

BS 8210:2020



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Facilities maintenance management — Code of practice

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Foreword

Publishing information

This British Standard is published by BSI Standards Limited, under licence from The British Standards Institution, and came into effect on 31 October 2020. It was prepared by Technical Committee FMW/1, *Facilities management*. A list of organizations represented on this committee can be obtained on request to the committee manager.

Supersession

This British Standard supersedes [BS 8210:2012](#), which is withdrawn.

Information about this document

This British Standard does not prescribe “how to do maintenance” but acts as the basis of an approach for achieving successful maintenance outcomes for a range of facilities. It is intended to assist facility owners and operators, or those acting on their behalf, in regard to facilities maintenance management in aligning the formulation and implementation of maintenance strategies and policies to the core business objectives of the organization in the most efficient and effective way.

This is a full revision of the standard, and introduces the following principal changes:

- the incorporation of practices based upon a business-focused or risk-based process for determining maintenance requirements, changing this British Standard from a guide to a code of practice;
- greater consideration of building, fire and water safety and environmental factors, and the importance of risk assessment in determining how these might impact maintenance strategies, policies and plans; and
- further guidance arising from developments in technology affecting the nature of facility assets and the maintenance management process, in particular the use of information and communications technology (ICT) and smart systems has been taken into account.

This publication can be withdrawn, revised, partially superseded or superseded. Information regarding the status of this publication can be found in the Standards Catalogue on the BSI website at bsigroup.com/standards, or by contacting the Customer Services team.

Where websites and webpages have been cited, they are provided for ease of reference and are correct at the time of publication. The location of a webpage or website, or its contents, cannot be guaranteed.

Use of this document

As a code of practice, this British Standard takes the form of guidance and recommendations. It should not be quoted as if it were a specification and particular care should be taken to ensure that claims of compliance are not misleading.

Any user claiming compliance with this British Standard is expected to be able to justify any course of action that deviates from its recommendations.

Presentational conventions

The provisions of this standard are presented in roman (i.e. upright) type. Its recommendations are expressed in sentences in which the principal auxiliary verb is “should”.

Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.

Where words have alternative spellings, the preferred spelling of the Shorter Oxford English Dictionary is used (e.g. “organization” rather than “organisation”).

Contractual and legal considerations

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

Compliance with a British Standard cannot confer immunity from legal obligations.

1 Scope

This British Standard gives recommendations for the maintenance management of facilities by:

- a) outlining a business-focused or risk-based process approach to maintenance management at the strategic and tactical levels, with links to operational activities;
- b) assisting organizations and individuals to formulate strategies and policies for maintenance management;
- c) assisting those responsible for ensuring that facility assets continue to perform as intended, retaining their asset value at minimal cost;
- d) highlighting the necessity of regular and planned maintenance to safeguard the safety, health and well-being of users;
- e) explaining its importance as a value-adding activity; and
- f) highlighting relevant areas of importance with regard to occupational health and safety and information management.

NOTE It might be economically desirable to carry out maintenance at the same time as improvements, additions or alterations.

This British Standard applies to most types of building-related facilities, for example, those for health care, education, housing, manufacturing and distribution, commerce, retailing, utilities, communication and transportation.

The term “organization” is used throughout this document to refer to the entity with responsibility for facilities management, including facilities maintenance management. The term “user” has been adopted to refer collectively to occupants, service personnel and occasional visitors to a facility.

This British Standard does not give recommendations on:

- 1) facilities management in general;
- 2) the procurement of services for maintenance (see [BS 8572](#));
- 3) how to carry out different types of maintenance;
- 4) any improvements, additions or alterations to a facility that would make it suitable for a purpose other than that for which it was designed (see BS 8536-1);
- 5) cleaning facilities (see [BS 6270-3](#)); or
- 6) maintenance of engineering infrastructure.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes provisions of this document.¹⁾ For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

[BS 7671](#), *Requirements for Electrical Installations – IET Wiring Regulations*

BS 8536-1, *Briefing for design and construction – Part 1: Code of practice for facilities management (Buildings infrastructure)*

[BS 8572](#), *Procurement of facility-related services – Code of Practice*

¹⁾ Documents that are referred to solely in an informative manner are listed in the Bibliography.

