

# Facilities and Client Services Management Process

Group Corporate Services Property

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## Document Control

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### Revision History

Version	Author	Last Modified Date	Changes
0.1	Chris Virtue	26 August 2010	NEW

### Distribution List

Name	Title	Business Unit	Responsibility
			Owner
			Reviewer
			Approver

# 1. Introduction

## 1.1 Document Purpose

The purpose of this document is to detail processes in the Property Management team.

## 1.2 How to read this document

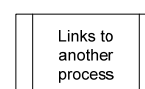
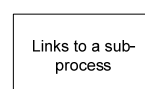
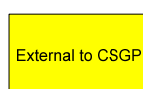
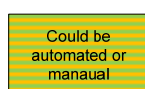
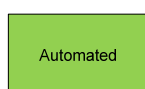
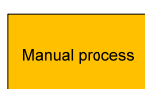
### 1.2.1 Abbreviations used

The table below provides an explanation of the terms used in this document:

Term	Meaning
ACMC	Alternative Corrective Maintenance Contractor
AP	Accounts Payable
AV	Alternative Vendor
BP	Bulk Procurement
BU	Business unit
BW	BankWest
CMC	Corrective Maintenance Contractor
D&C	Design and Construction
EMPOC	Executive Manager Property Operations Centre
FAAA	Finance Analyst Asset Accounting
FC	Furniture Coordinator
FM	Facilities Manager
FMgmt	Facilities Management
FR	Furniture Repairer (external)
FS	Furniture Supplier (external)
GPHD	General Procurement Help Desk
MA	Managing Agent
MP	Maintenance Planner
PD	Project Director
PM	Preventative Maintenance
POC	Property Operations Centre
POC TL	POC Team Leader
PR	Purchase Request (Ariba)
ProcM	Procurement Manager
PV	Preferred Vendor
SC	Storage Contractor (external)

Term	Meaning
SOP	Sydney Olympic Park precinct
SOPA	Sydney Olympic Park Authority
SOPBA	Sydney Olympic Park Business Association
SOPOT	Sydney Olympic Precinct Operations Team
WO	Work Order

### 1.2.2 Flow chart key colour codes

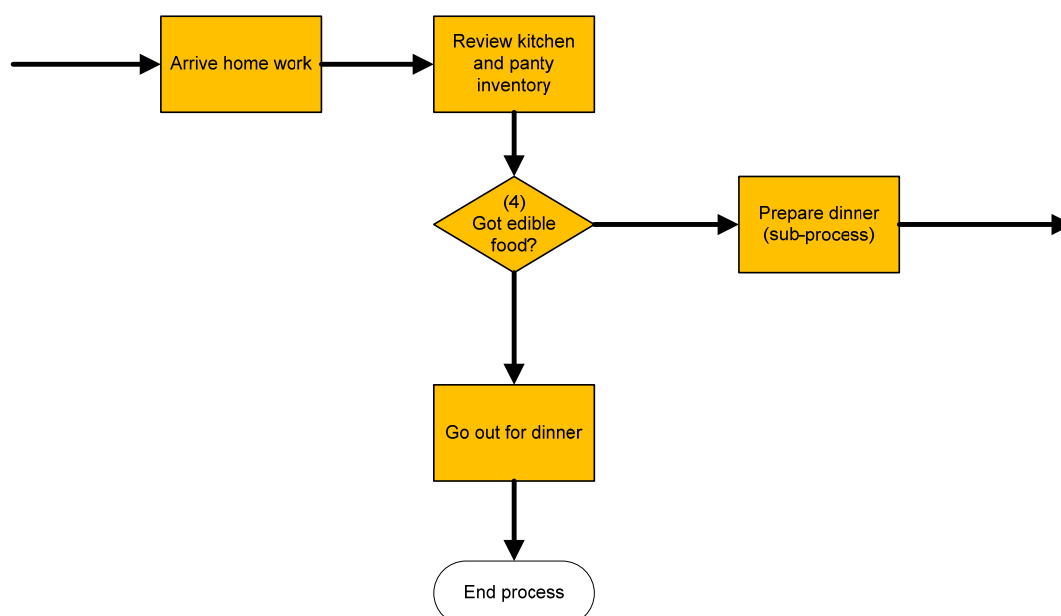


### 1.2.3 Flow chart decision points

All binary decision points imply a question that can have only a 'yes' or a 'no' answer that is driven by business rules.

If	Then
yes	<ul style="list-style-type: none"> <li>the process moves right</li> </ul>
no	<ul style="list-style-type: none"> <li>the process moves down</li> </ul>

In the following example, if there is food in the house, then stay in and cook dinner. If cupboards and fridge are bare, then go out for dinner.



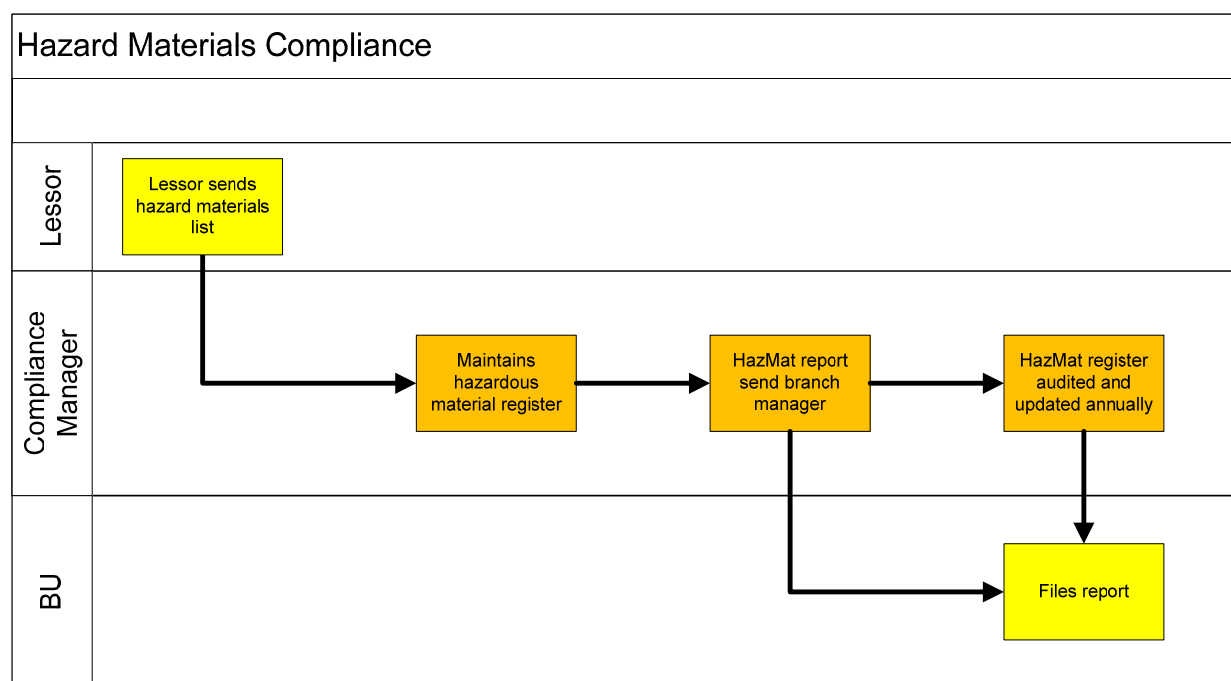
## 2. Compliance Management

### 2.1 Hazardous materials compliance audits

#### 2.1.1 Process description

Stage	Description	Responsibility	Output issue to:
1	Lessor provides hazard materials	Lessor	CompM
2	Compliance Manager maintains hazard materials registers	CompM	
3	HazMat reports produced and forwarded to branch managers.	CompM	BU
4	Hazardous Materials Register audited and updated annually.	CompM	

#### 2.1.2 Process flow





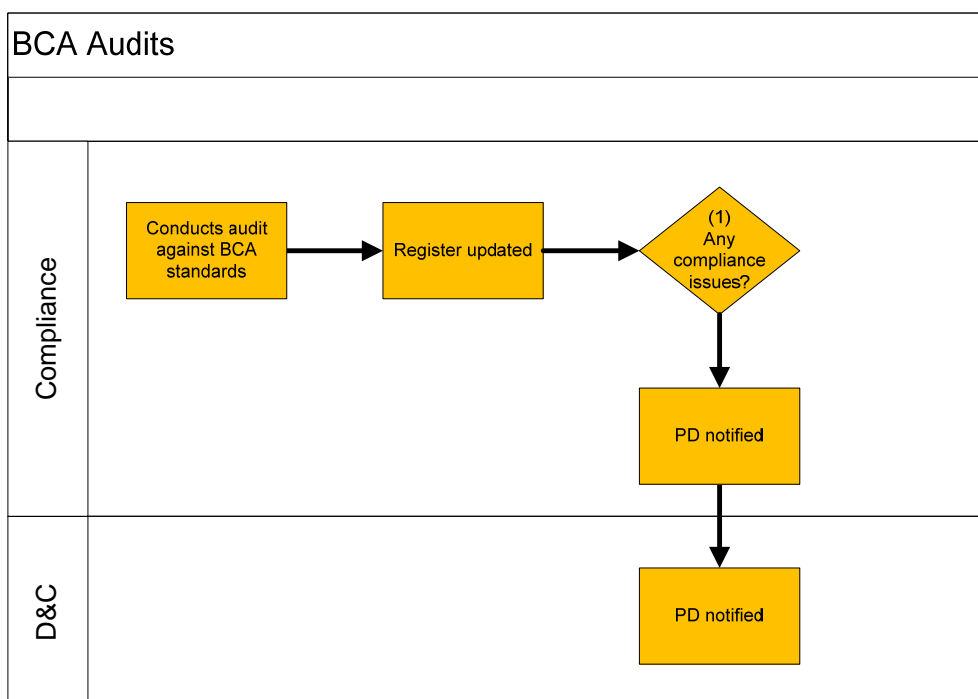
## 2.2 Building code compliance audits

Building code compliance audits are conducted during practical completion, during the programme or as scheduled. Approximately 220 sites are audited per year.

### 2.2.1 Process description

Stage	Description	Responsibility	Output issue to:
1	Sites are retrospectively audited for compliance with BCA standards.  Items include: <ul style="list-style-type: none"> <li>• works performed</li> <li>• emergency lighting</li> <li>• emergency exit signs</li> </ul>	CompM	
2	Audit results recorded in an electronic BCA register (an MS Excel spreadsheet).	CompM	
3	Non-compliant sites are reported to Design and Construction.	CompM	PD

### 2.2.2 Process flow



### 2.2.3 Business rules

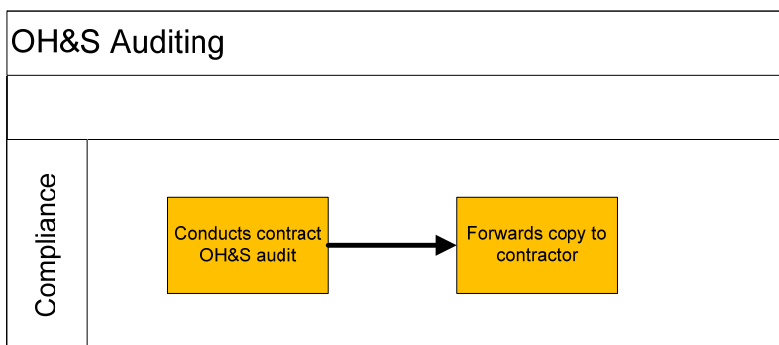
Refer to the decision points (diamonds) in the flow charts.

Refer to the decision points (diamonds) in the flow charts.								
No.	Decision point label	Business rule						
1	Any compliance issues?	Sites are audited for compliance with the BCA						
		<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>notify the Project Director</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>no further action required</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>notify the Project Director</li></ul>	no	<ul style="list-style-type: none"><li>no further action required</li></ul>
		If	Then					
		yes	<ul style="list-style-type: none"><li>notify the Project Director</li></ul>					
no	<ul style="list-style-type: none"><li>no further action required</li></ul>							

## 2.3 Contractor occupational health & safety audits

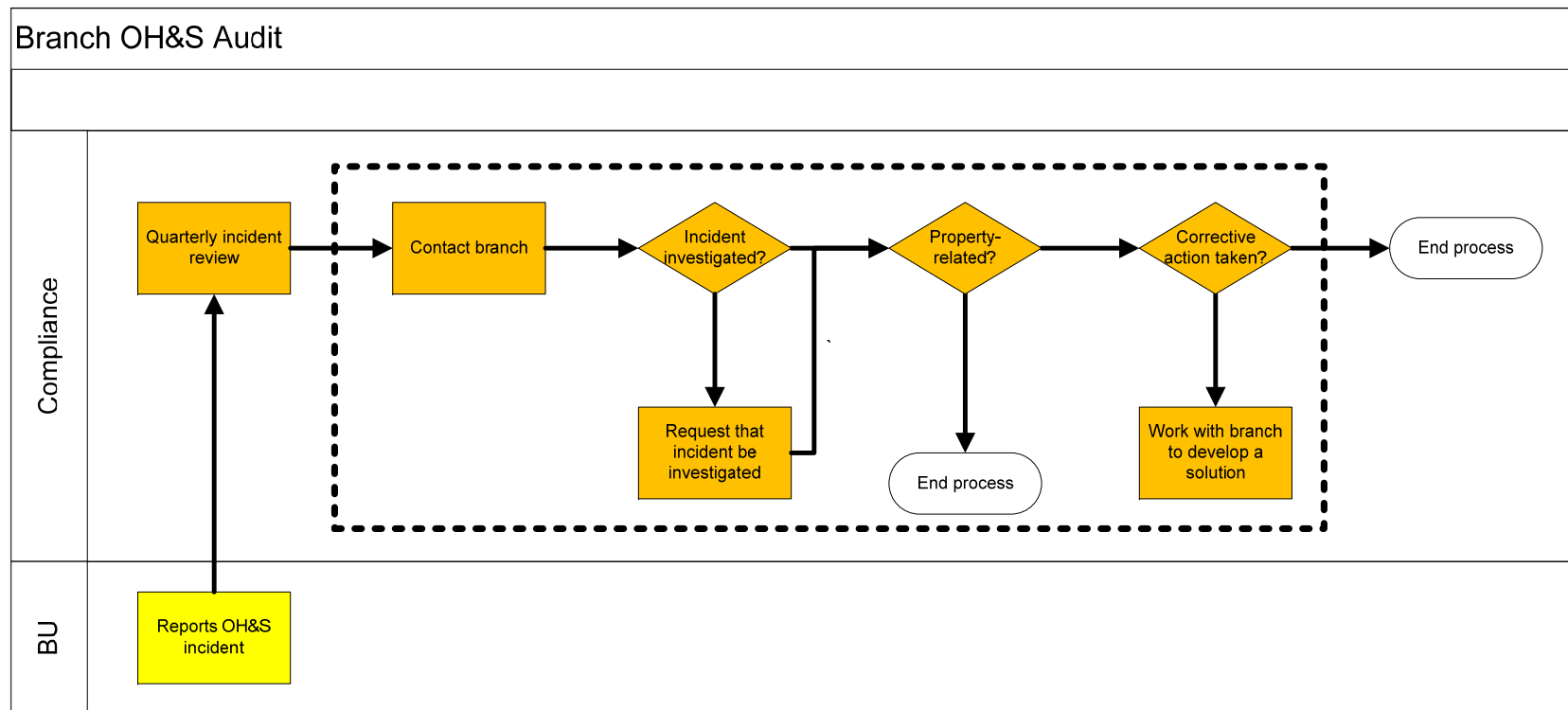
OH&S audits are conducted on contractors who perform work for the Bank.

Stage	Description	Responsibility	Output issue to:
1	Contractor audited for OH&S compliance with Comcare requirements.	CompM	Contractor



## 2.4 Branch OH&S audits

Branches are required to submit an OHS Incident & Investigation Report for OH&S incidents. The Compliance Manager audits the incidents register quarterly.



## 2.5 Conducting insurance renewals

Approximately 220 sites are audited for building code compliance.

Stage	Description	Responsibility	Output issue to:
1	<p>Sites are retrospectively audited for compliance with BCA standards.</p> <p>Items include:</p> <ul style="list-style-type: none"><li>• works performed</li><li>• emergency lighting</li><li>• emergency exit signs</li></ul>	CompM	

## 3. Client Services Management

### 3.1 Introduction

Client Services manages meeting facilities and catering services at the following sites:

- Darling Park levels 19 and 20
- 52 Martin Place level 35
- 385 Bourke Street level 2
- BankWest Tower, levels 46 and 47

As the internal “customer service arm” of the Group Property business, it uses an insourced model for kitchen and event staffing.

### 3.2 Interaction with other teams

Customer Services provides input into the design processes as a business unit representative.

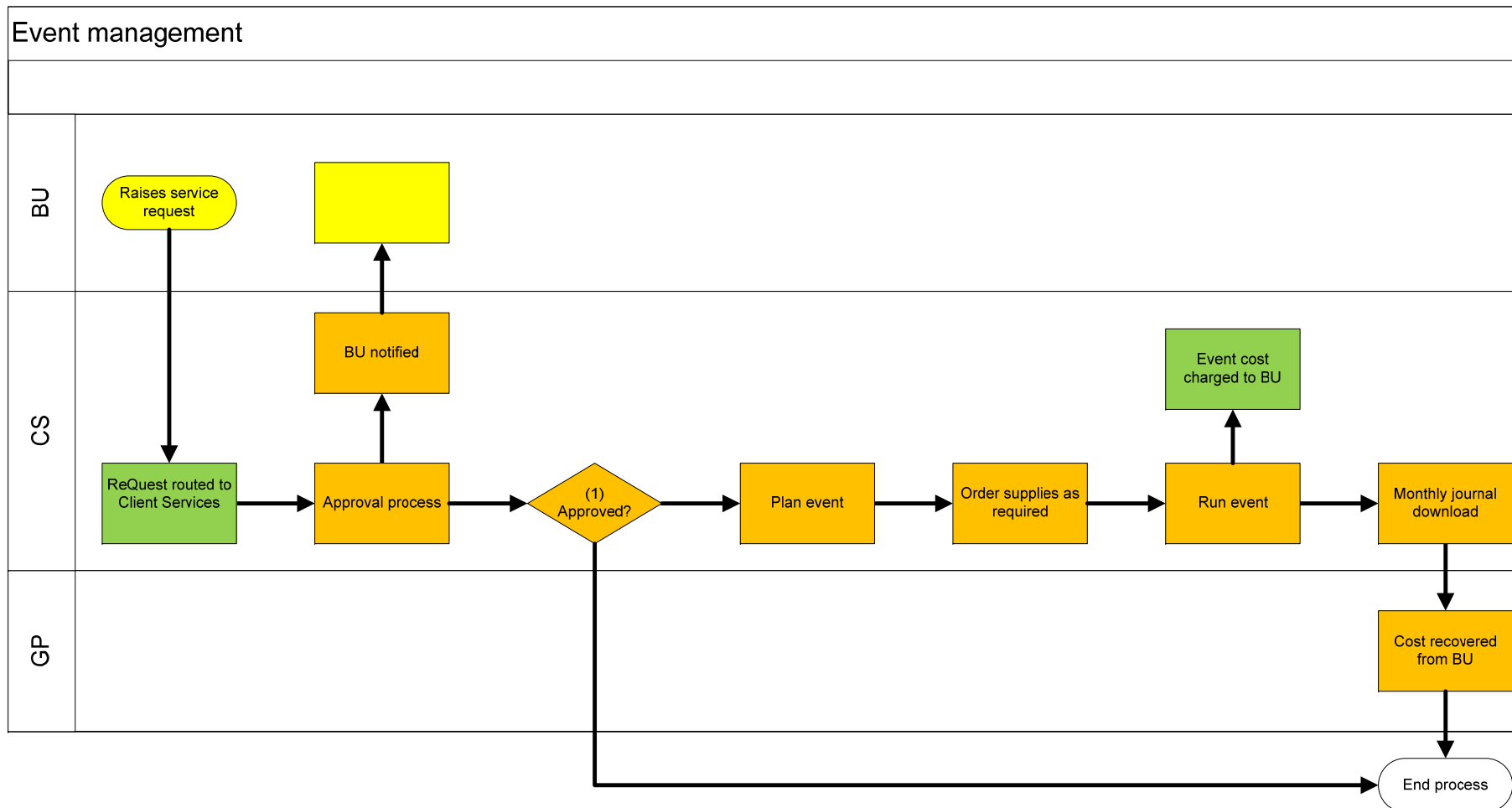
### 3.3 Providing concierge services and reception services

Concierge and reception requirements are determined on site by site basis with Client Services having input into the design process. There are no specific business rules.

