



Facilities Management Plan  
Code of Practice

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ABMA Building Management Code [2020]



This Queensland ABMA Code of Practice was developed by ABMA Building Compliance Accreditation Agency Limited (“**ABMA**”) and is effective until 31 December 2020.

This ABMA Code of Practice is based on the ABMA Building Management Code [current year] and forms part of the quality management system for the “Facilities Management Plan”. This code has been reviewed and endorsed by the ABMA Independent Review Panel.



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## Foreword

This ABMA Code of Practice for Developing & Implementing a Compliant Facilities Management Plan has been endorsed by the Independent Review Panel for the ABMA Building Management Code [current year] and provides a practical guide to industry practitioners and building owners seeking to develop and implement a “Facilities Management Plan” (“**FMP**”) for the community titles scheme, aged care facility or commercial property.

Compliance with the ABMA Building Management Code [current year] is pre-requisite to building compliance Accreditation with the ABMA. An ABMA Accredited compliance assessor may refer to this ABMA Code of Practice when issuing an improvement notice following a compliance inspection.

This ABMA Code of Practice has been developed in Australia for the purpose of supporting industry best practice standards and legislative compliance in the development of the Facilities Management Plan as well as for the full life cycle of the property infrastructure.

A draft of this ABMA Code of Practice was first released for consultation with the Independent Review Panel on 22 October 2015 and endorsed by the Independent Review Panel on 18 February 2016. Each ABMA Code of Practice is reviewed annually and all comments and suggestions received by the ABMA are considered by the Independent Review Panel prior to endorsement of the new version.

Public comment is invited from interested parties via emailing [help@abma.org.au](mailto:help@abma.org.au) or Freecall 1800 124 262.

## Scope & Application

This ABMA Code of Practice provides practical guidance for persons who have duties under the ABMA Building Management Code [current year] with respect to the design, development, implementation and/or annual review of the “Facilities Management Plan” for the compliant and quality servicing and maintenance of common property within a community titles scheme, aged care facility or commercial property.

In providing guidance to the end-user, this ABMA Code of Practice will use the term ‘should’ in the context of recommending a course of action, while use of the term ‘may’ is used to indicate an optional course of action.

This ABMA Code of Practice also includes various references to sections of relevant Acts, Regulations and Australian Standards which set out legal requirements. These references are not exhaustive. Use of the words ‘must’, ‘mandatory’ and ‘statutory’ indicate that a legal requirement exists which must be complied with.

# 1. Introduction

## 1.10 What is a Facilities Management Plan?

1.11 The Facilities Management Plan (“**FMP**”) is a quality management system developed to incorporate best practice reporting and administration practices into the day-to-day and long-term management of the common property of the community titles scheme or commercial facility.

1.12 As a minimum standard the FMP must contain mechanisms to discharge the following in order to deem to satisfy the requirements of the ABMA Building Management Code: -

- (i) Registers of assets and infrastructure
- (ii) Register of service contractors and workers
- (iii) Schedule of maintenance tasks
- (iv) Register of compliance records and certificates
- (v) Systems for discharging mandatory compliance obligations
- (vi) Performance management system
- (vii) Register of accountable parties to the FMP
- (viii) Financial Management Plan
- (ix) Capital Works & Building Defects Management Plan
- (x) Register of Establishment & “As Constructed” documentation

1.13 The FMP may be developed, implemented and reviewed annually by any competent person. ABMA standard templates for development of the FMP to the required minimum standard are available from ABMA, along with copies of the ABMA Building Management Code and associated Guidebooks for assistance in the FMP development. Visit [www.abma.org.au](http://www.abma.org.au) for details or Freecall 1800 123 262.

1.14 ABMA encourages annual auditing of the FMP to ensure compliance with the minimum standard required under the ABMA Building Management Code [current year] and this Code of Practice.

1.15 A register of ABMA Accredited Industry Practitioners, having proven competence in the development, implementation and annual review of the FMP, is available by visiting [www.abma.org.au](http://www.abma.org.au) or Freecall 1800 123 262.

