

BS 8892:2014



BSI Standards Publication

Transition management of facility-related services – Code of Practice

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Documents

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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 August 2014. It was prepared by Technical Committee FMW/1, *Facilities management*. A list of organizations represented on this committee can be obtained on request to its secretary.

Relationship with other publications

This British Standard is a new addition to an existing set of standards connected with facilities management and complements BS 8572.

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.

The word “should” is used to express recommendations of this standard. The word “may” is used in the text to express permissibility, e.g. as an alternative to the primary recommendation of the clause. The word “can” is used to express possibility, e.g. a consequence of an action or an event.

Notes and commentaries are provided throughout the text of this standard. Notes give references and additional information that are important but do not form part of the recommendations. Commentaries give background information.

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.

Introduction

The purpose of this British Standard, which complements BS 8572, is to give recommendations and guidance on processes and procedures by which facility owners, operators and tenants can manage the transition from one facility-related service arrangement to another in an efficient and cost-effective manner and minimize exposure to risk and threat to business continuity.

Transition management of facility-related services is the process of moving from one service arrangement to another. This can cause unnecessary disruption to end-users of those services and incur additional indirect costs. The issues arising from a change in an existing arrangement can be off-putting for facility owners, operators and tenants. The idea of moving from an established familiar situation to one that is unfamiliar can be unattractive, not least because of a lack of understanding of how to manage such an undertaking. In the absence of guidance, facility owners, operators and tenants might be disinclined to break with an existing arrangement, despite some dissatisfaction with it. Transition has to be planned and controlled over and above arrangements for the procurement of facility-related services, where this applies, if it is not to impact negatively on service delivery.

1 Scope

This British Standard provides facility owners, operators and tenants (and professional advisors on their behalf) with recommendations and guidance on managing changes to their existing sourcing arrangements and where there is a move between insourcing and outsourcing and vice versa. It is applicable to a range of situations from the replacement of one service provider by another, to bringing all services in-house following a lengthy period of outsourcing, and incorporates recommendations that allow the approach to be scaled to suit the degree of complexity involved.

NOTE For the purpose of this British Standard, the “organization” can be the facility owner, an operator, a tenant or a professional advisor acting on their behalf.

2 Normative references

The following documents, in whole or in part, are normatively referenced in this document and are indispensable for its application. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

BS 8572, *Procurement of facility-related services – Guide*

BS 8587, *Guide to facility information management*

BS EN 15221-1, *Facility management – Part 1: Terms and definitions*

BS EN 15221-2, *Facility management – Part 2: Guidance on how to prepare facility management agreements*

BS EN 15221-5, *Facility management – Part 5: Guidance on facility management processes*

PAS 1192-3:2014, *Specification for information management for the operational phase of assets using building information modelling*

3 Terms, definitions and abbreviations

3.1 Terms and definitions

For the purposes of this British Standard, the terms and definitions given in BS EN 15221-1 and BS EN 15221-2 and the following apply.

3.1.1 contingency planning

activity designed to take account of conditions or events whose occurrence or effect is uncertain and which would likely result in a change to the agreed plan

3.1.2 control

comparison of actual performance with planned performance, analysing variances and taking appropriate corrective and preventive action as needed
[SOURCE: BS ISO 21500:2012, 2.6]

3.1.3 cost contingency

sum added to a cost estimate to cover conditions or events whose occurrence or effect is uncertain and which would likely result in additional cost

3.1.4 critical path

longest planned sequence of activities (or tasks) in a network

3.1.5 flawless start-up

fault-free commencement of operations
[SOURCE: BS 8587:2012, 3.1.15]

3.1.6 informed client function

individual or group within an organization with expertise in procurement designated to act as the client or customer in a procurement transaction
[SOURCE: BS 8572:2011, 3.1.10, modified]

3.1.7 insourcing

delivery of a service by one part of an organization to another

3.1.8 manual of authorities

document containing the authorities and authority holders within an organization relating to its business, functions and legal entities
[SOURCE: BS 8587:2012, 3.1.20]