### 3.4 Event management

#### 3.4.1 Process description

Stage	Description	Responsibility	Output issue to:
1	Business unit raises event request through the meeting booking tool.	BU	Client Services
2	The request is approved: <ul style="list-style-type: none"> <li>• Reception can approve standard events.</li> <li>• The Events Manager approves requests for complex events</li> </ul>	Client Services	Business unit
3	Plan the event according to BU requirements: <ul style="list-style-type: none"> <li>• determine catering requirements</li> <li>• determine staffing requirements</li> <li>• order supplies</li> </ul>	Client Services	Suppliers
4	Run the event.	Client Services	
5	End of month: download journal and forward to Group Procurement for recovery for business units.	Client Services	Group Procurement



### 3.4.3 Business rules

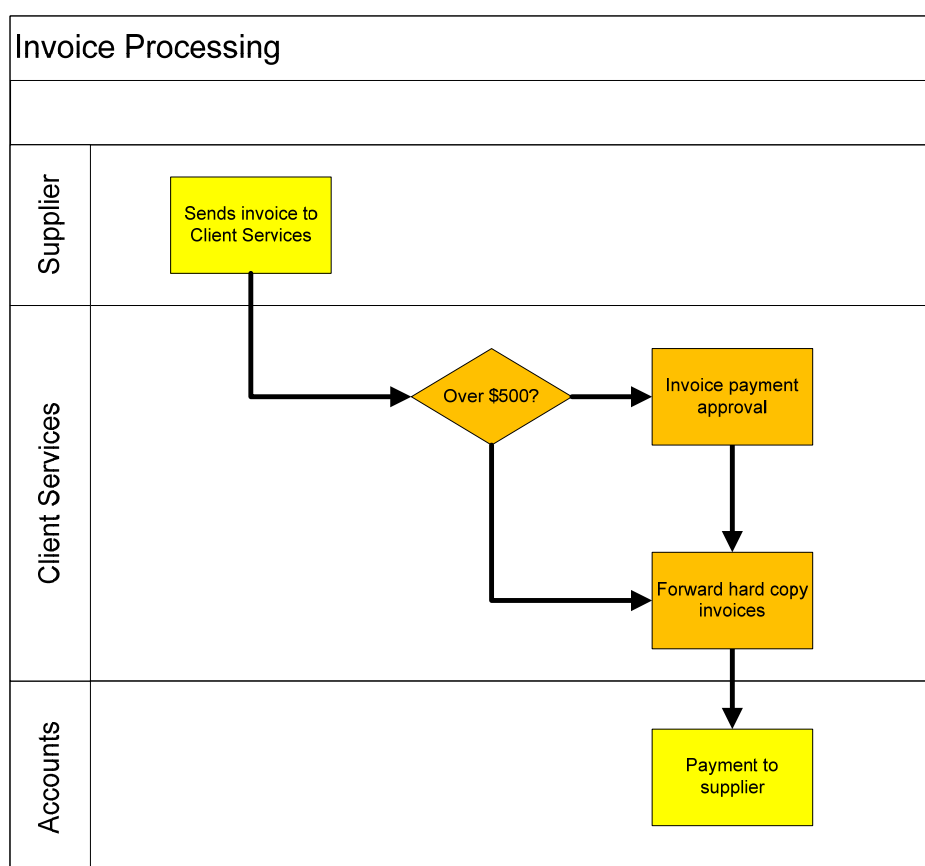
No.	Decision point label	Business rule						
1	Approved?	<p>Standard events can be approved at reception and complex events can be approved by the Events Manager.</p> <p>Standard events have fixed room set-ups and normal catering requirements.</p> <p>Complex event:</p> <ul style="list-style-type: none"><li>• utilises flexible working space, requiring multiple room configurations</li><li>• all day events requiring breakout space</li><li>• run sheets to ensure staff are informed</li></ul> <p>Complex events include client-related events, board and ExCo functions requiring personalised service, formal lunches and dinner dining.</p> <p>Approval criteria includes:</p> <ul style="list-style-type: none"><li>• availability</li><li>• CBA senior management level</li><li>• client-facing priority</li><li>• impact on employees based in the building</li></ul> <p>Requests would be declined if:</p> <ul style="list-style-type: none"><li>• there was no availability</li><li>• the numbers exceed room capacity</li><li>• inappropriate for the facility</li></ul> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>• plan and run the event</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>• notify the business unit and end the process</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>• plan and run the event</li></ul>	no	<ul style="list-style-type: none"><li>• notify the business unit and end the process</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>• plan and run the event</li></ul>							
no	<ul style="list-style-type: none"><li>• notify the business unit and end the process</li></ul>							

## 3.5 Invoice processing

### 3.5.1 Process description

Stage	Description	Responsibility	Output issue to:
1	Suppliers send invoices directly to Client Services.	Supplier	Client Services
2	Invoices are forwarded to Accounts for payment	Client Services	Accounts
3	Payment made to supplier	Accounts	Supplier

### 3.5.2 Process flow



### 3.5.3 Business rules

No.	Decision point label	Business rule	
1	Over \$500?	<b>If</b>	<b>Then</b>
		yes	<ul style="list-style-type: none"> <li>Executive Manager Client Services approval required in PeopleSoft</li> <li>forward invoice to Accounts</li> </ul>
		no	<ul style="list-style-type: none"> <li>forward invoice to Accounts</li> </ul>



### 3.6 Budgeting

The EM Client Services works with the EM Commercial Property to prepare an annual budget. The budget is approved by the Head of Facilities Management and Client Services.

### 3.7 Process management

#### 3.7.1 RASCI Matrix

**Key:**

R – Responsible

A – Approve

S – Support

C – Consult

I – Inform

Process	Client Services	BU	Group Procurement	D&C	Accounts
Providing concierge services and reception services	R	A		S	
Event management	R	A	S		S
Invoice processing	R				R
Budgeting	R				

#### 3.7.2 SIPOC

Suppliers	Inputs	Process	Outputs	Customers
Food and beverage vendors	Catering requests	Refer to flow charts	D&C	BU

#### 3.7.3 Systems and Tools

System	Used for
Meeting booking tool	<ul style="list-style-type: none"> <li>raising and approving requests</li> </ul>
MS Outlook	<ul style="list-style-type: none"> <li>sending requests, reminders and approvals</li> </ul>
PeopleSoft	<ul style="list-style-type: none"> <li>invoice processing</li> </ul>

## 4. Building Access Control

### 4.1 Building security systems

There are three different access systems in use across the nine properties:

#### Honeywell

- 52 Martin Place Sydney
- 120 Pitt St Sydney
- 48 Martin Place Sydney
- 9 – 19 Elizabeth Street Sydney
- 309 George Street Sydney

#### Siemens

- 363 George Street Sydney
- 799 Pacific Highway Chatswood

#### TComm

- 45 Clarence Street Sydney

#### Cardax

- Darling Park (DP1)

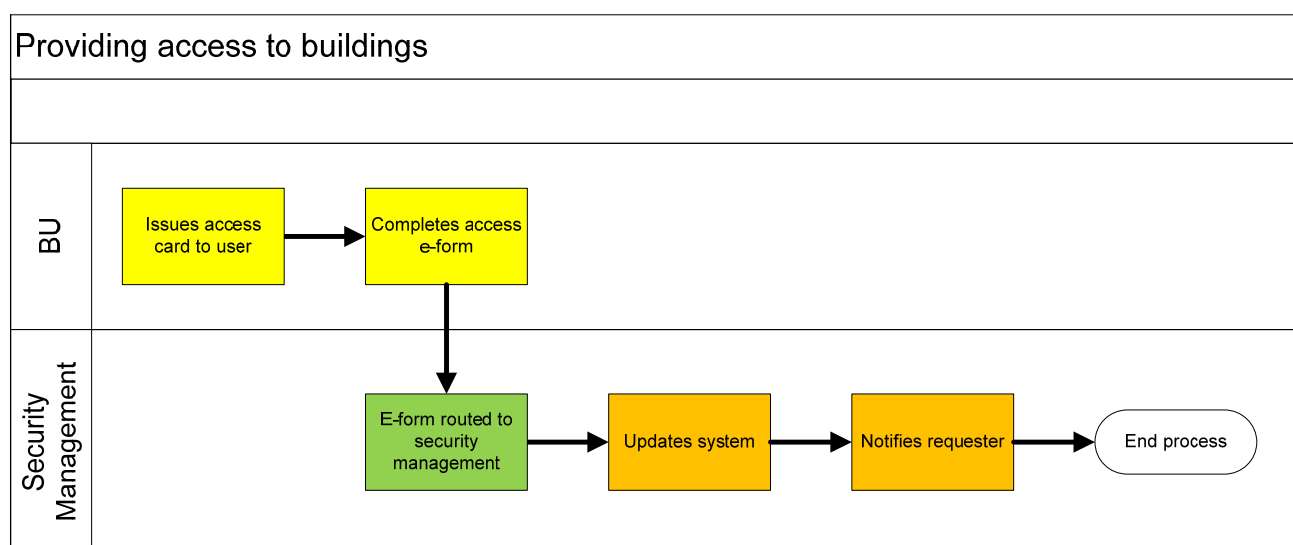
### 4.2 Programming access requests

Access authorisers are issued with a supply of cards. When a new staff member requires access to a building, the authoriser provides the staff member with the card and advises Security Management.

#### 4.2.1 Process description

Stage	Description	Responsibility	Output issue to:
1	Business unit issues the staff member with an access card and completes and submits the Building Access Card Request form.	BU	Security Management
2	Security Management record the card number against the staff member in the system.	Security Management	
3	Requestor notified.	Security Management	BU

## 4.2.2 Process flow



## 4.2.3 Business rules

There no business for this process.

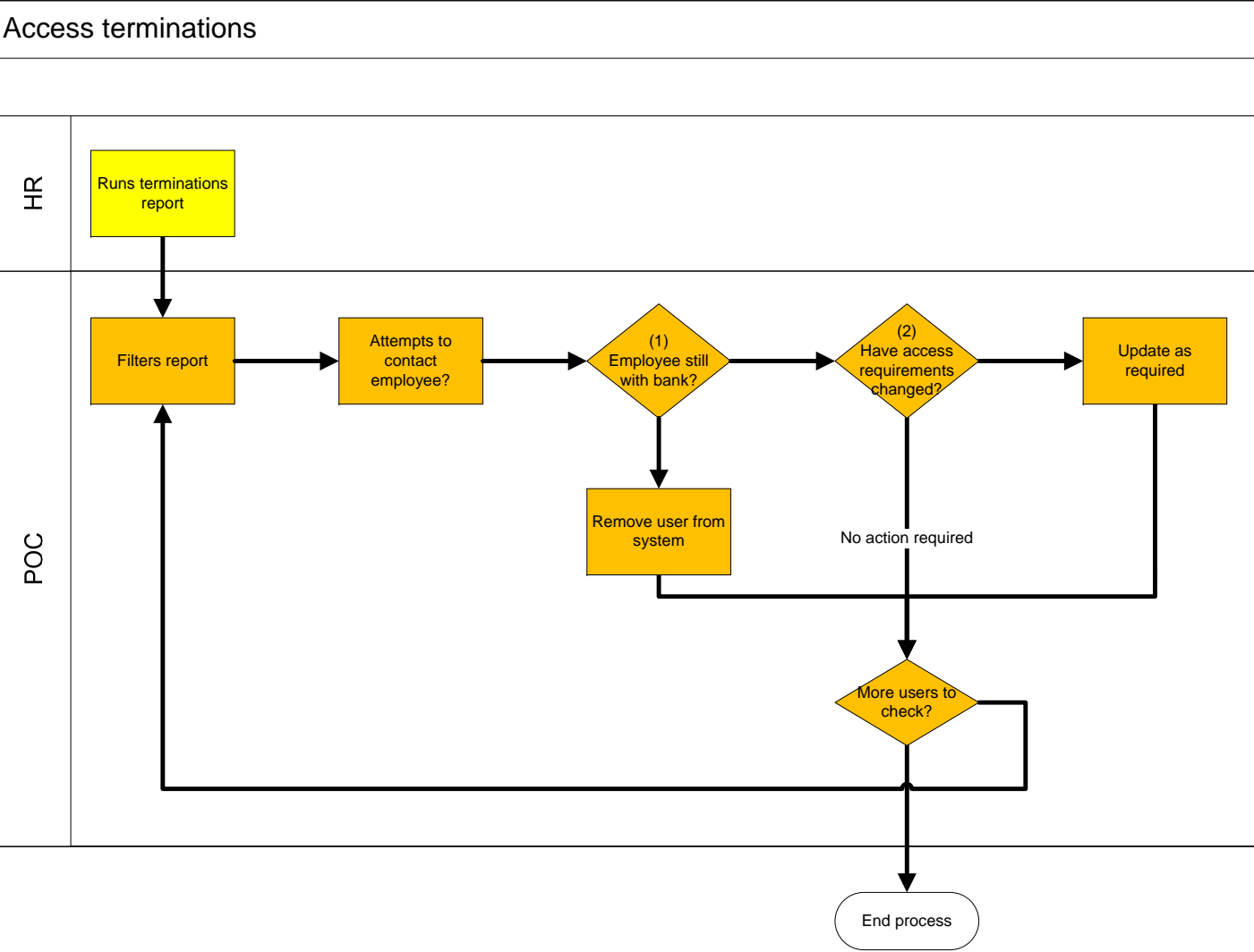
## 4.3 Terminating access

**Note:** Security Management contacts every staff member on the report to ascertain the employee status because there is no real indication in the Action Reason column on the report as to whether the staff member has left the Bank. For example, an Action Reason of “End Temporary Employment” might mean that a contractor has become a permanent employee.

### 4.3.1 Process description

Stage	Description	Responsibility	Output issue to:
1	HR produces the Terminations report	HR	Security Management
2	Security Management: <ul style="list-style-type: none"> <li>filters the report for the buildings managed</li> <li>deals with all items with an Employee Status of T or A</li> </ul>	Security Management	
3	Security Management attempts to contact the staff member to ascertain their employment status.  If Security Management: <ul style="list-style-type: none"> <li>is unable to contact the employee, then access is revoked</li> <li>is able to contact the employee, their access record is updated as required.</li> </ul>	Security Management	

4.3.2 Process flow



### 4.3.3 Business rules

Refer to the decision points (diamonds) in the flow charts.

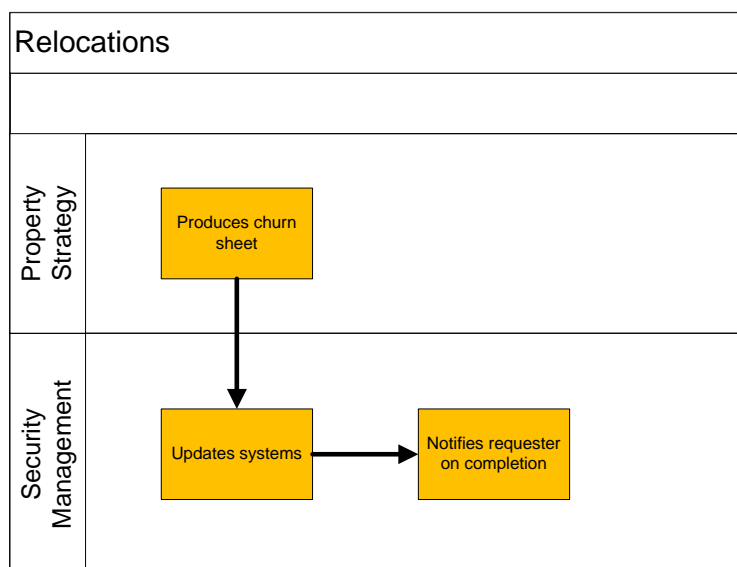
Refer to the decision points (diamonds) in the flow charts.								
No.	Decision point label	Business rule						
1	Employee still with bank?	Security Management attempts to contact the employee. If the employee is cannot located in the directory, it is assumed that the employee is no longer employed by the Bank.						
		<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>check employee location and update system as required.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>remove the employee from the system</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>check employee location and update system as required.</li></ul>	no	<ul style="list-style-type: none"><li>remove the employee from the system</li></ul>
		If	Then					
		yes	<ul style="list-style-type: none"><li>check employee location and update system as required.</li></ul>					
no	<ul style="list-style-type: none"><li>remove the employee from the system</li></ul>							
2	Have access requirements changed?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>update the system as required.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>take no further action.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>update the system as required.</li></ul>	no	<ul style="list-style-type: none"><li>take no further action.</li></ul>
		If	Then					
		yes	<ul style="list-style-type: none"><li>update the system as required.</li></ul>					
		no	<ul style="list-style-type: none"><li>take no further action.</li></ul>					

## 4.4 Dealing with relocations

### 4.4.1 Process description

Stage	Description	Responsibility	Output issue to:
1	Churn sheet produced	Property Strategy	Security Management
2	Systems updated	Security Management	
3	Requester notified	Security Management	Property Strategy

### 4.4.2 Process flow



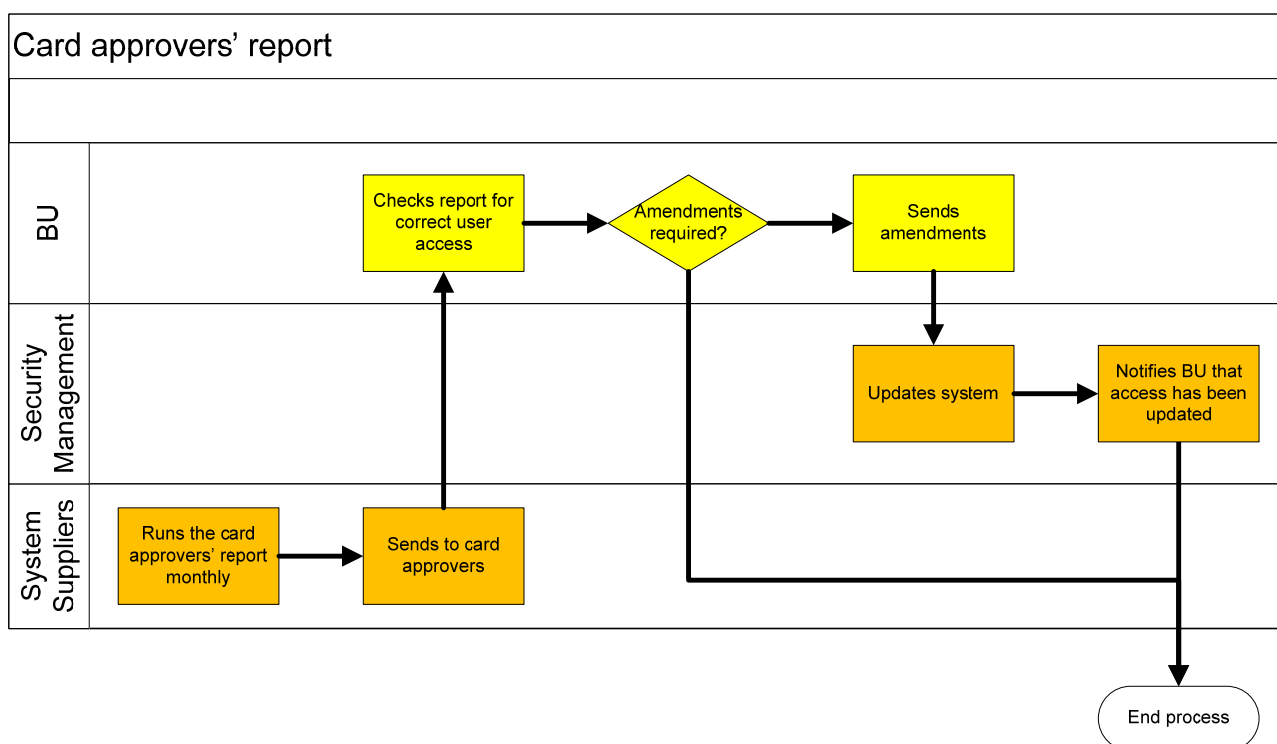
## 4.5 Monthly approvers' report

At present, the approvers' report is only produced for the Honeywell system.

