

SAAMA2018

Smarter approaches in asset management

4-6 JUNE | NH The Lord Charles Somerset West



AM Designations and Qualifications

Update and Next Steps

Rob Childs and Wyhan Jooste | June 2018

Overview

- ❖ Background and objectives
- ❖ Final interpretation of the definitions of the designations – linked to roles
- ❖ Submission requirements (across all levels)
- ❖ Pilot application processand refinements
- ❖ Beyond the pilot and CSAM



Background

- ❖ Objective – recognition of the essential role that PEOPLE perform in ensuring that AM systems are appropriate and enable them to deliver
- ❖ SAQA approved SAAMA's application to register a professional designation (Nov 2016)
- ❖ “Certified Senior Asset Manager” (CSAM) - in terms of the national qualifications framework
- ❖collaboration of leaders in AM from countries across the globe, incl SA linked to the preparation, and launch in 2014, of ISO 55001 (principles for asset-intensive organisations to most effectively and efficiently manage assets)
- ❖ Public sector – providing basic services that support social well-being and facilitate economic growth
- ❖ Private sector – enhancing business performance and maximising job opportunities

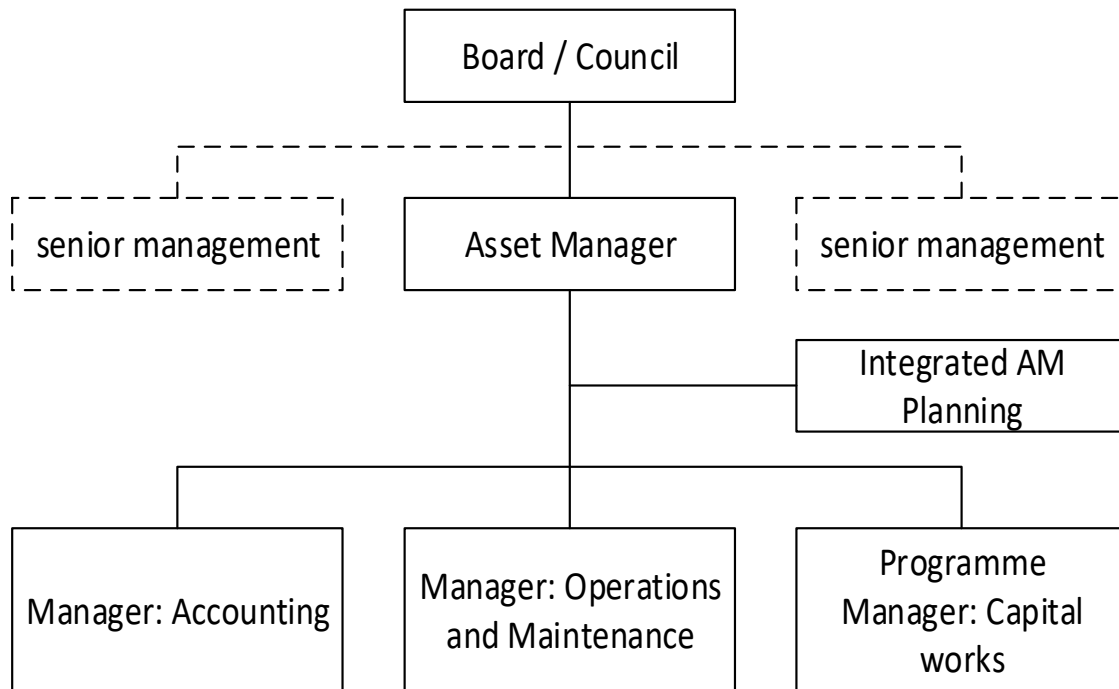


Objectives

- ❖ Raise the profile (and therefore pride and motivation) of people responsible for the foundational performance of infrastructure (that may often be over-looked until things go wrong)
- ❖ Provide a cross-sectoral and multi-layered career structure in which young people can enter and confidently grow according to their capabilities, or in which domain specialists can be equipped to better contribute to overall organisational objectives
- ❖ Successful delivery is the result of effective integration of the contributions of the various members of the AM TEAM.....each applying their specific competencies, aware of the impact of their contribution to the whole