BS EN ISO 22301, *Security and resilience – Business continuity management systems – Requirements*
[BS EN ISO 41012](#), *Facility management – Guidance on strategic sourcing and the development of agreements*

BS ISO 15686-1, *Buildings and constructed assets – Service life planning – Part 1: General principles and framework*

BS ISO 15686-2, *Buildings and constructed assets – Service life planning – Part 2: Service life prediction procedures*

BS ISO 15686-5, *Buildings and constructed assets – Service life planning – Part 5: Life-cycle costing*

BS ISO 31000, *Risk management – Guidelines*

[BS ISO 44001](#), *Collaborative business relationship management systems – Requirements and framework*

3 Terms, definitions and abbreviations

3.1 Terms and definitions

For the purposes of this British Standard, the following terms and definitions apply.

3.1.1 asset register

collection of records holding information about facility assets in terms of their manufacturer, vendor, make, model, specifications, date of acquisition, initial cost, maintenance costs and requirements, accumulated depreciation and written-down value

[SOURCE: BS 8587:2012, 3.1.3]

3.1.2 balanced scorecard

performance measurement tool

3.1.3 building fabric

elements and components of a building other than furniture and engineering installations

3.1.4 building information modelling (BIM)

use of a shared digital representation of a built asset to facilitate design, construction and operation processes to form a reliable basis for decisions

[SOURCE: BS EN ISO 19650-1:2018, 3.3.14]

3.1.5 building management system (BMS)

computer-aided control systems, including hardware and software, to collect and monitor parameters and performance data of plant, equipment, systems and elements either at source or remotely and to enable corrective action to be initiated

3.1.6 building physicist

person with knowledge and experience of the behaviour and performance of buildings and their components under the influence of physical, chemical and biological phenomena

3.1.7 computer-aided facilities management system (CAFM)

systems, applications and tools that automate functions needed to support the core business in its efficient and effective use of facilities

3.1.8 computer-aided maintenance management system (CMMS)

system specifically designed to enable planning, organizing, directing and controlling maintenance programmes and to collect and collate historical data on the performance of assets so the most effective maintenance is selected under actual performance and environmental conditions

3.1.9 condition monitoring

act of measuring and recording data from operating parameters, using either human senses or instrumentation, to verify plant and equipment condition and trends

3.1.10 corrective maintenance

maintenance carried out after fault recognition and intended to put an item into a state in which it can perform a required function

[SOURCE: BS EN 13306:2017, 7.9]

3.1.11 critical environment

area or location that, in the event of its non-availability, would have a significant negative impact upon business processes and activities

3.1.12 element

functional part of a building or other facility

3.1.13 facilities maintenance

work needed to maintain the performance of the building structure, fabric and components, and engineering installations

3.1.14 facility

collection of assets which is built, installed or established to serve an entity's needs

[SOURCE: BS EN ISO 41011:2018, 3.2.3.2]

3.1.15 facility asset performance

requirements in terms of measurable outcomes to meeting organizational goals

3.1.16 facility management strategy (facilities management strategy)

statement expressing the analysed needs of the demand organization, proposed facility management (FM) solution(s) and outline plan for implementation

3.1.17 integrated workplace management system (IWMS)

software platform for optimizing the use of workplace resources

3.1.18 internet of things (IoT)

system of interrelated mechanical and digital devices with the ability to transfer data over a network without requiring human-to-human or human-to-computer interaction

3.1.19 maintenance management

process of ensuring that the most effective and efficient maintenance programme is formulated and delivered to ensure that assets continue to perform their intended function

3.1.20 maintenance manual

technical instructions intended to preserve an item in, or restore it to, a state in which it can perform a required function

[SOURCE: BS EN 13460:2009, 5.3]

3.1.21 maintenance plan

structured and documented set of tasks that include the activities, procedures, resources and the time scale required to carry out maintenance

[SOURCE: BS EN 13306:2017, 2.5]

3.1.22 maintenance policy

scope and course of action taken to achieve an organization's objectives

NOTE This can include requirements related to regulations and standards to be observed during maintenance.

