 6601	Office Accommodation Development	Feasibility Study	Utho Capital
N122	Department of Transport	Metse Ralephenya 0123093032	Procurement of two Emergency Towing Vessels(ETV)(SALVA TUGS)	Feasibility Study	J Maynard SA Pty Ltd
N123	Home Affairs	Mr. Vukani Nxasana 012 406 4024	Implementation of the port of entry redevelopment master plan	Procurement	New TAs to be appointed
N124	Home Affairs	Mr. Vukani Nxasana 012 406 4024	The smart identification card Project	Inception	Not yet appointed
TASN125	DIRCO		Pan African Parliament	Inception	Not yet
TASN126	Social Development	Mr Tony van der Merwe	Office Accommodation Development	Inception	Not yet appointed
TASN128	Correctional services		New Head office accommodation	Inception	Not yet appointed
TASN129	National Treasury	George Matsane 012 315 5412	New Head office accommodation	Inception	Not yet appointed

# THEORY OVERVIEW

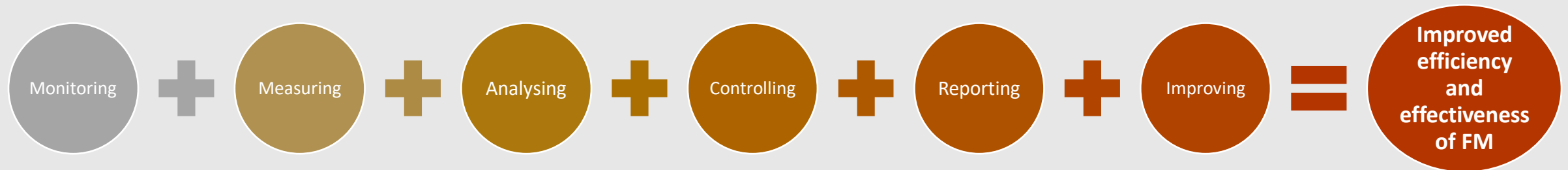


# PERFORMANCE MANAGEMENT

# THEORY OVERVIEW



# PERFORMANCE MANAGEMENT - DEFINITION



# SERVICE REVIEWS

## End-user reviews

Includes post-implementation and post-occupancy reviews

- Physical asset review post new-build or refurbishment
- Performance of services

## Operational review

Applies to both in-house and outsourced services

- Actual vs planned performance for each measured aspect
- Review of criteria selected, that these remain effective measurements
- Highlight matters requiring attention

## Financial review

Actual and committed cost review

- Actual costs versus total budget
- Actual cost versus contract mandate
- Actual cost versus individual service cost budgets
- Forecast spend versus total period budgets
- Ongoing financial capacity of service provider



# SERVICE REVIEWS

## HSSE review

Health, Safety, Security and Environment

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- Reporting on details and causes of incidents
- Tracking consolidated statistics

## Regulatory compliance review

- Actual compliance with Laws and Regulations
  - Actual compliance with corporate policies and procedures
- 

## Service specifications

Applicable to in-house and outsourced services

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- Review of service specifications
- Review of service level agreements

# PERFORMANCE MEASUREMENT

## Critical Success Factors

CSFs

- Actions/Processes/Procedures to be performed well for organisational objectives and/or facility management objectives to be achieved

## Key Performance Indicators

KPIs

- Must be aligned with CSF
- An indicator(s) that assist to measure and control progress of a CSF
- Defines what's to be achieved and confirmation subsequently achieved
- Enables comparison over time and establish the trend towards achieving the CSF

## Performance monitoring

- Comparing actual performance with expected performance
- Monitoring end-user satisfaction
- Informing senior managers of deviations

# BENCHMARKING

## Basic approach

External focus to achieve continuous improvement

- Establishing norms of performance
- Applied to several processes such as financial management, people management, innovation, quality, etc.
- Introduce new thinking by comparing with other similar organisations in same industry, other industry, etc.

## Best practice

Level of performance or standard of achievement at a given time

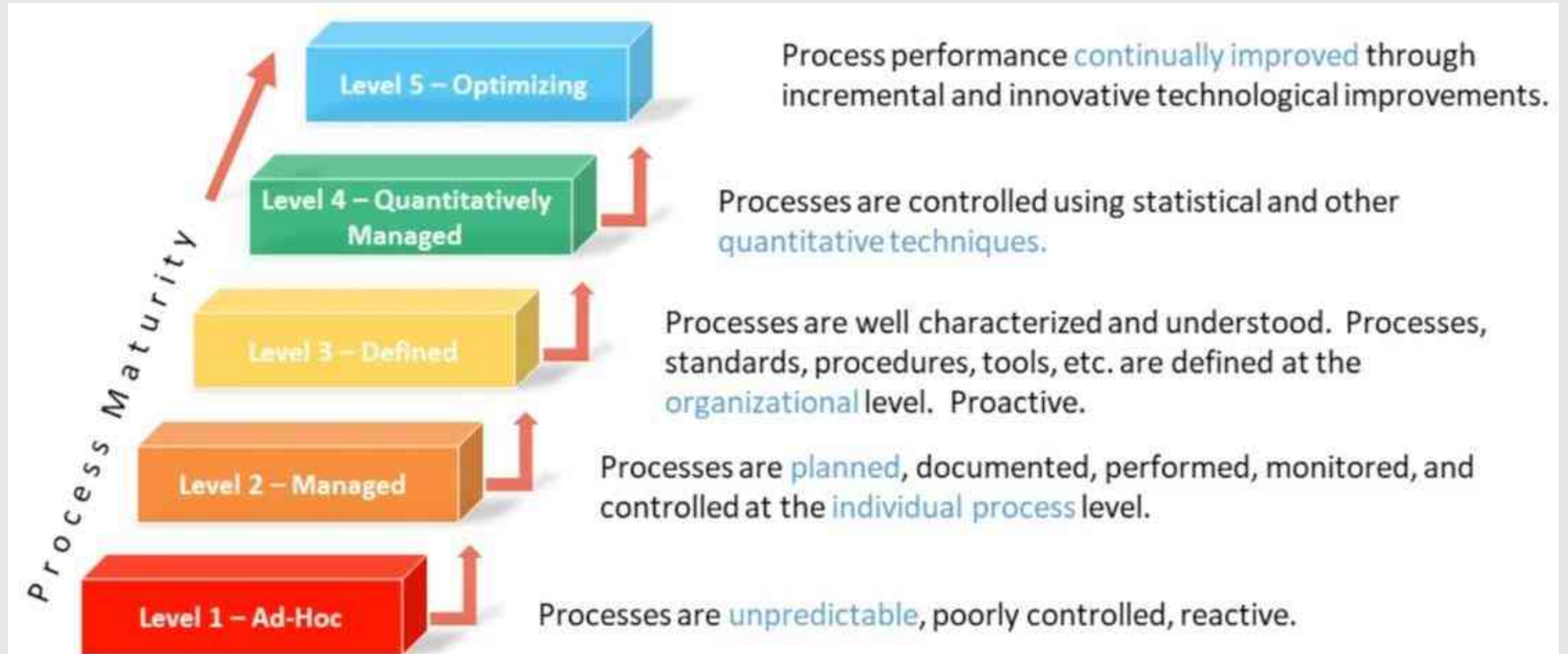
- Not a fixed performance, as soon as higher level of performance is found, it becomes the best practice
- Can apply to outcomes, results or process