### 4.5.1 Process description

Stage	Description	Responsibility	Output issue to:
1	Approvers' report monthly are produced monthly by system suppliers and distributed to the business units and Security Management.	System suppliers	BU Security Management
2	BU checks report for correct user access	BU	
3	Notifies Security Management of any amendments	BU	Security Management
4	Security Management updates system	Security Management	
5	Security Management notifies BU	Security Management	BU

### 4.5.2 Process flow



## 4.6 Process Management

### 4.6.1 RASCI Matrix

**Key:**

R – Responsible

A – Approve

S – Support

C – Consult

I – Inform

Process	Security Management	BU	Property Strategy	HR
Providing access	R	AI		
Terminating access	R			AI
Relocations	R		AI	

### 4.6.2 SIPOC

Suppliers	Inputs	Process	Outputs	Customers
Honeywell	Termination Report	Refer to flow charts	Completion notification	BU
Cardax	Churn sheets		Approvers' report	Property Strategy
TComm				
Siemens				

### 4.6.3 Systems and Tools

System	Used for
MS Excel	<ul style="list-style-type: none"> <li>reviewing strategy spreadsheets</li> </ul>
MS Outlook	<ul style="list-style-type: none"> <li>sending requests, reminders and approvals</li> </ul>



## 5. Furniture Supply and Maintenance

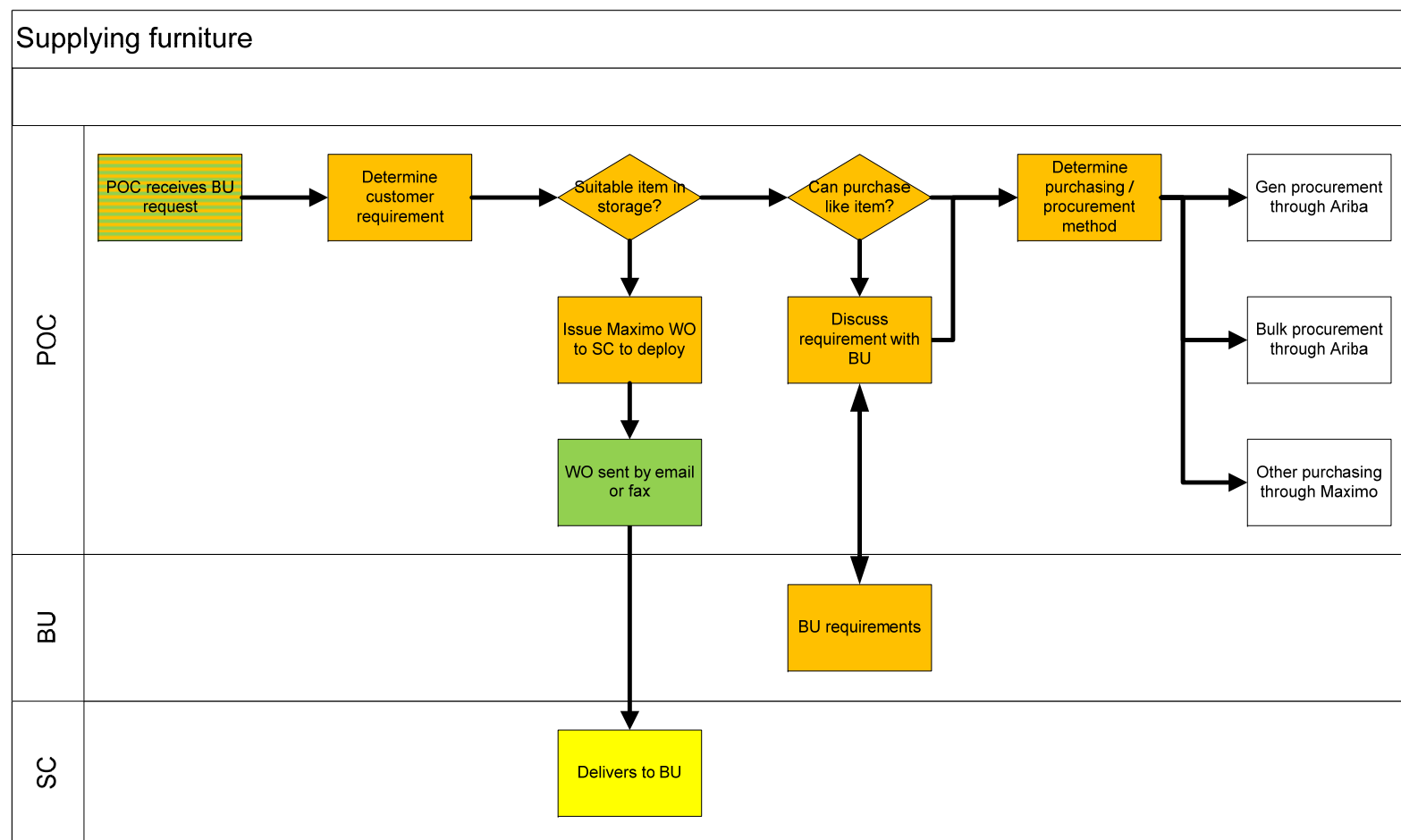
### 5.1 Supplying furniture to business units

#### 5.1.1 Process description

Stage	Description	Responsibility	Output issue to:
1	BU request raised in Maximo	BU POC	Furniture Coordinator
2	FC contacts BU to accurately determine client needs	FC	
3	FC phones storage contractor to ask if a suitable item is held in stock.	FC	SC
4	Can SC supply item? <ul style="list-style-type: none"> <li>• Yes – go to stage 5</li> <li>• No – go to stage 6</li> </ul>	FC	
5	Raise work order to SC to deploy item to site Process ends	FC	SC
6	Decision point – which of the three purchase processes to use: <ul style="list-style-type: none"> <li>• For replacement Edison-3 fit-out items – go to <i>Bulk Purchasing through Ariba</i>.</li> <li>• For general procurement items that can be purchased through Ariba – go to <i>General Procurement purchasing through Ariba</i>.</li> <li>• For all other items – go to <i>Purchasing through Maximo</i>.</li> </ul>		

