



Guidance on Tailoring SFG20 Schedules

This guidance (“Guidance”) is published by SFG20 to provide clarity on which elements of the SFG20 standard maintenance schedules (“SFG20 Schedules”) can be legitimately tailored, and the conditions under which tailoring is appropriate. It is intended to help both Clients and Service Providers evidence and explain maintenance decisions, particularly where an SFG20 Schedule has been adapted to suit an asset, site context, risk profile, or statutory compliance approach.

For the avoidance of doubt, tailoring is permitted in defined circumstances. However, tailoring of statutory (red) tasks must be applied through a documented process, with traceable rationale, so that the resulting maintenance regime can be justified and evidenced.

This Guidance does not override statutory and legislative duties, sector-specific mandatory requirements, or contractual obligations. Where conflicts arise, statutory and safety compliance and sector/contractual requirements should take precedence.

1. Definitions

Client means the organisation that owns, occupies, or is responsible for the building or assets to which maintenance is applied.

Service Provider means the organisation (including contractors) delivering maintenance services to a Client.

Facilities-iQ means SFG20’s software platform through which SFG20 Schedules may be accessed and applied.

SFG20 Schedule means the proprietary standard maintenance specification for building engineering services produced and maintained by SFG20.

User means any person using SFG20 Schedules and/or Facilities-iQ.

Tailoring means any change to an SFG20 Schedule applied to suit an asset, site context, risk profile, or compliance approach, including (without limitation) removing non-applicable tasks, adjusting task frequency, and/or changing criticality.

OU task (zero followed by the letter U) means a task within an SFG20 Schedule where the frequency is intended to be set by the User based on asset and site-specific variables.

Statutory means¹

The term Statutory denotes anything required by primary legislation such as Acts of Parliament and secondary legislation such as Statutory Instruments (including Regulations), Statutory Rules and Orders.

When working to achieve statutory compliance, primary and secondary legislation often focuses on general outcomes rather than prescribing specific activities.



The specific activities required to meet statutory compliance may, therefore, be included in government guidance and Approved Codes of Practice (ACoPs) published by agencies such as the Health and Safety Executive (HSE), or other industry standards and/or guidance (BSI standards, publications by trade associations and professional bodies, etc).

In the absence of a traceable reference to legislation, following industry standards and/or guidance may assist in discharging duties under the statutory requirements.

For example: for electrical installations, The Health and Safety at Work etc. Act 1974 led to the Electricity at Work Regulations 1989. This is supported by the HSE-issued guidance note HSR25 which also references British Standard 7671, which is supported by an on-site guide.

There may be more than one way of discharging duties. To achieve statutory compliance, remedial actions may need to be identified and completed. Applying a documented process will greatly assist in evidencing these decisions.

2. Purpose and scope

2.1 This Guidance sets out (a) what aspects of SFG20 Schedules may be tailored; (b) why tailoring can be appropriate; and (c) what documentation and governance is required to evidence tailoring decisions.

2.2 This Guidance applies to the use of SFG20 Schedules by Clients and Service Providers. It is intended to support transparent decision-making and to reduce uncertainty in situations where a Service Provider needs to evidence that schedule tailoring is permitted and appropriately justified.

2.3 Tailoring of an SFG20 PPM regime may have contractual implications. Any deviation from the default SFG20 Task Schedule—whether task removal, frequency change, or criticality adjustment—should be agreed between Client and Service Provider and formally documented as the contract baseline, or a variation to contract defined during mobilisation or by a periodic review decision - captured by the change-control process.

3. General principles for tailoring

3.1 SFG20 Schedules are designed as a standard baseline. Tailoring may be appropriate where asset configuration, use, operating conditions, risk profile, or the method chosen to achieve statutory compliance differs from the assumptions underpinning the standard schedule.

3.2 Tailoring of statutory tasks must be applied through a documented process. Where a task criticality is changed, the rationale should be recorded so that it is clear what was changed and why. Rationale for change can be recorded within Facilities-iQ.

3.3 The SFG20 RAG colour coding system (Statutory, Optimal, Discretionary) provides a structured hierarchy for decision making and tailoring a maintenance regime. Tailoring does not alter the meaning of these categories.

Method: Tailoring of the Default SFG20 Colour Coding



The SFG20 product's core functionality allows licence users to adjust the colour coding for task schedules. This tailoring method can be applied by engineering judgement or based on accepted fit for function standards (e.g. office usage) - and supported by a local risk assessment.