3.1.9 milestone

point in a timeline, a time-plan or a schedule that indicates a significant event

3.1.10 outsourcing

business model for the delivery of a product or service to an organization by a third party provider
[SOURCE: BS ISO 37500 ¹⁾, 2.9]

3.1.11 precedence diagram

graphical network in which the nodes are activities or tasks and the links between them define the logical sequence of events

3.1.12 project management plan

document or collection of documents that define the execution, monitoring and control of the project

¹⁾ In preparation

3.1.13 risk and opportunity register

record of identified risks and opportunities, including results of assessment/analysis and planned responses

3.1.14 schedule

plan of tasks and their times with the resources required to achieve defined objectives

3.1.15 schedule contingency

time added to a schedule to cover conditions or events whose occurrence or effect is uncertain and which would likely result in delay

3.1.16 stakeholder

person, group or organization that has interests in, or can affect, be affected by, or perceive itself to be affected by, any aspect of the project

[SOURCE: BS ISO 21500:2012, 2.14]

3.1.17 task

work item in a schedule

NOTE The term "task" is used in this British Standard instead of "activity", as defined in BS ISO 21500:2012, to refer to a work item in a schedule. This distinction is necessary to avoid possible confusion when referring to work in an organizational and business process context, where "activity" is the generally accepted term.

3.1.18 time-plan

tasks placed in sequence along a timeline or against a timescale and incorporating phases, milestones and deadlines

3.1.19 transition

activities for migrating agreed upon knowledge, assets, liabilities, systems, processes and people from the client to the provider in order to create desired delivery capability and the reverse situation

[SOURCE: BS ISO 37500 ²⁾, 2.24, modified]

3.1.20 transition management

process for accomplishing transition

3.1.21 transition planning

activity of preparing for transition

3.2 Abbreviations

HSSE health, safety, security and environmental sustainability

4 Transition planning

4.1 General

A business case for transition, or statement of needs, should be prepared and used as a basis for transition planning. The starting point for transition should be made explicit.

²⁾ In preparation

NOTE The starting point for transition could be a decision relating to the organization's operation of an individual facility or its facilities in general. This decision needs to be documented, either as a business case for transition or within a statement of needs. The former is the more usual situation and occurs where a change to existing arrangements is necessary, perhaps in light of operational experiences. The latter would be appropriate when a facility is to be refurbished and where a change to existing arrangements is required (see BS 8536).

4.2 Transition process

4.2.1 Transition as managed change

Transition is a process that involves change in the delivery of facility-related services. For change to be managed effectively, transition should be supported by a defined plan (see 4.2.3) that is based on the business case for transition or statement of needs (see 4.1).

4.2.2 Transition as a project

The organization should adopt a project-based approach to transition in which the scope of services subject to transition, together with the tasks to be performed, their times, resources and cost, are defined and controlled within a risk-bound environment.

NOTE Planning and scheduling the tasks necessary to achieve the organization's objectives form a significant activity when preparing for transition.

4.2.3 Plan for transition

The organization should prepare a plan for transition to cover, as a minimum:

- a) objectives, including critical processes and activities affected (see 4.3.2.2), scope of services subject to transition (see 4.3.4) and criteria for measuring success (see 4.3.6);
- b) impact on the business and end-user requirements (see 4.3), including HSSE provisions (see 4.6.6), the needs of disabled people (see 5.3.4) and equality obligations in general (see 5.4.3);
- c) governance, including assessment of the need for a board or equivalent body for steering purposes, definition of roles, responsibilities and accountabilities, internal approvals, applicable organizational structure and controls to be applied (see 4.6.2);
- d) external permissions and notices which might be required (see 4.6.3);
- e) stakeholders, including arrangements for assessing their interest and likely impact, engagement and communication (see 4.4 and Clause 5);
- f) risks, including identification and assessment/analysis of downside risk events and upside opportunities, responses to risk events and controls to be applied (see 4.5);
- g) knowledge and supporting information and data to be acquired or exchanged in the course of transition (see 4.6.4);
- h) procurement strategy, policy and procedures for facility-related services, where outsourcing is involved (see 4.6.5 and BS 8572);
- i) service definitions (see 4.6.5.2), service specifications (see 4.6.5.3) and service levels (see 4.6.5.4);
- j) existing arrangements in regard to agreements, contracts and employment of personnel affected (see 4.6.7);
- k) time-plan and deadlines, or schedule, including critical tasks, milestones and controls to be applied (see 4.6.9 and 4.7);

