

---

---

**Facility management — Management  
systems — Requirements with  
guidance for use**

*Facility management — Systèmes de management — Exigences avec  
directives d'utilisation*



This document is a preview generated by ERS



**COPYRIGHT PROTECTED DOCUMENT**

© ISO 2018

All rights reserved. Unless otherwise specified, or required in the context of its implementation, no part of this publication may be reproduced or utilized otherwise in any form or by any means, electronic or mechanical, including photocopying, or posting on the internet or an intranet, without prior written permission. Permission can be requested from either ISO at the address below or ISO's member body in the country of the requester.

ISO copyright office  
CP 401 • Ch. de Blandonnet 8  
CH-1214 Vernier, Geneva  
Phone: +41 22 749 01 11  
Fax: +41 22 749 09 47  
Email: [copyright@iso.org](mailto:copyright@iso.org)  
Website: [www.iso.org](http://www.iso.org)

Published in Switzerland

# Contents

Page

<b>Foreword</b>	<b>iv</b>
<b>Introduction</b>	<b>v</b>
<b>1 Scope</b>	<b>1</b>
<b>2 Normative references</b>	<b>1</b>
<b>3 Terms and definitions</b>	<b>1</b>
<b>4 Context of the organization</b>	<b>4</b>
4.1 Understanding the organization and its context	4
4.2 Understanding the needs and expectations of interested parties	4
4.3 Determining the scope of the FM system	5
4.4 FM system	5
<b>5 Leadership</b>	<b>5</b>
5.1 Leadership and commitment	5
5.2 Policy	6
5.3 Organizational roles, responsibilities and authorities	6
<b>6 Planning</b>	<b>7</b>
6.1 Actions to address risks and opportunities	7
6.2 FM objectives and planning to achieve them	7
<b>7 Support</b>	<b>8</b>
7.1 Resources	8
7.2 Competence	8
7.3 Awareness	8
7.4 Communication	8
7.5 Documented information	9
7.5.1 General	9
7.5.2 Creating and updating information	9
7.5.3 Control of documented information	9
7.5.4 FM information and data requirements	10
7.6 Organizational knowledge	10
<b>8 Operation</b>	<b>11</b>
8.1 Operational planning and control	11
8.2 Coordination with interested parties	11
8.3 Integration of services	11
<b>9 Performance evaluation</b>	<b>11</b>
9.1 Monitoring, measurement, analysis and evaluation	11
9.2 Internal audit	12
9.3 Management review	12
<b>10 Improvement</b>	<b>13</b>
10.1 Nonconformity and corrective action	13
10.2 Continual improvement	14
10.3 Preventive actions	14
<b>Annex A (informative) Guidance on the use of this document</b>	<b>15</b>
<b>Bibliography</b>	<b>45</b>

## Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see [www.iso.org/directives](http://www.iso.org/directives)).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see [www.iso.org/patents](http://www.iso.org/patents)).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see the following URL: [www.iso.org/iso/foreword.html](http://www.iso.org/iso/foreword.html).

This document was prepared by Technical Committee ISO/TC 267, *Facility management*.

# Introduction

## 0.1 General

Facility management (FM) integrates multiple disciplines in order to have an influence on the efficiency and productivity of economies of societies, communities and organizations, as well as the manner in which individuals interact with the built environment. FM affects the health, well-being and quality of life of much of the world's societies and population through the services it manages and delivers.

While FM has such a broad impact, recognition of its principles and practices at a global level has been lacking. This document provides the basis for a common interpretation and understanding of FM and the ways in which it can benefit organizations of all kinds.

The development of the market for FM services would be enhanced by the presence of a common global structure and supporting standard. The sector benefits from a common basis upon which FM can be assessed and measured. This is the primary driver for, and purpose of, this document.

In a globally-competitive environment, FM organizations and providers need to communicate among themselves and with interested parties using common principles, concepts and terms, including assessment and measurement of performance. This document is intended to raise the standard of care and increase levels of quality, thereby stimulating organizational maturity and competition for the delivery of FM.

The benefits of an integrated system standard for FM include:

- improved workforce productivity, safety and health and well-being;
- improved communication of requirements and methodologies among and between public and private sector organizations;
- improved efficiency and effectiveness, thus improving cost benefits to organizations;
- improved service consistency;
- providing a common platform for all types of organizations.

