
Facility management — Scope, key concepts and benefits

Facility management — Domaine d'application, concepts clés et bénéfices

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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 broad 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 reducing 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.

Without International Standards, the development of FM is market-driven, with the risk that developing nations and smaller organizations are either left to accept what they are offered, regardless of its suitability to their culture and needs, or otherwise subsumed by what the major supply side providers offer. At the same time, global providers are unable to compete as effectively as they could because of the absence of a single standard for the planning and description of FM and related support services. The development of the market for FM has been hampered by the absence of a common global structure with associated standards. In particular, small organizations, both buyers and suppliers, have been hindered in participating effectively in their respective markets. The sector needs standards against which FM, facility services and management systems can be assessed and measured.

This document makes use of concepts from other standards in the field of FM and introduces FM concepts which could be the subject of future standardization work.

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Facility management — Scope, key concepts and benefits

1 Scope

This document outlines the scope, key concepts and benefits of facility management (FM) and provides a context for the use and application of the terms defined in ISO 41011.

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 Scope of FM

All organizations rely on support processes, which are often critical to their core business. FM integrates and optimizes a broad spectrum of support processes and delivers their output (the facility services), which enable the demand organization to focus on its primary activities. The aim of FM is to ensure that this support is available in line with the organization's mission and strategy, e.g. in an appropriate form, defined quality and quantity, and provided in a cost effective manner.

In the past, there have been different understandings of the concept of FM globally, regionally, nationally or even within different types of organizations. FM capabilities have evolved in different ways in different countries, as has the quality of service provided. Demand organization expectations have evolved from local to national, and are now becoming global.

As a result of this evolution, the term FM is now used in different ways. Meanings range from a strategic business process model that integrates support services, to the name of the unit or entity in an organization managing these services, or even down to the discipline taught.

NOTE The term FM is also sometimes used for the provision of (single) operational services such as cleaning or housekeeping. Within this document, the term "facility service" is used in this context, which is more appropriate given the integrative function in the definition of FM.

5 Business process background of FM

5.1 Business process

To understand FM, an understanding of where the FM organization fits within the core business is essential.

5.2 Core business/primary activities and separating the support processes

The primary activities of an organization constitute its distinctive and indispensable competencies in its value chain. Every organization relies on support services that provide an infrastructure within which the primary activities can be achieved effectively. The relationship and interface between facilities processes and the primary activities need to be decided by each organization according to the needs of that organization, and should be reviewed as those needs and the competitive environment evolves.

EXAMPLE In the case of an automobile manufacturer, the primary activity of the organization is the manufacture of automobiles. The factory is a facility that supports the primary activity, a manufacturing operation. The FM organization has processes and activities that allow the effective manufacture of automobiles, i.e. the appropriate environment, power for manufacturing, and other spaces to oversee the manufacturing activity. These activities help to create an environment within which the manufacture of automobiles can be completed effectively and efficiently.

5.3 Assigning support processes to FM

FM requires specific competencies and a holistic approach which distinguishes FM from the isolated provision of one or more support services, often called facility services. Assigning support services is an important step in the identification of FM.

EXAMPLE An example of a support service that is often managed separately is the cleaning of buildings. Most organizations do not treat this as a core business process. However, if the core business is to provide cleaning services to other businesses, then its position within the organization is central and other services become support for the core business.

6 Key concepts in FM

6.1 FM model

FM requires a broad and clear understanding of the interdependencies within processes of a demand organization. A variety of FM models are employed around the world. A common element between them is the integrated delivery of a support service to the core business of a demand organization.

There is no single system for delivering FM. Solutions are dependent on a range of factors, including but not limited to the following:

- geographical location;
- organizational risks involved;
- mission criticality;
- availability of support services;
- skills, expertise and capacity of internal specialists;
- host organizational core business culture and management structures;
- core business strategy and market position;
- needs and requirements of the demand organization.

The methodology for analysing all these factors is explained in ISO 41012.

FM aligns with the goals and long-term strategies of the whole organization, but it also translates this alignment into day-to-day service for individual people, their well-being, their productivity and their quality of life. In addition, FM supports organizational units (e.g. business areas, sites or departments) in achieving business results. FM therefore acts on the main three organizational levels: strategic, tactical and operational.

6.2 Broad scope of FM and facility services

FM covers and integrates a very broad scope of processes, services, activities and facilities enabling cost-effective, safe and healthy workplaces and ensuring an efficient provision of facility services. The distinction between the primary activities and support services is decided by each organization. The International Standards on FM developed by ISO/TC 267 reflect a clear distinction between facility services and other support services, which are discrete, non-integrated service lines. Although the latter can be integrated into an FM delivery system, on their own they do not merit the use of the term FM.