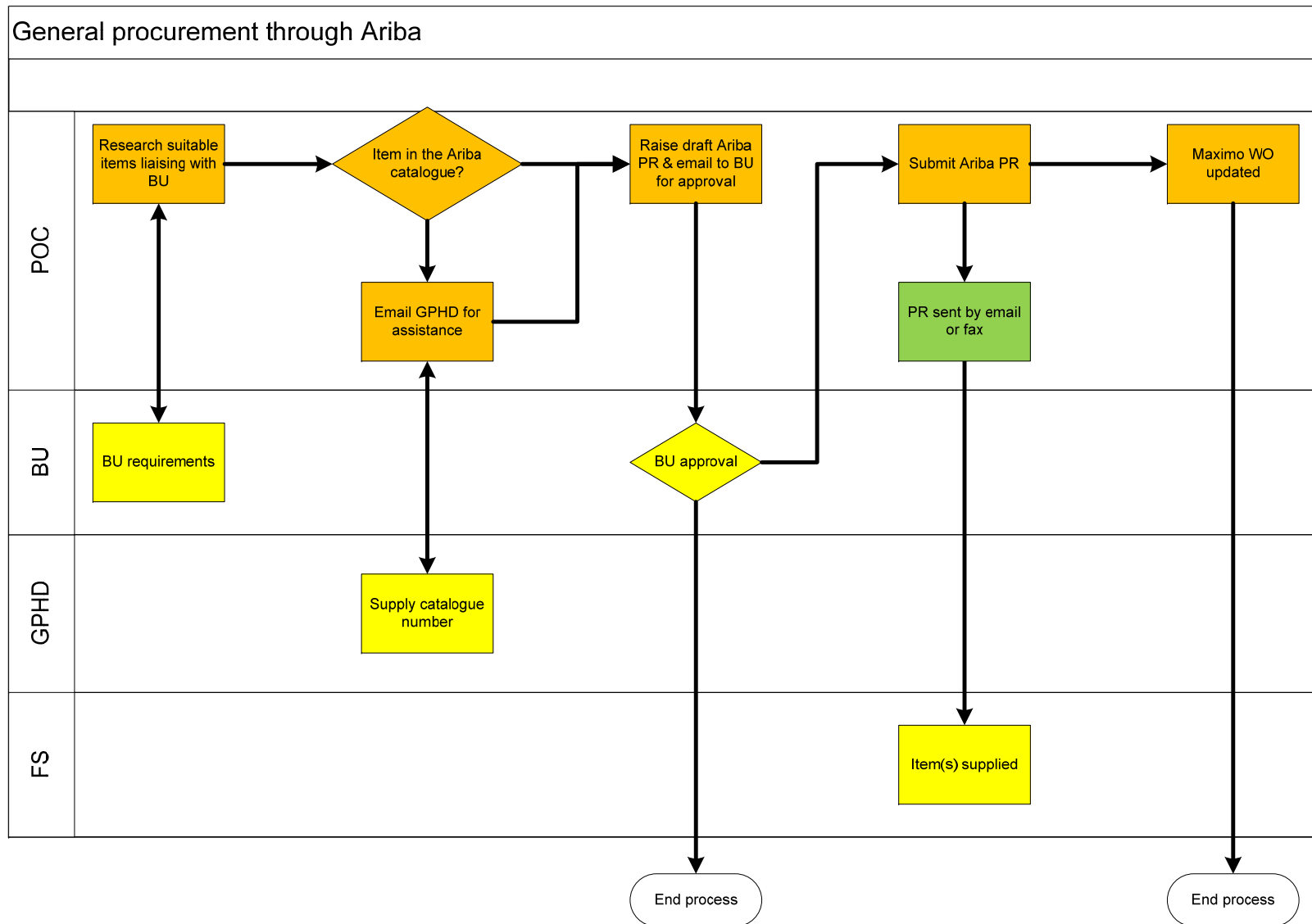
## 5.1.2 Process flows

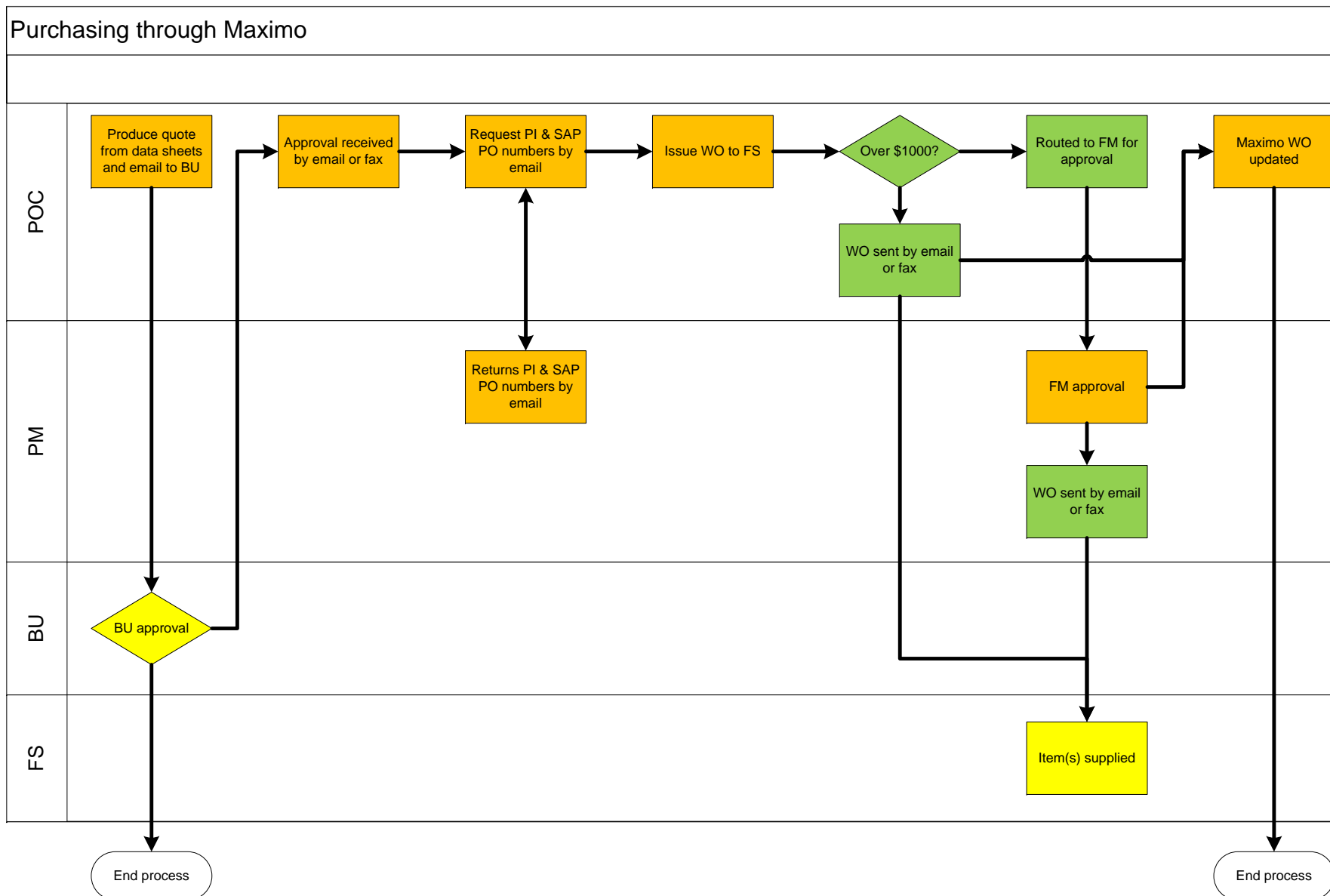
### 5.1.2.1 Process start



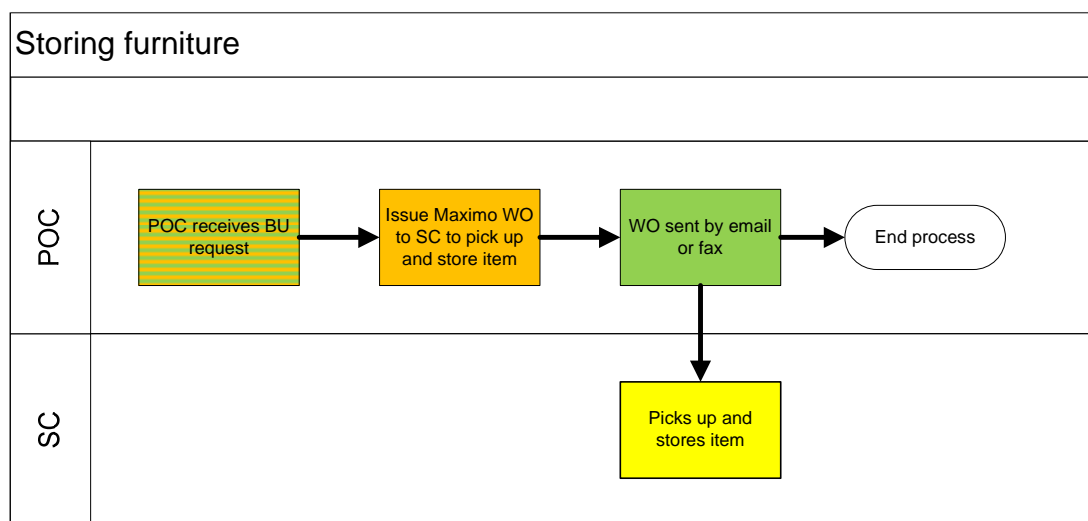


### 5.1.2.3 Purchasing general procurement items through Ariba





### 5.1.2.5 Storing furniture



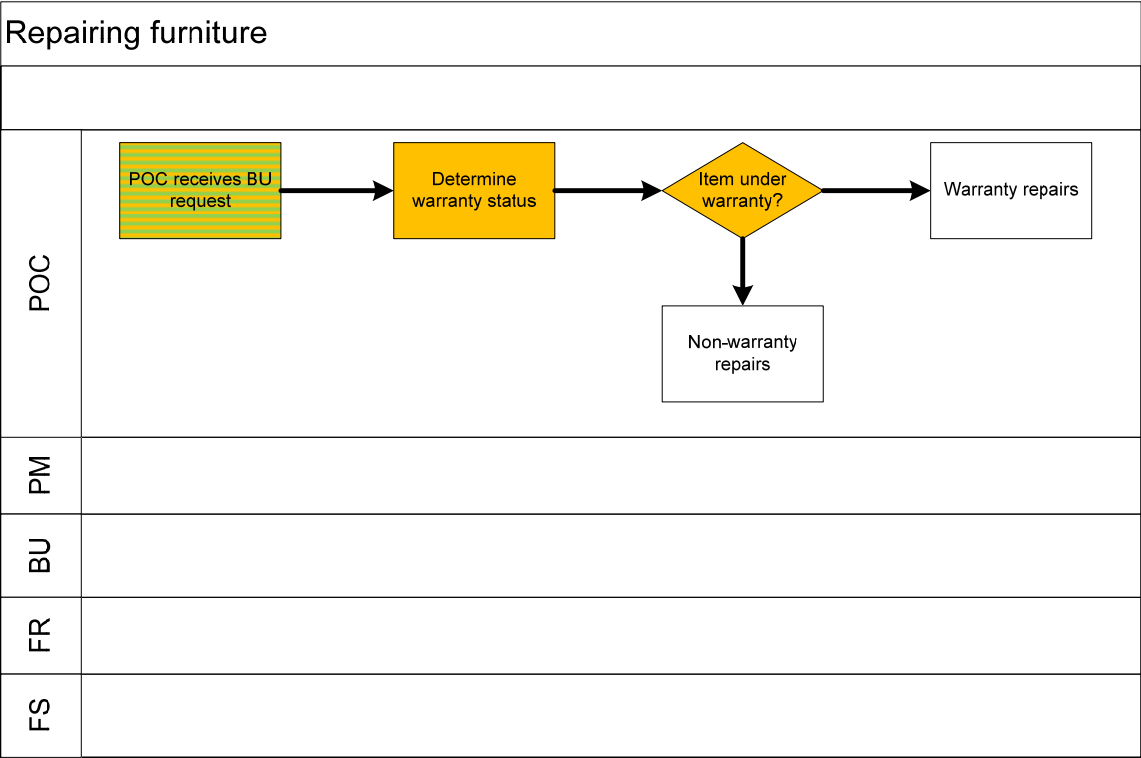
## 5.2 Repairing furniture

### 5.2.1 Process description

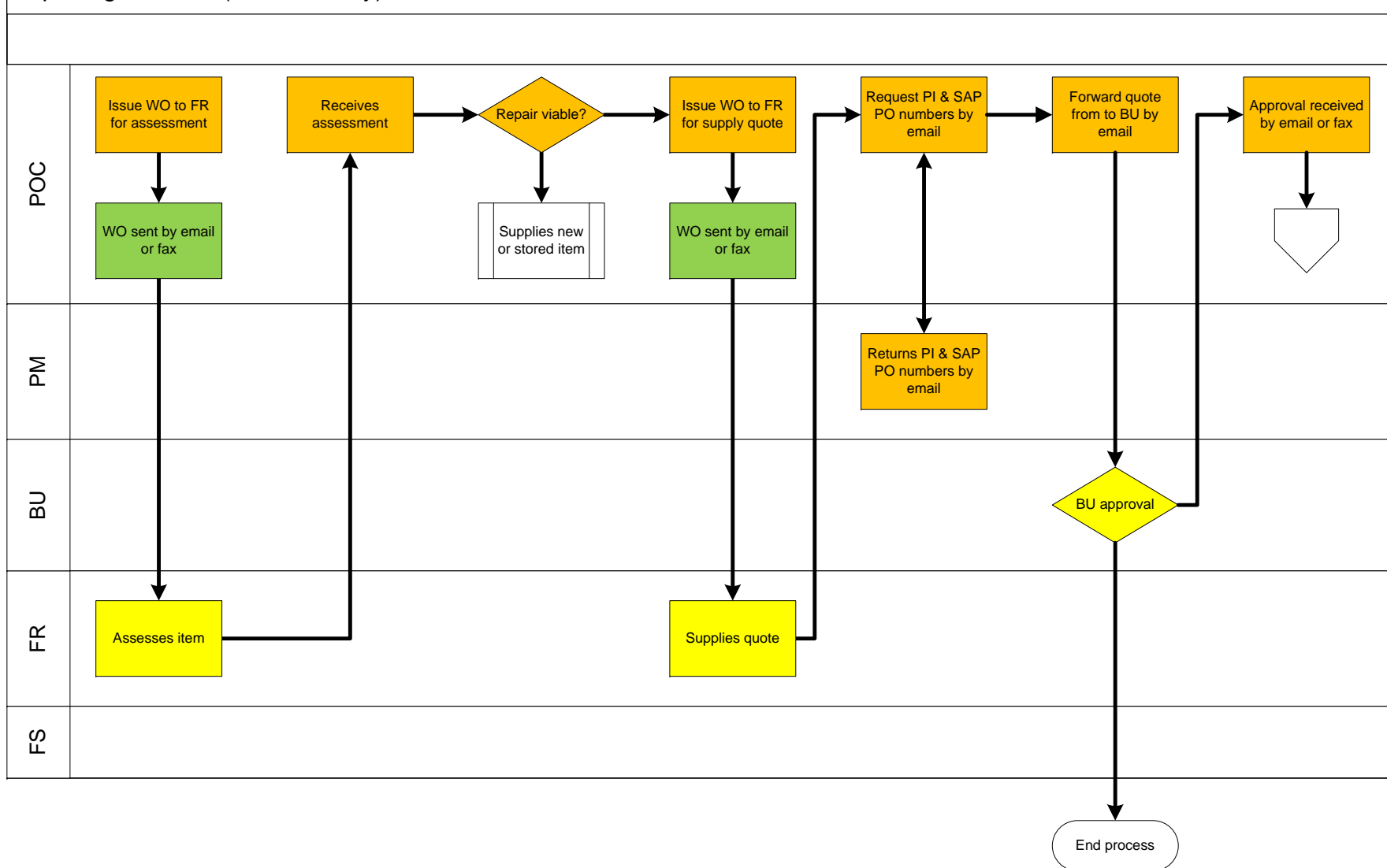
Stage	Description	Responsibility	Output issue to:
1	BU request raised in Maximo	BU POC	Furniture Coordinator
2	FC checks for recently completed projects as the affected item may be under warranty.	FC	
3	Is the affected item under warranty? <ul style="list-style-type: none"> <li>Yes – go to <i>Repairing furniture (warranty)</i></li> <li>No – go to <i>Repairing furniture (non-warranty)</i></li> </ul>	FC	
4	Raise \$0 value work order to supplier to repair item. Process ends	FC	FR

5.2.2 Process flows

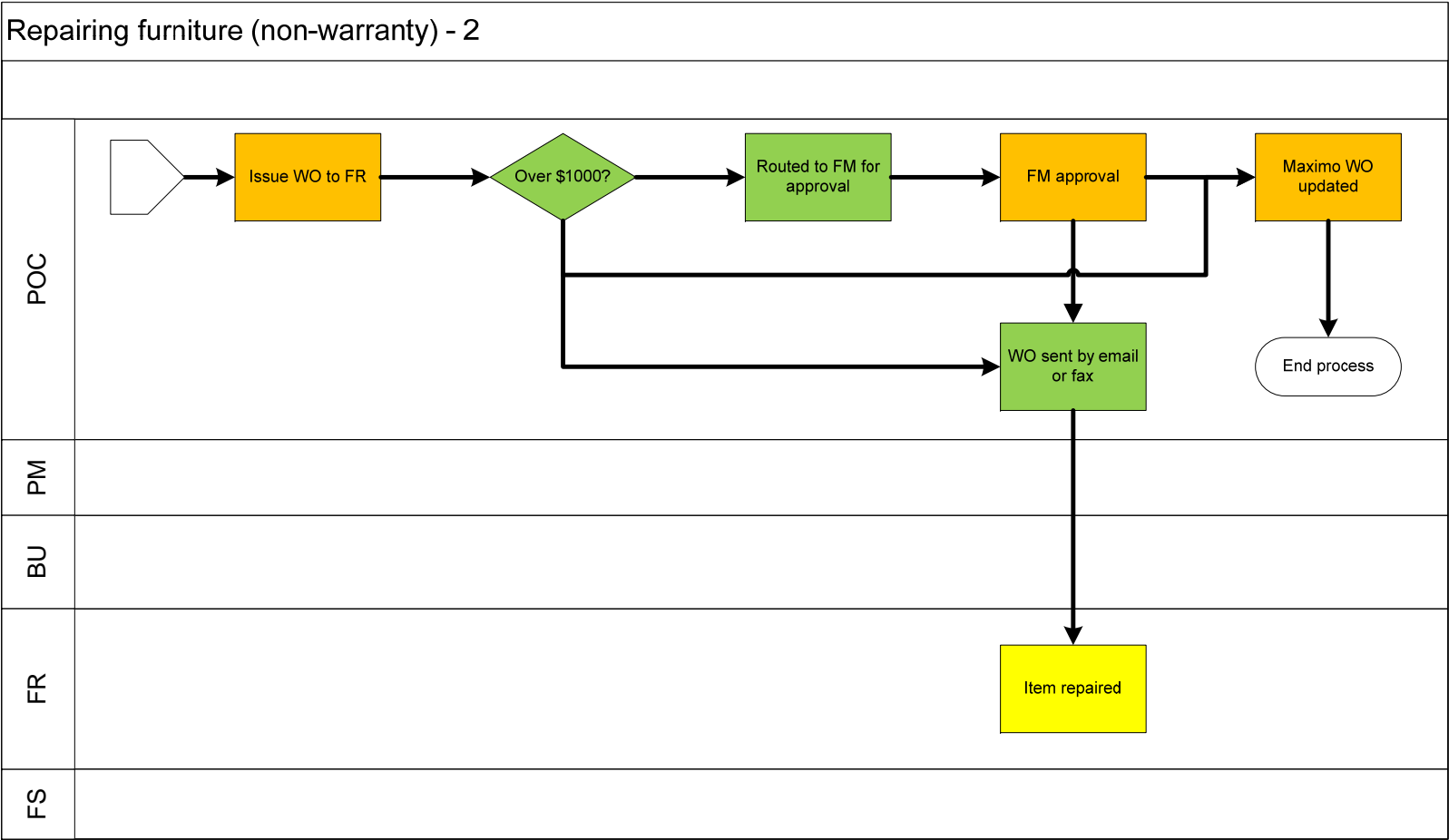
5.2.2.1 Process start



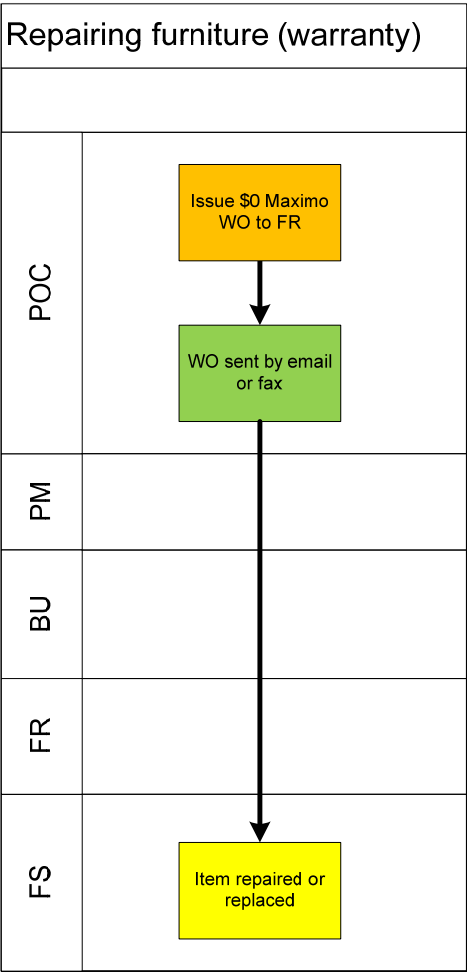
## Repairing furniture (non-warranty) - 1



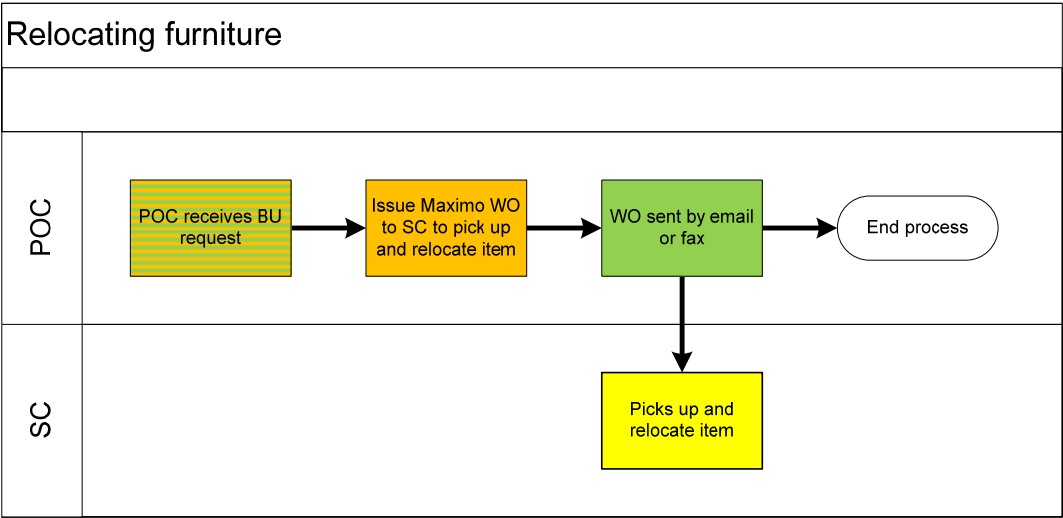




5.2.2.3 Repairing furniture (warranty)



5.2.2.4 Relocating furniture



## 5.3 Process Management

### 5.3.1 RASCI Matrix

**Key:**

R – Responsible

A – Approve

S – Support

C – Consult

I – Inform

Process	FC	BU	POC	SC	FR	FV	PM	BW
Supplying furniture	R	A	S	SI		S	S	
Picking up furniture	R	I	S	SI				
Repairing furniture	R	I	S		SI		S	
Bank West processes	R	I	S					R

## 5.4 SIPOC

Suppliers	Inputs	Process	Outputs	Customers
Relay (storage)	Work orders	Refer to flowcharts	Work orders (Maximo)	Business Units
Furniture vendors			Purchase requests (Ariba)	
Furniture repairers				

## 5.5 Systems and Tools

System	Used for
Maximo	<ul style="list-style-type: none"> <li>receive furniture supply, pick-up and repair requests</li> <li>issue work orders to external contractors</li> <li>storage of correspondence, quotes and approvals</li> <li>general work flow</li> </ul>
Ariba	<ul style="list-style-type: none"> <li>purchasing of general procurement and bulk procurement items</li> </ul>
Acrobat	<ul style="list-style-type: none"> <li>producing quotes from data sheets</li> </ul>
MS Excel	<ul style="list-style-type: none"> <li>producing quotes from data sheets</li> </ul>
MS Outlook	<ul style="list-style-type: none"> <li>sending quotes to customers</li> <li>receiving purchasing approvals from customers</li> </ul>

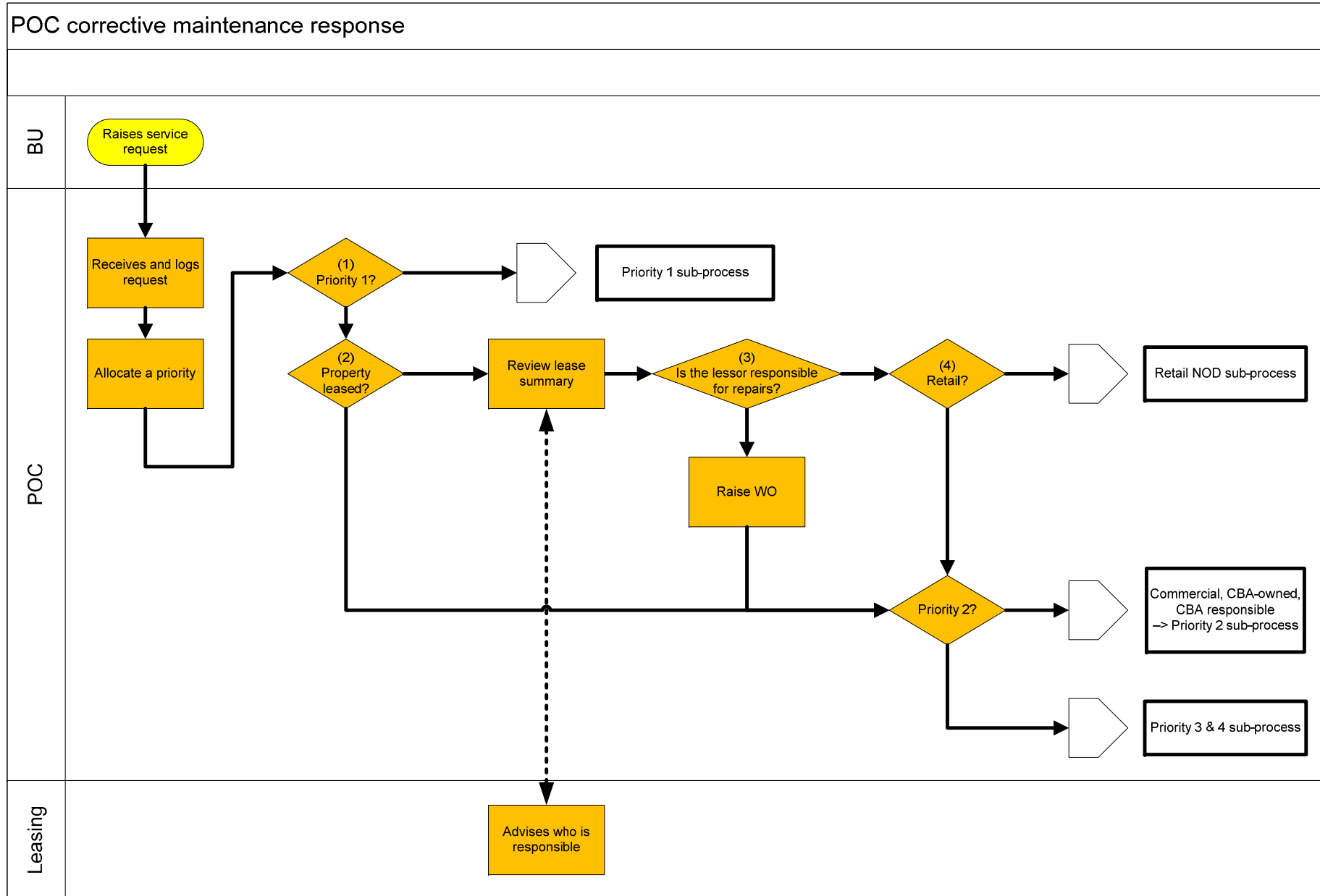
## 6. Corrective Maintenance

### 6.1 Responding to a corrective maintenance request

This process occurs when a business unit site contacts the POC call centre to report a fault.

#### 6.1.1 Process description

Stage	Description	Responsibility	Output issue to:
1	Receive and log the call	POC	
2	Refer to the <i>Work order priority matrix</i> and allocate a priority: <ul style="list-style-type: none"> <li>if priority 1, go to <i>Managing Priority 1 faults</i></li> <li>otherwise, proceed to the next stage</li> </ul>	POC	
3	Determine if the property leased. <ul style="list-style-type: none"> <li>if the property is not leased (i.e. it is Bank-owned), go to <i>Raising a corrective maintenance work order</i></li> <li>otherwise, proceed to the next stage</li> </ul>	POC	
4	Review the lease summary to determine who is responsible for repairs. <b>Note:</b> If unsure, contact Leasing. <ul style="list-style-type: none"> <li>if the lessor is responsible and it is a retail site, go to <i>Raising a retail notice of defect</i></li> <li>if the lessor is responsible and it is not retail site, go to <i>Lessor-managed repairs</i></li> <li>if the lessor is not responsible, go to <i>Raising a corrective maintenance order</i></li> </ul>	POC FM	



### 6.1.3 Business rules – manual

Refer to the decision points (diamonds) in the flow charts.

Refer to the decision points (diamonds) in the flow charts.								
No.	Decision point label	Business rule						
1	Is it a priority 1 incident?	<p>The Bank manages all priority 1 incidents.</p> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>go to <i>Managing priority 1 incidents</i></li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>continue to analyse the incident</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>go to <i>Managing priority 1 incidents</i></li></ul>	no	<ul style="list-style-type: none"><li>continue to analyse the incident</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>go to <i>Managing priority 1 incidents</i></li></ul>							
no	<ul style="list-style-type: none"><li>continue to analyse the incident</li></ul>							
2	Is the property lease?	<p>If the property is not leased, the Bank is responsible for repairs.</p> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Review the lease conditions to determine who is responsible for repairs</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>go to <i>Raising a corrective maintenance order.</i></li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>Review the lease conditions to determine who is responsible for repairs</li></ul>	no	<ul style="list-style-type: none"><li>go to <i>Raising a corrective maintenance order.</i></li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>Review the lease conditions to determine who is responsible for repairs</li></ul>							
no	<ul style="list-style-type: none"><li>go to <i>Raising a corrective maintenance order.</i></li></ul>							
3	Is the lessor responsible for repairs?	<p>When the lessor is responsible for repairs, the process is different for retail and non-retail sites.</p> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Determine whether the site is retail or non-retail.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>go to <i>Raising a corrective maintenance order.</i></li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>Determine whether the site is retail or non-retail.</li></ul>	no	<ul style="list-style-type: none"><li>go to <i>Raising a corrective maintenance order.</i></li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>Determine whether the site is retail or non-retail.</li></ul>							
no	<ul style="list-style-type: none"><li>go to <i>Raising a corrective maintenance order.</i></li></ul>							
4	Is it a retail site?	<p>If it is a retail site and the lessor is responsible for repairs, then a notice of defect is to be raised.</p> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>go to <i>Raising a retail notice of defect</i></li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>go to <i>Managing lessor-responsible works.</i></li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>go to <i>Raising a retail notice of defect</i></li></ul>	no	<ul style="list-style-type: none"><li>go to <i>Managing lessor-responsible works.</i></li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>go to <i>Raising a retail notice of defect</i></li></ul>							
no	<ul style="list-style-type: none"><li>go to <i>Managing lessor-responsible works.</i></li></ul>							

### 6.1.4 Business rules – automated processes

Refer to the green boxes in the flow charts.