3.1.23 maintenance programme

arrangement of maintenance tasks in terms of their sequence, durations and resource requirements

3.1.24 maintenance strategy

statement of organizational approach to maintenance management

3.1.25 operational plan

organization's statement of actions intended to achieve a specific business goal(s)

3.1.26 preventive maintenance

maintenance carried out to mitigate degradation and reduce the probability of failure

[SOURCE: BS EN ISO 14224:2016, 3.78]

3.1.27 reliability centred maintenance (RCM)

systems-based methodology used to determine maintenance tasks required to ensure that a facility asset or system continues to function in order to fulfil its purpose as designed in its present operating context

3.1.28 water safety plan (WSP)

strategic plan which defines and documents the arrangements that are required for the safe use and management of all water systems together with all associated systems and equipment within each building or estate to prevent harm arising from all forms of exposure

[SOURCE: BS 8680:2020, 3.33]

3.2 Abbreviations

For the purposes of this British Standard, the following abbreviations apply.

CAFM	computer-aided facilities management system
CMMS	computer-aided maintenance management system
FRS	fire and rescue service
IWMS	integrated workplace management system
KPI	key performance indicator
RCM	reliability centred maintenance
WSP	water safety plan

4 Facilities maintenance

4.1 General

COMMENTARY ON 4.1

A well-defined facilities maintenance strategy supports an organization's goals, whereas a poorly defined or absent strategy can have significant adverse safety and commercial consequences for the organization. The effectiveness of an organization to fulfil its environmental and social responsibility commitments and targets is also dependent upon an effective maintenance strategy. Since targets are subject to revision and are progressive, a static maintenance arrangement is unlikely to meet the developing needs of the organization. A review process is particularly important as changes, for example, to health, safety, security and the environment can impact the way in which maintenance is undertaken.

The organization should formulate a facilities maintenance strategy and policy that meets its current and likely future needs, including those relating to any new or refurbished facilities in accordance with BS 8536-1. The strategy and policy should be reviewed, at least annually, to ensure that it continues to be aligned to the organization's core business objectives and primary processes. The organization should ensure that the needs of its stakeholders are identified and the impact of those needs is assessed and taken into account when formulating the strategy and policy. A communication plan to disseminate the strategy and policy, as well as tactical and operational actions, to stakeholders should be prepared by the organization. Details of annual, or more frequent, reviews to check on the alignment between actions and the organization's facilities maintenance strategy should be included in the plan.

NOTE 1 BS ISO 55001 gives guidance on the high-level approach to the management and maintenance of physical assets, including those related to constructed facilities. [BS 8544](#) provides detailed guidance on the life-cycle costing of maintenance and BS ISO 15686-5 provides guidance on the wider context for the life-cycle costing of facilities.

Where a new facility is being procured, the organization should ensure that operational requirements, including those concerning maintenance, are taken into account during briefing and design.

NOTE 2 BS 8536-1 gives recommendations on an appropriate approach for organizations and their design and construction (or delivery) teams.

The organization should be mindful of the restrictions or constraints that additional requirements imposed by non-governmental organizations might place on its obligations and duties with respect to maintenance of its facility or facilities.

NOTE 3 “Blue tape” refers to the extra burdens placed on organizations by other organizations or their representative industry or professional bodies, often encouraged by government or its agencies in line with prevailing policy. In simple terms, it can be seen as additional administration and is in contrast to “red tape”, which stems directly from government or its agencies. There can be time and cost involved in complying with “blue tape”, including any additional requirements placed on a service provider and the basis for recompensing the latter.