1.16 A register of ABMA Accredited Industry Practitioners having proven competence in the auditing of “draft” FMP’s to the minimum standard of this Code of Practice and the ABMA Building Management Code [current year] is available by visiting [www.abma.org.au](http://www.abma.org.au) or Freecall 1800 123 262.

1.17 While ABMA Accredited Industry Practitioners may be multi-disciplined and competent to develop *and* audit FMP’s, it is not appropriate for the FMP to be audited by the Industry Practitioner who developed it. In order to deem to satisfy the minimum standard, the “draft” FMP must be audited by an alternative ABMA Accredited Industry Practitioner.

## 1.20 Who is responsible for the Facilities Management Plan?

1.21 The FMP requires the parties to the building management arrangement to share tasks, deliverables and responsibilities and these duties and obligations should be detailed in the register of accountability contained within the FMP.

1.22 Parties to the building management arrangement include (but are not limited to) the following: -

- (i) the building owner and its elected board or committee
- (ii) any employee or contracted facilities manager or caretaker
- (iii) any employee or contracted maintenance worker
- (iv) the strata (or body corporate) manager
- (v) any other consultant, advocate or service provider delivering outcomes under the FMP

1.23 ABMA recommends that the FMP is developed and implemented by the original owner prior to Practical Completion of the construction project and audited by the ABMA prior to registration of the scheme and settlement of unit sales contracts. Along with "As Constructed" and establishment documentation, ABMA recommends that the original owner tables the Audited FMP at the first Annual General Meeting of the scheme so that the new owner/s may implement the FMP ongoing.

1.24 For existing schemes, aged care facilities and commercial properties that are "self-managed", the ABMA recommends that the building management team move to develop and implement a FMP to the minimum standard and review annually for the full life cycle of the building.

1.25 For existing schemes, aged care facilities and commercial properties under external management arrangements, the ABMA recommends that the building management team move to develop and implement a FMP to the minimum standard and review annually for the full life cycle of the building.

1.26 For building management teams with skills that fail to meet the minimum standard of competence required to develop, implement and annually review the FMP, the ABMA recommends engagement with an ABMA Accredited Industry Practitioner able to provide advocacy services, support, guidance and information around the FMP.

1.27 ABMA recommends that the completed "draft" FMP is submitted to the ABMA for assessment. When the submitted "draft" FMP has been assessed as deemed to satisfy the minimum standard, the ABMA will issue a Certificate of Compliance on the FMP and apply the ABMA Gold Seal of Compliance to the FMP. It is recommended that in circumstances where the building owner has engaged a consultant to develop the FMP, the consultant's final payment is reserved until submission of the ABMA Certificate of Compliance to ensure the FMP has been developed in accordance with the required standards.

## 1.30 What is involved in developing the Facilities Management Plan?

1.31 A FMP may be developed by any individual or entity, provided they are capable of achieving the minimum standard outlined further in this Code of Practice. Individuals and/or entities who may wish to develop a FMP can include (but are not limited to) the following: -

- (i) the building owner and its elected board or committee
- (ii) a facilities management or caretaking service provider
- (iii) any other consultant, advocate or service provider

1.32 The entity or individual developing the FMP does not have to possess any formal training and/or qualification, however a high level of skill is required to develop a compliant FMP in such a fashion as to successfully deem to satisfy the ABMA FMP audit process and comply with the conditions required for issuance of the Certificate of Compliance. It is therefore recommended that the individual and/or entity seeking to develop a compliant FMP utilises the following support options: -

- (i) Purchase and use the ABMA FMP Template
- (ii) Attend an approved industry training program to develop appropriate skills
- (iii) Appoint an ABMA Accredited Industry Practitioner to develop the ABMA FMP Template on your behalf
- (iv) Ensure that the "draft" FMP is assessed by the ABMA for completeness and deemed to satisfy the standard before implementing

#### 1.4 What does the ABMA Facilities Management Plan Template NOT contain?

1.41 It is important to note that the FMP is a quality management system providing a mechanism for managing compliance documentation under existing legislation. The FMP provides guidance to the building owner around specific mandatory requirements and how building maintenance and compliance information may be organised, coordinated and arranged within the FMP so as to satisfy these mandatory requirements. The FMP does not provide for the supply of specialist compliance reports, records or documents – it offers a system for identifying what compliance reports, records and/or documents are required by the building owner and establishes a system for managing same.