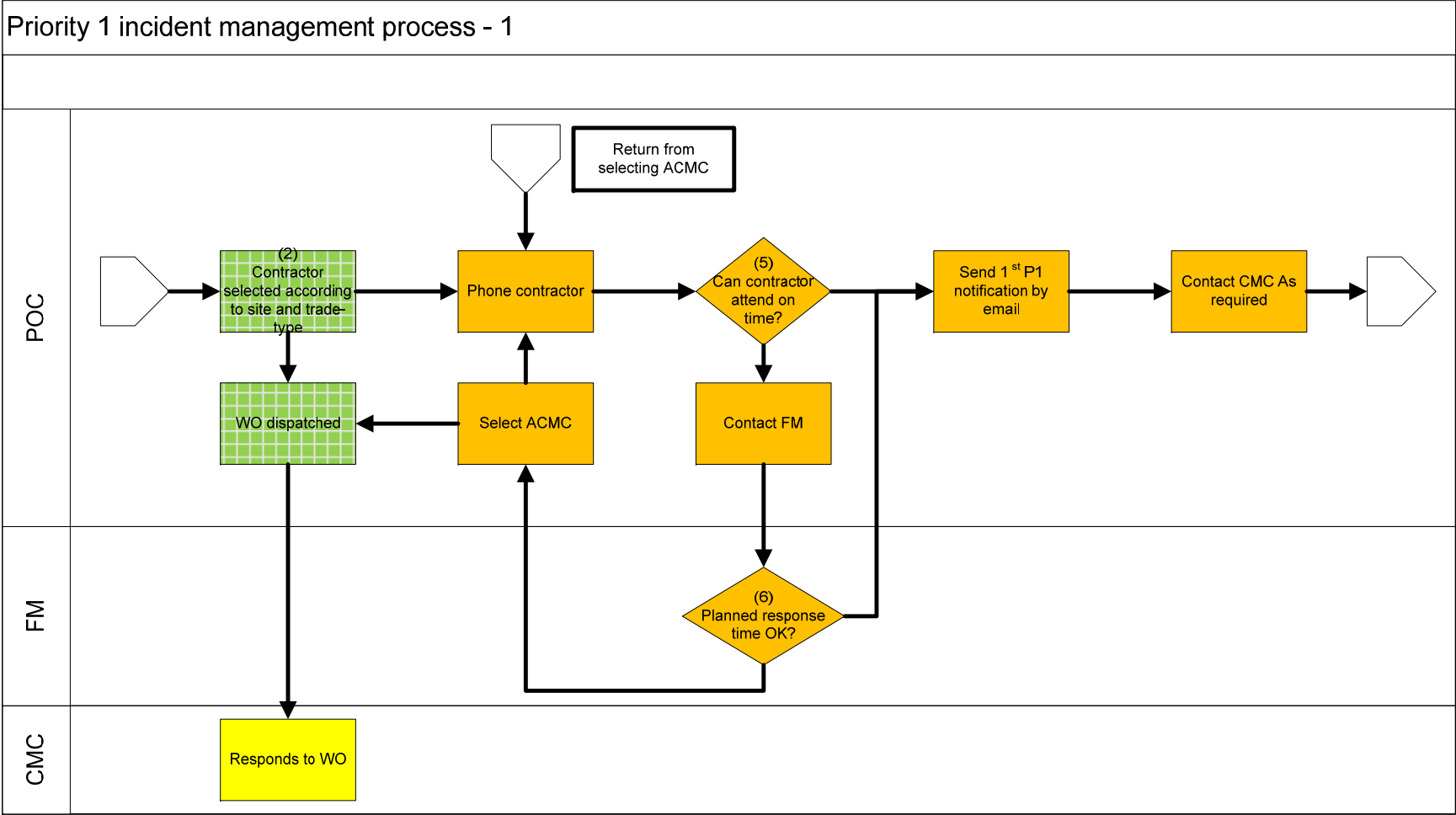
No.	Auto-process label	Business rule
1	(A1) WO despatched	<p>Maximo routes the work order according to the site, trade type selected and who is responsible for the repairs.</p> <p>For example, if the site is a commercial premises and leased, the work order is routed to lessor for base-building issues; and to the Bank's preferred contractor for tenancy-related issues.</p>

## 6.2 Managing with Priority 1 faults

### 6.2.1 Process description

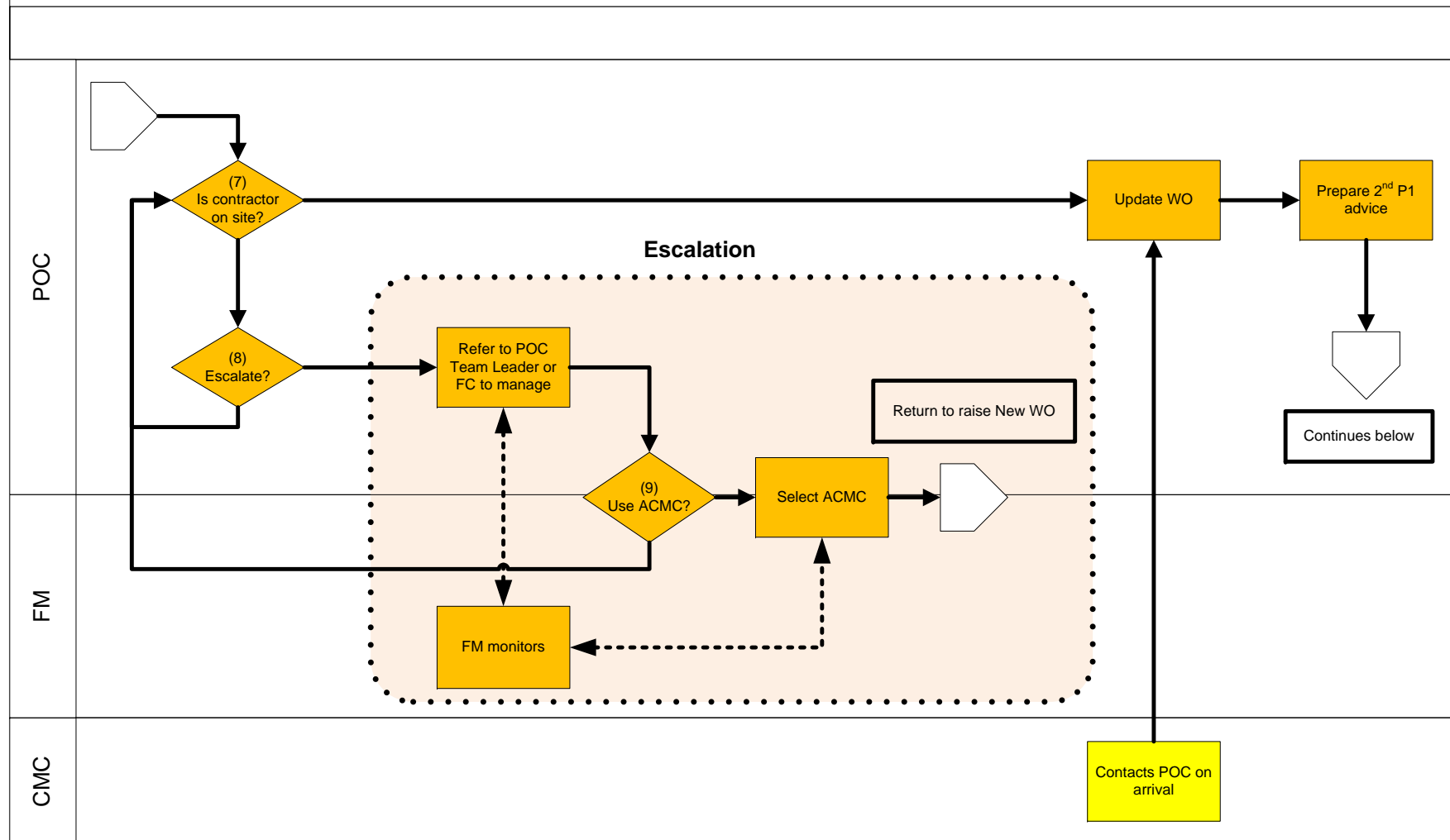
Stage	Description	Responsibility	Output issue to:
1	POC issues the first Priority 1 advice.	POC	All stakeholders
2	Select and telephone the contractor to determine that they can attend the site on time <ul style="list-style-type: none"> <li>if they can attend on time, create and dispatch work to contractor</li> <li>if they cannot, contact the Facility Manager who will decide whether the planned response is acceptable or to select an alternative contractor.</li> </ul>	POC	CMC  FM
3	Create and issue the work order to contractor. (POC contacts the contractor every 15 minutes until arrival on site.)  Note: Escalation may be required if the contractor is not going to arrive on site on time. POC Team Leader and the Facility Manager may decide to select an alternative contractor.	POC	CMC
4	The contractor notifies POC on arrival at the site.	CMC	POC
5	POC issues the second Priority 1 advice	POC	All stakeholders
6	POC contacts the contractor every 30 minutes until necessary work is completed.	POC	CMC
7	On completion of the work, POC updates the work order and issues the final Priority 1 advice detailing the issue, resolution, confirmation of make safe/secure work and any additional follow up works required.	POC	All stakeholders
8	If additional work is required, the Facility Manager will raise additional work orders to request quotes	FM	CMCs

6.2.2 Process flow

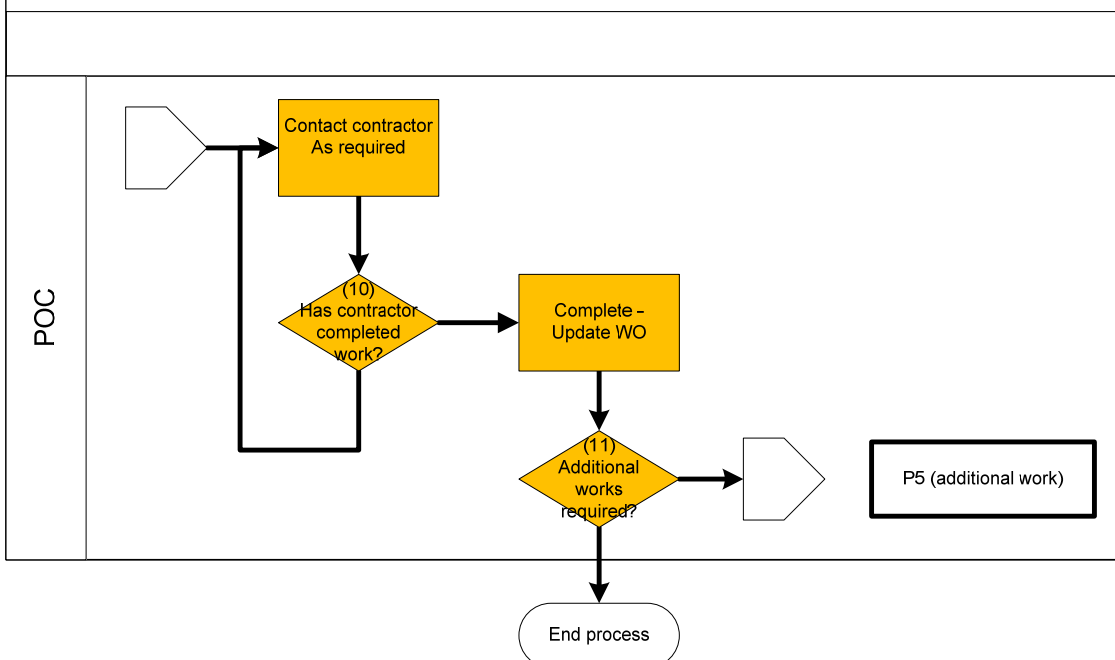




## Priority 1 incident management process - 2



### Priority 1 incident management process - 3



#### 6.2.3 Business rules

No.	Decision point label	Business rule						
5	Can contractor attend on time?	<p>The contractor is required to be on site within one hour.</p> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Issue a work order for them to proceed.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Refer to the matter to the Facility Manager with an estimated time of arrival.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>Issue a work order for them to proceed.</li></ul>	no	<ul style="list-style-type: none"><li>Refer to the matter to the Facility Manager with an estimated time of arrival.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>Issue a work order for them to proceed.</li></ul>							
no	<ul style="list-style-type: none"><li>Refer to the matter to the Facility Manager with an estimated time of arrival.</li></ul>							
6	Planned response time OK?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Issue a work order for them to proceed.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Select an alternative contractor.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>Issue a work order for them to proceed.</li></ul>	no	<ul style="list-style-type: none"><li>Select an alternative contractor.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>Issue a work order for them to proceed.</li></ul>							
no	<ul style="list-style-type: none"><li>Select an alternative contractor.</li></ul>							
7	Is contractor on site?	<p>The contractor is required to be on site within one hour.</p> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Update work order.</li><li>Issue the second P1 advice.</li><li>Continue to contact the contractor every 30 minutes until the work is completed</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Escalation may be required – refer to Team Leader.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>Update work order.</li><li>Issue the second P1 advice.</li><li>Continue to contact the contractor every 30 minutes until the work is completed</li></ul>	no	<ul style="list-style-type: none"><li>Escalation may be required – refer to Team Leader.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>Update work order.</li><li>Issue the second P1 advice.</li><li>Continue to contact the contractor every 30 minutes until the work is completed</li></ul>							
no	<ul style="list-style-type: none"><li>Escalation may be required – refer to Team Leader.</li></ul>							

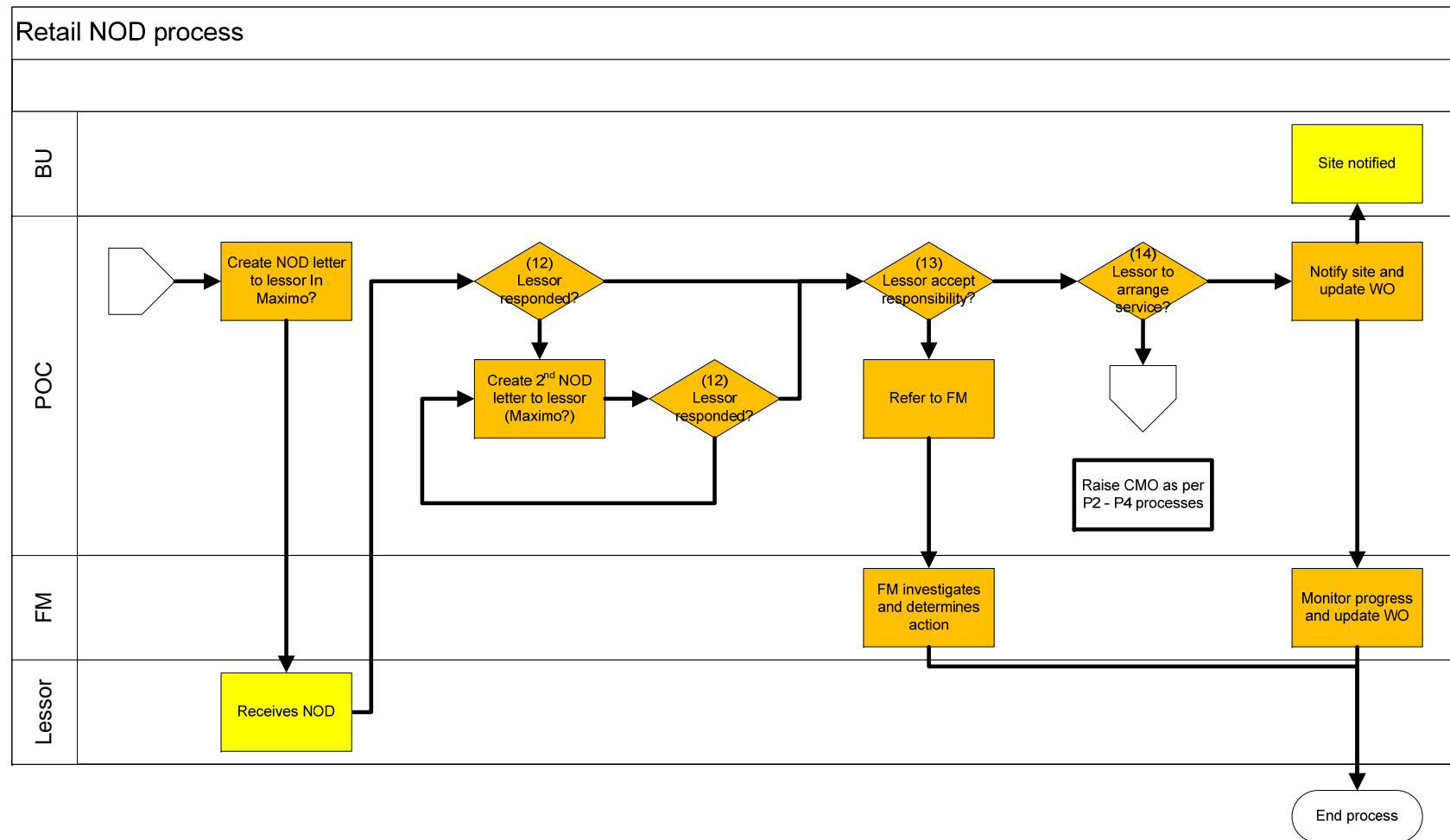
No.	Decision point label	Business rule						
8	Escalate?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Refer the matter to the Team Leader.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Continue to contact the contractor every 15 minutes.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>Refer the matter to the Team Leader.</li></ul>	no	<ul style="list-style-type: none"><li>Continue to contact the contractor every 15 minutes.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>Refer the matter to the Team Leader.</li></ul>							
no	<ul style="list-style-type: none"><li>Continue to contact the contractor every 15 minutes.</li></ul>							
9	Use ACMC?	<p>The POC Team Leader consults the Facility Manager to decide whether an alternative contractor is required.</p> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Select an alternative contractor and issue work orders as required.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Continue to contact the contractor every 15 minutes.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>Select an alternative contractor and issue work orders as required.</li></ul>	no	<ul style="list-style-type: none"><li>Continue to contact the contractor every 15 minutes.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>Select an alternative contractor and issue work orders as required.</li></ul>							
no	<ul style="list-style-type: none"><li>Continue to contact the contractor every 15 minutes.</li></ul>							
10	Has contractor completed work?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Update work order.</li><li>Issue the final P1 advice.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Continue to contact the contractor every 30 minutes until the work is completed.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>Update work order.</li><li>Issue the final P1 advice.</li></ul>	no	<ul style="list-style-type: none"><li>Continue to contact the contractor every 30 minutes until the work is completed.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>Update work order.</li><li>Issue the final P1 advice.</li></ul>							
no	<ul style="list-style-type: none"><li>Continue to contact the contractor every 30 minutes until the work is completed.</li></ul>							
11	Additional works required?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>The Facility Manager issues work order to request quotes.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>The work order is closed.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>The Facility Manager issues work order to request quotes.</li></ul>	no	<ul style="list-style-type: none"><li>The work order is closed.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>The Facility Manager issues work order to request quotes.</li></ul>							
no	<ul style="list-style-type: none"><li>The work order is closed.</li></ul>							

## 6.3 Raising a retail notice of defect

### 6.3.1 Process description

Stage	Description	Responsibility	Output issue to:
1	Create and despatch the notice of defect letter in Maximo.  Phone the lessor to ensure that the notice has been received.  If the lessor has not responded within 48 hours, escalate the matter to the managing agent (presently Colliers) and the facility manager.	POC	Lessor
2	If the lessor does not accepted liability for the repairs, refer the matter to the Facility Manager or the managing agent for further investigation.	POC	FM MA
3	The work may be performed by either the lessor or by the Bank's contractors. <ul style="list-style-type: none"><li>If the work is performed by the lessor, the Facility Manager or the managing agent monitors the progress and updates the work order.</li><li>If the work is performed by the Bank, then go to <i>Raising a corrective maintenance work order</i>.</li></ul>	Lessor  FM	FM  CMC

### 6.3.2 Process flow



### 6.3.3 Business rules

No.	Decision point label	Business rule						
12	Lessor responded?	<div>Has the lessor responded to the notice of defect?</div> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Continue the process.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Issue a second notice of defect and escalate to the FM and managing agent.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>Continue the process.</li></ul>	no	<ul style="list-style-type: none"><li>Issue a second notice of defect and escalate to the FM and managing agent.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>Continue the process.</li></ul>							
no	<ul style="list-style-type: none"><li>Issue a second notice of defect and escalate to the FM and managing agent.</li></ul>							
13	Lessor accepts responsibility?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Continue the process.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Refer the matter to the Facility Manager and managing agent.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>Continue the process.</li></ul>	no	<ul style="list-style-type: none"><li>Refer the matter to the Facility Manager and managing agent.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>Continue the process.</li></ul>							
no	<ul style="list-style-type: none"><li>Refer the matter to the Facility Manager and managing agent.</li></ul>							
14	Lessor to arrange service?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Notify the site</li><li>Update work order.</li><li>Refer the matter to the Facility Manager and managing agent to monitor.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Raise a corrective maintenance order.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>Notify the site</li><li>Update work order.</li><li>Refer the matter to the Facility Manager and managing agent to monitor.</li></ul>	no	<ul style="list-style-type: none"><li>Raise a corrective maintenance order.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>Notify the site</li><li>Update work order.</li><li>Refer the matter to the Facility Manager and managing agent to monitor.</li></ul>							
no	<ul style="list-style-type: none"><li>Raise a corrective maintenance order.</li></ul>							