- l) resources, including personnel, materials, equipment, temporary facilities or works, and controls to be applied (see 4.8);
- m) costs and required budgets, including controls to be applied (see 4.9); and
- n) required contingency, including quantification of schedule (i.e. time) contingency and cost contingency (see 4.10).

NOTE 1 Schedule contingency and cost contingency are not optional and are required. The extent of contingency might not, however, be easy to gauge and so is likely to call for a qualitative risk assessment. In the case of large or complex transitions, a quantitative risk analysis is advisable (see 4.10.2 and 4.10.3).

The plan should complement existing policies and procedures as far as practicable.

NOTE 2 A plan for transition is analogous to a project management plan, which is a document, or collection of documents, defining how the project is to be executed, monitored and controlled (see 3.1.12 and 4.6). It is necessary to distil the essential actions from the plan in order to focus on the tasks, decisions and key information needed in transition (see 4.6.1).

4.2.4 Transition control

The organization should adopt an integrated approach to the control of transition. The scope of services subject to transition should be accompanied by and reflected in a time-plan (or schedule), resource plan and cost estimate (or budget). Where any alteration is made to the scope, its impact on the time-plan (or schedule), resource plan and cost estimate (or budget) should be assessed before proceeding (see 4.5.2.6). Variances from the plan for transition should be controlled so that the organization's objectives in regard to transition are achieved (see 6.4).

4.3 Impact of transition

4.3.1 General

As transition involves change to the support for the organization's primary processes and activities and therefore has the potential to impact end-users and threaten business continuity, the organization should assess the potential impact of transition upon its ability to maintain normal operations or operations at another level that is acceptable.

4.3.2 Business continuity

4.3.2.1 General

NOTE 1 Business continuity involves managing the continuation or resumption of the primary processes and activities of the organization in the event of a disruption to operations.

The organization should identify potential threats and other risk events arising from transition and the impact upon operations that these might have. Arrangements to strengthen organizational resilience to counter the effects of disruption from transition should be made in order to safeguard the interests of key stakeholders (including end-users), value-creation and reputation.

NOTE 2 See BS ISO 22301 and BS ISO 22313 for further guidance.

4.3.2.2 Critical processes and activities

The organization should identify processes and activities that are essential to maintaining normal operations, which it should regard as critically important to the continuity of the organization's business. The organization should categorize these primary processes and activities according to their priority for resumption. Those activities whose loss would have the greatest impact in the shortest time and which need to be resumed most rapidly should be identified as "critical activities". This information should be used when planning transition, especially with regards to the management of risk (see 4.5).

NOTE The maximum time period for resuming normal operations can vary between minutes and months depending on the nature of the process or activity. Those that are time-critical might have to be specified with a greater degree of precision, for example to the minute or hour, than less time-critical processes and activities. See BS ISO 22301 and BS ISO 22313 for further guidance.

4.3.2.3 Impact analysis

The organization should determine the potential impact of disruption to the facility-related services that support its primary processes and activities in the event that transition fails to achieve its objectives (see 4.5.2). For each primary process and activity the organization should:

- a) establish the maximum tolerable period of disruption by identifying:
 - 1) the maximum time period after the start of a disruption within which the process or activity needs to be resumed,
 - 2) the minimum level at which the process or activity needs to be performed on its resumption,
 - 3) the length of time within which normal operations need to be resumed;
- b) assess the impacts that would occur if the process or activity was disrupted in each of the cases outlined above; and
- c) identify interdependent processes, activities, assets, supporting infrastructure or resources that have to be maintained continuously or resumed over time.

NOTE See BS ISO 22301 and BS ISO 22313 for further guidance.