This document is applicable to any organization that wishes to:

- establish, implement, maintain and improve an integrated FM system;
- assure itself of conformity with its stated management policy;
- demonstrate conformity with this document by:
  - making a self-determination and self-declaration;
  - seeking confirmation of its conformity by parties having an interest in the organization;
  - seeking confirmation of its self-declaration by a party external to the organization;
  - seeking certification/registration of its FM system by an accredited third-party certification body.

## 0.2 Process approach

This document applies the framework developed by ISO to improve alignment among its International Standards for management systems.

This document promotes the adoption of a process approach when developing, implementing and improving the effectiveness of a management system standard to enhance customer satisfaction by meeting their requirements.

For an organization to function effectively, it needs to determine and manage numerous interrelated activities. An activity, or set of activities, using resources and managed in order to enable the transformation of inputs into outputs, can be considered as a process. Generally, the output from one process directly forms the input to the next.

The application of a system of processes within an organization, together with the identification, interactions of these processes and their management to produce the desired outcome, can be referred to as the “process approach”.

An advantage of the process approach is the ongoing control that it provides over the linkage between the individual processes within the system of processes, as well as over their combination and interaction.

When used within an FM system, such an approach emphasizes the importance of:

- a) understanding and meeting the demand organization’s requirements through an integrated planning process;
- NOTE A demand organization is an entity which has a need and the authority to incur costs to have requirements met. It is typically an authorized representative within a functional unit of the organization.
- b) the relationship between the integrated planning process and [Clauses 4](#) to [10](#) of the FM system;
- c) the documentation associated with the requirements of the FM system and the subject of certification assessments;
- d) all of the above in the context of management levels;
- e) continual improvement of processes based on objective measurement.

To preview the FM system, the core processes start with understanding and defining the following criteria within a demand organization.

- **Context of the organization:** understanding and determining the appropriate FM system (see [Clause 4](#)).
- **Leadership:** understanding organizational roles, responsibilities, policies and authorities (see [Clause 5](#)).
- **Planning:** understanding risks, strategic objectives and current policies (see [Clause 6](#)).
- **Support:** understanding available versus required resources in the form of financial, human and technology (see [Clause 7](#)).
- **Operations:** delivering integrated FM services (see [Clause 8](#)).
- **Performance evaluation:** benchmarking standards, monitoring and meeting target requirements (see [Clause 9](#)).
- **Improvement:** reviewing benchmarked standards, identifying and implementing process improvement initiatives (see [Clause 10](#)).

Reference is made to the demand organization and the organization throughout this document. This distinction is made due to the variable nature in which FM services may be delivered through internal staffing within the demand organization, external service providers, or a combination of the two. The requirements of this document apply to the FM organization. However, as illustrated in [Figure 1](#), the FM organization and the demand organization need to work together to clearly define needs to meet the core business strategy, and to develop FM policies and practices that will enable the core business activities of the demand organization. The organization (and top management) refers to the FM organization throughout, unless otherwise noted as the demand organization.

In addition, the clauses of this document can be considered through the process approach methodology known as “Plan-Do-Check-Act” (PDCA), as is illustrated in [Figure 1](#). PDCA can be briefly described as follows.

**Plan:** establish the objectives and processes necessary to deliver results in accordance with customer requirements and the organization’s policies.

**Do:** implement the processes.

**Check:** monitor and measure processes and product against policies, objectives and requirements for the product and report the results.