## 6.4 Raising a corrective maintenance work order

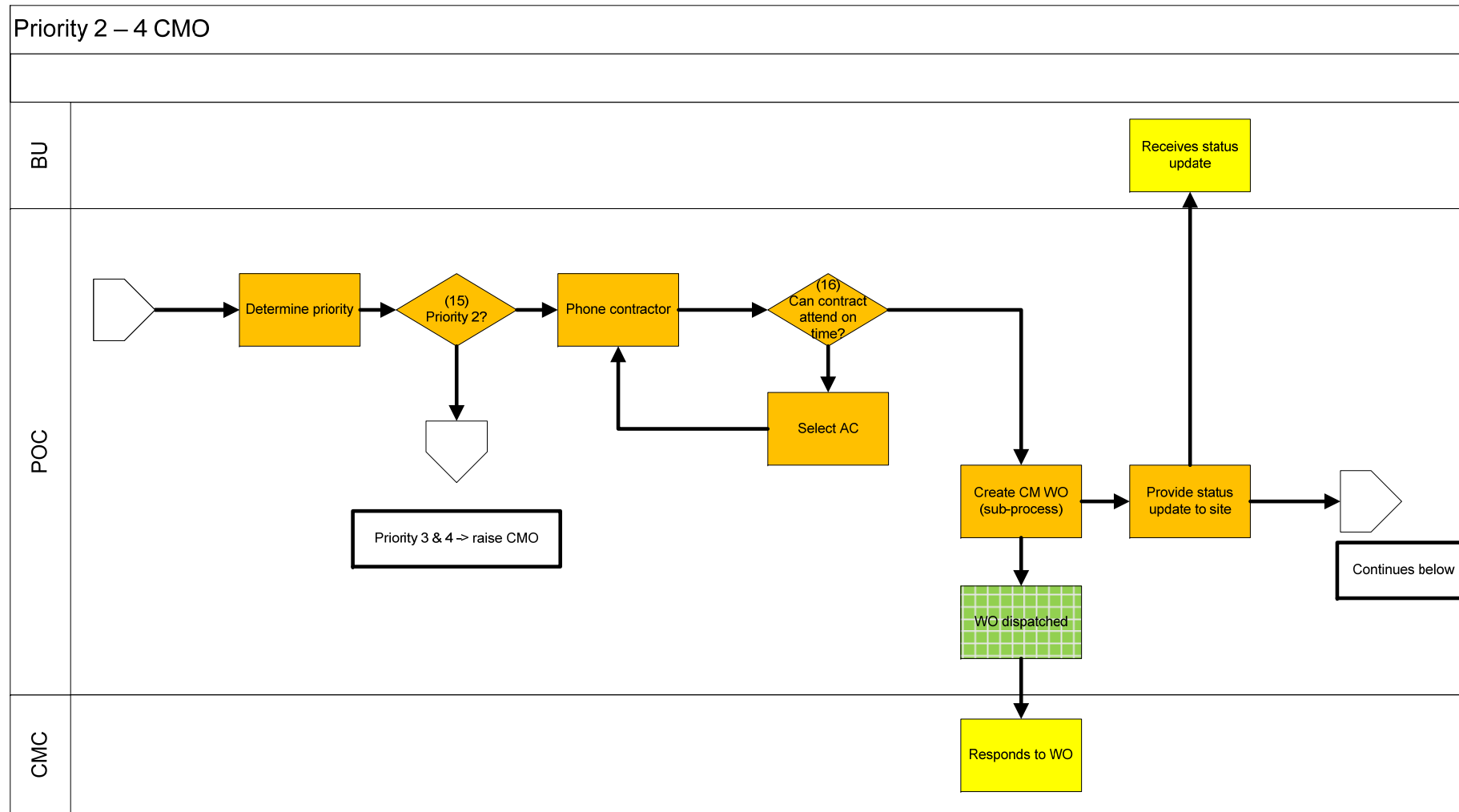
### 6.4.1 Process description

Stage	Description	Responsibility	Output issue to:
1	For priority 3 and 4 incidents, raise a corrective maintenance order. Go to stage 3.	POC	CMC
2	Select and telephone the contractor to determine that they can attend the site on time <ul style="list-style-type: none"> <li>if they can attend on time, create and dispatch work to contractor</li> <li>if they cannot, select an alternative contractor.</li> </ul>	POC	CMC
3	Create and issue the work order to contractor.  Note: For priority 2 incidents, escalation may be required if the contractor is not going to arrive on site on time. POC Team Leader and the Facility Manager may decide to select an alternative contractor.	POC	CMC
4	The contractor: <ul style="list-style-type: none"> <li>notifies POC on arrival at the site</li> <li>assess the work to do done</li> </ul>	CMC	POC
5	If the contractor is unable to perform the work required, the contractor notifies the POC who will select another contractor and issue a new work order.	CMC	POC
6	If the estimated cost of the work is less than \$300, the contractor performs the work, notifies the POC on completion who close the work order. The process ends.	CMC	POC
7	If the estimated cost of the work exceeds \$300, then the contractor provides a quote to the POC. Approval: <ul style="list-style-type: none"> <li>up to \$1,000 – POC agent</li> <li>up to \$1,500 – POC Team Leader</li> <li>Over \$1.500 – refer to the Facility Manager. Go to stage 9.</li> </ul>	CMC	POC
8	After approval, the contractor performs the work, notifies the POC on completion who close the work order. The process ends.	CMC	POC
10	The Facility Manager reviews the work order and decides whether the work is to proceed. Considerations include: <ul style="list-style-type: none"> <li>the total cost of the work in relation tom the value of the asset</li> <li>the age of the asset</li> <li>any plans for refurbishment of the site</li> </ul>	FM	
11	If the work is not to proceed, the Facility Manager updates and closes the work order. The process ends.	FM	
12	If the work is to proceed, the Facility Manager: <ul style="list-style-type: none"> <li>issues further work orders for more quotes</li> <li>assesses the quotes and selects a contractor</li> </ul>	FM	CMC

Stage	Description	Responsibility	Output issue to:
13	The Facility Manager issues a work order.	FM	CMC
14	The contractor performs the work and notifies the POC on completion.	CMC	FM