4.2 Maintenance strategy

NOTE 1 Facilities maintenance strategies can embody different methods of maintenance, for example scheduled preventive, condition-based or corrective methods, or a combination of these and other methods (see [Clause 6](#)). Attention is drawn to CIBSE Guide M: Maintenance engineering and management [1], which includes guidance on maintenance strategy, business risk assessments, maintenance contracts, condition surveys and maintenance audits.

The facilities maintenance strategy should define the criteria by which an appropriate arrangement for maintenance can be assessed (see [Clause 6](#)). This strategy should form an integral part of the organization’s facilities management strategy. Where no facilities management strategy exists, such a strategy should be prepared to support the organization’s core business and primary processes.

NOTE 2 For more information, see BS EN ISO 41014.

The supply chain below the principle service provider, especially specialist providers, should be included in any briefing on the facilities maintenance strategy.

4.3 Maintenance policy

4.3.1 General

COMMENTARY ON 4.3.1

Facility assets have to be maintained to ensure that:

- a) they are suitable for their intended purpose;*
- b) they continue to perform their function throughout their useful life in a safe and efficient way; and*
- c) their value is protected.*

Ignoring maintenance risks the failure of systems and components and incurs needless additional cost, as well as threatening business continuity. Lack of maintenance can arise, in part, from a belief that a facility is a long-lived asset that deteriorates gradually. Even so, failure to maintain the structure and fabric can affect its function and presents safety risks in addition to reducing the value of the facility as an asset.

Requirements for the health, safety and security of persons in and around a facility, coupled with the need to discharge the responsibilities of ownership, mean that an organization would benefit from adopting a proactive approach to its facilities maintenance management. The maintenance requirements of a facility are, to a large extent, a consequence of its original design and construction. Inefficient design, inappropriate specifications and poor-quality work can result in faults that are subsequently difficult and expensive to diagnose and remedy. Inappropriate maintenance and repairs amount to unnecessary cost and inconvenience, which can be compounded by further attempts to remedy faults.

A policy should be developed to support the preparation of operational plans in accordance with the maintenance strategy. The policy should outline the scope (see [4.3.2](#)) and course(s) of action that should be taken to achieve the organization’s goals (see [4.1](#)). Organizations should ensure that suitable expertise is available for maintenance and its management at all levels within the organization. Where this expertise is not available in the organization, external resources should be employed. Personnel responsible for managing the maintenance of the facility or facilities, including engineering installations, should possess appropriate management ability and technical competence.

NOTE For many safety systems, personnel conducting maintenance need to possess specific qualifications and competences.

4.3.2 Scope of policy

The maintenance policy should reflect the principle of best value for money (see [BS 8572](#)) to protect both the asset value and the resource value of the facility. The policy should cover:

- a) the organization's anticipated future requirements for the facility, taking into account the facility's physical performance, functional suitability and energy performance, for example:
 - 1) the use of the facility, i.e. anticipating likely upgrades and the effect on the life cycles of existing materials, components and engineering installations, including energy performance (see [7.2](#) and [7.3](#));
 - 2) progressive reduction in energy consumption to achieve a zero-carbon footprint for the facility (see [7.2.1.1](#));
 - 3) a change of use for the facility and the effect of any conversion work on the life cycles of existing materials, components and engineering installations, including energy performance (see [7.2](#) and [7.3](#)); and
 - 4) the anticipated date of conversion, renovation or refurbishment work;
- b) any cycles of maintenance determined in accordance with [4.3.2 a](#));
- c) the method of maintenance, taking account of cycles of maintenance [see [4.3.2 b](#))] together with the requirements of the organization with respect to the use of the facility and any special requirements to which this might give rise;
- d) holding spare parts and other items to replace those that are beyond repair or which have exceeded their useful life (see [9.7.6](#)); and
- e) the means for reporting on performance achieved.