**Act:** take actions to continually improve process performance.

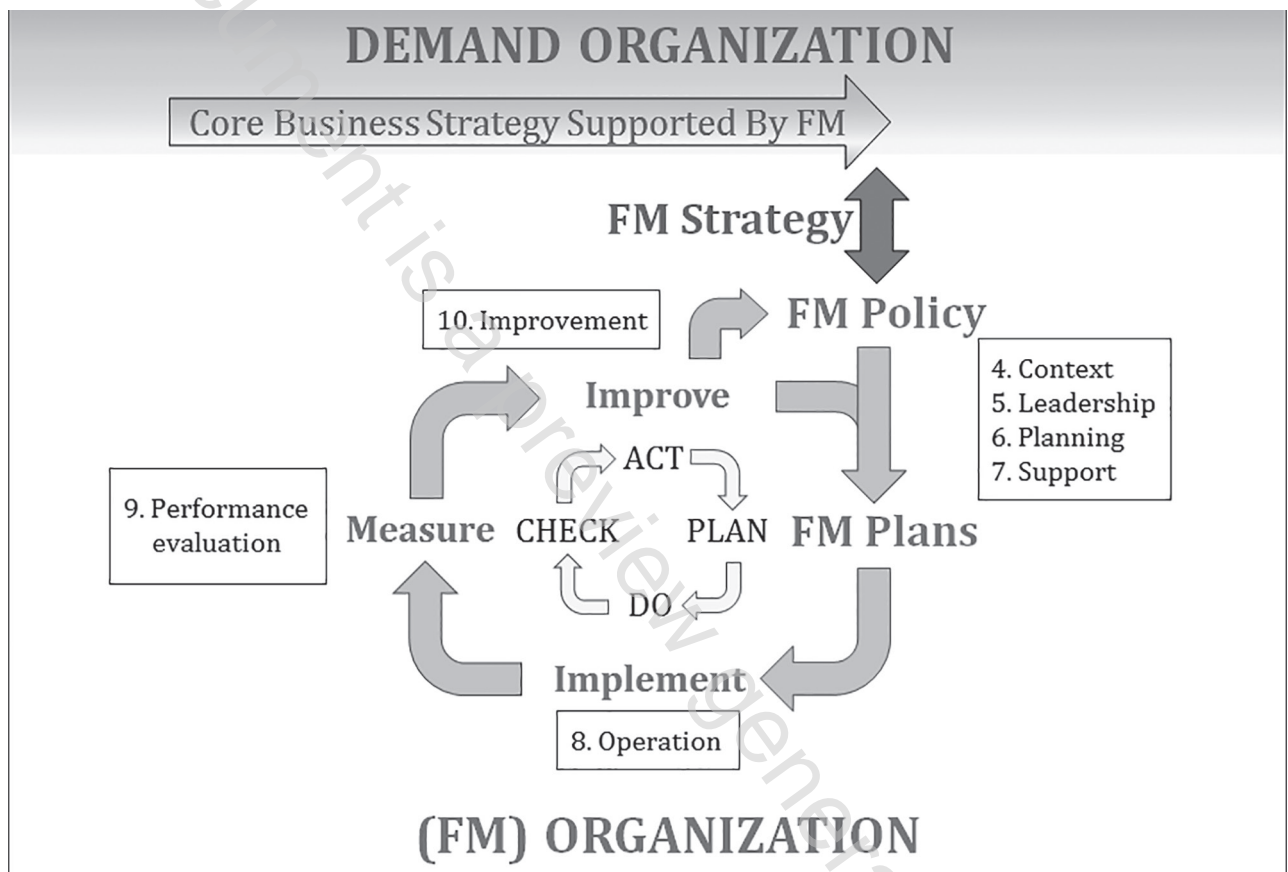


Figure 1 — Process approach methodology in facility management





# Facility management — Management systems — Requirements with guidance for use

## 1 Scope

This document specifies the requirements for a facility management (FM) system when an organization:

- a) needs to demonstrate effective and efficient delivery of FM that supports the objectives of the demand organization;
- b) aims to consistently meet the needs of interested parties and applicable requirements;
- c) aims to be sustainable in a globally-competitive environment.

The requirements specified in this document are non-sector specific and intended to be applicable to all organizations, or parts thereof, whether public or private sector, and regardless of the type, size and nature of the organization or geographical location.

[Annex A](#) provides additional guidance on the use of this document.

## 2 Normative references

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

ISO 41011, *Facility management — Vocabulary*

## 3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 41011 and the following apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <http://www.electropedia.org/>

NOTE 1 For the purposes of this document, the term “FM system” is used to refer to a system for facility management.

NOTE 2 For the purposes of this document, the term “organization” or “top management” will refer to the FM organization or FM top management unless otherwise stated.

### 3.1 organization

person or group of people that has its own functions with responsibilities, authorities and relationships to achieve its *objectives* (3.8)

Note 1 to entry: The concept of organization includes, but is not limited to sole-trader, company, corporation, firm, enterprise, authority, partnership, charity or institution, or part or combination thereof, whether incorporated or not, public or private.

Note 2 to entry: For the purposes of this document, the term “organization” refers to the FM organization unless otherwise stated.