4.3.2.4 Disruption and contingency planning

The organization should prepare plans to counter the adverse effects of a failure in service delivery affecting normal operations irrespective of the source of the service. Plans should be based upon plausible scenarios, for example the financial failure of a key service provider or a deteriorating level of service that shows no sign of improvement. Each scenario should be accompanied by an action plan capable of minimizing disruption to normal operations, together with schedule and cost estimates for maintaining or resuming normal operations. Details of resources required to be held on standby should be identified (see 6.3.4). A risk assessment should be undertaken to inform this process (see 4.5.2.4). All scenarios should be kept up-to-date, as far as practicable.

NOTE 1 It is reasonable to expect that the organization would have more control over an in-house team; even so, it would be advisable to prepare plausible scenarios to cover eventualities that might affect normal operations. When preparing scenarios, the aim is to "flesh-out" possible causes, their effects and the most effective approach for dealing with them, not to predict the future; the organization is attempting to build organizational resilience.

In planning transition, the organization should assess the extent of contingency that might be required in the project's time-plan or schedule and cost or budget to avoid or lessen the impact of any disruption to primary processes or activities.

NOTE 2 Such a situation can arise for various reasons, including a preferred service provider failing to mobilize on time or falling short of the required level of performance. A quantitative risk analysis might be needed for this purpose once sufficient data are available in regard to the project's schedule and cost estimate (see 4.10.2 and 4.10.3 respectively).

NOTE 3 Once costs have been estimated and subsequently accepted, it is usual for a budget or budgets to be allocated. The term "budget" is used to cover costs expected to be incurred. A budget sets the limit on the commitments that can be made, e.g. orders placed (see 6.4.6).

4.3.3 Types of transition

4.3.3.1 General

COMMENTARY ON 4.3.3.1

Transition can mean the transfer of an existing service from the organization to an external service provider (i.e. outsourcing) or from an incumbent service provider to another provider if the service is already outsourced. It can also mean bringing services in-house (i.e. insourcing) either partially or in their entirety.

The organization should categorize the nature of a proposed transition in terms of one of the following types:

- a) moving to outsourcing;
- b) changing the outsourcing model;
- c) reverting to insourcing; or
- d) insourcing for the first time.

NOTE 1 Each of the above types has implications for the organization's structure, including personnel and their required competences and skills, as well as reflecting a focus on either external or internal arrangements for service delivery. The relationship between these types of transition is shown in Figure 1.

As the realization of any transition is likely to be subject to conditions or constraints, the organization should identify limitations and state them clearly when describing the nature of a proposed transition.

The types shown in Figure 1 should be qualified as to their particular character.

NOTE 2 Changing the existing outsourcing model can cover anything from the substitution of the provider of one minor service to a complete restructuring of all service delivery including the appointment of new service providers.