1.42 It is assumed that the building owner either already has all statutory reports, records and/or documents (in some form), as is already required under associated legislation, however, where reports, records and/or documents are missing, either the formal development of the FMP Template and/or the ABMA FMP Audit process will pick this up. Where statutory documentation is missing, the FMP will not be deemed to satisfy during the ABMA Audit process and an Improvement Notice will be issued accordingly.

1.43 If the building owner engages an ABMA Accredited Industry Practitioner to develop the FMP, the consultant will have the skill to identify specific non-compliances throughout the FMP development phase. It is intended that the ABMA Accredited Industry Practitioner is skilled sufficiently to competently advise the building owner on its site specific compliance requirements while assisting establishment of compliance throughout the development phase.

1.44 Once the "draft" FMP is complete, the building owner should be in a position to demonstrate full statutory compliance under existing legislation as well as the requirements of the ABMA Building Management Code [current year] and this Code of Practice.

1.45 The ABMA Audit process will provide feedback to the building owner regarding statutory record keeping non-compliances in the form of an Improvement Notice where the minimum standard has not been achieved.

1.46 Details of statutory reports, records and documents required of each property vary according to many factors, however details of statutory requirements are detailed in the ABMA Building Management Code [current year] and referenced Acts, Regulations, Building Codes, Australian Standards and Codes of Practice. Site specific analysis of compliance requirements may be provided via engagement of an ABMA Accredited Industry Practitioner. A register of appropriately qualified consultants is available via [help@abma.org.au](mailto:help@abma.org.au) or Freecall 1800 123 262.

## 1.5 What is involved in the ABMA Facilities Management Plan Audit?

1.51 Upon completion of the FMP, the “draft” is issued to ABMA Building Compliance Accreditation Limited [“ABMA”] for assessment. The ABMA assessment process audits the content of the FMP to ensure it achieves the minimum standard required under the ABMA Building Management Code for the current year as well as this Code of Practice.

1.52 If the “draft” FMP does not deem to satisfy the minimum standard required under the ABMA Building Management Code and this Code of Practice, the author of the FMP will be issued with an Improvement Notice outlining the areas of non-compliance and providing recommendations for remedy.

1.53 Once the “draft” FMP has been deemed to satisfy the minimum standard, the ABMA issues a Certificate of Compliance and applies the ABMA Gold Seal of Compliance upon the FMP.

1.54 The “draft” FMP cannot be audited by the same Industry Practitioner who developed the FMP.

1.55 When engaging a consultant to assist with the development of the FMP, ABMA recommends that the building owner retains a percentage of the consultant’s fee as a performance guarantee, until issuance of the ABMA Certificate of Compliance occurs.

## 1.6 What qualifications are required for the ABMA FMP Auditor?

1.61 In order to qualify for the role of ABMA FMP Auditor the individual must be able to demonstrate competency in the development, implementation and annual review of a compliant FMP. As a minimum standard, evidence of competency must be provided in the following format: -

- (i) Minimum of 5 years demonstrable experience, such as: -
  - a. a building management professional, caretaker or facilities manager;
  - b. Owner of Management Rights entity
  - c. Chairperson (or Office Bearer) for a Committee

**OR:** -

- (ii) Completion of skills development training, such as: -
  - a. Diploma of Building Management

- b. Diploma in Facilities Management

1.62 In addition to the provision of the required minimum evidence of competency the ABMA FMP Auditor must also:-

- a. successfully complete the ABMA Auditors training course
- b. have current Accreditation as an Industry Practitioner
- c. continue to deliver FMP Auditing outcomes in accordance with this Code of Practice and within the terms and conditions of engagement with ABMA
- d. successfully complete annual skills development training
- e. be able to enter into a common commercial contract agreement with ABMA for the delivery of FMP Auditing services

1.63 A register of Registered Training Organisations and skills development training service providers around Australia is available by requesting information via [help@abma.org.au](mailto:help@abma.org.au) or Freecall 1800 123 262.

