



Technical Report

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Facility management — Existing performance management in facility management organizations — State of the industry

*Facility management — Gestion de la performance dans les
organismes de facility management — État de l'industrie*

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Foreword

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

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.

Introduction

Facility management (FM) directly involves or impacts a significant portion of the world's total workforce, indicating that improving FM can have a significant impact on how demand organizations function worldwide. As a result, effective FM performance measurement and management is essential within the FM profession to ensure FM professionals and their organizations understand and meet the objectives of demand organizations. While there is a large body of existing efforts to provide meaningful performance measures that align with demand organization objectives and business practices, there does not seem to be a clear and consistent approach across the FM industry.

This document provides a summary of existing research, methodologies and performance indicators, and creates a path forward for standard development which addresses performance measurement and management needs.

This document builds on previous efforts completed by ISO/TC 267 regarding performance measures and improvement. The underlying strategy is threefold and designed to provide efficient progress towards a well-organized collection of work outputs:

- a) exploring a broad understanding of the current state of FM performance measures and improvement across all demand organizations with an anticipated greater interest and engagement from a broad-based perspective;
- b) modularizing work output development into smaller, more focused initiatives that are part of the broader framework (allowing greater participation and a work output focused on meeting specific requirements);
- c) creating a long-range approach that can be adjusted and enhanced as circumstances dictate, allowing for improved life cycle management of the work output products.

Facility management — Existing performance management in facility management organizations — State of the industry

1 Scope

This document provides a robust understanding of existing performance measures in facility management (FM) organizations and the needs of both:

- the demand organization;
- the FM organization across the breadth of public and private sector organizations, profit and not for profit.

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 terminology databases for use in standardization at the following addresses:

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

4 Context

4.1 History

Since its beginning in 1980s, as studies related to the history of FM show, the profession has evolved from a function with responsibility for dealing only with “hardware,” such as buildings, furniture and equipment, to a professional discipline concerned with “software,” looking at people, processes, data, environment, and health and safety.

For some, FM went from being the custodial function of a building superintendent/janitor concerned largely with operational issues of maintenance, cleaning and tenant security to a more complex one, where the cost of its management and operation has led to the need for tactical and strategic functions.

This has raised the profile of the discipline along with other support functions such as human resources management and information technology.^[22]

Demand organizations range from private sector entities with a financial performance focus to public sector and federal government organizations whose primary objectives are often not financially driven. Similarly, profit versus not for profit influences the selection of the demand organization's performance indicators and, in many instances, FM organizations become nested with supporting roles between a demand organization and a third-party service provider delivering some or all of the FM activities to the demand organization. These entities typically have different objectives.

How different countries with dissimilar social-economic milestones adopt FM must also be considered. The research by Lindholm and Leväinen^[17] reveals how the diverse approaches adopted by societies in cultivating leadership and organizational growth are directly influenced by societies and social, economic and historical progress. Every country has its own culture, type of organization and leadership, resulting in different levels of FM at different stages of development. Due to these differences in leadership and organizational structure, it is logical that the demands set for facility professionals differ and the quality realized is valued differently. Differences in FM leadership and organizational structure also impact the way in which FM is performed, measured and managed.

Historically, performance management and measurement has mainly focused on outcomes, utilizing available information to establish a quantifiable indicator, and then measuring whether the desired performance was achieved in the context of the performance measurement. More recently, performance management has expanded within FM organizations to incorporate forward-looking performance management that also incorporates measurements assessing an organization's ability to identify and adapt to future requirements versus historical performance.

Performance measurement is important because it provides the basis for an organization to assess how well it is progressing towards its predetermined objectives, to identify areas of strengths and weaknesses, and to decide on future initiatives, while aiming to improve organizational performance.^[2] The function of performance measurement is to generate a class of information that will be useful in a wide variety of problems and situations. It focuses on the means and results (ends) or processes and outcomes and can be described in terms of practices and metrics. Performance measurement includes:

- enhancing improvements;
- adopting a long-term perspective;
- more precise communication;
- allocating resources to the most attractive improvement activities;
- an effective and efficient planning, control and evaluation system;
- motivating individuals and encouraging the correct organizational behaviour;
- supporting management initiatives and managing change.

Organizations can use performance measures to:

- identify success;
- identify whether they are meeting customer requirements;
- understand their processes (to confirm what they know or reveal what they do not know);
- identify where problems, bottlenecks and waste exist, and where improvements are necessary;
- ensure that decisions are based on facts, and not supposition, emotion or intuition;
- show if the improvements planned actually happened.

A performance measurement system can be defined as a complete set of performance measures and indicators derived in a consistent manner according to a forward set of rules or guidelines. It is a means of monitoring and maintaining organizational control, i.e. the process of ensuring that an organization pursues strategies that lead to the achievement of overall goals and objectives. Performance measures can be used to force an organization to focus on the right issues.

To reduce the complexity of performance measurement, a wide range of measurements must be arranged or categorized. Representing the cause-and-effect relationship of an organization's strategy has shown to be helpful to categorizing a huge number of measurements in connection to core business and surroundings.^[12] On the other hand, the overview of key performance indicators (KPIs) can be useful to organizations in different contexts and on different levels: operational, tactical and strategic.