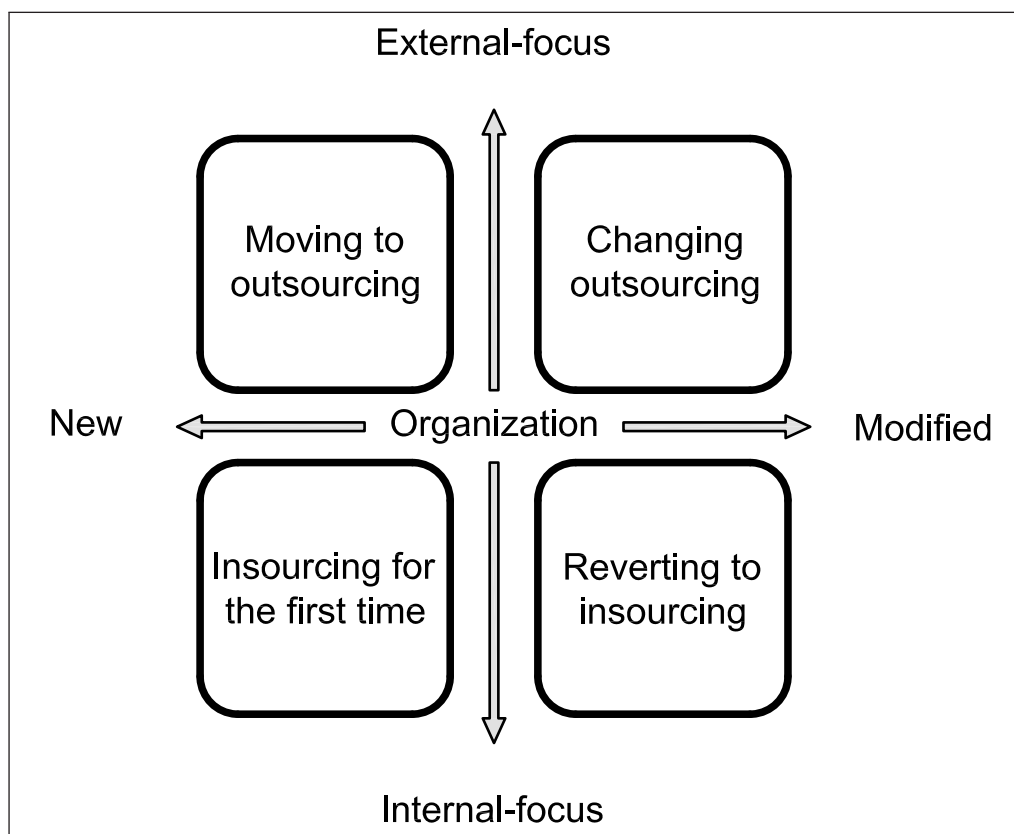
4.3.3.2 Moving to outsourcing

In aligning with this transition, the organization is changing from insourcing to the procurement of facility-related services from one or more service providers. The organization should carry out procurement in accordance with BS 8572.

4.3.3.3 Changing the outsourcing model

In aligning with this transition, the organization is continuing to procure facility-related services from service providers, but in a way that differs from the existing arrangement. The organization should address the options for service delivery in accordance with BS 8572.

Figure 1 Types of transition



4.3.3.4 Reverting to insourcing

In aligning with this transition, the organization is seeking to return to a situation where facility-related services – presently delivered by external service providers – are to be provided by an in-house team. The organization should determine if it has sufficiently retained the structure, resources, competences and skills to cope with this new arrangement (see 4.6.2.10). The management of service delivery should be in accordance with BS 8572.

NOTE BS 8572 addresses the procurement of facility-related services. It looks widely at the procurement process, including stages and practices that are also applicable to an insourced arrangement, notably service definitions, mobilization and performance review.

There should be no practical difference in the way that insourced and outsourced personnel are treated in the context of service and performance. It should be established whether the organization has the structure, resources, competences and skills to manage an in-house team (see 4.6.2.8 and 4.6.2.10).

4.3.3.5 Insourcing for the first time

In aligning with this transition, the organization is bringing in-house the delivery of facility-related services (i.e. insourcing) following an exclusive period of outsourcing. The organization should determine if it has the structure, resources, competences and skills to cope with this new arrangement (see 4.6.2.8 and 4.6.2.10). The management of service delivery should be in accordance with BS 8572 and BS EN 15221-5.

An organizational structure, with new positions, roles, responsibilities and accountabilities, should oversee and deal with the day-to-day demands of this new arrangement (see 4.6.2).

4.3.4 Scope definition

The organization should define and document the scope of services subject to transition (see 4.6.5.2).

NOTE The defined scope, together with the time-plan (or schedule), resources and cost estimate (or budget) define the project boundary for the purpose of 4.2.2.

4.3.5 Prioritization of requirements

The organization should prioritize its requirements and reflect them in its list of actions for transition (see 4.6.1). Account should be taken of the practical steps involved in the procurement of facility-related services (see 4.6.5 and BS 8572) when determining priorities involving outsourcing.