## Continual improvement

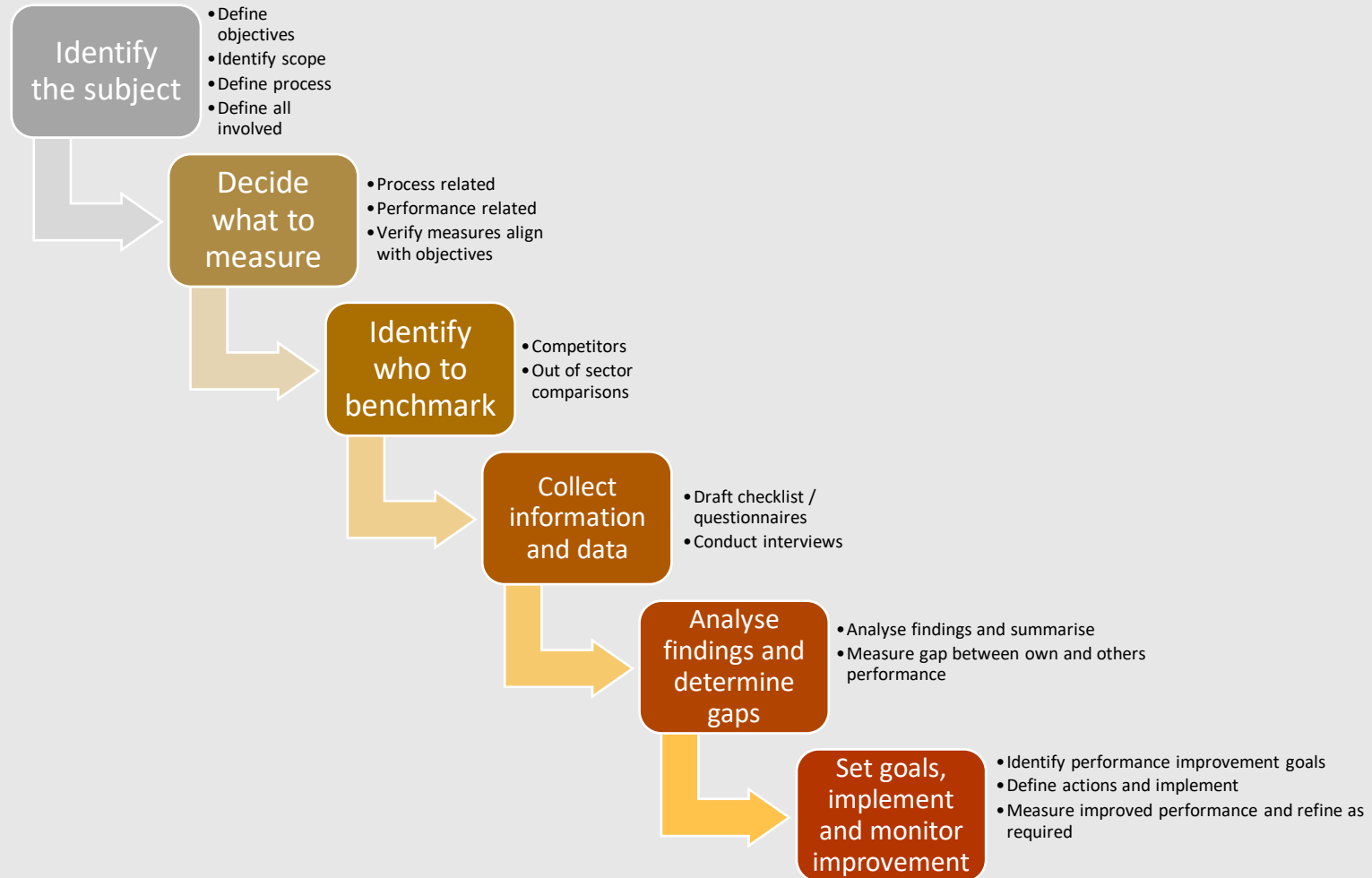
Process of continual advancement to best practice

- Identify current performance versus best practice
- Determine steps and resources required to improve performance

