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Facility management — Development of a facility management strategy

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Preface

This Standard was prepared by the Standards Australia Committee MB-022, Facilities management.

The objective of this document is to provide 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; and

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

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The terms "normative" and "informative" are used in Standards to define the application of the appendices or annexes to which they apply. A "normative" appendix or annex is an integral part of a Standard, whereas an "informative" appendix or annex is only for information and guidance.

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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 of 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 www.iso.org/iso/foreword.html.

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

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

3.1.4
post-occupancy evaluation
process of evaluating a facility after it has been completed and is in use to understand its actual performance against that required and to capture *lessons learned* (3.5.5)

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3.1.5
serviced workspace
serviced workplace
space that is equipped for immediate use usually on flexible terms and conditions

3.1.6
sustainable space provision
requirement for space that is necessary and affordable into the future against environment, social and economic criteria

3.1.7
target operating model
arrangement for delivering an organization's business strategy expressed in terms of the people, processes, data and technology required to deliver that strategy

3.1.8
workplace management
activities that optimize the use of a workplace

3.2 Terms related to assets

3.2.1
digital asset
data set describing an asset that is not necessarily physical

[SOURCE: ISO/TS 18101-1:2019, 3.10, modified — The example has been deleted.]

3.2.2
operability
capability of being used or operated effectively to provide an intended result or function

[SOURCE: ISO 22902-1:2006, 3.1.63]

3.3 Terms related to people

3.3.1
communication plan
documented description and communication needs of stakeholders

[SOURCE: ISO/TR 21506:2018, 3.11]

3.3.2
cross-cultural impact
effect on an individual, group or community when different cultures are combined

3.3.3
human capital
value of the collective knowledge, skills and abilities of an organization's people

[SOURCE: ISO 30400:2016, 4.1]

3.3.4
responsibility assignment matrix
documented structure that shows the allocation of delegated work responsibilities designated for delivery of scope or benefits

Note 1 to entry: RACI and RASCI are example responsibility matrices where, typically, R = responsible, A = accountable, S = supported, C = consulted and I = informed.

[SOURCE: ISO 21511:2018, 3.10, modified — Note 1 to entry has been added.]

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3.3.5
stakeholder impact assessment
method for evaluating the influence or other attributes that stakeholders possess in relation to an organization, facility or project

3.3.6
user
end user
person or organization which uses products or services from a supplier

[SOURCE: ISO 41011:2017, 3.3.5]

3.4 Terms related to sourcing

3.4.1
co-sourcing
combination of in-house and outsourced service delivery

3.4.2
procurement plan
document defining the process for acquiring goods and services from suppliers or service providers (internal or external)

3.4.3
self-deliver
service delivery based solely upon the provider's own resources

3.4.4
transition
change from one mode of service delivery to another

3.5 Terms related to process

3.5.1
baseline
minimum or starting point used for comparisons

3.5.2
brief
working document that specifies at any point the relevant needs and aims, resources of the client and *user* (3.3.6), the context of the project and any appropriate design requirements within which all subsequent *briefing* (3.5.3) (when needed) and designing can take place

3.5.3
briefing
process of identifying and analysing the needs, aims and constraints (the resources and the context) of the client and the relevant parties, and of formulating any resulting problems that the designer is required to solve

3.5.4
decision gate
activity that determines whether to continue, recycle or stop a process

3.5.5
lessons learned
knowledge distilled from the performance of a process, activity or event and used to improve future performance

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3.5.6
management of change
change management
process that systematically recognizes and communicates to the necessary parties changes of a technical, physical, procedural or organizational nature that can impact system integrity

[SOURCE: ISO 19345-2:2019, 3.1.22]

3.5.7
trigger event
action or condition initiating a response or treatment of a *risk event* (3.7.10)

3.5.8
work stage
division of a standardized process for the delivery and operation of a facility

3.6 Terms related to finance

3.6.1
cost/benefit analysis
analysis contributing to decision-making on whether to adopt a project or a plan by quantifying and comparing its costs and benefits

[SOURCE: ISO 13824:2020, 3.2]

3.6.2
value driver
anything that is added, or perceived to be added, to a product or service to improve its worth to stakeholders

3.7 Terms related to general business

3.7.1
business driver
key input or activity that drives the operational and financial performance of a business

3.7.2
business planning horizon
timeframe over which an organization should look into the future in its business planning and within which business decisions should be taken prior to the implementation of specific actions

3.7.3
capability maturity model
model that contains the essential elements of effective processes for one or more disciplines and describes an evolutionary improvement path from ad hoc, immature processes to disciplined, mature processes with improved quality and effectiveness

[SOURCE: ISO/IEC/IEEE 24765:2017, 3.472]

3.7.4
cost leadership
establishing a competitive advantage by having the lowest cost of operation in an industry or sector

3.7.5
disaster recovery
recovery phase that starts after the immediate threat to human life has subsided with the immediate goal to bring the affected area back to normalcy as quickly as possible

[SOURCE: ISO/TR 19083-1:2016, 3.10]

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3.7.6
enterprise system
combination of computer hardware and software applications that an organization uses to support its business processes and operations

3.7.7
governance
principles, policies and framework by which an organization is directed and controlled

[SOURCE: ISO 21505:2017, 3.1]

3.7.8
mission-critical system
system that is essential to the operation and survival of an organization

3.7.9
risk description
structured statement of risk usually containing four elements: sources, events, causes and consequences

[SOURCE: ISO/Guide 73:2009, 3.5.1.1]

3.7.10
risk event
uncertain discrete occurrence that, if it occurs, would have a positive or negative effect on the achievement of one or more objectives

3.7.11
risk register
record of information about identified risks

[SOURCE: ISO Guide 73:2009, 3.8.2.4, modified — The note has been deleted.]