AM Team



- ❖ **Domain-specific** teams led by a person competent in that field eg project management, asset accounting, or maintenance management
 - Organisation-wide policies, strategies, and plans with respect to that domain (and who may in turn adopt aligned *domain-specific* policies, strategies and plans)
 - Small organisations – often individuals
- ❖ Supported by junior / trainees
- ❖ Integration - covering the whole ambit of AM



Role definitions linked to designations (high level summary)

CFAM										12 yrs NQF 8	Responsible for strategic leadership in AM: <ul style="list-style-type: none"> Strategic leadership / corporate sponsor in complex operational environments; and / or Contributes significantly to the advancement of the AM BOK
CSAM										8 yrs NQF 7	Responsible for integrated AM outcomes (significant portfolio) <ul style="list-style-type: none"> Determines integrated AM policy, strategy, procedures, and plans, ensuring these are properly informed Ensures effective risk, financial and performance control Advises asset owners, participates in top management
CPAM		CPAM		CPAM		CPAM		CPAM		5 yrs NQF 6	Responsible for managing a specific domain of AM <ul style="list-style-type: none"> Informs and implements organisational policy, strategy, procedures and plans with respect to the domain
CAAM	CAAM	CAAM	CAAM	CAAM	CAAM	CAAM	CAAM	CAAM	CAAM	2 yrs NQF 5	Responsible for implementing tasks in a specific domain of AM <ul style="list-style-type: none"> Coordinates

Note: the designation hierarchy is structured substantially in line with that adopted by Australia's Asset Management Council (AMC)though specific interpretation has been added



Gazetted CSAM designation

- ❖ SAQA approval only for CSAM designation – others expected to follow
- ❖ SAQA requirements for CSAM:
 - ❑ **Member of SAAMA**
 - ❑ **Bachelor** in Engineering (or equivalent *international* qualification as evaluated by SAQA) – or in another primary background (at discretion of SAAMA)
 - ❑ Minimum set of theoretical **short courses** at approved training providers
 - ❑ Portfolio of evidence of 8 years (min) relevant experience in the field of AM (with references)
 - ❑ Specified SAAMA examination as final evaluation
 - ❑ Commit to Code of Conduct
 - ❑ Maintain minimum 15 cpd points every 3 years (with portfolio of evidence)
 - ❑ In line with the above, SAAMA must adopt...:
 - RPL policy
 - Designation progression pathway



Detailed requirements (established by SAAMA Work Group)

Designation	Role	Registration requirements #		
		Work experience	Knowledge	Practice
CAAM – Certified Associate Asset Manager	Responsible for implementation of specific operational processes within a domain of AM. In so doing: <ul style="list-style-type: none"> • Implements domain-specific tasks • Coordinates as a member of the AM team 	Minimum of 2yrs in AM	<ul style="list-style-type: none"> • NQF 5 or RPL in core discipline; • Short intro course on AM; and • “Core” version of CAMA (or adjusted SCPP^) 	Demonstrated successful application of required competency in line with the CAAM role *
CPAM – Certified Practitioner in AM	Responsible for the management of a specific domain of AM. In so doing: <ul style="list-style-type: none"> • Informs organisation-wide policies, procedures, strategies and plans relating to the domain • Implements organisation’s applicable risk, performance and financial management controls, and informs optimisation within the domain • Integrates inputs from and provides outputs to other AM practitioners in the organisation 	Minimum of 5yrs in AM	<ul style="list-style-type: none"> • NQF 6 or RPL in core discipline sup with short AM course(s); or Physical Asset Practitioner qualification; and • CAMA (or updated SCPP^) 	Demonstrated successful application of required competency in line with the CPAM role relating to a significant asset portfolio *



.....continued

Designation	Role	Registration requirements #		
		Work experience	Knowledge	Practice
CSAM – Certified Senior Practitioner in AM	<p>Responsible for the management of integrated AM outcomes of a significant portfolio; in so doing:</p> <ul style="list-style-type: none"> • Develops and implements integrated organisational AM policies, procedures (comprising processes, roles, support systems, models and data), strategies and plans • Ensures policy, strategy and tactical and operational decisions are properly informed • Ensures effective risk, performance and financial management control • Ensures implementation of ongoing AM practice improvement • Integrates with / participates as part of top management 	Minimum of 8yrs in AM	<ul style="list-style-type: none"> • NQF 7 or RPL in core discipline suppl with applicable AM courses; or Physical Asset Manager qualification; and • CAMA (or updated SCPP[^]) 	Demonstrated successful application of required competency in line with the CSAM role relating to a significant asset portfolio