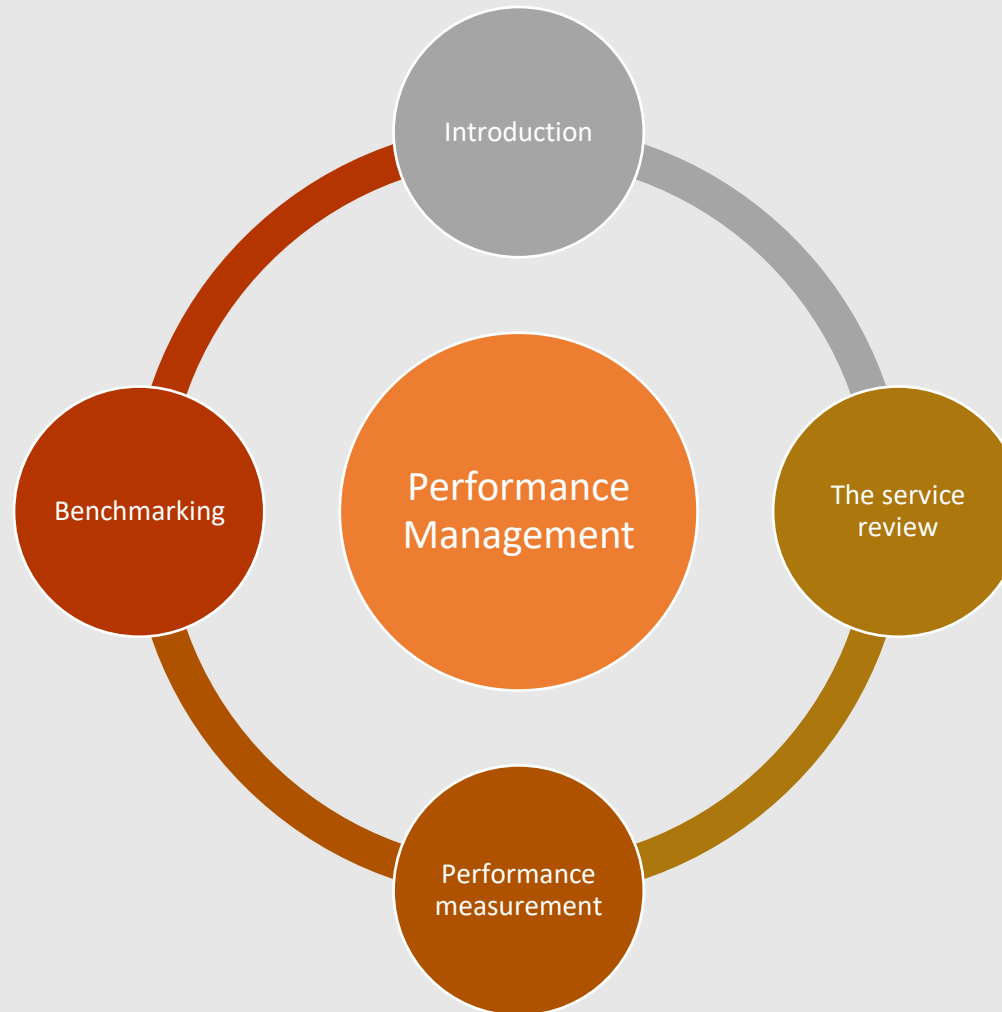
# PROCESS MATURITY PROGRESSION MODEL



# BENCHMARKING PROCESS



# THEORY OVERVIEW



# EXAMPLE OF SPECIFICATIONS

# COMPLETE DEFINITION OF SERVICES





# UNDERSTAND THE SERVICE AND INDUSTRY



Know the service  
as well as your  
service provider

# BASIC BUSINESS MODEL

## Inputs

- **Primary**
  - Consumable equipment
  - Consumable chemicals and materials
- **Secondary**
  - Electricity
  - Water

## Resources

- **People**
  - Cleaners
  - Supervisors
- **Equipment**
  - Capital
  - Consumable
- **Working capital**