4.4 Risk management

Risks that could affect the performance of the facility should be systematically assessed to identify any condition or event that could impact negatively or positively on its operation or affect the asset value and resource value of the facility. Particular attention should be given to building safety, fire safety, water safety and environmental factors and how these might impact the maintenance strategy (see [4.2](#)), policy (see [4.3](#)) and plans (see [Clause 5](#)).

Assessment should extend to include identification and analysis of downside risk events and upside opportunities and their proposed treatment. Details of such events and the actions arising should be recorded in a risk register.

NOTE 1 Downside risks are factors that can have a potentially negative impact (i.e. threats) on the facility (e.g. unusual hazards faced in certain maintenance work and inability to obtain spare parts in the future). Upside risks are factors that can enhance or add value to the outcome and are more commonly referred to as opportunities. The latter might arise from a re-examination of the scope of maintenance work (e.g. changes to take advantage of more energy-efficient technology).

For downside risks (i.e. threats), actions should be explored to reduce or avoid their potential impact. For upside risks (i.e. opportunities), actions should be explored to realize or enhance the improvement. The risk register should be kept up to date so that it reflects the current status and condition of the facility and its assets.

NOTE 2 Risks in relation to health, safety, security and environment are most commonly regarded as threats. Risk treatments are generally directed to reduce or avoid these threats, although there are other options. Opportunities to treat risks can sometimes open up the possibility of a different and better way of working, for example,

redesigning layouts, accesses and supporting measures which can bring additional benefits in operation and use of the facility.

A business-focused or risk-based model of maintenance should be adopted by the organization, which should first review its business objectives and needs to ascertain the consequences of the failure of any aspect of the facility on its primary processes. The organization should have a strong understanding of the resilience of its facility especially the engineering installations. Critical systems and equipment should be identified and recorded to this effect (see [9.7.4](#)). An assessment of the condition of the engineering installations should be sought to support available information on the facility's history.

NOTE 3 BG 53/2016 [2], on business-focused maintenance (BFM), provides guidance concerning risk-based maintenance management. It details the six steps to take when following BFM, including calculations and considerations to be made to review scheduled preventive maintenance (see [6.2.1](#)).

Wherever possible, information and data on the condition of the facility should be converted to numerical values that can then be used objectively to support review of the frequency of maintenance and to provide a level of risk that is acceptable to the organization.

NOTE 4 PD CEN/TS 17385 provides a method for the condition assessment of constructed assets that results in a condition class from 1 (excellent condition) to 6 (very bad condition) based on the severity of defects and level of degradation.

The organization should establish its level of appetite in respect of maintenance activities and articulate this clearly in the form of a risk policy. Risk management should include robust risk monitoring, utilizing a risk register, which should be regularly reviewed and updated as necessary to reflect the control measures that are in place and to ensure alignment with the organization's business objectives. The organization should, as far as practicable, align its risk management policy and processes (see BS ISO 31000).

4.5 Permits and approvals

The organization should determine the extent to which permits and approvals apply to maintenance work. A risk assessment should be carried out for all critical systems, equipment and services to determine the need for a safe system of work or permit-to-work. Safety should be checked at each stage.

NOTE A permit-to-work is a formal system that states, in precise terms, the work to be done and when, and which parts of it are safe. A permit-to-work is a means of communication between site management, plant supervisors and operators, and those carrying out the work. It helps in coordinating different work activities to avoid conflicts. Guidance is given in HSE's Guidance on permit-to-work systems [3]; while focusing on the petroleum, chemical and allied industries, it is nonetheless applicable to the built environment. The organization needs to be aware of the time and cost involved in establishing a permit-to-work, not least where the burden falls on a service provider and the basis for recompensing the latter.

4.6 Procurement of maintenance-related services

COMMENTARY ON 4.6

One of the functions of maintenance management is to determine which procurement option, or combination of options, for the delivery of maintenance-related services best fits the core business and primary processes of an organization. It is essential for organizations to understand the full extent of maintenance requirements and the capability and capacity required of service providers to deliver these services for a price that is economically viable.