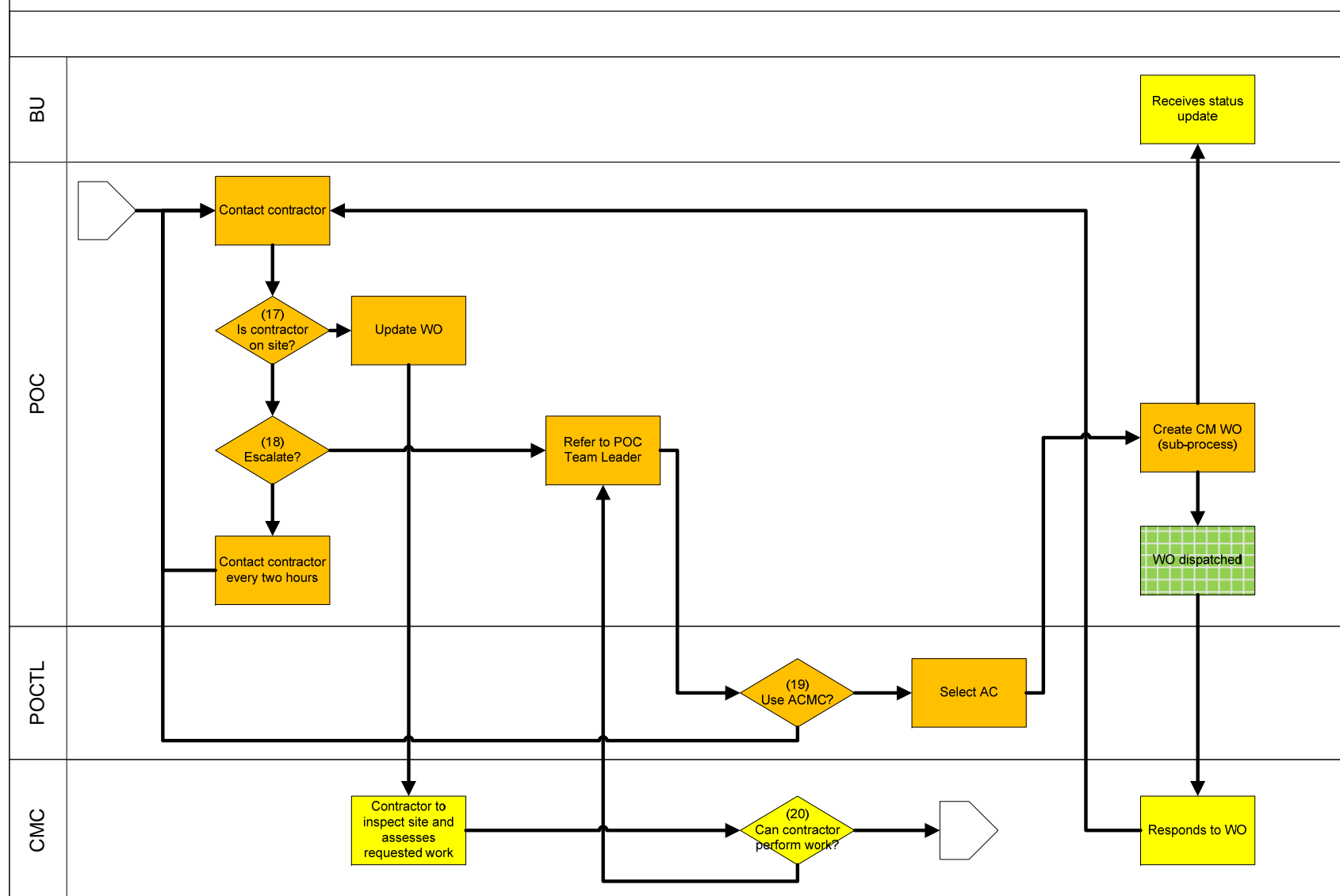


## 6.4.2 Process flow

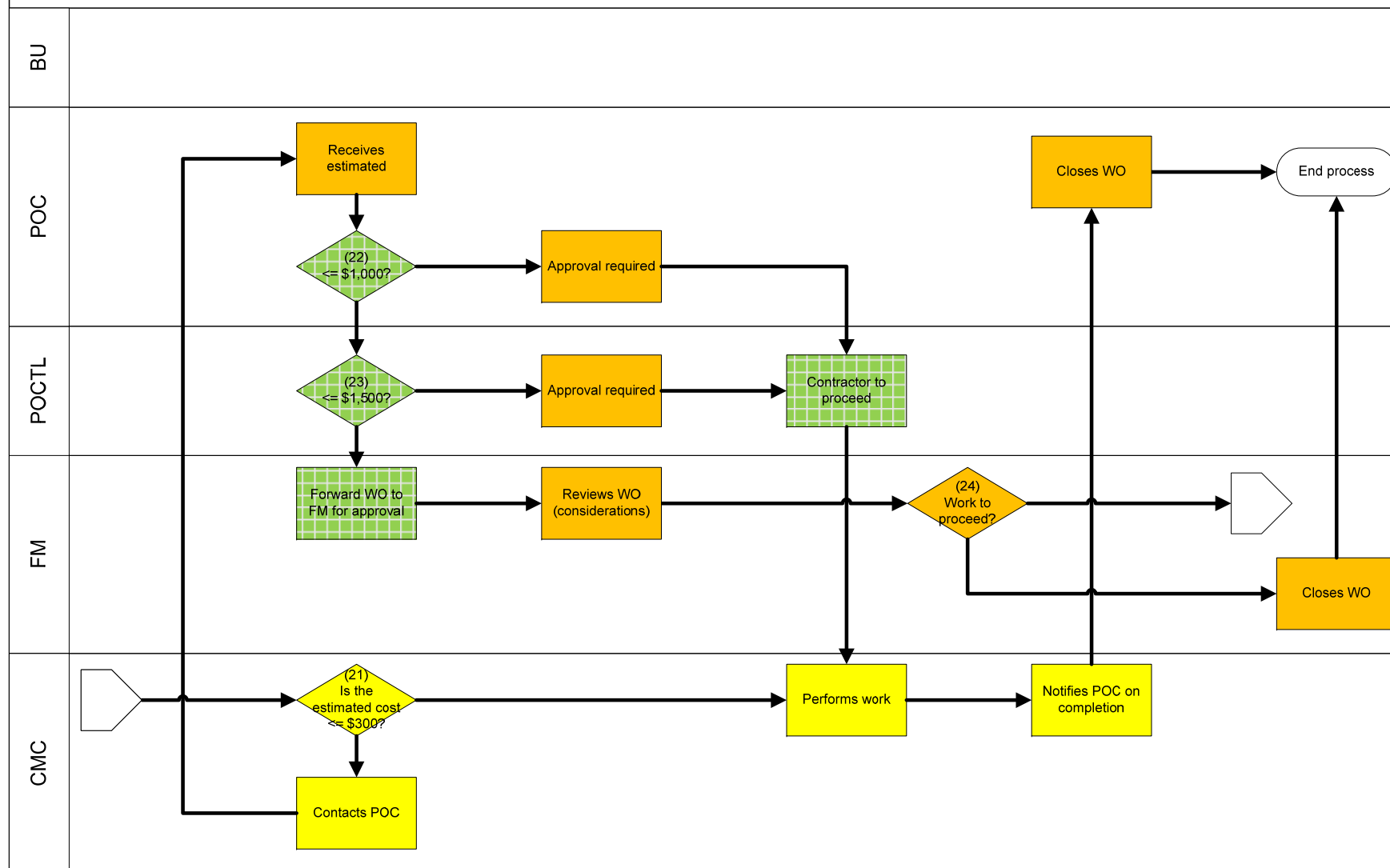




## Priority 2 CMO

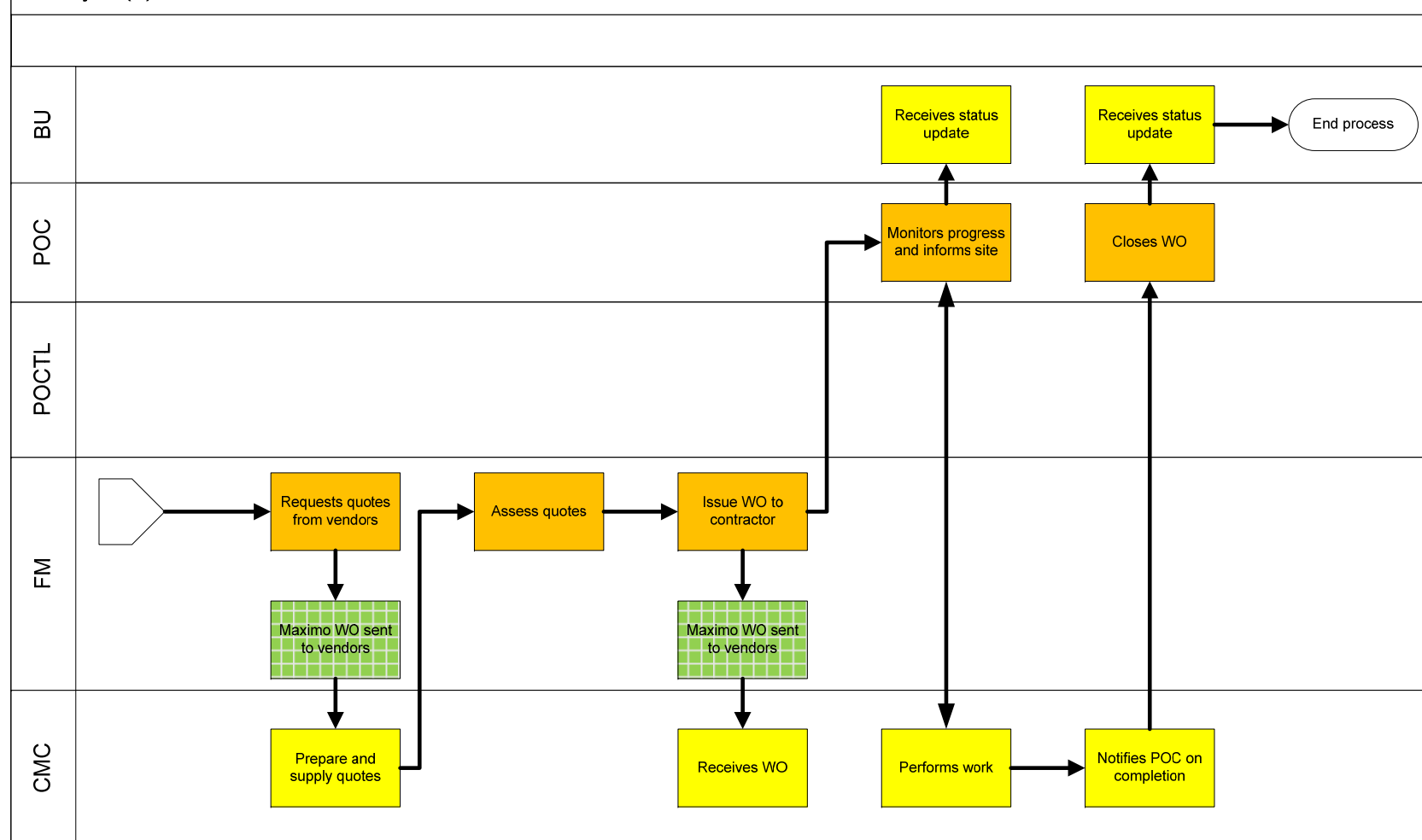


## Priority 2 (3)



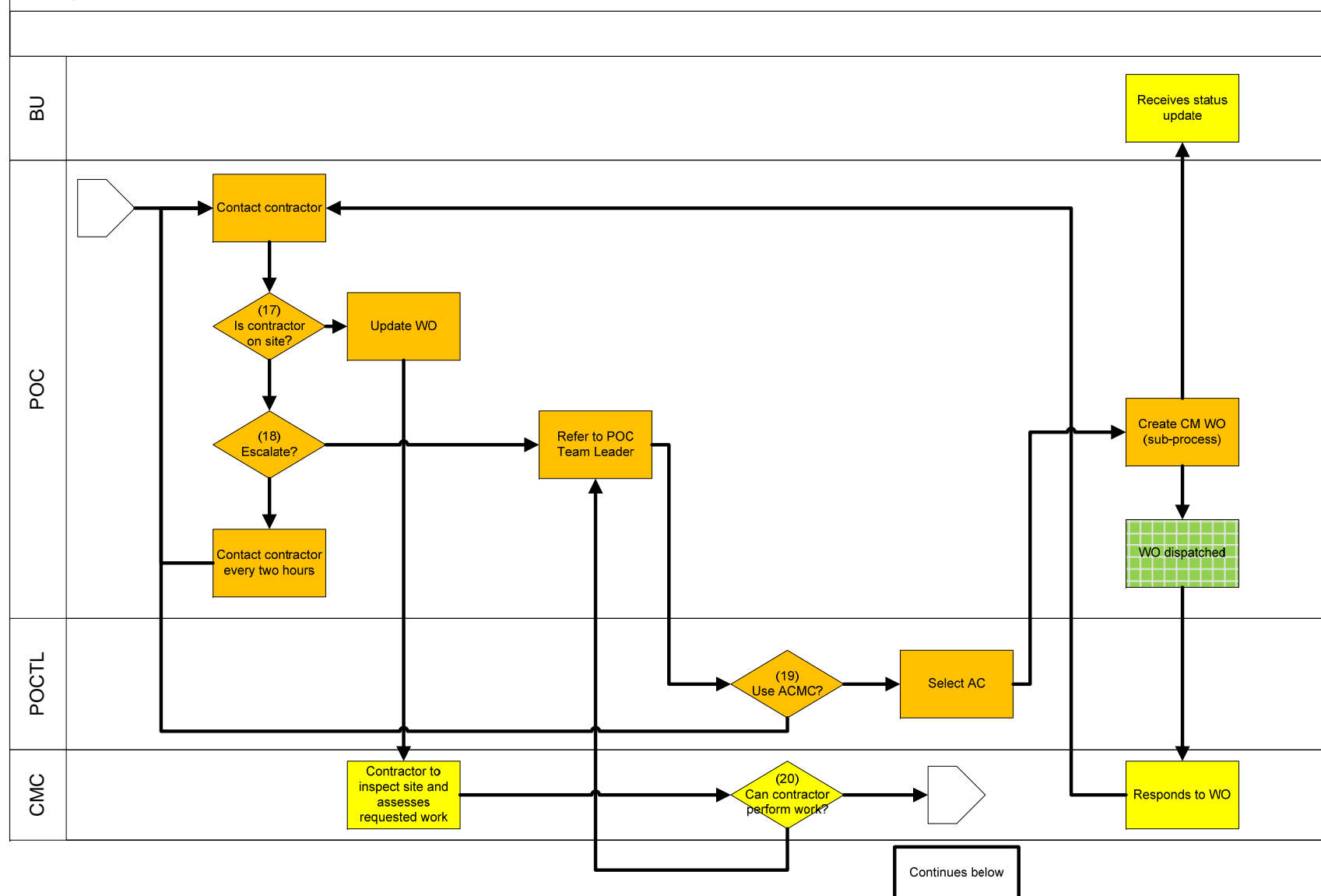


## Priority 2 (4)

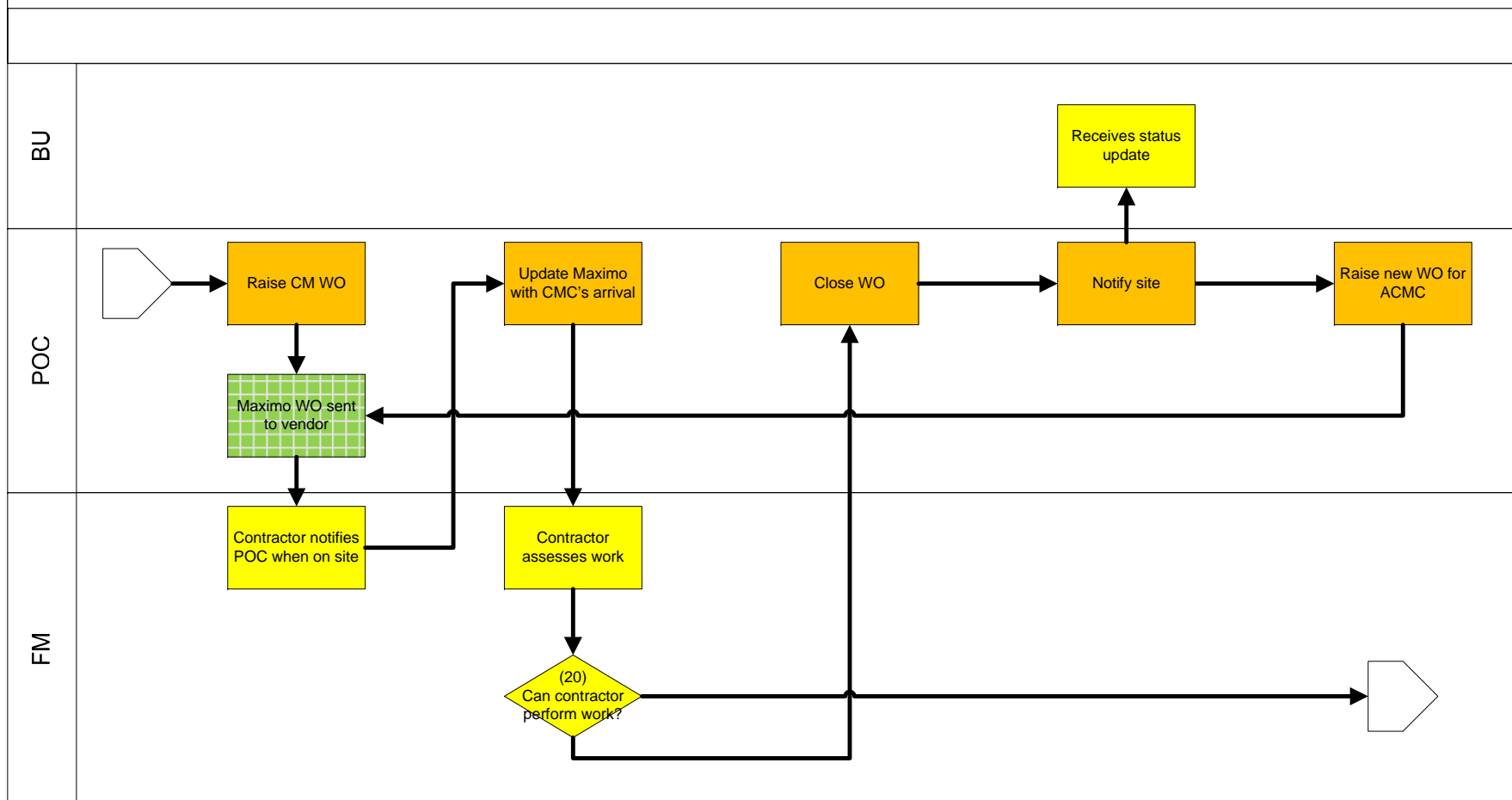




## Priority 2 CMO

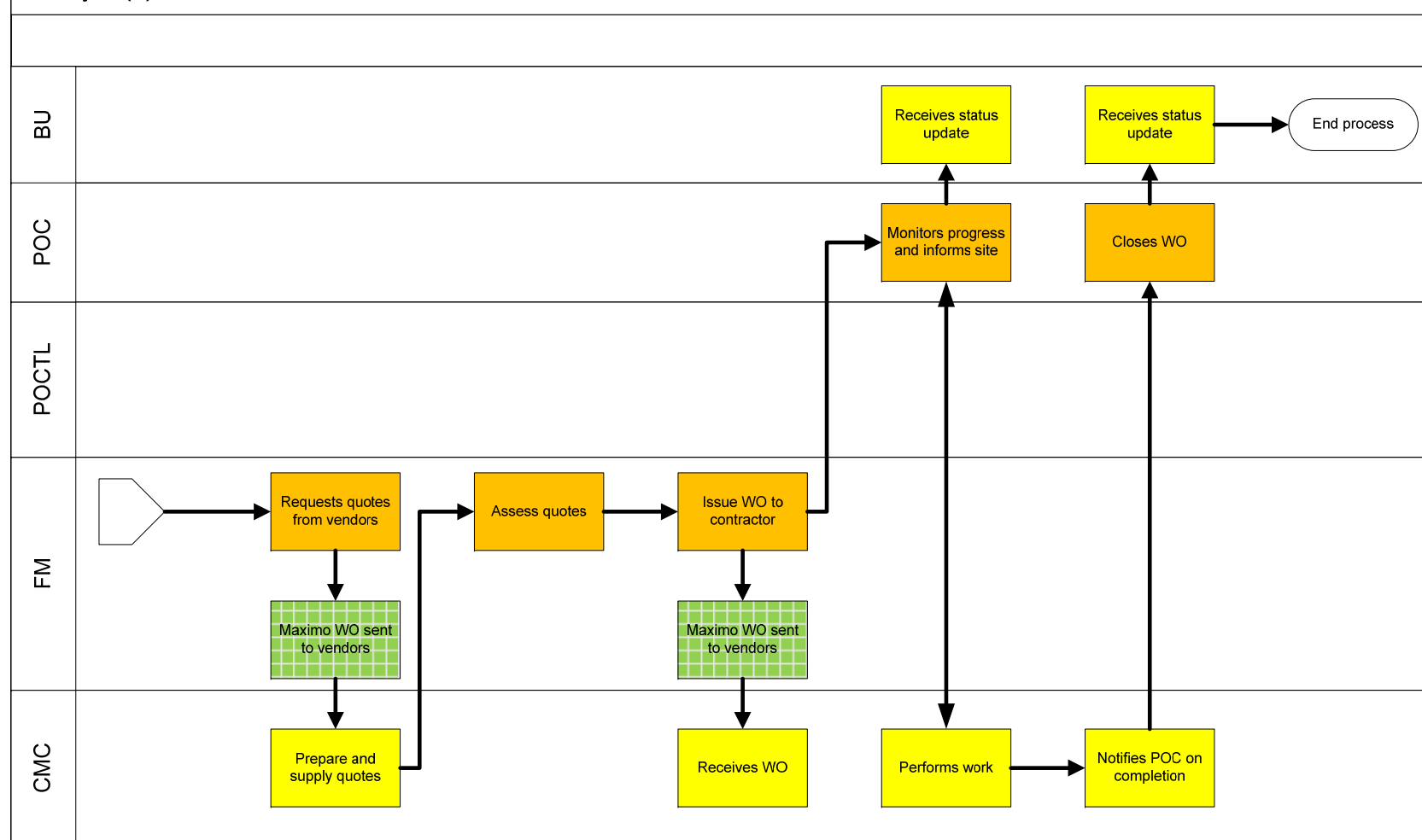


## Priority 3 &amp; 4 raise CMO





## Priority 2 (4)



**6.4.3 Business rules**

No.	Decision point label	Business rule							
15	Priority 2?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Contact the contractor.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Raise a corrective maintenance order.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>Contact the contractor.</li></ul>	no	<ul style="list-style-type: none"><li>Raise a corrective maintenance order.</li></ul>	
If	Then								
yes	<ul style="list-style-type: none"><li>Contact the contractor.</li></ul>								
no	<ul style="list-style-type: none"><li>Raise a corrective maintenance order.</li></ul>								
16	Can contractor attend on time?	<p>The contractor is required to be on site within one hour.</p> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Issue a work order for them to proceed.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Refer to the matter to the Facility Manager with an estimated time of arrival.</li></ul></td></tr></table>		If	Then	yes	<ul style="list-style-type: none"><li>Issue a work order for them to proceed.</li></ul>	no	<ul style="list-style-type: none"><li>Refer to the matter to the Facility Manager with an estimated time of arrival.</li></ul>
If	Then								
yes	<ul style="list-style-type: none"><li>Issue a work order for them to proceed.</li></ul>								
no	<ul style="list-style-type: none"><li>Refer to the matter to the Facility Manager with an estimated time of arrival.</li></ul>								
17	Is contractor on site?	<p>The contractor is required to be on site within one hour.</p> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Update work order.</li><li>Issue the second P1 advice.</li><li>Continue to contact the contractor every 30 minutes until the work is completed</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Escalation may be required – refer to Team Leader.</li></ul></td></tr></table>		If	Then	yes	<ul style="list-style-type: none"><li>Update work order.</li><li>Issue the second P1 advice.</li><li>Continue to contact the contractor every 30 minutes until the work is completed</li></ul>	no	<ul style="list-style-type: none"><li>Escalation may be required – refer to Team Leader.</li></ul>
If	Then								
yes	<ul style="list-style-type: none"><li>Update work order.</li><li>Issue the second P1 advice.</li><li>Continue to contact the contractor every 30 minutes until the work is completed</li></ul>								
no	<ul style="list-style-type: none"><li>Escalation may be required – refer to Team Leader.</li></ul>								
18	Escalate?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Refer the matter to the Team Leader.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Continue to contact the contractor every 15 minutes.</li></ul></td></tr></table>		If	Then	yes	<ul style="list-style-type: none"><li>Refer the matter to the Team Leader.</li></ul>	no	<ul style="list-style-type: none"><li>Continue to contact the contractor every 15 minutes.</li></ul>
If	Then								
yes	<ul style="list-style-type: none"><li>Refer the matter to the Team Leader.</li></ul>								
no	<ul style="list-style-type: none"><li>Continue to contact the contractor every 15 minutes.</li></ul>								
19	Use ACMC?	<p>The POC Team Leader consults the Facility Manager to decide whether an alternative contractor is required.</p> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>Select an alternative contractor and issue work orders as required.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Continue to contact the contractor.</li></ul></td></tr></table>		If	Then	yes	<ul style="list-style-type: none"><li>Select an alternative contractor and issue work orders as required.</li></ul>	no	<ul style="list-style-type: none"><li>Continue to contact the contractor.</li></ul>
If	Then								
yes	<ul style="list-style-type: none"><li>Select an alternative contractor and issue work orders as required.</li></ul>								
no	<ul style="list-style-type: none"><li>Continue to contact the contractor.</li></ul>								
20	Can contractor perform work?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>The contractor performs the work if the estimated cost is less than \$300.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Refer the matter to the Team Leader.</li></ul></td></tr></table>		If	Then	yes	<ul style="list-style-type: none"><li>The contractor performs the work if the estimated cost is less than \$300.</li></ul>	no	<ul style="list-style-type: none"><li>Refer the matter to the Team Leader.</li></ul>
If	Then								
yes	<ul style="list-style-type: none"><li>The contractor performs the work if the estimated cost is less than \$300.</li></ul>								
no	<ul style="list-style-type: none"><li>Refer the matter to the Team Leader.</li></ul>								



No.	Decision point label	Business rule						
21	Is the estimated cost <= \$300?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>The contractor performs the work.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>The contractor provides and estimate to the POC.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>The contractor performs the work.</li></ul>	no	<ul style="list-style-type: none"><li>The contractor provides and estimate to the POC.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>The contractor performs the work.</li></ul>							
no	<ul style="list-style-type: none"><li>The contractor provides and estimate to the POC.</li></ul>							
22	<= \$1,000?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>The POC agent can authorise the contractor to proceed.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Refer the matter to the Team Leader.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>The POC agent can authorise the contractor to proceed.</li></ul>	no	<ul style="list-style-type: none"><li>Refer the matter to the Team Leader.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>The POC agent can authorise the contractor to proceed.</li></ul>							
no	<ul style="list-style-type: none"><li>Refer the matter to the Team Leader.</li></ul>							
23	<= \$1,500?	<table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>The Team Leader can authorise the contractor to proceed.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>Refer the matter to the Facility Manager.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>The Team Leader can authorise the contractor to proceed.</li></ul>	no	<ul style="list-style-type: none"><li>Refer the matter to the Facility Manager.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>The Team Leader can authorise the contractor to proceed.</li></ul>							
no	<ul style="list-style-type: none"><li>Refer the matter to the Facility Manager.</li></ul>							
24	Work to proceed?	<p>The Facility Manager will take the follow into consideration before deciding that the work is to proceed:</p> <ul style="list-style-type: none"><li>the total cost of the work in relation tom the value of the asset</li><li>the age of the asset</li><li>any plans for refurbishment of the site</li></ul> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>issue a new work order to request quotes</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>close the work order.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>issue a new work order to request quotes</li></ul>	no	<ul style="list-style-type: none"><li>close the work order.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>issue a new work order to request quotes</li></ul>							
no	<ul style="list-style-type: none"><li>close the work order.</li></ul>							

## 6.5 Process Management

### 6.5.1 RASCI Matrix

#### Key:

R – Responsible

A – Approve

S – Support

C – Consult

I – Inform

Process	POC	FM	BU
Responding to a corrective maintenance request	R		I
Managing with Priority 1 faults	RI	ASC	I
Raising a retail notice of defect	RI	SC	I
Raising a corrective maintenance work order	RIS	ASCI	I

### 6.5.2 SIPOC

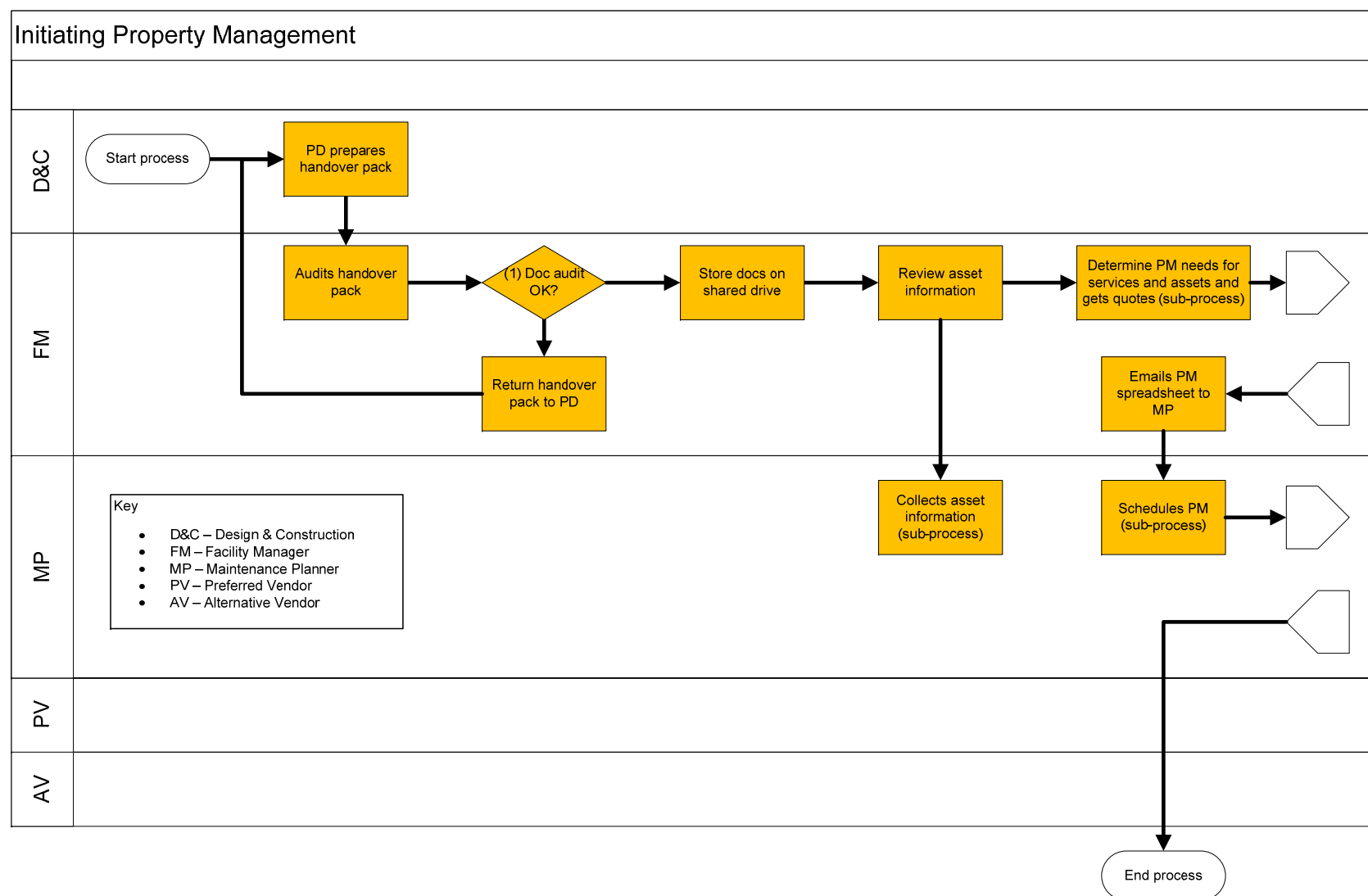
Suppliers	Inputs	Process	Outputs	Customers
Corrective maintenance contractors	Work orders	Refer to flow charts	Work orders	BU
	Requests			

## 7. Preventative maintenance

### 7.1 Scheduling Preventative Maintenance for a site

This process occurs after the Design and Construction team hands the property over the Facility Manager for ongoing maintenance.