## 2. The Facilities Management Plan

### 2.10 Step 1 – The Facilities Management Plan Template

2.11 Any person or entity may develop a FMP and existing commercial properties and community titles schemes may already have aspects of a compliant FMP already in existence within the management system of the property. It is not a mandatory requirement that the building owner utilises the ABMA FMP Template to develop a compliant FMP. This Code of Practice is outcomes based, so if the building owner is able to deem to satisfy the minimum requirements via an alternative solution, this is entirely acceptable under this Code of Practice.

2.12 In order to streamline the development of a FMP that has been developed specifically to achieve the minimum standard requirement, building owners may elect to utilise the ABMA FMP Template, which is available for purchase via [www.abma.org.au](http://www.abma.org.au) and Freecall 1800 123 262.

2.13 The ABMA FMP Template comes in specific components and the building owner is able to tailor the Template to the infrastructure contained within the scheme land. Each property will require the "Base Facilities Management Plan" as a minimum, however other components are completely site specific. The following FMP Template components are available: -

- (i) **Base Facilities Management Plan** – For all properties: -
  - a. Asset Management System
  - b. Maintenance Management System
  - c. Compliance Management System
  - d. Financial Management System
  - e. Capital Works & Defects/Repairs Management System

- f. Document Management, Reporting & Record Keeping System
  - g. Accountability Plan
- (ii) **Garden Maintenance Management Plan** – For properties with a heavy focus on supervision of maintaining significant gardens, lawns and landscaped infrastructure
  - (iii) **Cleaning Maintenance Management Plan** – For properties with a heavy focus on supervising of significant cleaning of common infrastructure
  - (iv) **Pool & Spa Maintenance Management Plan** – For properties that have a swimming pool and/or spa facility

### 3.10 **Step 2 – Developing the Facilities Management Plan**

3.11 Instruction and guidelines for developing the FMP are available via the following resources: -

- (i) ABMA Building Management Code
- (ii) ABMA Building Management Code Guidebooks:-
  - a. Assessment of Building Management Standards Guide
  - b. Facilities Management Plan Guide
  - c. Cleaning Maintenance Guide
  - d. Fire Protection Systems Guide
  - e. Gardening Maintenance Guide
  - f. Industry Code of Conduct Guide
  - g. Industry Terms & Definitions Guide
  - h. Swimming Pools & Spas Guide
  - i. Work Health & Safety Guide
- (iii) 4.0 “Step 4 – Auditing the Facilities Management Plan” of this ABMA Code of Practice

3.12 Copies of the ABMA Building Management Code (hard copy version and digital e-Book) and associated Guidebooks are available for purchase by visiting [www.abma.org.au](http://www.abma.org.au) or Freecall 1800 123 262.

3.13 Copies of this ABMA Code of Practice are available for free download by visiting [www.abma.org.au](http://www.abma.org.au)

### 4.10 **Step 3 – Auditing the BASE Facilities Management Plan**

4.11 Once the “draft” FMP has been supplied to the ABMA in an acceptable format a suitably qualified ABMA Industry Practitioner will be allocated to complete the assessment process.

4.12 The “draft” FMP must be supplied to the ABMA in the following format: -

- (i) Hard copy of completed FMP Template
- (ii) A USB of associated attachments may accompany the completed FMP Template

- (iii) Submission Declaration Form and executed Authority to Act letter to accompany the submission
- (iv) Submission to be posted to ABMA Accreditation Department, GPO Box 1935, Brisbane Q. 4001

4.12 Upon receipt of the submission, the following rigorous testing rationale will be applied by the ABMA Industry Practitioner during the Audit of a FMP: -

- (i) Processing of received documentation: -
  - a. Submitted documents scanned and filed
  - b. Acknowledgement receipt correspondence issued to the Submitter
  - c. ABMA internal allocation of audit project to a registered ABMA Accredited Industry Practitioner ("**Auditor**")
  - d. Seven (7) days internal turn-around on Auditor's assessment process
  - e. Receipt of Auditor's assessment report and issuance to the Submitter of either an ABMA FMP: -
    - \* Certificate of Compliance; or
    - \* Improvement Notice.