The organization should define its procedures on the procurement of maintenance-related services in accordance with [BS 8572](#), on collaborative business arrangements in accordance with [BS ISO 44001](#) and on the preparation of facilities management agreements in accordance with [BS EN ISO 41012](#).

5 Facilities maintenance planning

5.1 General

Maintenance plans should be driven by, and support, the intended outcomes stated in the facilities maintenance strategy and should be fully aligned with them. Plans should take explicit account of the safety, health and well-being of maintenance personnel and users, as well as the need for inspections (see [5.4](#)).

Maintenance plans should be prepared in consultation with stakeholders, taking account of the following as a minimum:

- a) the organization's requirements for production and operational demands and constraints;
- b) the organization's financial circumstances and/or taxation position; and
- c) feedback data on maintenance outcomes, including associated costs.

NOTE The organization might find it beneficial to implement an annual programme of maintenance that takes into account climate, seasonal changes and conditions, physical environment, business continuity and user requirements.

Multi-year programmes of maintenance should be put in place where appropriate, i.e. for long-term planning, finance or other expediency. Programmes should state a review date for assessing progress and performance (see [Clause 8](#)).

When formulating maintenance plans, a number of maintenance methods should be evaluated (see [Clause 6](#)). The links between the selected maintenance method(s), maintenance performance, facility asset performance and service delivery (see [Clause 8](#)) should be established through metrics, e.g. key performance indicators (KPIs), based on a practical and effective maintenance process.

5.2 Roles and responsibilities

The organization should ensure clarity on the party responsible (e.g. general contractor, subcontractor or equipment vendor) for each asset in the facility (e.g. building element, system or component). An asset register should be maintained (see [9.7.4](#)) with the name of the responsible party assigned to each asset and the means for that party to signify acceptance of its responsibility. Each asset should be cross-referenced to any related or connected asset to ensure integrity of the asset(s).

NOTE A hardwired item of equipment maintained by a manufacturer or vendor needs to "handshake" with the fixed wiring system maintained and be inspected by the party responsible for electrical installations with the rules and associated responsibilities clearly noted in the asset register (see [9.7.4](#)). Effective integration of systems is vital for seamless operation of the whole facility, not just the individual assets.

5.3 Supporting documentation

5.3.1 General

Success in planning maintenance depends on the quality of information available for this purpose; therefore, records and documents relating to the maintenance of the facility should be organized, kept up-to-date and stored in a secure environment.

NOTE 1 [BS 8587](#) provides comprehensive guidance on the management of facility-related information and data. See [Clause 9](#) for detailed guidance on further aspects of facilities information management.

The following general information should be recorded:

- a) classification: the facility and its sub-divisions (i.e. rooms and other spaces) should be assigned codes according to type or use to support the management of information and data;

NOTE 2 Uniclass Table D (Facilities) [4] provides a classification that covers most types of facility. Close alignment with the Uniclass system in general offers benefits in areas such as maintenance, repair work, cost accounting and benchmarking. While intended for new facilities, adoption of the system can prepare the organization for those occasions where alteration or extension of the facility is necessary.

- b) obligations under conditions of lease or occupancy (e.g. frequency of repainting);
- c) statutory and insurance inspections;
- d) estate terrier (i.e. records of property holdings with legal status);
- e) ownership of, and/or maintenance obligations with respect to, separating and boundary walls;
- f) rights of way, easements and wayleaves (particularly with respect to buried utilities); and
- g) requirements and restrictions laid down by planning, building regulation control and fire authorities including, in the case of the latter, fire risk assessments.

Elements/sub-elements of the facility should be labelled or marked, as far as is practicable, so that the materials, components, systems, plant, equipment and parts can be easily identified.

Where information is limited or lacking, records should be compiled during maintenance. Alternative (or additional) surveys or investigations should be initiated to accelerate the gathering of information for record-keeping purposes; high-resolution photographic records can be of assistance in this respect.