Example of tailoring tasks are:

- Optimal (amber tasks) Heating, Lighting and Power to a facility, therefore, function critical assets are boilers, lighting and power installations.
- Discretionary (green tasks) Tasks which could be 'run to failure', as the task has been assessed to have low risk or impact if it were to fail.

For example, under a run-to-failure maintenance regime, assets with a low risk of failure, such as armoured cabling, may be suitable for no planned preventative maintenance. These can be marked as green to show that a decision has been made to make this PPM task discretionary.

3.4 Tailoring should be managed through a gated approval process so that proposed changes are drafted, reviewed, approved, and recorded before being implemented in the live maintenance regime. The level of review and approval should be proportionate to the nature and risk of the change, with enhanced scrutiny where statutory tasks, task criticality, frequency reductions, or alternative approaches to statutory compliance are involved.

4. Tailoring for asset suitability

4.1 It is acceptable to amend an SFG20 Schedule to remove tasks that are not applicable because the relevant asset, component, or feature is not fitted or not present within the maintained scope.

Illustrative examples:

10-01 Cold Rooms Task 24 (RED Criticality) Automatic leak detection system (if installed) – This task can be removed if the system is not present on the asset.

23-02 Fire Hose Reels - Pressure Boosting Sets Task 12 (RED Criticality) Hydraulic accumulator (if fitted) – This task can be removed if the device is not present on the asset.

4.2 Where tasks are removed as non-applicable, the Client and/or Service Provider it is best practice to document the basis for removal (for example, asset register evidence, site survey findings, or scope confirmation) for non-statutory tasks and a requirement for all statutory tasks.

5. Tailoring task frequency and criticality

5.1 It is acceptable to change the frequency and/or criticality of tasks where this is justified by the asset context, risk profile, operating environment, or an organisation's decision-making process for maintenance optimisation.

For example: Increasing the inspection frequency of AHU filters from 6-monthly to quarterly due to a dusty working environment, and/or when the run time operating hours are 24/7.



Caution warning: Frequency reductions should be justified by evidence such as, abnormal environmental conditions, run time. Reducing frequency for convenience of lesser PPM, is not advised.

6. Tailoring when working to achieve statutory compliance

6.1 When working to achieve statutory compliance, legislation often focuses on outcomes rather than prescribing specific activities. Accordingly, it may be acceptable for a Client and/or Service Provider to discharge duties using a documented approach that differs from the default task set in an SFG20 Schedule, provided the approach is evidenced and traceable.

6.2 Where a statutory task in an SFG20 Schedule is not followed because an alternative method is being used to discharge Statutory duties, the Client and/or Service Provider must document what is being done instead and why, including traceable references where available (for example, relevant guidance, Approved Codes of Practice (ACoPs), or industry standards and/or guidance).

6.3 Tailoring for statutory compliance does not remove the need to identify and complete any remedial actions required to achieve compliance.

7. When tailoring is not acceptable

7.1 Where a statutory or regulatory duty exists, it must be discharged regardless of client preference, budget constraints or operational pressures, unless justified by a local risk assessment in the case of OU tasks and this has been approved by an authorised person, or an alternative documented means of discharging the statutory obligation has been formally recorded.

7.2 If a Client elects not to proceed with work required to discharge a Statutory duty, this should be recorded and escalated in accordance with the organisation's governance and risk procedures.

8. 'OU' (zero + letter U) tasks and assigning frequencies

8.1 OU tasks are designed to be assigned an appropriate frequency based on asset and site-specific variables. A OU task may be given a frequency individually or applied at scale using Facilities-iQ.

8.2 When assigning frequencies to OU tasks, the Client and/or Service Provider should record the basis for the chosen frequency and retain evidence of the variables and assumptions used.

9. Tailoring for maintenance optimisation

9.1 Tailoring is not limited to Statutory tasks. The SFG20 standard can also be tailored for the purposes of optimising maintenance.

9.2 Organisations should pay special attention to operationally critical assets and use a risk-based approach to determine whether optimal and discretionary tasks should be completed.



9.3 When the correct decision-making process is followed, a risk-based approach can result in significant cost savings while maintaining appropriate levels of safety, reliability and performance.

10. Documentation and evidence

10.1 For any tailoring decision that affects statutory duties (task removal, frequency change, criticality change, or alternative approach to statutory compliance), the Client and/or Service Provider should record, as a minimum:

- (a) what was changed;
- (b) why it was changed;
- (c) who approved the change;
- (d) any references used (legislation, ACoPs, guidance, industry standards);
- (e) the date of decision and review cycle.

