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Facility management - Development of facility management strategy (ISO 41014:2020)

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Facility management - Élaboration d'une stratégie de facility management (ISO 41014:2020)

Facility Management - Entwicklung einer Facility Management Strategie (ISO 41014:2020)

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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).

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This document was prepared by Technical Committee ISO/TC 267, *Facility management*, in collaboration with the European Committee for Standardization (CEN) Technical Committee CEN/TC 348, *Facility Management,* in accordance with the Agreement on technical cooperation between ISO and CEN (Vienna Agreement).

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

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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 safety, well-being and quality of life of much of the world's societies and population through the services it manages and delivers (see ISO 41001).

NOTE 1 FM is defined as an organizational function which integrates people, place and process within the built environment with the purpose of improving the quality of life of people and the productivity of the core business (see ISO 41011:2017, 3.1.1).

FM is of strategic importance because it directly supports a demand organization's core business strategy, enabling its objectives and plans to be realized through the management of facilities that are safe, reliable, efficient, cost effective and sustainable.

NOTE 2 A demand organization is an entity which has a need and the authority to incur costs to have requirements met (see ISO 41011:2017, 3.3.1.1), e.g. a facility owner, operator, owner-operator, tenant or, in some cases, a managing agent acting on behalf of an owner.

This document refers to the demand organization and to the organization responsible for FM and facility services. A distinction is necessary because of the variable nature in which FM is organized and where facility services are delivered through personnel within the demand organization, through external service providers or a combination of the two.

The guidance in this document applies principally to the organization responsible for FM. In situations where there is presently no formal FM organization, a person (or body) should be appointed to take an active role in developing the strategy for FM.

ISO 41001 makes reference to a strategy for FM and sets this in the context of an FM management system.

The benefits of developing a strategy for FM include:

— improved understanding of the demand organization's objectives, needs and constraints and an appropriate approach to FM and facility services;

— reduced likelihood of a disconnect between the demand organization's objectives and needs and the means to support them;

— alignment between FM requirements and the demand organization's core business activities;

— improved efficiency in the management of FM in general and in the delivery of facility services in particular;

— consistent management practices from a methodology for developing a strategy for FM that is transparent, reproducible and measurable;

— a baseline for measuring improvement in the operational effectiveness of FM and its contribution to the core business of the demand organization;

— contribution to the cost-efficiency of the demand organization and, where applicable, its competitiveness;

— contribution to sustainability through the more efficient use of scarce resources.

This document is intended to fill a gap in the current provision of guidance to enable the most appropriate approach to FM and facility services to be determined. The aim is to promote awareness, competence development and expertise by providing strategic advice on the decisions affecting the management of facilities and/or the delivery of facility services.

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Specifically, this document is applicable to any FM organization that wishes to:

— utilize a methodology for developing a strategy for FM;

— assure itself of the alignment of the FM strategy with the core business strategy of the demand organization;

— 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 FM organization;

  — seeking confirmation of its self-declaration by a party external to the FM organization.

This document provides guidance for internal or external audit programmes. Users of this document can compare practices for developing a strategy for their FM with an internationally recognized benchmark, providing sound principles for the effective management of those practices.

0.2 Process approach

This document provides a common basis for understanding the factors that the FM organization should consider when developing a strategy for FM. It promotes a methodology to assist the FM organization in determining the most appropriate approach to, and arrangements for, the development of a strategy as a basis for the subsequent implementation of tactical and operational FM requirements to support the demand organization's core business, primarily its business activities.

This document emphasizes the decisions, activities, information, data and stakeholders that have to be coordinated into a manageable process for the development of a strategy for FM and the stages within it, including:

— understanding the demand organization: context, governance, risk management and strategic alignment (see Clause 4);

— developing FM requirements: interest in facilities, maturity of FM, stakeholders, priorities, functional requirements, services, delivery options and sourcing (see Clause 5);

— formulating the FM strategy: compiling the strategy, its format and content, budgetary requirements, procurement, communication, feedback and implementation (see Clause 6);

— managing performance: monitoring and control, performance indicators, measurement, review, corrective actions and lessons learned (see Clause 7);

— improving outcomes: applying lessons learned, reassessing outputs and targets, updating the strategy and policy (see Clause 8).

When adopting a process approach to the development of a strategy, it can be helpful to consider three phases: analysis, solution and implementation. These are covered by Clause 4, Clause 5 and Clauses 6 to 8, respectively.

The methodology is intended to be scalable, meaning that this document's provisions are applicable to any FM organization to a greater or lesser extent. As such, the FM organization can determine which of the provisions apply fully or partially to the development of the FM strategy in line with the objectives, needs and constraints of the demand organization's core business and the type, size, complexity, condition and geographical location of its facilities.

Similarly, the responsibility for the analysis, solution and implementation of the FM strategy can vary within organizations, depending on their structure and contractual scope. A responsibility assignment matrix can be used to allocate roles within the core business, the FM organization and service providers, as appropriate, for developing the FM strategy.

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Facility management — Development of a facility management strategy

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1 Scope

This document gives guidelines for the development of a strategy for facility management (FM) when the FM organization:

a) intends to ensure alignment between FM requirements and the objectives, needs and constraints of the demand organization's core business;

b) wants to improve the usefulness and benefits provided by the facilities for the betterment of the demand organization and its core business;

c) aims to meet the needs of stakeholders and applicable provisions consistently;

d) aims to be sustainable in a globally competitive environment.

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, definitions and abbreviated terms

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/

3.1 Terms related to facility management

3.1.1
facility management strategy
statement expressing the analysed needs of the demand organization, proposed facility management solution(s) and outline plan for implementation

3.1.2
facility management organization
FM organization
entity responsible for facility management

3.1.3
integrator model
arrangement in which a single supply chain partner engages, coordinates and controls key service providers across a range of business support functions

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