BS EN ISO 41018:2022

BSI Standards Publication

# Facility management — Development of a facility management policy

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The UK participation in its preparation was entrusted to Technical Committee FMW/1, Facilities management.

A list of organizations represented on this committee can be obtained on request to its committee manager.

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# Facility management - Development of a facility management policy (ISO 41018:2022)

Facility management - Élaboration d'une politique de facility management (ISO 41018:2022)

Facility Management - Entwicklung einer Facility-Management-Politik (ISO 41018:2022)

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## European foreword

This document (EN ISO 41018:2022) has been prepared by Technical Committee ISO/TC 267 "Facility management" in collaboration with Technical Committee CEN/TC 348 “Facility Management” the secretariat of which is held by SN.

This European Standard shall be given the status of a national standard, either by publication of an identical text or by endorsement, at the latest by February 2023, and conflicting national standards shall be withdrawn at the latest by February 2023.

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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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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).

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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 organizations, societies and communities, 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).

This document makes reference 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 FM organization. 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 FM policy. Unless otherwise stated in this document, "organization" refers to the FM organization.

ISO 41001 makes reference to an FM policy in the context of an FM system.

The benefits of developing an FM policy include:

— a framework for setting FM objectives;

— support for the management of risk;

— a commitment to the continual improvement of the FM system;

— leadership and commitment by top management or an agent of the demand organization to the operation of the FM system;

— reduced likelihood of a disconnect between the FM strategy and operational FM requirements;

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

— a commitment to the protection of people, property and the environment;

— strengthening of related policies of the demand organization.

In a hierarchy of decision-making and actions, the FM policy is positioned between the FM strategy and operational plans. The FM policy is derived from the FM system, which is all-encompassing in its scope although not in terms of detailed requirements or recommendations.

This document is intended to complement the current provision of guidance on FM policy in the context of the FM system (see ISO 41001). The aim is to promote awareness, competence development and expertise by providing advice on those decisions that affect the management of the facility and the delivery of facility services.

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

— utilize a methodology for developing an FM policy;

— assure itself of the alignment of the FM policy with the FM strategy (see ISO 41014);

— provide a framework for setting FM objectives and operational FM requirements.

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

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## 0.2 Process approach

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

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

— defining the FM policy framework (see Clause 4);

— compiling the FM policy (see Clause 5);

— implementing the FM policy (see Clause 6);

— review and revision of the FM policy (see Clause 7).

The methodology is intended to be scalable, meaning that this document's provisions are applicable to any organization to a greater or lesser extent. As such, the organization can determine which of the provisions apply fully or partially to the development of the FM policy.


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