10.2 Applying a documented process will greatly assist in evidencing these decisions.

11. Status of this Guidance

11.1 This Guidance is intended to support consistent understanding and good practice in applying and tailoring SFG20 Schedules. Clients and Service Providers remain responsible for ensuring that their maintenance regime is appropriate for their assets and operating context, and that Statutory duties are discharged.

Manufacturer's instructions could take precedence over SFG20 where they impose stricter requirements. Where O&M guidance is less prescriptive than SFG20 for statutory tasks, the User must justify and record any reduction in task scope or frequency.

11.2 This Guidance may be updated from time to time.

¹ Building Services Research and Information Association (BSRIA), SFG20 (part of Building Engineering Services Association (BESA), Chartered Institution of Building Services Engineers (CIBSE) and Institute of Workplace and Facilities Management (IWFM) agreed a common definition for the term "statutory" in the context of workplace and facilities management (WFM). This definition will be used going forward in guidance issued by these organisations.

Best Practices - sources of Related Guidance

The BS8544 2013 includes guidance on the tailoring of maintenance regimes, using accepted best practices methods to determine the impact of failure.

SFG20 separate guidance defines how the BS8544 method of 'Asset Criticality Risk Factoring' can be applied to the SFG20 task schedules, using SFG20 asset profiling.

There are other proven best practice methods of tailoring the maintenance regime as listed in the table below, as well as accepted techniques such as: Business Focused Maintenance; Availability,



Reliability and Maintainability Assessment; Failure Mode Effect Analysis (FMEA) techniques that are widely used to determine tailor the PPM regimes.

Source	Relevance to Tailoring	Notes
BSRIA BFM	Business focused maintenance (impact on functional usage and asset reliability)	Supports Sections 5 & 9 of tailoring guidance
BS8544 2013	Asset criticality risk factoring to inform customisation of maintenance plans	Best practice worked examples of risk profiling
CIBSE Guide M	Maintenance strategy & statutory context; variation factoring of maintenance regime	Aligns with SFG20 task baseline (colour coding)
IWFM AIM Guide	Governance & decision-making and use of maintenance strategies to inform tailoring	Supports documentation requirements

Key terms and definitions

Term	Definition	Relevant Tailoring Section
Asset	A physical item, system, or component that requires maintenance to ensure safe, reliable, and compliant operation.	General use across Sections 1–11
Asset profile	The SFG20-defined grouping of tasks associated with a specific asset type, used to generate a tailored maintenance regime.	Sections 3, 4, 5, 9
CIBSE	Chartered Institution of Building Services Engineers – publisher of guidance on maintenance strategy, statutory context, and variation factoring.	Section 11.2
Client	Organisation that owns, occupies, or is responsible for the building or assets to which maintenance is applied.	Section 1
Criticality	A measure of the impact and consequence of failure of an asset or task, based on safety, statutory, operational usage, environmental, and business impact (high, medium, low). BS8544 defines criticality as the impact of asset failure on organisational objectives.	Sections 5, 7, 9
Facilities-iQ	SFG20's software platform through which SFG20 Schedules may be accessed and applied.	Section 1



NRM 3	New Rules of Measurement 3 – industry standard for maintenance costing and lifecycle planning, referenced for alignment with asset hierarchies and maintenance regimes.	Section 11.2
O&M	Operation and Maintenance manuals provided by manufacturers, containing instructions, maintenance intervals, safety notices, and warranty conditions.	Section 11.1
Optimise	A risk-based method (as best practice in BS8544-2013) for determining the “must-do, should-do, and could-do” tasks to achieve an optimised maintenance regime.	Sections 5, 9, 11.2
OUs	A task within an SFG20 Schedule where the frequency is intended to be set by the User based on asset and site-specific variables.	Section 8
PPM	Planned Preventative Maintenance – scheduled maintenance activities designed to prevent failure, maintain statutory and legal compliance, and ensure safe operation.	General use across Sections 2–11
Service Provider	The organisation (including contractors) delivering maintenance services to the Client.	Section 1
SFG20 Schedule	The proprietary standard maintenance specification for building engineering services produced and maintained by SFG20.	Section 1
Statutory	Anything required by primary legislation (Acts of Parliament) and secondary legislation (Regulations, Statutory Instruments, Rules, Orders). Industry guidance and ACoPs may support discharge of statutory duties.	Sections 3, 6, 7
Tailoring	Any change to an SFG20 Schedule applied to suit an asset, site context, risk profile, or compliance approach, including removing non-applicable tasks, adjusting frequency, or changing criticality.	Sections 3–10
User	Any person using SFG20 Schedules and/or Facilities IQ	Section 1 definitions



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