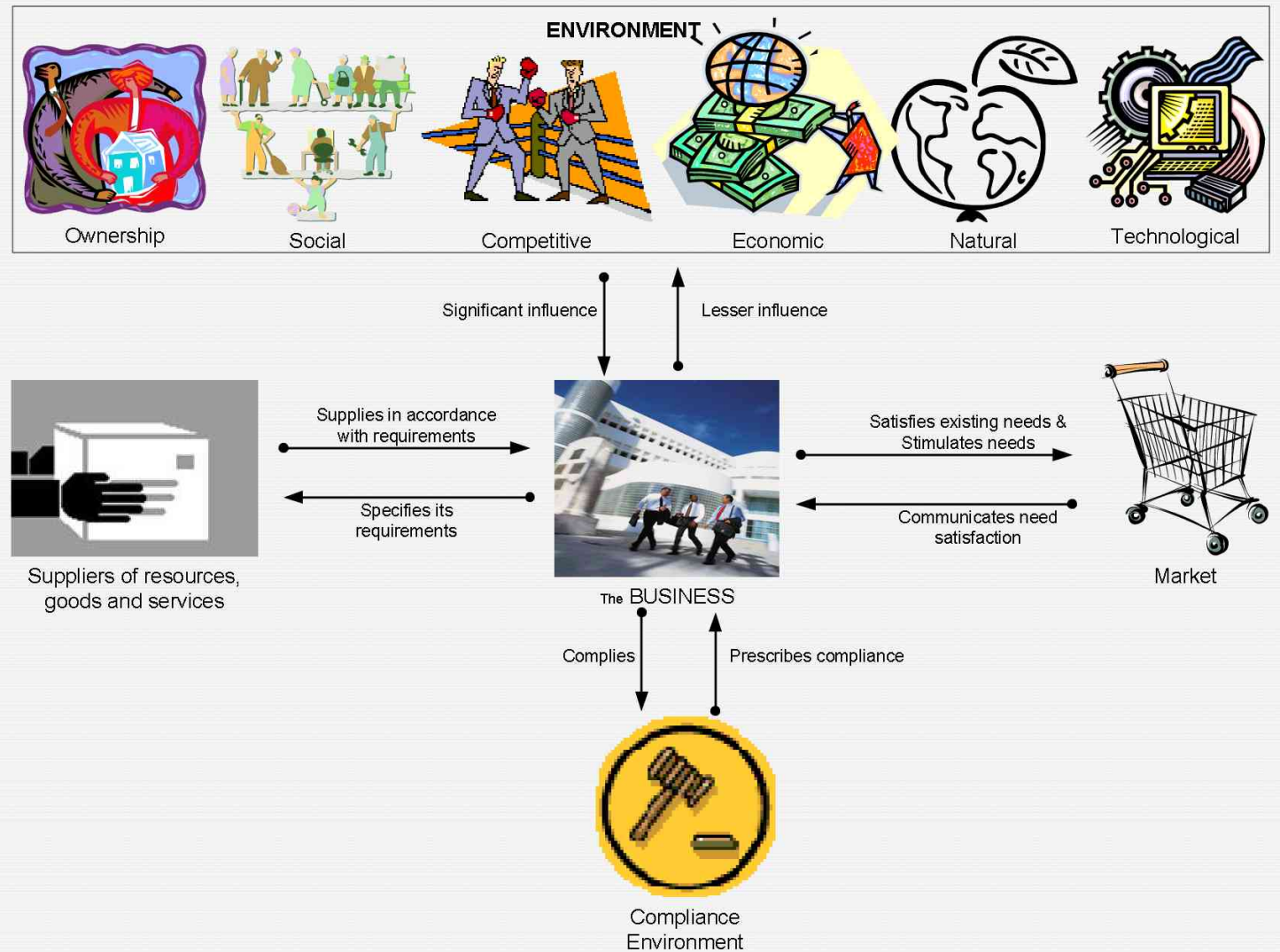
## Process

- Schedule administration
- Supply, storage and delivery logistics

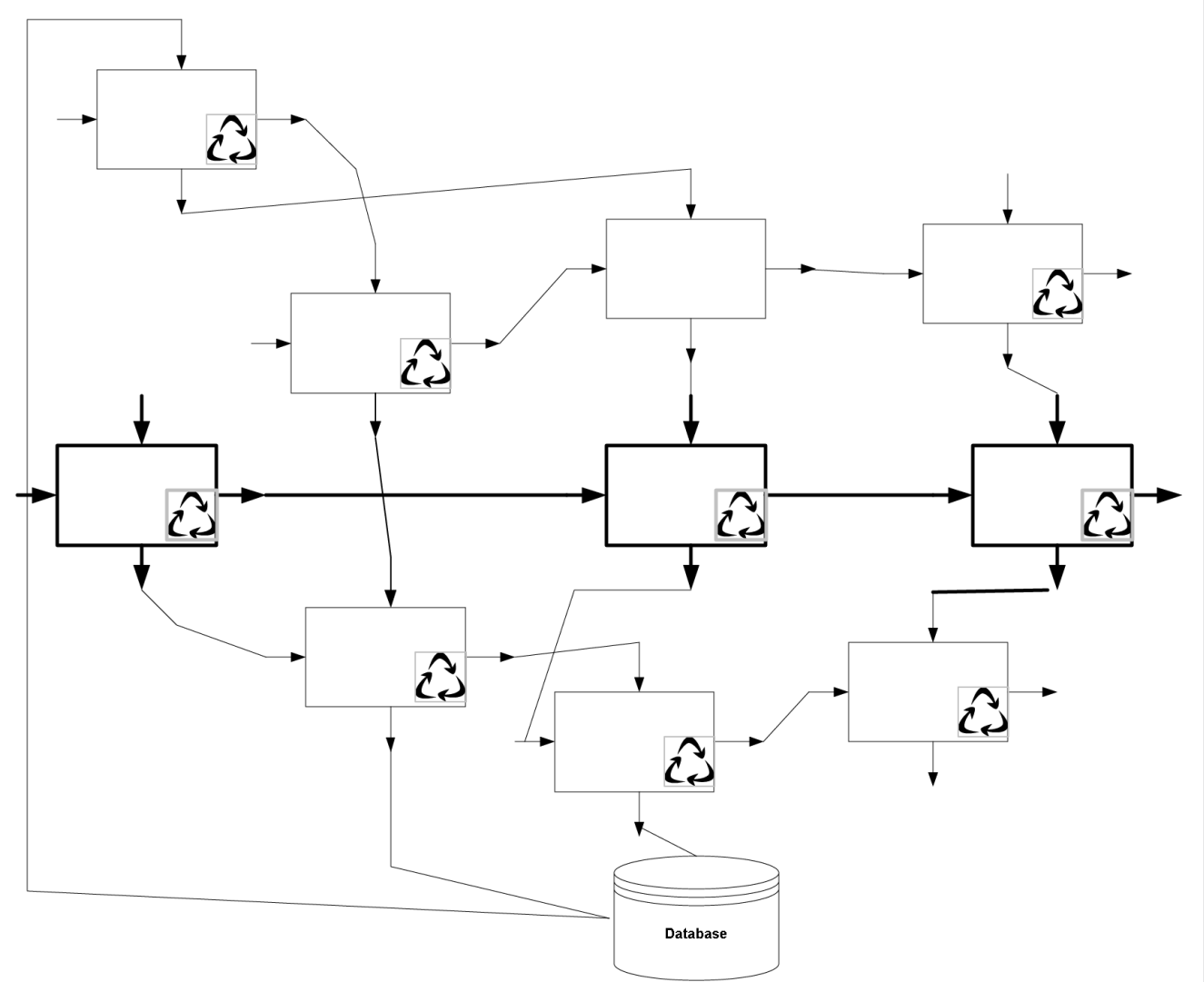
## Outputs

- **Primary**
  - Clean and hygienic workplace
- **Secondary**
  - Solid waste
  - Liquid waste

