
**Facility management — Guidance
on strategic sourcing and the
development of agreements**

*Facility management — Directives sur le procédé
d'approvisionnement stratégique et d'élaboration des accords*



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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).

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).

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.

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

Introduction

The International Standards on facility management (FM) developed by ISO/TC 267 describe the characteristics of facility management and are intended for use in both the private and public sectors.

NOTE The terms “facility management” and “facilities management” can be used interchangeably.

International cooperation in the preparation of these International Standards has identified common practices that can be applied across a wide variety of market sectors, organizational types, process activities and geographies, and their implementation will help to:

- improve quality, productivity and financial performance;
- enhance sustainability and reduce negative environmental impact;
- develop functional and motivating work environments;
- maintain regulatory compliance and provide safe workplaces;
- optimize life cycle performance and costs;
- improve resilience and relevance;
- project an organization’s identity and image more successfully.

FM and related goods and services support the achievement of core organizational activities and objectives. The purpose of this document is to enable organizations identify and select the most appropriate options for the design, sourcing and delivery of FM. This document provides step-by-step guidance on the overall strategic sourcing process and on how to prepare and implement adequate internal or external FM agreements.

This document also provides guidance on:

- types of agreements;
- development, structure and contents of agreements;
- clarification of definitions, where appropriate.

This document promotes a methodology from a strategic level to an operational level, with examples and check lists. The application of this sourcing approach is intended to contribute significantly to adding value and optimizing costs of operations for FM professionals and procurement, finance and senior management teams.

[Annexes A](#) and [B](#) give examples of requirements for typical services and of a business case. [Annexes C](#) and [D](#) provide general and specific clauses and structured checklists for typical agreements. These annexes facilitate the selection of important clauses and preferences in the development of agreements, which allow for differences in origin, purpose and national rules and regulations, and are based on a generic platform.

This document is primarily written for complex in-house or externally procured services, and might need to be scaled down if used for smaller projects. Not all information in this document will be applicable to every FM process or agreement.

In this document, references to “agreement”, “service” or “service provider” are specific to FM and facility services agreement, facility service or facility service provider (internal or external). Any reference to a single service can also include multiple services.

Facility management — Guidance on strategic sourcing and the development of agreements

1 Scope

This document provides guidance on sourcing and development of agreements in facility management (FM). It highlights:

- essential elements in FM sourcing processes;
- FM roles and responsibilities in sourcing processes;
- development processes and structures of typical agreement models.

This document is applicable to:

- strategic processes related to service and support functions for the core business;
- development of FM strategies;
- development of facility service provision agreements covering both public and private service demand and internal and external production/delivery options;
- development of FM information systems;
- FM education and research;
- organization development and business re-engineering processes in major types of working environments (e.g. industrial, commercial, administration, military, healthcare, accommodation).

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 apply.

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

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

4 Sourcing strategy and understanding the core business context

4.1 Sourcing strategy

Aligning the structures and delivery of FM and support services provision with the demand organization's business strategy is critical to successfully achieving core business objectives. It is