4.13 The standard to which the Auditor will assess the "draft" FMP submission, is detailed as follows:-

#### **4.13(a) Part 1: - Asset Management System**

As a minimum standard a compliant Asset Management System must be incorporated into the Facilities Management Plan and provide the following: -

1. Register of all building owner assets contained within the common property
2. Where more than one occurrence of a particular asset type is identified, a "sub-asset" (prepared by the service contractor) is to accompany (e.g. fire doors, light fittings, sanitary fixtures, etc.)
3. Where the asset is part of a structural system containing concealed componentry, an "equipment register" (prepared by the service contractor) is to accompany (e.g. air conditioning system, irrigation system, lifts, etc.)
4. Break down or identification of assets into the following categories: -
  - a. Essential Services infrastructure
  - b. Non-Essential Services & Capital infrastructure
  - c. Fire System infrastructure
  - d. Soft Services infrastructure
    - i. Garden Species & landscape systems
    - ii. Cleaning zones & surfaces
    - iii. Recreation facilities
  - e. Plant, Equipment & Consumable Stock
  - f. Furniture, Fixtures & Fittings
  - g. Building Management Systems
5. Each recorded asset to include: -

- a. Photo (indicative only)
  - b. Location
  - c. Related structural system "equipment register" or "sub-asset register" (if applicable)
  - d. Date of installation
  - e. Life Cycle Indicator (refer Table 1C – *Asset Life Cycle Indicators*, ABMA Building Management Code)
  - f. Remaining useful life (in years)
6. Annual Review Process (where data is updated at least annually)

#### **4.13(b) Part 2: - Maintenance Management System**

As a minimum standard a compliant Maintenance Management System must be incorporated into the Facilities Management Plan and provide the following: -

1. A calendar or schedule of preventative maintenance events for all essential services infrastructure contained within the Asset Register
2. A calendar or schedule of preventative maintenance events for all fire protection systems infrastructure contained within the Asset Register
3. A calendar or schedule of programmed maintenance events for all non-essential and capital infrastructure contained within the Asset Register
4. A calendar or schedule of advisory maintenance events for the cleaning, maintenance and gardening of all soft services infrastructure and recreational areas contained within the Asset Register
5. A calendar or schedule of advisory maintenance events for all plant and equipment owned by the building owner (or Body Corporate)
6. A calendar or schedule of advisory maintenance events for all furniture, fixtures and fittings contained within the Asset Register
7. Calendar or schedule for all assets to include the following: -
  - a. Name of asset
  - b. Service Contractor/s identity
  - c. Frequency of servicing regime
  - d. Standard of testing or servicing (e.g. Australian Standard)
  - e. Mandatory records required under the standard
  - f. Last service date
  - g. Forecast next service date
8. Monthly review process (maintenance calendar must always be current within 28 days)

#### **4.13(c) Part 3: - Compliance Management System**

As a minimum standard a compliant Compliance Management System must be incorporated into the Facilities Management Plan and provide the following: -

1. **General Building Data:** -
  - a. Legal identification of building owner
  - b. Legal identification of building management team: -
    - a. Nominated Representative for the building owner