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Designation	Role	Registration requirements #		
		Work experience	Knowledge	Practice
CFAM – Certified Fellow in AM #	Providing strategic leadership in the field of AM. In so doing: <ul style="list-style-type: none"> • Provides strategic leadership in complex operational environments; and / or • Contributes significantly to the advancement of the AM industry 	Minimum of 12yrs in AM	<ul style="list-style-type: none"> • RPL (NQF 8); and • CAMA (or updated SCPP^) 	Successful application of required competency in line with the CFAM role

* “core disciplines” include trades, engineering, architecture, facilities management, quantity surveying, town planning, and management sciences as applicable – option of demonstrating competency in the core discipline in the form of registration with recognised industry institutions at the respective level

^ “updated / adjusted” version of SCPP – if to be used, needs to be brought to equivalent standard as CAMA – also format to be modernised etc (...or use CAMA only, with window of time for SCPP holders to convert?) – at CAAM level, this should be focussed on the fundamental principles of broad AM only

role includes individuals external to an AM organisation (such as consultants, academics, researchers)

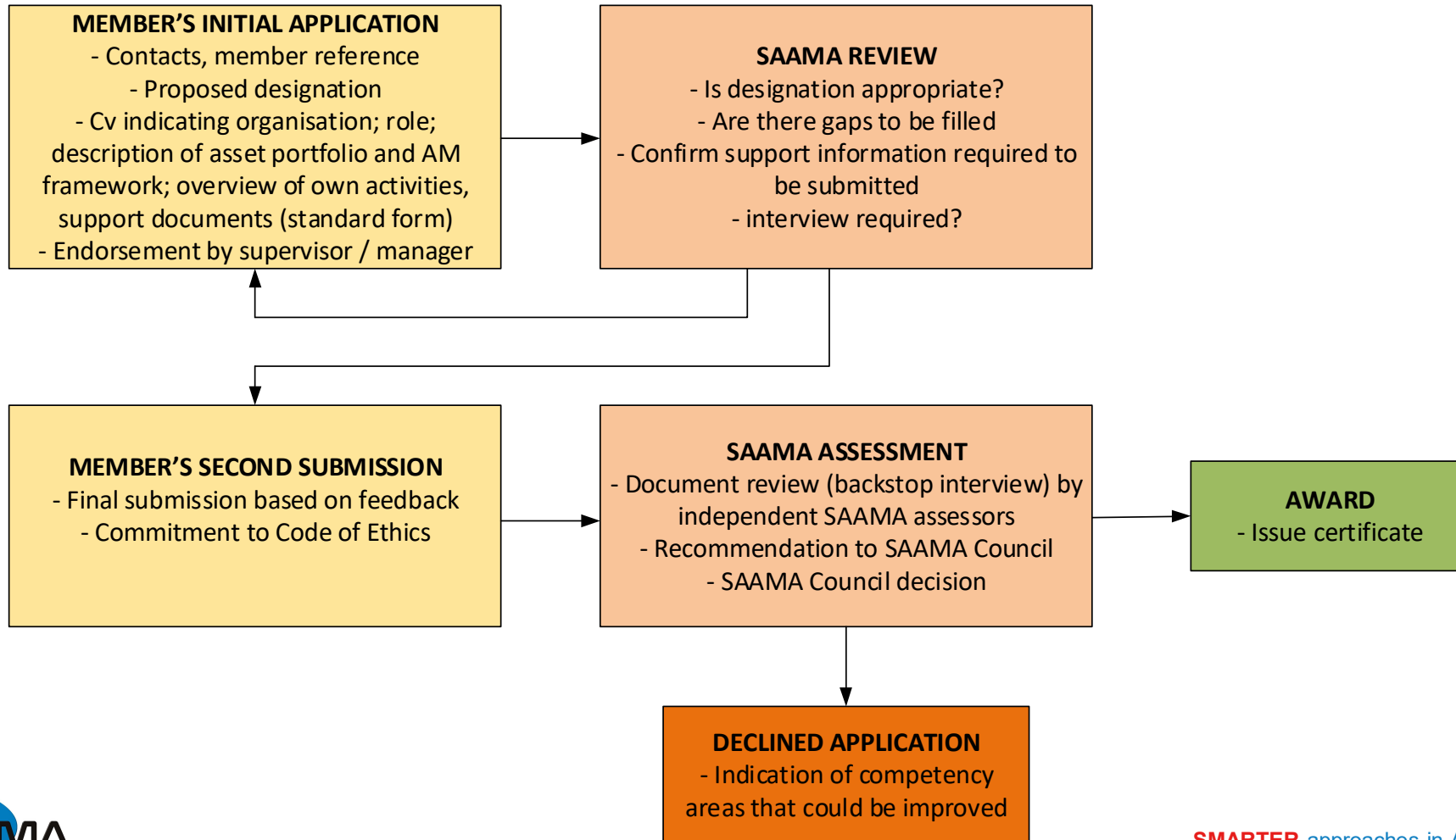


Draft application process

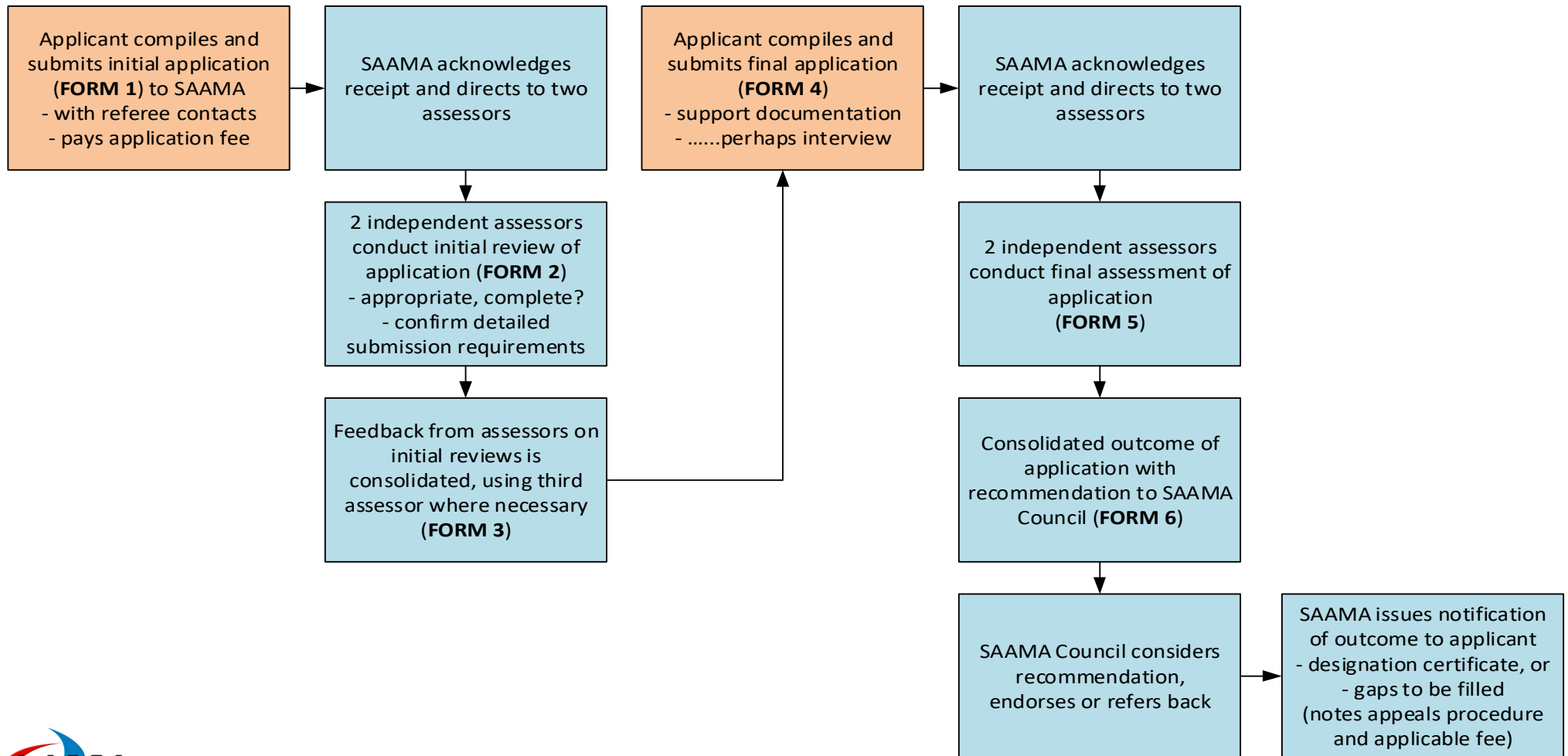
- ❖ 2-stage process
 - ❑ initial screening and confirmation of application requirements
 - ❑ final submission (including supporting evidence and the option of an interview)
- ❖ Reviewed **independently** by two assessors from a panel appointed by SAAMA (...no vested interest) - 3rd independent review if required – recommend to SAAMA Council
- ❑ Applicants may submit appeals
 - ❑ Process-based - Appeals Committee appointed by SAAMA Council (decision is final) – admin fee
 - ❑ Content-based - new application (with associated fee). If process appeal, then goes to.