# UNDERSTAND THE BIG PICTURE

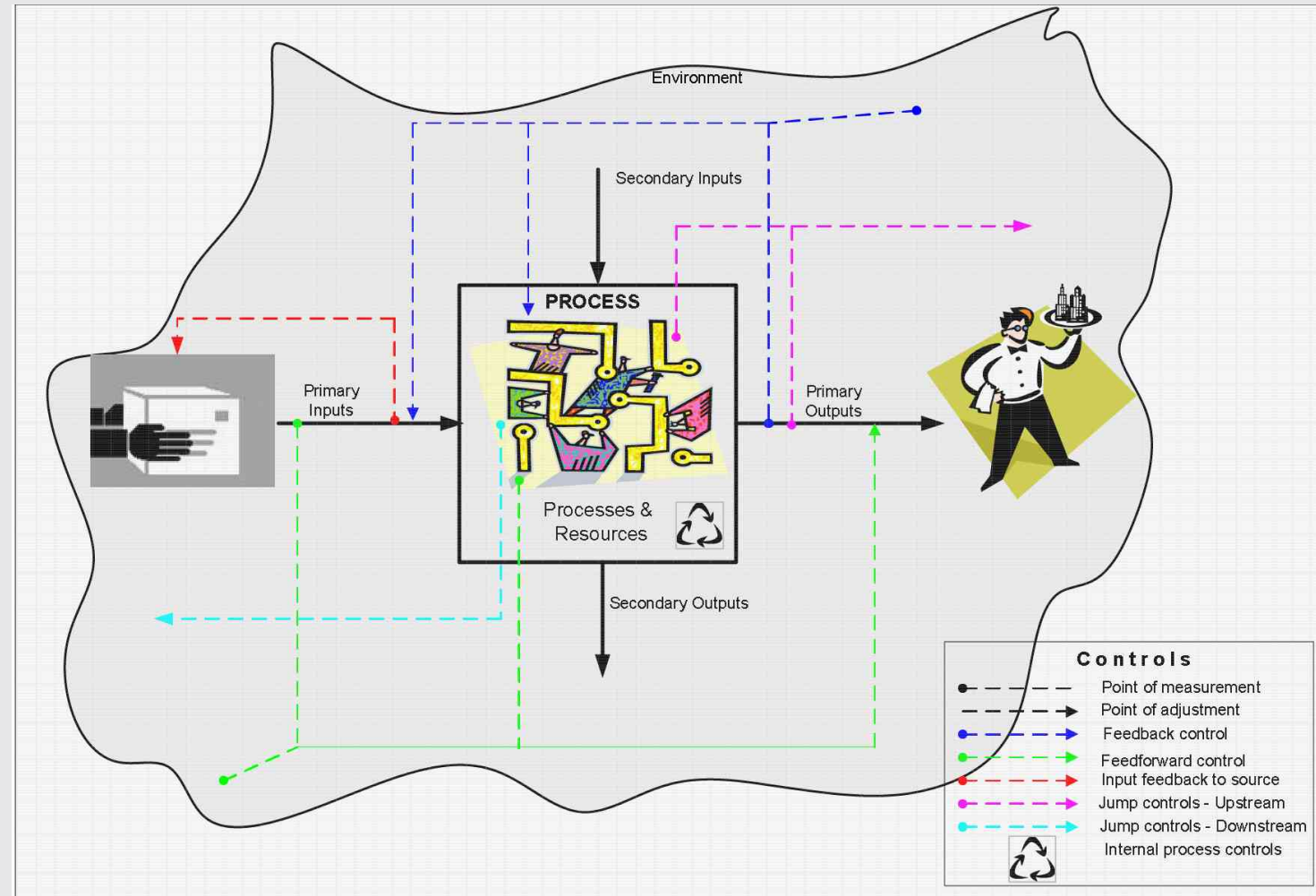


# UNDERSTAND CONNECTIVITY OR DEPENDENCIES



# UNDERSTAND CONTROLS

- Leading indicators and controls allows for proactive action and gives assurance of service performance
- Lagging indicators and controls measures past performance and responses will always be reactive



# VOLUNTARY / PROFESSIONAL ASSOCIATIONS

- National Contract Cleaners Association
  - Industry association
  - Employers Association registered with Dept of Labour
- International Sanitary Supply Association
- South African Pest Control Association
- Institute of Waste Management of South Africa
- ECO-Choice Africa
- International WELL Building Institute

# LEGISLATION

- Occupational Health and Safety Act: Facilities Regulations
  - “Condition of rooms and facilities - Every employer shall maintain all rooms and facilities which are prescribed or provided for in terms (of the provisions of these regulations, in a clean, hygienic, safe, whole and leak-free condition, and in a good state of repair.”
- National Minimum Wage Act - Sectoral Determination for Contract Cleaning Sector
- National Environmental Management: Waste Act: Regulations

# ALIGNMENT WITH ORGANISATION STRATEGY AND OBJECTIVES

- Legislative compliance
- Employee safety, health, productivity and wellness  
(<https://v2.wellcertified.com/en/wellv2/materials/feature/11> )
- Environmental wellness
- Zero waste to landfill, i.e. 100% recycling
- Water and energy efficiency
- Cost efficiency



# WHAT AND WHERE: INCLUSIONS

- Building fixtures and fittings and equipment
- Internal walls, floors and ceiling finishes
- Movable furnishings and equipment
- Building façade including walls, windows, doors
- Per above, outdoor covered areas (e.g. patios, walkways)

# WHAT AND WHERE: EXCLUSIONS

- Artwork?
- Personal possessions?
- Specially insured items?
- High-rise work?
- Specialised hygiene/cleaning treatments?
- Under-warranty equipment, e.g. new carpets?
- Information Technology equipment?
- Data centres or server rooms?
- Outdoor areas uncovered, e.g. roads, walkways, etc.?

# EXAMPLES OF SPECIFICATIONS

**CLEANING AND HYGIENE SERVICE:  
OUTPUT-BASED SPECIFICATION #1**

## 1. CLEANING AND HYGIENE SERVICE

### 1.1. Service definition

Service definition	
<b>Objective</b>	a) The workplace conforms with legislation governing the workplace and other functions conducted within or from the facility.
	b) Risks associated with infectious diseases transmission through direct and indirect surfaces' contact are mitigated.
	c) Level of cleanliness and hygiene maintains an environment that is conducive to productive and satisfying work and services; and enhances the image of the Institution.
	d) Surface or ingrained chemicals, particles and liquids that contributes to the accelerated wear and tear of finishes, fittings and equipment; are removed or minimised.
<b>Scope of service</b>	a) External façade cleaning, both normal and high-rise, inclusive of windows, doors, wall finishes and fittings.
	b) Indoor ceiling, wall and floor fixtures including finishes and fittings.
	c) Movable furniture, artifacts and artwork.
	d) Ablution hygiene equipment installations and servicing, consumable replenishment and deep cleaning; inclusive of the following as examples: <ul style="list-style-type: none"><li>i. Toilet paper dispensing.</li><li>ii. Hand wash, sanitising and drying.</li><li>iii. Odour prevention and control.</li><li>iv. Female sanitary waste collection and disposal.</li><li>v. Urinal, toilet and wash-hand basin disinfection.</li><li>vi. Toilet seat sanitising</li></ul>
<b>Scope of application</b>	a) Dedicated-closed, dedicated-open and shared office space.
	b) Employee pause areas including staff kitchen, food and beverage consumption.
	c) Reception, meeting and conferencing, and recreation spaces.
	d) Commercial food preparation and serving, and consuming spaces.
	e) Bathrooms and ablutions.
	f) Support and utilities spaces
<b>Exclusions</b>	a) Vehicle roadways and parking areas.

Service definition	
	b) Pedestrian walkways that are not adjacent to the building.
	c) Site landscaped surfaces.
	d) Pest control services.
	e) Central waste recycling and disposal.
	f) Original artwork requiring specialised cleaning.

## 1.2. Service output specification

Service output specification				
Specification		Performance Standard	Rectification Period	Monitoring Method
<b>Documented cleaning and hygiene management system.</b>	Each space category of each facility has a documented health/safety/illness risk assessment.	Full conformance with documented management system	C	1, 2, 3, 4, 5, 6, 7
	Each space category of each facility has a documented cleaning and hygiene management system. The management system will include as example: a) Scope of cleaning and hygiene services b) Specifications of services including the frequency and standard. c) Resource plan, i.e., whether self-performed and outsourced.			