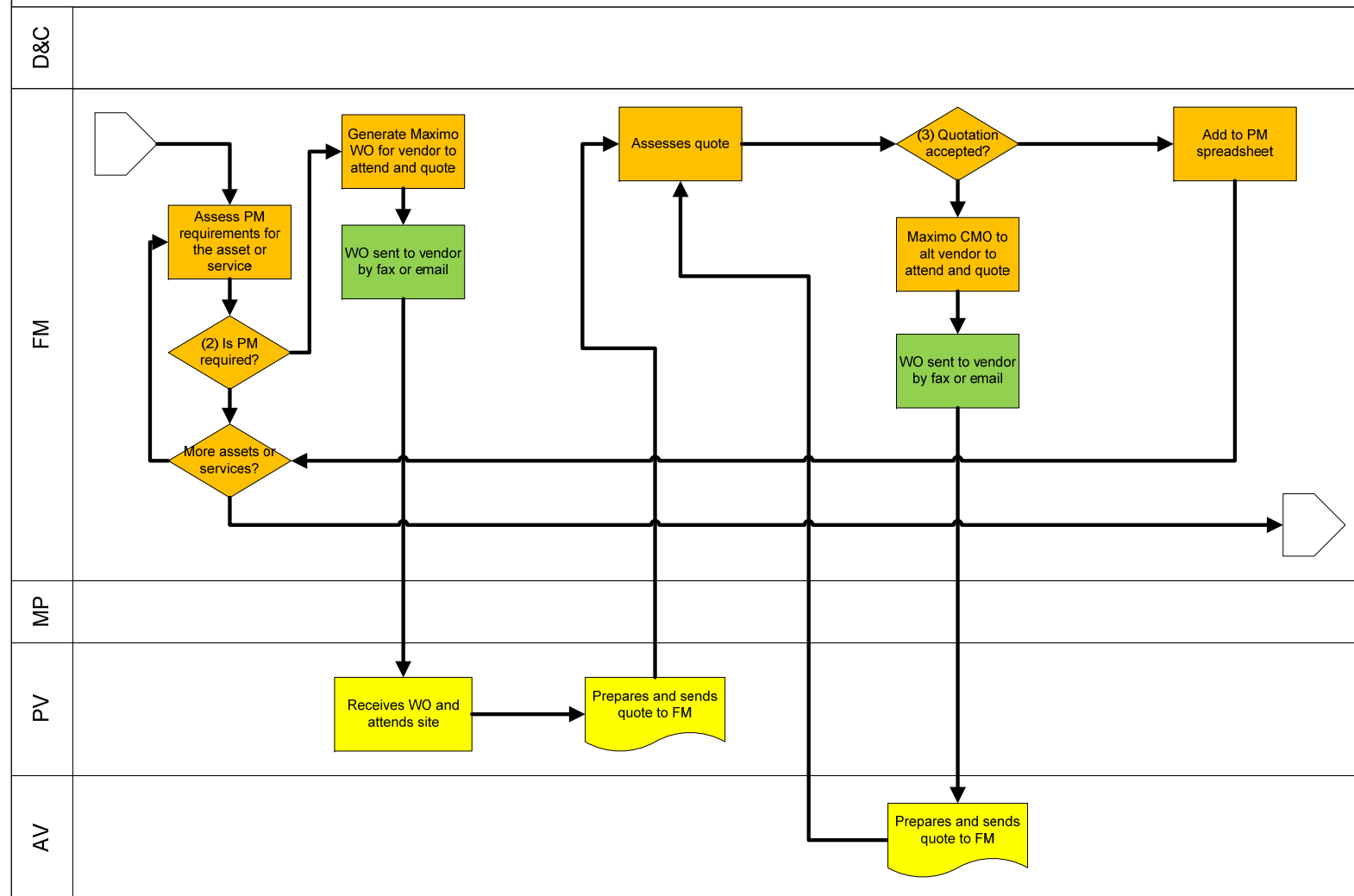
Stage	Description	Responsibility	Output issue to:
1	Design and Construction hands the property over to the Facility Manager along with a "handover pack" that includes all necessary documentation, such as as-built drawings, warranty information, certificates and so on.	PD	FM
2	FM audits documentation received. If there are missing or incomplete documents, the pack is returned to the PD.	FM	PD
3	FM files handover pack in on the shared driver under the property number.	FM	
4	FM creates an asset register for the site.	FM	
5	FM determines whether preventative maintenance should be scheduled for each service and asset at the site.  (Iterative process – repeated for each asset and service)  Considerations for assets include: <ul style="list-style-type: none"> <li>warranty implications of third-party vendors</li> <li>any maintenance contracts with supplier</li> <li>leasing arrangements, e.g. landlord may be responsible for maintenance or costs may be recoverable</li> <li>compliance requirements</li> </ul>	FM	PV AV
6	Vendors supply quote to FM for assessment.  Accepted the quote? <ul style="list-style-type: none"> <li>yes – details added to PM spreadsheet</li> <li>no – seek quote from alternative vendor and assess</li> </ul>	PV, AV	FM
7	Maintenance Planner: <ul style="list-style-type: none"> <li>adds to an existing schedule or creates a new schedule as required</li> <li>checks for correct schedule generation</li> </ul>	MP	MV

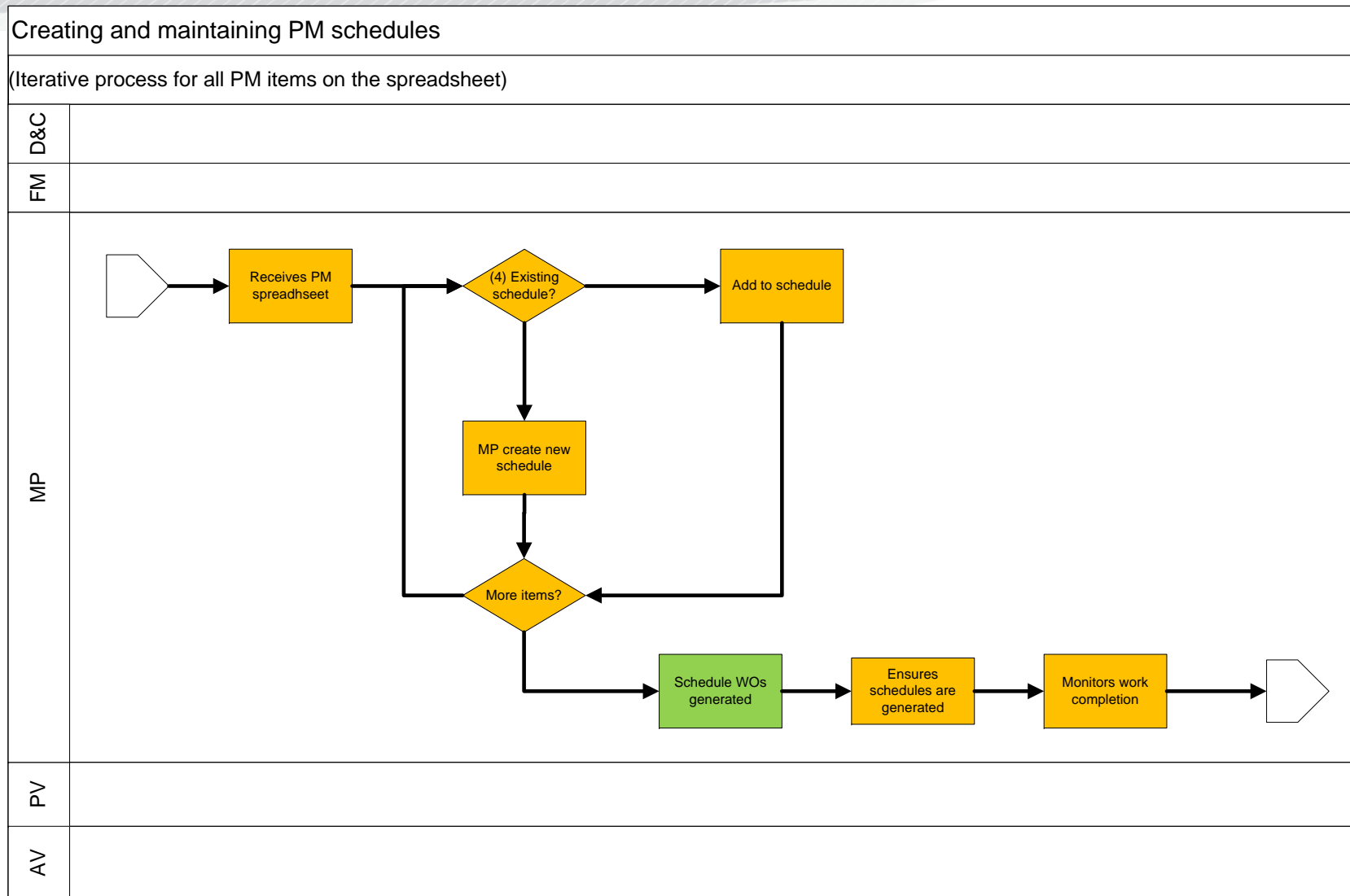


# Determining PM requirements for assets and services



(Iterative process for all registered assets and services)





### 7.1.1 Business rules

Refer to the decision points (diamonds) in the flow charts.

No.	Decision point label	Business rule						
1	Doc audit OK?	<div>Has Design and Construction provided all necessary documents and operations manuals?</div> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>FM assesses whether preventative maintenance is required</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>FM notifies the Project Director that not all paperwork has been received.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>FM assesses whether preventative maintenance is required</li></ul>	no	<ul style="list-style-type: none"><li>FM notifies the Project Director that not all paperwork has been received.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>FM assesses whether preventative maintenance is required</li></ul>							
no	<ul style="list-style-type: none"><li>FM notifies the Project Director that not all paperwork has been received.</li></ul>							
2	Is PM required?	<div>After assessing warranty information and any impact on the defects liability period, is preventative maintenance required for this asset or service?</div> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>FM requests that the preferred vendor visit the site and provide a quote.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>process ends - corrective maintenance WOs will be raised as required.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>FM requests that the preferred vendor visit the site and provide a quote.</li></ul>	no	<ul style="list-style-type: none"><li>process ends - corrective maintenance WOs will be raised as required.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>FM requests that the preferred vendor visit the site and provide a quote.</li></ul>							
no	<ul style="list-style-type: none"><li>process ends - corrective maintenance WOs will be raised as required.</li></ul>							
3	Quotation accepted?	<div>Is the quotation from the preferred vendor acceptable?</div> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>FM adds PM and vendor information to the PM spreadsheet. Maintenance Planner uses this to schedule PM.</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>FM seeks quote from an alternative vendor.</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>FM adds PM and vendor information to the PM spreadsheet. Maintenance Planner uses this to schedule PM.</li></ul>	no	<ul style="list-style-type: none"><li>FM seeks quote from an alternative vendor.</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>FM adds PM and vendor information to the PM spreadsheet. Maintenance Planner uses this to schedule PM.</li></ul>							
no	<ul style="list-style-type: none"><li>FM seeks quote from an alternative vendor.</li></ul>							
4	Existing schedule?	<div>Is there an existing preventative maintenance schedule for the preferred?</div> <table><tr><th>If</th><th>Then</th></tr><tr><td>yes</td><td><ul style="list-style-type: none"><li>add the new PM item to the existing schedule</li></ul></td></tr><tr><td>no</td><td><ul style="list-style-type: none"><li>create a new schedule</li></ul></td></tr></table>	If	Then	yes	<ul style="list-style-type: none"><li>add the new PM item to the existing schedule</li></ul>	no	<ul style="list-style-type: none"><li>create a new schedule</li></ul>
If	Then							
yes	<ul style="list-style-type: none"><li>add the new PM item to the existing schedule</li></ul>							
no	<ul style="list-style-type: none"><li>create a new schedule</li></ul>							

## 7.2 Process Management

### 7.2.1 RASCI Matrix

**Key:**

R – Responsible

A – Approve

S – Support

C – Consult

I – Inform

Process	MP	D&C	FM
Scheduling Preventative Maintenance for a site	R	R	R

### 7.2.2 SIPOC

Suppliers	Inputs	Process	Outputs	Customers
Preventative maintenance contractors	Work orders	Refer to flow charts	Schedules	BU
Design and Construction				



## 8. Precinct Management

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### 8.1 Introduction

The Sydney Olympic Precinct Operations Team manages all maintenance and operational functions at the Bank's Sydney Olympic Park precinct, including the following:

- dealing with base building-related issues, such as air conditioning, lighting and power
- managing building and car parking access
- client services, such as catering, concierge and meeting rooms
- cleaning
- lifestyle and community committees
- fire evacuation policies and procedures
- occupational health and safety management
- mail and courier services
- security
- external tenant management
- vendor management
- sustainability management
- bicycle parking and storage
- liaising with transport providers and authorities

### 8.2 Base building management

Base building at SOP is managed by Jones Lang Lasalle. SOPA approval is required for work on the building.

### 8.3 Transport

The Precinct Operations Team directly engages with transport providers to provide several services, including:

- inter-precinct shuttle buses (CBD, Parramatta)
- car park shuttle service
- staff bus services from the northern beaches and eastern suburbs

### 8.4 Community relationships

#### 8.4.1 Sydney Olympic Park Business Association (SOPBA)

The Executive Manager Property Sydney Olympic Park sits on the board of SOPBA. Other local businesses represented include ANZ Stadium, Acer Arena, Novotel and others.

#### 8.4.2 Lifestyle

Lifestyle is a program that delivers benefits including discounts to employees and residents of the Sydney Olympic Park area. The program is run by the Sydney Olympic Park Business Association (SOPBA). Business units based at SOP contribute to the funding of the program. The Executive Manager Property Sydney Olympic Park sits on the management committee.

### 8.5 Major events planning

Major events at SOP can include sporting events and concerts.



## **8.6 Client services management**

### **8.6.1 Catering services**

Catering services are outsourced, presently to Compass Group.

Raising request

BU emails the Catering and Events Manager.

She sends the BU a link to I-buy to the BU

BU completes Function Requisition form and emails it to the Catering and Events Manager.

BU select menu items from I-Buy

### **8.6.2 Providing concierge services and reception services**

Concierge and reception requirements are determined on site by site basis with Client Services having input into the design process. There are no specific business rules.

## **8.7 Security and building access**

All security and access matters are directly managed by the Sydney Olympic Precinct Operations Team, including hiring of security contractors.

### **8.7.1 Mail delivery and loading dock**

Mail services are managed by Toll who deliver and distribute mail throughout the precinct.

### **8.7.2 Car parking**

There are 1,170 car parking spaces for staff under 2 and 4 Dawn Fraser Avenue. The Bank pays for an additional 500 spaces in the SOPA-managed car park in Sarah Durack Drive.

Two floors of public car parking under 2 and 4 Dawn Fraser Avenue are leased back to SOPA as public car parking.

Card access to the car parks is updated by SOPOT. Business units are allocated parking spaces according to the floor space occupied and allocate them to staff who pay through a salary-sacrifice arrangement. Spaces are allocated as a whole on or not allocated to Current policy is oversell



## 8.8 Work order priority matrix

Priority	For	Response time	Examples
1	<p>Situations that are:</p> <ul style="list-style-type: none"> <li>life-threatening or have a high probability of causing injury</li> <li>compromising critical operations</li> <li>compromising security</li> <li>have a high probability of causing property damage</li> </ul>	1 hour	<ul style="list-style-type: none"> <li>any life threatening or immediate injury threatening situation</li> <li>any situation that will result in prolonged branch closure and requires intervention from the POC</li> <li>any event which compromises branch security such as broken window or unlockable door</li> <li>any situation, which leads to the building being evacuated</li> <li>gas odour</li> <li>structural problems with the building</li> <li>major leak or flooding</li> <li>fire</li> <li>lift entrapment</li> <li>loss of power.</li> </ul>
2	<p>Situations:</p> <ul style="list-style-type: none"> <li>causing a significant reduction in operational efficiency</li> <li>may cause property damage</li> <li>where there are OHSE issues affecting staff, customers &amp; contractors such as worn and lifting carpet creating a trip hazard or a faulty power point</li> <li>impacting on customer perception.</li> </ul>	4 hours	<ul style="list-style-type: none"> <li>lift out of order and there is only one lift in the building</li> <li>escalator out of service and no other access available</li> <li>fire alarm / sprinkler operating</li> <li>no water service in the building or water leaks</li> <li>access door to building not operating</li> <li>broken glass (depending on safety).</li> <li>air conditioning not working</li> <li>flickering lights above desks</li> <li>major spill on floor and is toxic, slippery or dangerous</li> <li>any event that significantly compromises customer service operations or prevents localised back-of-house work continuing</li> </ul>
3	Non-critical incidents that have an impact on safety or morale	24 hours	<ul style="list-style-type: none"> <li>hot water not working</li> <li>flickering lights and blown lights</li> <li>additional pest control</li> <li>broken glass (depending on safety)</li> <li>graffiti depending on where and context or wording</li> <li>major spill in car park</li> <li>broken lock not in a vital area</li> <li>events that may reduce operational efficiency, but not preventing work continuing</li> <li>illuminated signage out, including exit signs</li> <li>air conditioning too hot or too cold</li> </ul>



Priority	For	Response time	Examples
4	Incidents that can be in planned works or maintenance	5 working days	<ul style="list-style-type: none"><li>• boiling water units for the coffee and tea not working but other facilities are available such as a microwave (otherwise classify as priority 2)</li><li>• minor works</li><li>• compliance upgrades</li><li>• broken furniture</li><li>• cracked glass, unless considered dangerous</li><li>• sticking door</li><li>• cleaning problems not resolved through cleaning communications book</li></ul>
5	Incidents that can be in planned works	10 working days or as scheduled	<ul style="list-style-type: none"><li>• quote requests</li><li>• quote approvals</li><li>• retrospective work orders</li></ul>

## 9. Delegated Authority to Commit Expenditure for CBA Group Corporate Services

Interim delegation for BWA/CBA Corporate Services Property pending implementation of CBA Systems (Ariba)

Within plan / within approved business spend

	Property Manager	Executive Manager Property Management	Head of Property Management	Leasing Manager	Head of Property Leasing	Project Director	Executive Manager Design and Construction	Head of Design and Construction	Head of General Procurement	EGM	GE - FS	BWA CFO/CEO
Capital Expenditure	\$0.05 M	\$0.25M	\$1M	\$0.05M	\$0.25M	\$0.1M	\$0.3M	\$2.5M	Nil	\$10M	Within CBA Board approved expenditure	Within BWA Board approved plan
Leases	Nil	Nil	Nil	Up to 1,500sqm not exceeding \$1.5M annually	Up to 5,000sqm not exceeding \$5M annually	Nil	Nil	Nil	Nil	Up to 10,000sqm not exceeding \$10M annually	Within CBA Board approved expenditure	Within BWA Board approved plan
Property Sales	Nil	Nil	Nil	Nil	Sale value up to \$3M	Nil	Nil	Nil	Nil	Sale value up to		
\$5M	Within CBA Board approved expenditure	Within BWA Board approved plan										
Property Acquisitions	Nil	Nil	Nil	Nil	Purchase value up to \$1M	Nil	Nil	Nil	Nil	Purchase value up to \$2M	Within CBA Board approved expenditure	Within BWA Board approved plan



	Property Manager	Executive Manager Property Management	Head of Property Management	Leasing Manager	Head of Property Leasing	Project Director	Executive Manager Design and Construction	Head of Design and Construction	Head of General Procurement	EGM	GE - FS	BWA CFO/CEO
Occupancy (general repairs and maintenance, individual or per event)	\$0.05 M	\$0.25M	\$1M	0.1M	0.5M	\$1M	\$0.1M	\$1M	Nil	\$2M	Within CBA Board approved expenditure	Within BWA Board approved plan
Professional Fees (Technical, engineering, valuers, agency, management fees, legal fees, marketing costs)	Nil	\$0.125M	\$0.25M	\$0.125M	\$0.25M	\$0.05M	\$0.125M	\$0.25M	Nil	\$0.5M	Within CBA Board approved expenditure	Within BWA Board approved plan
General Procurement	Nil	Nil	Nil	Nil	Nil	Nil	Nil	Nil	12.5M	25M	Within CBA Board approved expenditure	Within BWA Board approved plan

The delegations presented above are approved by the CBA Board for day to day management of CBA & Subsidiaries Property and Procurement activities. Approval is sought from the BWA CEO/Board to utilise these same delegations on behalf of BWA. Whilst operating under transition structures Glen Fowler, Property and Procurement Program Manager, West Coast will have the ability to authorise payments in Oracle and execute contracts on behalf CBA / BWA where authorised by the relevant functional Property or Procurement staff member with their delegation.

#### Notes

All lease and General procurement contracts or commitments must have BU confirmation of support, signoff from legal and Group Risk, prior to commitment or execution. CBA Group Corporate Services is the only entity able to commit the CBA Group & Subsidiaries to General Procurement and Property contracts.