- b. Any building management service provider (e.g. Caretaker or Facilities Manager)
  - c. Any strata or body corporate manager
  - d. Any consulting advocates who are authorised to act on behalf of the building owner (e.g. Fire Safety Advisor, Evacuation Coordinator, Sinking Fund Forecaster, Building Durability Consultant, Compliance & Performance Consultant)
  - e. Nominated Representative for managing common property access hardware (keys, fobs, swipe cards, PIN codes, etc.)
  - c. Building owner insurance Certificate of Currency
  - d. Building management team insurance Certificates of Currency
  - e. Register of common property access keys, fobs, swipe cards, garage remotes, PIN codes and access hardware
2. **Regulatory Compliance Schedule:** - the site-specific schedule of all mandatory maintenance, testing, inspecting and servicing regimes required for the common property infrastructure. To include mandatory compliance management plans relevant to the property.
3. **Establishment Building Data, Records & Certificates:** -
- a. "As Constructed" documentation (e.g. plans, sub-contractor warranties, final certificates)
  - b. Development Approval documentation (e.g. Development Approval Notice, design documentation)
  - c. Building Construction Contract
  - d. Builder's Operations, Warranties & Maintenance Manual & Key/Access Register
  - e. Original owners "Facilities Management Plan"
  - f. Baseline Data (fire protection system)
  - g. Penetrations Register (fire protection system)
  - h. Interface Matrices (fire protection system)
  - i. Final Fire Inspection Certificate (from fire & rescue service)
  - j. Final occupancy permit
  - k. Confirmation of registration of the scheme
  - l. Survey or Strata Plan
  - m. Community Management Statement or by-laws/rules
  - n. Registration of Plant certificate/s
  - o. Caretaking Agreement or Facilities Management Agreement
  - p. Fire Proof "Lock Box" able to be accessed after hours
4. **Periodical Building Compliance Data, Records & Certificates:** -
- a. Building owner & management team Certificates of Currency on insurance/s
  - b. Registration of Plant certificate/s
  - c. Pool Safety Certificate (and registration with local authority, if required)
  - d. Annual fire safety certificate
  - e. Asbestos Register (and management plan, labelling, if required)
  - f. Evacuation Plan (manual with training records)

- g. WHS Plan (including contractors site management system, all records and annual review of WHS Plan)
- h. Certificates of Maintenance (associated with infrastructure)
- i. Record of Maintenance (associated with infrastructure)

#### **4.13(d) Part 4: - Financial Management System**

As a minimum standard a compliant Financial Management System must be incorporated into the Facilities Management Plan and provide the following: -

1. Service Contractors Register (e.g. a list of all repair/service contractors undertaking works on the common property for the building owner)
2. Consumable Stock Register (e.g. a list of all consumable stock items purchased for the building owner and stored on the common property such as cleaning chemicals, sprays, fertilisers, light globes, pool salt, etc.)
3. Quote Register (e.g. a list of quotes requested and harvested)
4. Formal approval system for quotes (e.g. Committee Meeting Minutes)
5. Work Order (e.g. formal written advice accepting quote and providing instruction for approved works to proceed)
6. Work Order Register (e.g. Work in progress register of approved works, Work Orders and Practical Completion dates)
7. Practical Completion certificate (e.g. Exit Survey or certificate of practical completion to be provided to the building owner by the repair/service contractor upon completion of the approved works)
8. Invoice Register (e.g. a list of repair/service contractor invoices received and processed for payment)

#### **4.13(e) Part 5: - Capital Works & Defects/Repairs Management System**

As a minimum standard a compliant Capital Works & Defects/Repairs Management System must be incorporated into the Facilities Management Plan and provide the following: -

1. Minor, Non-Structural Defects Assessment – completed prior to the end of the state-specific defect liability period by an ABMA Accredited Building Durability Consultant
2. Major, Structural Defects Assessment – completed bi-annually (every 2 years) during defect liability period (or earlier at the first presentation defects) by an ABMA Accredited Building Durability Consultant
3. Current Sinking Fund Forecast, incorporating Building Condition Assessment Report data
4. Building Condition Assessment Report – completed at least 5-yearly by an ABMA Accredited Building Durability Consultant
5. Building Repair and Maintenance Reports for self-managed schemes – completed quarterly
6. Regulatory Compliance Assessment Reports – completed annually
7. A professional Project Manager/s is required for the scoping, tendering, contract administering, site supervision, technical substantiation, certification, warranting, progress claim validating and Practical Completion certification of the following: -

- a. Works structural in nature (i.e. relating to any structural or waterproofing system within the building, including insurance repair projects)

#### **4.13(f) Part 6: - Document Management, Reporting & Record Keeping System**

Keeping records of the Facilities Management Plan including all servicing, testing, inspections, defect reports, quotes, work orders, invoices, maintenance records and compliance certificates demonstrates potential compliance with all required Acts, Regulations and standards. Maintaining an effective audit trail helps when undertaking risk assessments and reviewing current policies, procedures and management plans.