Service output specification				
Specification		Performance Standard	Rectification Period	Monitoring Method
	d) Materials and consumable stock management and related safe use and storage. e) Quality control and assurance f) Employee uniform and other visible identifiers.			
<b>Cleanliness and hygiene practices are compliant with minimum standards and developed illness risk-mitigation plan.</b>	Compliance with legislation governing the workplace environment and the tasks and materials associated with the services: a) Occupational Health and Safety Act, and specifically the Regulations b) Environmental Management Act	Full conformance with legislation governing the workplace environment and the tasks and materials associated with the services	C	1, 2, 3, 4, 5, 6, 7
	Compliance with all relevant SABS standards, examples include: a) SABS 049 - Hygiene Management b) SABS 0330 - HACCP Food Safety c) SABS 0245 - Maintenance of Textile Floor Coverings d) SABS 0247 - Cleaning of Textile Upholstered Furniture	Full conformance with SANS standards, unless exclusions agreed		

Service output specification				
Specification		Performance Standard	Rectification Period	Monitoring Method
	Compliance with industry standards, without being exhaustive: a) NCCA Cleaning Chemical Standard b) NCCA Cleaning Equipment Standard c) NCCA Window Cleaning Safety Standard	Full conformance with industry standards, unless more stringent standards are implemented		
<b>Compliance with legislation governing the cleaning industry employment conditions</b>	Compliance with the following, as example: a) Basic Conditions of Employment Act, Sectoral Determinations as promulgated. b) Contract Industry Cleaning Bargaining Council and related agreements	Full conformance with contract cleaning industry legislative and industry employment conditions	C	1, 2, 3, 4, 5, 6, 7



**CLEANING AND HYGIENE SERVICE:  
OUTPUT BASED SPECIFICATIONS #2**

## Annexure 1: Cleaning Services - Scope, Specification and Performance Level

### a) Scope of services

Area of Responsibility		Service Provider Responsibilities	Cleaning standard	Client Responsibilities
Scheduled basic cleaning	Cleaning of hard Floors	All hard floors within the cleaning areas shall be swept and otherwise cleaned on a scheduled basis in accordance with the agreed cleaning schedules.	Hard floors to be reasonably free from visible dirt, dust, debris, removable scuff and heel marks, removable soil, stains, build-up, and other foreign matter.	None
	Cleaning of entry matting and wells	Entry matting and wells within the Cleaning Areas shall be swept or otherwise cleaned on a scheduled basis in accordance with the agreed cleaning schedules.	Entry matting and wells to be reasonably free from visible debris.	None
	Cleaning of Carpeted Floors	All carpeted floor areas and throw rugs, and floor mats within the Cleaning Areas shall be vacuumed on a scheduled basis in accordance with the agreed cleaning schedules.	Carpeted floors to be reasonably free from visible loose debris, dirt, dust, and other foreign matter.	None
	Cleaning of Paintwork, Doors, Walls, and baseboards	All washable paintwork, doors, walls, and baseboards within the Cleaning Areas shall be dusted on a scheduled basis in accordance with the agreed cleaning schedules.	Paintwork, doors, walls, and baseboards to be reasonably free from visible dust.	The Client shall be responsible for cleaning all artworks within the sites, including without limitation all paintings and statues.
	Stairs	All stairs within the Cleaning Areas (including treads, risers, nosing, banisters, balustrades, handrails ledges and guards) shall be dusted on a scheduled basis in accordance with the agreed cleaning schedules.	Stairs to be reasonably free from visible dust, removable stains, grease, smears, spots, and spillages.	None
	Fixtures and Fittings	All fixtures (phones and desktops) and fittings within the Cleaning Areas shall be cleaned on a scheduled basis in accordance with the agreed cleaning schedules.	Fixtures and fittings to be reasonably free from visible dust.	The Client shall ensure that all its Personnel adhere to the Client's "clean desk policy".
	Cleaning of Dustbins and Trash Receptacles	All dustbins and trash receptacles shall be routinely emptied and soiled, or torn receptacle liners shall be replaced in accordance	All dustbins and trash receptacles to be reasonably free from unpleasant odours.	None

Area of Responsibility		Service Provider Responsibilities	Cleaning standard	Client Responsibilities
		with the agreed cleaning schedules.		
	General Spot Cleaning	General spot cleaning shall be performed within the Cleaning Areas on a scheduled basis in accordance with the agreed cleaning schedules.	All washable surfaces of all walls, partitions, doors, door handles, push bars, kick plates, light switches, and fixtures to be reasonably free from visible smudges, fingerprints, marks, streaks, spills, and other marks.	None
	Scheduled Window Cleaning	The inside of all glazed surfaces within the Cleaning Areas and the outside of the glazed foyer of the sites shall be cleaned on a scheduled basis in accordance with the agreed cleaning schedules	Glazed surfaces to be reasonably free from visible smudges, fingerprints, marks, streaks, spills, and other marks.	None
Scheduled hygiene services	Cleaning schedules	Service Provider shall determine the frequency of any cleaning services and activities relating to the scheduled hygiene services to enable it to comply with its obligations under this Service Level Agreement.		None
	Cleaning and disinfecting of all bathrooms, washrooms, and toilet surfaces	Sinks, toilets, bowls, urinals, showers, shower mats, plumbing fixtures, partitions, doors (both internal and access doors), walls within washrooms and toilets within the Cleaning Areas shall be disinfected and cleaned using a germicidal detergent on a scheduled basis in accordance with the agreed cleaning schedules.	Sinks, toilets, bowls, urinals, showers, shower mats, plumbing fixtures, partitions, doors (both internal and access doors), walls to be reasonably free from visible deposits, dirt, streaks, and unpleasant odours.	None
	Restocking of Toilet Supplies	a) Toilet supplies including Hygiene Equipment shall be restocked sufficiently on a scheduled basis in accordance with the cleaning schedules. b) If toilet supplies do run out, stocks of toilet supplies, including Hygiene Equipment, shall be replenished based on requests received via the Help Desk.	Toilet supplies to not run out based on normal usage patterns	Client shall ensure that its personnel log any shortages in respect of toilet and bathroom supplies with the Help Desk.
Specialised cleaning service	Shelves and bookcases	All shelves and bookcases within the Cleaning Areas shall be dusted based on ad hoc cleaning requests received via the Help Desk.	Shelves and bookcases to be reasonably free from visible dust, removable stains, grease, smears, spots, and spillages.	Client shall ensure that its personnel clear all shelves and cupboards, which require cleaning.