3.7.12
risk treatment
process to modify risk

[SOURCE: ISO Guide 73:2009, 3.8.1, modified — The notes have been deleted.]

3.8 Terms related to measurement

3.8.1
lagging indicator
measure of an output

3.8.2
leading indicator
measure of an input

3.9 Abbreviated terms

PESTLE	political, economic, social, technical, legal and environment
RACI	responsible, accountable, consulted and informed
RASCI	responsible, accountable, supported, consulted and informed
SWOT	strengths, weaknesses, opportunities and threats

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4 Understanding the demand organization

4.1 Organization

4.1.1 General

Most organizations exist in an environment of dynamic change. No two organizations are likely to be the same and what makes sense for one could prove inappropriate for another. Understanding how a demand organization anticipates, plans and responds to change, especially change that could affect its need for, and impact on, FM and facility services, is a key consideration for its top management. Aligning the structures and delivery of FM and facility services with the demand organization's business activities is therefore critical to the successful achievement of its core business objectives. This applies whether the demand organization is a public or private body and is independent of the sector in which it operates. Nonetheless, its organizational structure, people, values, culture, management style and context have an effect upon how it deals with a wide range of factors and its decisions in regard to the need for, and use of, facilities.

Increasingly, demand organizations are working across geographies and in different cultures. They might experience differences in the cultural influences affecting them from one location to another. These can enrich the work environment and quality of work but might require a modified approach on the part of top management. These factors and the related decisions that the demand organization faces are typically made explicit in its core business strategy or a policy statement derived from it.

The demand organization's core business strategy should acknowledge the contribution that FM is expected to make to the success of its core business, however success is defined. Equally, the strategy for FM should reflect the demand organization's business objectives, needs and constraints and should be capable of translating them into FM requirements. Doing so greatly reduces the likelihood of a disconnect between the business objectives, needs and constraints and the means to support them in the form of appropriate facilities and facility services. Consideration should be given to any business plans that would impact needs in regard to the current and future use of facilities and facility services and the business planning horizons over which these might occur (e.g. short, medium and long term as defined by the demand organization).

In practical terms, the core business strategy is concerned with how people in the demand organization make decisions and allocate resources to achieve the business objectives and the planning required for this purpose. The objectives can be achieved through actions that include but which are not limited to:

— formulating the FM strategy in alignment with the demand organization's core business strategy;

— policymaking;

— determining internal standards and guidelines (e.g. assets, space, activities and facility services);

— ensuring the health, safety and security of people within and in close proximity to the facilities;

— proactive management of risk events;

— ensuring business continuity in the event of disruption to normal use of the facilities;

— supporting disaster recovery;

— providing practical support for the demand organization's management of change;

— assessing the impact of facilities on business activities, environment and community;

— maintaining relations with authorities and other stakeholders;

— approving business plans and budgets;

— procuring goods and services;

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— providing a resilient and sustainable response.

The FM organization should be mindful of the extent to which it should address the issues in this document to help satisfy the business objectives and needs of the demand organization. The aim should be for the FM organization to consider each issue sufficiently to arrive at a balanced understanding of needs.

Where information and data sought by the FM organization cannot be provided by the demand organization, appropriate assumptions should be made and stated explicitly in documentation and communication concerning the strategy for FM.

4.1.2 Structure

The demand organization's nature, size, structure and location have a direct impact on the need for facilities and facility services and so the current and future organizational structure should be defined where practicable. Any changes to the existing organizational structure (e.g. expansion, contraction, relocation, divestment or restructuring) and the time frame involved should be documented.

In an ideal situation, the demand organization's facilities and facility services would fit the current organizational structure and anticipate changes within reasonable limits. Where this state has not been achieved or cannot be achieved, the demand organization should document the reasons and any preference for closing the gap between the existing facilities and facility services and those regarded as a best fit. Consideration should be given to the demand organization's policy on sustainable facilities and space as part of any assessment of its long-term business planning. Any gap should be documented and made available for developing the FM strategy.

4.1.3 Human capital

The safety, well-being and efficiency of the demand organization's people are key contributory factors to its success. There is a close relationship between organizational structure and people in many respects, not least the balance between required work and other human-centred activities or functions and the availability of suitably qualified and competent people.

The demand organization's plans for its people currently and into the future should be established together with the anticipated time frame. These plans should reflect any growth, contraction, re-deployment or relocation of people and the reasons (e.g. recruitment to target new markets and greater turnover or reduced headcount and lower operational expenditure).

4.1.4 Value system and organizational culture

A value system represents the set of beliefs and behaviour that people share and is closely associated with an organization's culture, which adds social and psychological dimensions. Collectively, they can be expressed as the way in which things are done in an organization. More formally, they are used to define an approach to work or other human-centred activities and functions. Examples are found in policy statements, internal standards and procedures that map out the beliefs, attitudes, behaviour, roles and responsibilities of people within an organization and relations with external bodies. In documenting such an approach, account should be taken of actual or potential cross-cultural impacts.

The FM organization should identify those existing policies, internal standards and procedures that guide the day-to-day business of the demand organization, including those relating to the facilities and facility services, and should take them into account when developing the FM strategy. Any gap in the coverage of essential provisions relating to the facilities or facility services should be documented. Details should be made available for developing the FM strategy.

4.1.5 Management style

The way in which a demand organization's business objectives are accomplished by its managers defines its management style. This varies from organization to organization, sector to sector and location to location, even from one manager to another, and might also be influenced by external factors. It is

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