4.3.6 Criteria for measuring success

The successful transition of facility-related services can be greatly assisted by the clarity with which required performance and outcomes are expressed. The organization should, therefore, determine the criteria by which success in transition is to be measured. As a minimum, the organization should consider performance in relation to the following for the defined scope:

- a) schedule progress and completion, including achievement of milestones, as planned (see 6.4.4);
- b) resource consumption in line with the resource plan and schedule it supports (see 6.4.5);
- c) expenditure within the agreed cost estimate or approved budget (see 6.4.6); and
- d) continuity of operations.

4.4 Stakeholders

The organization should outline its approach to engaging with stakeholders (see Clause 5).

NOTE Clause 5 covers stakeholder engagement in detail. Stakeholders can be a significant source of risk and opportunity (see 4.5.1).

4.5 Risk management

4.5.1 Risk and opportunity

COMMENTARY ON 4.5.1

Change involves uncertainty (see 4.10), which means exposure of the organization to risks. Understanding the nature, potential impact and likelihood of risks occurring is a key determinant of successful transition. Recognizing opportunities that might prove beneficial to the organization is important too.

An assessment should be undertaken, in conjunction with the preparation of the plan for transition, to identify any condition or event that could impact negatively or positively on operations as defined by the organization's primary processes and activities and any actions needed to manage them. Account should be taken of stakeholders' known interests in transition and facilities management in general when identifying and assessing risk and opportunity. Details of such conditions and events and action arising should be recorded in the plan for transition (see 4.2.3), a risk and opportunity register (see 4.5.2.3) and reflected in the time-plan or schedule (see 4.6.9 and 4.7 respectively) and cost estimate (see 4.9).

NOTE Conditions or events that have an impact on operations can be thought of as downside risks or upside risks. Downside risks can have a potentially negative impact on transition, e.g. the failure of a service provider to mobilize resources in sufficient time to meet start-up dates for service delivery.

One important downside risk under an organization's sustainability objectives is waste of materials, equipment and discontinuity of social value in services arising in the transition from one arrangement to another (as might occur during tendering in a move to full or partial outsourcing). Insufficient attention might be given to existing resources and social value in the context of social, economic and environmental sustainability.

Upside risks can add value to the outcome of transition and are more commonly referred to as opportunities. These might arise from a re-examination of the scope of services subject to transition against the objectives recorded in the plan for transition and as reflected in the statement of needs. For example, in a move towards outsourcing, an opportunity could present itself from the bundling of services, where a single service provider could offer improved coordination of service delivery and a reduction in cost from greater economy of scale.

4.5.2 Risk management process

4.5.2.1 General

Where transition poses significant risks and/or uncertainty, the organization should assess the need to adopt a formal process of risk management covering downside risks and upside risks (opportunities).

NOTE Attention is drawn to BS 6079-3, BS IEC 62198, BS ISO 21500:2012 and BS ISO 31000.

4.5.2.2 Risk identification

The organization should identify any condition or event that could impact negatively or positively on transition and undertake a systematic review of those conditions and events on a periodic basis. Details should be recorded in a risk and opportunity register (see 4.5.2.3). A recognized method for risk identification should be employed by the organization for this purpose.

4.5.2.3 Risk and opportunity register

A risk and opportunity register should be established and maintained from the commencement of transition and should be used to record any identified downside risks and upside risks (opportunities), an assessment of their potential impact and the likelihood of their occurrence (see 4.5.2.4). For downside risks, actions should be explored to reduce or avoid their potential impact. For upside risks, actions should be explored to realize or enhance the improvement. The risk and opportunity register should be kept up-to-date throughout transition so that it reflects the current situation and should be preserved in order to inform decision-making in subsequent transitions.

NOTE A risk and opportunity register allows conditions or events, which could threaten or improve outcomes, to be formally recorded and taken into account in risk assessment (see 4.5.2.4) or risk analysis (see 4.10.2 and 4.10.3). The register is not only a repository, but a tool to help gain a current understanding of conditions or events and the risks and/or opportunities they present.

4.5.2.4 Risk assessment

The organization should undertake a qualitative appraisal of conditions and events recorded in the risk and opportunity register to determine their potential impact and the likelihood of their occurrence. Periodic reassessment of risks should be used to update the risk and opportunity register and associated risk response (see 4.5.2.5). The interval for reassessment should take account of the duration of transition and the extent of any changes in the scope of service delivery. A recognized method for risk assessment should be employed by the organization for this purpose.