Area of Responsibility		Service Provider Responsibilities	Cleaning standard	Client Responsibilities
Reactive cleaning service	Deep cleaning of bathrooms and carpets, catering equipment cleaning, high access window cleaning and upholstery cleaning	A Reactive Cleaning Service shall be provided at the Sites during service hours and cleaning staff shall respond to any ad hoc requests for in scope cleaning services within the Cleaning Areas received by the Help Desk.		Client shall ensure that its personnel comply fully with the Help Desk procedures implemented at the sites relating to the logging of cleaning requests.

## b) Service specification

The service specification defines the standard to which the scope of services must be delivered.

### i. Cleaning service specification

Service aspect		Frequency	Standard
Sanitary areas	Signing of sanitary checklists	4 times daily	Schedule compliance
	Replenish toilet paper	As required	Always contain specified product
	Replenish hand towel	As required	Always contain specified product
	Replenish Seat Sanitizer	As required	Always contain specified product
	Replenish hand soap	As required	Always contain specified product
	Spot clean, walls, doors, floors	As required	Free of visible dirt/marks
	Spot clean, toilets, urinals, basins	As required	Free of visible dirt/marks
	Spot clean Mirrors	As required	Free of visible dirt/marks
Stairs, balconies, and common areas (all areas within 2 metres from the building)	Empty ashtrays	2 times daily or when required	<ul style="list-style-type: none"> <li>• Schedule compliance</li> <li>• Free of visible dirt/marks</li> </ul>
	Spot cleaning	As required	<ul style="list-style-type: none"> <li>• Free of visible dirt/marks</li> </ul>
	Cleaning of chairs and tables	Daily	<ul style="list-style-type: none"> <li>• Schedule compliance</li> <li>• Free of visible dirt/marks</li> </ul>
Windows & glass doors	Damp wiping of finger marks, smudges, and other soiling.	Daily	<ul style="list-style-type: none"> <li>• Schedule compliance</li> <li>• Free of visible dirt/marks</li> </ul>
Lifts	Clean interior, walls and floors, mirrors, doors, lift door track	Daily	<ul style="list-style-type: none"> <li>• Schedule compliance</li> <li>• Free of visible dirt/marks</li> </ul>
Classrooms/ Offices	Spot clean vacuum carpets	Daily	<ul style="list-style-type: none"> <li>• Schedule compliance</li> <li>• Free of visible dirt/marks</li> </ul>
	Dusting of windows, ledges, and skirting's	Daily	
	Wipe boardroom tables	Daily	
	Remove crockery to kitchen	Daily/ on request	
Waste removal offices and common areas	Emptying of waste receptacles	Daily/ or as necessary	<ul style="list-style-type: none"> <li>• Schedule compliance</li> </ul>
Sanitary areas	Perform detail clean toilets, basins, and urinals	Daily	<ul style="list-style-type: none"> <li>• Schedule compliance</li> <li>• Free of visible dirt/marks</li> </ul>
	Cleaning of mirrors, taps, dispensers, and fixtures	Daily	
	Emptying of waste receptacles	Daily	

Service aspect		Frequency	Standard
	Scrubbing of Floors	Monthly	
Carpeted areas, offices, boardrooms, common areas	Vacuum	Daily	<ul style="list-style-type: none"> <li>• Schedule compliance</li> <li>• Free of visible dirt/marks</li> </ul>
General cleaning, offices, boardrooms	Emptying of waste receptacles	Daily	<ul style="list-style-type: none"> <li>• Schedule compliance</li> <li>• Free of visible dirt/marks</li> </ul>
	Wiping of waste receptacles, interior/ exterior	Daily	
	Dusting of desks, removal of scuff marks	Daily	
	Vacuum of upholstered chairs	Daily	
	Dusting of other office furniture, credenzas and filing cabinets, removal of scuff marks	Daily	
	Damp wiping of office pot plants	Daily	
	Dusting of blinds and curtain rails	Once weekly on a programme	
	Dusting of window sills	Once weekly on a programme	
	Spot cleaning of walls and signage	Daily/ or as necessary	
	Wiping of Skirting's	Once weekly on a programme	
	Cleaning of hand contact areas, such as door handles, and light switches, handrails	Daily	
	Damp wiping of firefighting equipment	Weekly	
	Wiping of doors and removal of scuff marks	Daily	
Reception	Mopping of floors	Daily	<ul style="list-style-type: none"> <li>• Schedule compliance</li> <li>• Free of visible dirt/marks</li> </ul>
	Detail cleaning of reception counter	Daily	
	Wiping of glass and stainless steel	Daily	
	Vacuuming of upholstered furniture	Daily	
Pause areas and kitchenettes	Wiping of fridge and microwaves external	Daily	<ul style="list-style-type: none"> <li>• Schedule compliance</li> <li>• Free of visible dirt/marks</li> </ul>
	Cleaning of microwaves internal	Daily	
	Detailed cleaning of kitchen sink	Daily	
	Detail cleaning of counters and cupboards	Daily	
	Damp wiping of dishwashers	Daily	
Waste Removal	Emptying of waste receptacles	Daily	<ul style="list-style-type: none"> <li>• Schedule compliance</li> </ul>
	Replacement of bin liners	Daily	
Scrubbing of hard floor surfaces (site specific)	Verandas	Quarterly	<ul style="list-style-type: none"> <li>• Schedule compliance</li> <li>• Free of visible dirt/marks</li> </ul>
	Balconies	Quarterly	
	Walkways	Quarterly	
	Internal common areas	Quarterly	

## ii. Cleaning chemicals' specification

Cleaning chemicals utilised in the cleaning service will conform with South African National Standards, or other disclosed acceptable standards, be environmentally-friendly and non-hazardous.

Chemical	Use/Purpose	Application	Reference documentation
Envirogen	General purpose cleaning chemical	For the manual cleaning of all surfaces such as plastic, glass, ceramics, chrome, steel, stone and for the wet cleaning of windows	MSDS supplied
Envirosolve	Heavy duty cleaning chemical	For removing oil, grease and industrial soiling, marks on walls, doors etc.	MSDS supplied
Envirosan	Sanitary/ ablution cleaning chemical	For a fast and thorough cleaning of all washable surfaces and fittings made of stainless steel, plastic, porcelain, ceramic, enamel, glass, etc. in bath, shower, wash, and rest rooms	MSDS supplied
Indubleach	Disinfectant	whitening, stain removal, sanitizing, cleaning surfaces, walls, floors, showers, fridges, dustbins, toilet bowls etc	MSDS supplied
Pro-Inox	Abrasive cleaning agent for metal surfaces - as and when required	For all waterproof surfaces such as chrome, steel, enamel, ceramics, porcelain, plastics, etc	MSDS supplied
Furniture Polish	5L white furniture polish - as and when required	For the polishing of hard surface furniture in office environments etc.	MSDS supplied

#### c) Service scope of application

The scope of application as of March 2022 is detailed.