As a minimum standard a compliant Document Management, Reporting & Record Keeping System must be incorporated into the Facilities Management Plan and provide the following: -

1. **Accountability Plan** – individual/s and/or entity/s accountable to managing the requirements of the document management system are to be confirmed annually following each AGM and are to ensure delivery of the document management, reporting and record keeping system outcomes
2. **General Building Data** – Records to be displayed as per statutory requirements and updated annually (following each Annual General Meeting), then retained in accordance with relevant legislation, and as follows: -
  - a. Site specific list of General Building Data to reflect precise scheme requirements
  - b. Hard copy suite on site in fire proof container or Lock Box
  - c. Digital copy suite off site with strata manager
3. **Establishment Compliance Data** – Records to be displayed as per statutory requirements and copies to be retained in accordance with relevant legislation, and as follows: -
  - a. Site specific list of Establishment Data to reflect precise scheme requirements
  - b. Hard copy suite on site in fire proof container or Lock Box
  - c. Digital copy suite off site with strata manager
4. **Periodical Compliance Data** – Records to be displayed as per statutory requirements and copies retained in accordance with relevant legislation, and as follows: -
  - a. Site specific list of Periodical Data to reflect precise scheme requirements
  - b. Hard copy suite on site in fire proof container or Lock Box
  - c. Digital copy suite off site with strata manager
5. **Asset Register** – To be updated annually and retained as follows: -
  - a. Hard copy version provided to building manager by the building owner annually (following each AGM)
  - b. Annual review of the Asset Register to be completed by the individual/s or entity/s accountable to the annual editing task and provided to the building owner in digital format annually (prior to each AGM)
  - c. Current digital copy provided to the sinking fund forecaster by the building owner for the purpose of updating or preparing the sinking fund forecast
6. **Maintenance Calendar** – To be updated monthly and retained as follows: -

- a. Digital copy of the current Maintenance Calendar to be provided to the editing individual/s and/or entity/s by the building owner
  - b. Maintenance Calendar to be edited and updated monthly by the individual/s and/or entity/s accountable to the editing task/s
  - c. Digital copy of the updated monthly version to be provided to the building owner by the individual/s and/or entity/s accountable to the monthly editing task
7. **Register of Service Contractors** – To be updated annually and retained as follows: -
- a. Digital copy off site with strata manager
  - b. Digital copy with building management team
8. **Quote, Work Order, Approvals & Invoice Registers** – To be updated weekly and retained as follows: -
- a. Digital copy off site with strata manager
  - b. Digital copy with building management team
9. **Consumable Stock Register/s** – To be updated monthly and retained as follows: -
- a. Digital copy off site with strata manager
  - b. Digital copy with building management team

#### 4.13(g) Part 7: - Accountability Plan

As a minimum standard a compliant Accountability Plan must be incorporated into the Facilities Management Plan and provide the following: -

1. Nominate individual/s and/or entity/s responsible for the following: -
  - a. Editing and updating of the Asset Register, including provision of updated digital version annually prior to AGM (recommend building manager, Caretaker or Facilities Manager)
  - b. Supervision of the editing and updating of the Asset Register, including harvesting of updated version annually prior to AGM (recommend building owner Nominated Representative)
  - c. Editing and updating of the Maintenance Calendar, including provision of updated digital version monthly prior to any Committee Meeting/s (recommend building manager, Caretaker or Facilities Manager)
  - d. Supervision of the editing and updating of the Maintenance Calendar, including harvesting of updated version monthly prior to any Committee Meeting/s (recommend building owner Nominated Representative)
  - e. Harvesting of the compliance records, reports and certificates, including forwarding to offsite record keeping party (recommend building manager, Caretaker or Facilities Manager)
  - f. Offsite record keeping, including harvesting of required records (recommend building owner Nominated Representative)
  - g. Compliance with the financial management system, including harvesting of system documentation (recommend building owner Nominated Representative)
  - h. Compliance with the capital works, defects and repairs management system (recommend building owner Nominated Representative)

- i. Compliance with the accountability plan, including performance management of all nominated stakeholders (recommend building owner Nominated Representative)
- j. Compliance with the document management, reporting and record keeping system, including performance management of all nominated stakeholders (recommend building owner Nominated Representative)

#### **4.13(h) Part 8: - Supplementary Maintenance Plan/s**

As a minimum standard compliant supplementary Maintenance Plans must be incorporated into the Facilities Management Plan only in circumstances where the respective infrastructure and servicing requirements exist.