Application process



Application and assessment process



Pilot

- ❖ Draft forms – hard copy and on website
- ❖ Revised forms – clarity, alignment to criteria
- ❖ Call to members issued – volunteers to pilot
 - ❑ Assessors
 - ❑ Applicants
- ❖ 14 applicants for CSAM
 - Meet requirements – 3
 - Need additional information – 2
 - Need to confirm equivalent qualifications – 3
 - CSAM requirements not met / substantially incomplete information – 6
- ❖ Draft alternative to engineering-based degree: ***“Baseline degree at minimum NQF 7 in a field within the ambit of asset management (including architecture, quantity surveying, town planning, accounting, business management) supplemented with accredited short courses at NQF 7 addressing broad-based physical asset management”***



CALL FOR SUBMISSIONS FOR THE PILOT PHASE OF THE CSAM DESIGNATION

Background and objectives

In November 2016 the South African Qualifications Authority (SAQA) approved SAAMA's application to register a professional designation – “Certified Senior Asset Manager” (CSAM) - in terms of the national qualifications framework. This emanated from collaboration of leaders in AM from



Next steps

- Confirm / refine CSAM application process, forms, and on-line functionality (including assessments)
- Advise SAAMA members (and a broader audience) of the interpretation of “other” baseline degrees
- Confirm awards (based on pilot)
- Agree costs / fees around:
 - Applications
 - Appeals
 - Assessments
- Apply to SAQA to proceed with other designations
- Extend engagement with other bodies (professional, government) – cross-sectoral traction



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AM Qualifications

Update and Next Steps

History

- Two AM qualifications initiated by National Treasury (in 2013)
 - Physical Asset Practitioner
 - Physical Asset Manager
- Quals developed and submitted but remained in limbo for various reasons
- SAAMA WG reviewed 2013 versions during 2017
 - Updated from PAS 55 focus to aligned with ISO 55000



Qualification Descriptions

Physical Asset Practitioner

- NQF Level: (5-) 6
- Credits: 232 (2 years)
- Entry requirements: NQF 4 with Maths
- A qualified learner will be able to:
 - Maintain the AM system
 - Coordinating the processes of the various stages in the life cycle of physical assets
 - Interpreting, implementing and reporting
 - Participating and informing relevant aspects of physical asset management knowledge
 - Contributing to the statutory reporting

Physical Asset Manager

- NQF Level: (7-) 8
- Credits: 256 (2 years)
- Entry requirements: B degree or 5Y exp. or PAP
- A qualified learner will be able to:
 - Design and develop an AM system
 - Perform strategic and annual AM planning
 - Establish the AM capability of an organisation
 - Implement and monitor the AM system
 - Report on operational and financial performance
 - Review and evaluate the effectiveness of the AM system



Roles

- Development Quality Partner (DQP): **National Treasury**
 - Manage the process of developing PAP and PAM, curricula and assessment specifications
- Assessment Quality Partner (AQP): **SAAMA**
 - Develop assessment instruments and manage external summative assessment
- Skills Development Providers (SDP): **universities, training providers, consultants, etc.**
 - Develops and delivers learning programmes which culminate in qualifications
 - Manages internal (formative) assessments



Timeline and Progress