Facility	Sectoral determination	Cleaners	Super-visors	Total cleaners	S197 cleaners transferred Jan 2021
Campus 1	Other Provinces	3	0	3	0
Campus 2	Other Provinces	3	0	3	0
Campus 3	Other Provinces	2	0	2	2
Campus 4	Other Provinces	3	0	3	2

#### d) Service Performance level

The scope of service and the service specification must be delivered on a verifiable basis and the following service performance level applies:

Service aspect	Performance	Measure	Target	Measurement Period
Scheduled cleaning services	Actual cleaning services are delivered in accordance specified cleaning schedule.	Actual cleaning frequency to specified cleaning schedules.	80%	Monthly
Scheduled hygiene service	Actual hygiene equipment replenishment frequency is delivered in accordance with specified hygiene schedule.	Actual cleaning frequency to specified cleaning schedules for sanitary areas.	80%	Monthly

<b>Service aspect</b>	<b>Performance</b>	<b>Measure</b>	<b>Target</b>	<b>Measurement Period</b>
Scheduled hygiene service	Hygiene equipment always contains prescribed product	Client satisfaction level of functional hygiene equipment	80%	Monthly
Reactive cleaning services	Cleaning staff are contacted and respond within the agreed priority response times.	Percentage of Helpdesk calls for reactive cleaning service resolved within the agreed priority resolution times.	80%	Monthly

## Annexure 2: Hygiene Services - Scope, Specification and Performance Level

### a) Service scope

The service entails the installation, maintenance, and servicing of equipment in bathrooms, toilets, and common areas for hygiene requirements:

- i. Dispensing of Hand soap
- ii. Dispensing of hand sanitiser
- iii. Dispensing of Hand towels
- iv. Dispensing of toilet paper
- v. Dispensing of toilet seat sanitiser
- vi. Dispensing of urinal disinfectant
- vii. Automated dispensing of fragrant aerosol
- viii. Containment and disposal of female sanitary products
- ix. Detail hygiene cleaning of toilets, urinals, showers, and wash-hand basins

### b) Service specification

The service specification details the standard to which the scope of services must be delivered.

#### i. Service specification

Service aspect	Interval	Standard
Equipment maintenance	Daily	Equipment is maintained functional, clean and without visible defects
	As required	Where replacement is necessary, shall be of same standard
Equipment servicing	Per schedule	On-time servicing of equipment: SHE bins, aerosol dispensers and urinal disinfectant
Replenishment of consumables	Daily	Dispensers always contain specification-compliant product, i.e., no stock-out
	Per schedule	On-time delivery of right quantities of recurring consumables
	Within priority level	On-time delivery of right quantities of reactive consumables per priority of request logged at the Help Desk
Disposal of female sanitary products	Per schedule	On-time collection of sanitary waste products
	Per schedule	Disposal of sanitary waste always in compliance with Regulations governing health risk waste.
Deep hygiene treatments	Per schedule	On-time completion of treatments

#### ii. Equipment and product specification

Specification element		Brand name	Standard reference	Reference documentation
Equipment specification	Hand soap dispenser	HygieneSystems	Hygiene dispensers do not have a SABS certification.	Supported & maintained by Service Provider & Supplier warranty
	Hand sanitiser dispenser	HygieneSystems	Hygiene dispensers do not have a SABS certification.	Supported & maintained by Service Provider & Supplier warranty



Specification element		Brand name	Standard reference	Reference documentation
	Hand towel dispenser	HygieneSystems	Hygiene dispensers do not have a SABS certification.	Supported & maintained by Service Provider & Supplier warranty
	Toilet paper dispenser	HygieneSystems	Hygiene dispensers do not have a SABS certification.	Supported & maintained by Service Provider & Supplier warranty
	Toilet seat sanitiser dispenser	HygieneSystems	Hygiene dispensers do not have a SABS certification.	Supported & maintained by Service Provider & Supplier warranty
	Urinal disinfectant dispenser	HygieneSystems	Hygiene dispensers do not have a SABS certification.	Supported & maintained by Service Provider & Supplier warranty
	Aerosol dispenser	HygieneSystems	Hygiene dispensers do not have a SABS certification.	Supported & maintained by Service Provider & Supplier warranty
Consumable product specification	Anti-Bacterial Hand soap	Betasan	SANS 1853	MSDS, SABS
	Hand sanitiser	Betaspray Liquid Hand Sanitizer	SANS1853-2017	MSDS, SABS
	Hand Towels	HygieneSystems	Not supplied	N/A
	Toilet Paper	Lopac	SANS 1887-2:2015	SABS test report
	Toilet seat sanitiser	Betasan	As per Supplier, non-alcohol products do not have a SANS rating	MSDS
	Urinal disinfectant	Autosan	As per Supplier, non-alcohol products do not have a SANS rating	MSDS
	Aerosol	Airmist Aerosol Spray	As per Supplier, non-alcohol products do not have a SANS rating	MSDS
	Anti-Bacterial Foam Hand soap	Betasan	SANS 1853	MSDS, SABS

### c) Service scope of application

The service scope of application details extent of hygiene equipment and servicing per site:

i. Scope application

**d) Service performance standard**

Service aspect	Performance standard	Measure	Target	Interval
Equipment maintenance	Equipment is maintained functional, clean and without visible defects	Client satisfaction score on specific standard	80%	Monthly
Replenishment of consumables	Dispensers contain specification-compliant product	Incidents of non-compliant product identified	Zero	Monthly
	Delivery of reactive consumable products	Percentage of reactive requests resolved within its specific priority duration	80%	Monthly
	Delivery of recurring consumable products	Percentage compliance with recurring product delivery schedule	80%	Monthly
Disposal of female sanitary products	On-time collection of sanitary products	Percentage compliance with recurring collection schedule	80%	Monthly
	Disposal of sanitary waste in compliance with Regulations governing health risk waste	Percentage successful retrieval of documentary records supporting compliant disposal	100%	Quarterly
Deep hygiene treatments	On-time completion of treatments	Percentage compliance with recurring collection schedule	80%	Monthly