Supplementary maintenance plans include: -

- (i) Cleaning Maintenance Plan
- (ii) Garden Maintenance Plan
- (iii) Pool & Spa Maintenance Plan

#### **1. Cleaning Maintenance Plan** must provide the following: -

- (i) Register (or map) of areas/zones to be cleaned, e.g.: -
  - a. Sanitary Zone/s
  - b. High Traffic Zone/s
  - c. Low Traffic Zone/s
  - d. Hard Floors & Surfaces
  - e. Soft Floors & Surfaces
  - f. Furniture, fixtures & fittings
  - g. Waste Management Zones
  - h. Recreational Facilities
- (ii) Schedule of cleaning duties containing: -
  - a. Identification of relevant zone/area to be cleaned
  - b. Specific cleaning task
  - c. Frequency of cleaning task
  - d. Any specific tools, methodologies or chemicals that are preferred to be used
  - e. Schedule of periodical or specialist duties to be done by "others"
- (iii) Supervisory Checklist (to be completed by the cleaning entity)
- (iv) Consumable Stock List – if consumables are to be provided by the building owner
- (v) Plant & Equipment List – if P&E is to be provided by the building owner
- (vi) Hazardous Materials Registers (X2) – for all hazardous materials stored within the common property
- (vii) Colour Coding Chart

#### **2. Garden Maintenance Plan** must provide the following: -

- a. Asset Register of predominant species contained within the landscaped areas

- b. Asset Register of landscape systems and infrastructure contained within the landscaped areas (if to be maintained/serviced by the gardening services contractor; e.g. irrigation system)
  - c. Register (or map) of areas/zones to be serviced, e.g.: -
    - i. Lawn areas
    - ii. Garden (incl. planter box) areas
    - iii. Extent of hedging under the service contract/s
    - iv. Extent of accessible pruning under the service contract/s
    - v. Extent of inaccessible hedging/pruning (under secondary service contracts)
    - vi. Paved areas to be serviced under the contract/s
    - vii. Furniture, fixtures & fittings to be serviced under the contracts (e.g. pool furniture, gazebo furniture)
    - viii. Waste management zone/s
    - ix. Recreational facilities
  - d. Schedule of gardening duties
    - i. Identification of relevant zone/area to be gardened
    - ii. Specific gardening task
    - iii. Frequency of gardening task
    - iv. Any specific tools, methodologies or chemicals that are preferred to be used
    - v. Schedule of periodical or specialist duties to be done by "others"
  - e. Supervisory Checklist (to be completed by the gardening entity)
  - f. Consumable Stock List – if consumables are to be provided by the building owner
  - g. Plant & Equipment List – if P&E is to be provided by the building owner
  - h. Hazardous Materials Registers (X2) – for all hazardous materials stored within the common property
3. The **Pool & Spa Maintenance Plan** must provide the following: -
- a. Asset Register of pool and spa plant and equipment (within the non-essential infrastructure section of the main asset register)
  - b. Schedule of pool and spa cleaning/servicing duties
    - i. Specific servicing task
    - ii. Frequency of servicing task
    - iii. Any specific tools, methodologies or chemicals that are preferred to be used
    - iv. Schedule of periodical or specialist duties to be done by "others"
  - c. Supervisory Checklist (to be completed by the pool and spa servicing entity)
  - d. Consumable Stock List – if consumables are to be provided by the building owner
  - e. Plant & Equipment List – if P&E is to be provided by the building owner
  - f. Hazardous Materials Registers (X2) – for all hazardous materials stored within the common property

## 3.0 ABMA Facilities Management Compliance Accreditation

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### Facilities Management Plan Assessment Checklist: -

Available upon request to [help@abma.org.au](mailto:help@abma.org.au)

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#### **ABMA Building Compliance Accreditation Agency Limited**

Freecall 1800 123 262

(e) [help@abma.org.au](mailto:help@abma.org.au)

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