All personnel involved in the maintenance of the facility should be made aware of the existence of records containing information about it. Hazardous areas should be marked on the records as well as marked in their physical location and should be made known to maintenance personnel, together with any safe system of work adopted for use in these areas.

5.3.2 Facility handbook

A facility handbook should be prepared, which can be stored and retrieved electronically, as well as being reproduced on paper wherever necessary. The form of the handbook should be such that content can be easily updated and so versions of it can be controlled. The handbook should include the records relating to the operation and maintenance of the facility and the documents to support the wider needs of the organization in regard to its facilities management (see 9.7) and facilities information management (see BS 8587).

Records should be broadly classified according to:

- a) “as built” information, which should have been prepared before the handover of the facility, such as construction details, floor plans and other perspectives showing the location of engineering installations; and
- b) “as subsequently altered” information, which should be kept during the operational life of the facility, such as details of defects, maintenance, alterations and redecoration work.

NOTE 1 The use of building information models allows plans to be regularly updated to reflect changes to layouts and enables them to be stored in an efficient and easy-to-access manner (see 9.2).

A record should be kept of all reported defects and the measures taken to rectify them. Details of maintenance should also be recorded and cross-referenced to the reported defect (see 9.9).

NOTE 2 Captioned and dated high-resolution photographs can be particularly useful when monitoring defects developing over time. It is helpful to include a means for indicating the scale of the defect in the photograph (e.g. a ruler or an object of known dimensions).

Periodic reviews of records should be made and where there are recurrences of the same defect, the causes should be investigated. There should be clearly defined and logical responsibilities for maintaining records.

NOTE 3 For example, the F-gas refrigerant gas register needs to be maintained such that changes of specialist service provider do not disrupt accurate record-keeping.

The organization should determine where responsibility rests for verifying the accuracy of records and documents, including those captured digitally, when transferred from the design and construction (or delivery) team prior to, and upon, the handover of a new or refurbished facility, where applicable.

5.3.3 Building log-book and building manual

NOTE 1 Attention is drawn to The Building Regulations 2010, Regulation 40 [5] for details on the building log-book.

Where a building log-book is available, it should be incorporated into the facility handbook. Where no building log-book is available, information and data on the operation and maintenance of the facility, including measures to conserve energy, should be incorporated into the facility handbook. The organization should ensure that the scope of a building log-book is satisfied by provisions made in the facility handbook.

NOTE 2 The building log-book was conceived as a single reference source for information needed to operate a building and for those with the responsibility for the building to be able to understand their obligations and duties. It summarizes design assumptions and describes engineering installations, including operational and maintenance requirements for the safe and correct use of the facility, in terms that non-specialists can follow. The intention is that the building log-book can be a dynamic document, recording the performance of the facility over time and that it covers energy performance as well as maintenance (see the Building log book toolkit [6]).

Where a building manual and/or building user guide has been prepared it/they should be incorporated in the facility handbook.

NOTE 3 The Building Manuals and Building User Guides [7] gives guidance to those responsible for creating documentation to satisfy requirements for the building log-book and building user information for the Building Research Establishment Environmental Assessment Method. Building manuals and building user guides are intended to exceed the scope of building log-books. Similarly, the facility handbook is intended to extend the scope of building manuals by considering a broader base of information and data required to operate and maintain a facility.

NOTE 4 Attention is drawn to The Building Regulations 2013 (incorporating 2016 amendments), Approved document L2A [8] regarding the conservation of fuel and power in new buildings other than dwellings and building log-books [6].

5.3.4 Drawings

The records of the facility should include as-built and as subsequently altered drawings and contain, as a minimum, the following:

NOTE See BIP 2207 [9].

- a) a neighbourhood plan showing the position of the facility and the site where it is located in relation to its surroundings;
- b) the site plan showing the facility, other structures forming the facility and external engineering installations (e.g. drainage runs and incoming public utilities);