4.5.2.5 Risk response

The organization should determine the most appropriate response to risks that have been assessed, taking into account the practicability and affordability of any proposed action including the organization's capability or, where applicable, the capability of the service provider. Account should be taken of the potential that might exist to avoid or realize the risk, reduce or increase the extent of exposure and/or the likelihood of its occurrence, together with the schedule, resource and cost implications of doing so (see 4.7, 4.8 and 4.9). A recognized method for determining the most appropriate response should be employed by the organization for this purpose.

4.5.2.6 Risk control

The organization should proactively monitor and check the status of downside risks and upside risks (opportunities) recorded in the risk and opportunity register, the events that give rise to them and the outcomes of any risk responses.

NOTE In addition it might be appropriate to implement an active cycle of risk identification, assessment and response (scanning the environment for new conditions or events that could materialize), depending on the duration of transition.

4.6 Transition actions

4.6.1 General

A list of actions should be prepared by the organization based on the plan for transition (see 4.2.3). Actions should focus on the tasks, decisions and key information required for successful transition. Supporting details from the plan for transition should be appended to the list of actions to the extent that it is necessary to elaborate or substantiate requirements.

NOTE The purpose of the list of actions is to focus on the main aspects of transition in a way that facilitates rapid communication of intentions (i.e. tasks and decisions) supported by key information and data. The plan for transition (see 4.2.3) contains specific actions, detailed in 4.6.2. Annex A contains a checklist of actions covering transition in the broadest sense. The checklist is intended to assist the organization in planning and implementing transition, but does not purport to reflect all the actions that might be necessary.

4.6.2 Governance

4.6.2.1 General

As the successful management of transition relies upon clarity of roles, responsibilities and accountabilities, the organization should define a framework for governance that defines each of these functions in terms of named personnel and their level of authority within an explicit structure for the purpose of transition. In the case of outsourcing, the organization should assess the benefits of engaging a change manager and human resources manager to ensure smooth restructuring of the remaining in-house team, where appropriate, or other residual arrangement. Attention should be paid to the extent of engagement that might be required for this purpose.

NOTE The engagement of a change manager and human resources manager can, in the case of a large or complex transition, help to minimize impact upon personnel morale and business continuity (see BS ISO 37500³⁾).

4.6.2.2 Roles, responsibilities and accountabilities

Transition should be regarded as a distinct function within the organization's facilities management. As such, it should be covered by a designated role, which may be combined with an existing role. It should be exercised by someone with an appropriate level of competence in project management as well as in facilities management.

The organization should determine where responsibilities and accountabilities rest with respect to other defined roles in transition. Where tasks to be performed fall outside existing roles, it might be appropriate to designate additional personnel for this purpose. The need for expert advice from external sources to supplement any lack of competence and skill should be ascertained. Where found necessary, additional roles should be defined and incorporated alongside those existing. Where outsourcing is involved, the organization should identify all roles that are connected with the procurement of facility-related services and ascertain their nature as well as the relationship between them and the extent of their authority (see 4.6.2.7). The organization should consider the extent to which an incoming service provider might be able to fulfil any of the roles so identified and the authority it will need to be given to discharge its responsibilities. Where the organization is unable to fulfil the designated role for managing transition, the appointment of a managing agent (or other consultant) might be appropriate (see 4.6.2.12).

The organization should develop the informed client function to serve its broader and long-term interests in the procurement of facility-related services where outsourcing is involved. The informed client function should be developed and maintained to support an appropriate level of communication and cooperation between the organization and service providers as part of a mutual commitment to continual improvement.

4.6.2.3 RASCI chart

A RASCI (responsible, accountable, supported, consulted and informed) chart should be used to summarize the roles and functions performed in transition and the tasks within it.

NOTE A RASCI chart can highlight gaps in available competences or skills that the organization needs to address before proceeding and can also be used to confirm adherence to governance requirements.

³⁾ In preparation