Facility services may include the following:

- managing real estate or sites providing space (e.g. factories, offices, laboratories, classrooms, hospitals, shops, warehouses, data centres, airports, military installations, hotels, museums, playgrounds, prisons, internal roads, parking, lawns, parks);
- managing infrastructure (e.g. roads, bridges, dams, canals, levees, railroads, and transit systems);
- managing equipment and systems (e.g. structural components, furniture and workplace equipment, information and communication technology, lighting, sanitary, heating, ventilation and air conditioning, elevators, safety and surveillance, building automation and information management, computer-aided FM, transport vehicle fleet, primary business specific systems);
- managing utilities (e.g. electricity, gas, oil, district heating, solar energy, geothermal energy, pressurized air, technical gases, water treatment);
- safety management, security management, catering, access control, fleet management, reception and visitor services, printing services, greens service, winter service, event management, etc.;
- specific services for users and guests, which make all of these resources productive for them and for the organization and which maintain their functionality.

A facility is a collection of assets built, installed or established to serve the needs of an entity (i.e. to serve the needs of people or an organization). A single asset (e.g. a car or an air handling unit) is not a facility, nor is something that has not been built, even if it is an asset (e.g. a nature preserve).

Application of FM is not constrained, e.g. FM techniques could be applied to a cruise liner if required, although most large scale, specialized assets of that type would normally have their own specialized management disciplines.

7 Purpose and benefits of FM

7.1 General

The purpose of FM is to improve the quality of life of people and the productivity of the core business of organizations.

The main benefits of implementing an FM approach in organizations are as follows:

- a simple and manageable concept of internal and external responsibilities for services, based on strategic decisions, which leads to systematic insourcing or outsourcing procedures;
- clear and transparent communication between the demand side and the supply side by dedicating persons as single points of contact for all services, which are defined in an FM agreement;
- a most effective use of synergies amongst different services, which will help to improve performance and reduce costs of an organization in alignment with its strategic goals;
- reduction of conflicts between internal and external service providers, due to fewer and better managed interfaces;

- integration and coordination of all required support services, ensuring quality and efficiency as well as flexibility and adaptability;
- transparent knowledge and information on service levels and costs, which can be clearly communicated to the end users to ensure that quality meets requirements;
- improvement of the sustainability of an organization by the implementation of life cycle analysis for the facilities and reduction of organizational risks;
- a means to boost the reputation of the organization and how it is perceived by its stakeholders, and to improve the accountability of the organization to the communities that it serves.

FM synthesizes all the ideas outlined in this document into an applied management function, understanding the needs of the core business and interpreting the decisions of top management to define the demands for support services across the entire organization.

7.2 Productivity

Organizations face constant pressure to improve overall performance. Within organizations, the FM function competes with other functions for limited resources, which challenge facility managers to optimize performance by integrating facility processes even more effectively and by providing support even more efficiently. When these objectives are achieved, FM can contribute to higher productivity and to improving the competitiveness of the demand organization.

All sectors and organizations rely on the workplace to be cost effective in order to be economically successful. FM and the value that it brings, at whatever level and scale, contributes to the organization's viability, risks and efficiency.

7.3 Impact on people

By providing effective built and work environments, FM contributes to people's health, safety, security and environmental needs. Well-designed and operated workplaces help to increase motivation and productivity, resulting in a positive impact on employee recruitment and retention, corporate culture and brand identity.

Built assets have a public impact, even when private bodies own them. How buildings are managed and operated not only affects those who work in them or enter them, but also those who pass by or live in their vicinity. Efficiency management and operation therefore affects a much broader group of stakeholders than might initially be imagined.

7.4 Risk mitigation

Risk analysis is a process used to understand the nature, sources and causes of risk. A careful evaluation will ensure foreseeable risks are identified, quantified and, where possible, eliminated. It is also used to study impacts and consequences. The level of detail and complexity applied to the review will depend upon the potential impact and likelihood of occurrence.

Organizations can function without the formal application of FM, but this means accepting avoidable risks, including the following:

- non-compliance with regulatory or statutory obligations;
- increased operating costs;
- reduced employee productivity;
- reduced organizational flexibility to respond to changing circumstances;
- greater adverse environmental impact;
- increased officer and director liability.

7.5 Sustainability

Sustainability is an important topic for FM professionals, and is becoming more of a mandatory practice than an optional trend. Many global, financial and environmental factors are contributing to the need for a shift to sustainability. FM can add substantially to the sustainability of an organization because it covers a broad spectrum of activities concerning economic, environmental and social aspects. With its holistic approach, FM will play an important role in the years ahead in managing future requirements.

At a strategic level, it is important to consider the life cycle costs of each activity and investment. This may include the principles of sustainability, by considering not only the financial costs but also the social and environmental impacts and their associated costs. These costs can then be carried forward to a life cycle analysis to provide an enhanced financial assessment. In doing so for all supporting assets and as a management support for all assets in an organization, FM creates additional value for the organization and the society as a whole.

A dominant factor for sustainability is the new construction of buildings. A known source of conflict in the process of achieving optimal life cycle costs is the interface between design and construction, on the one hand, and administration, maintenance and operation of buildings, on the other hand. As a result, there may be misunderstandings in the specification of user requirements, missing or wrongly formatted data, inadequate quality, material or building technique, all of which may lead to less sustainability and higher maintenance and operation costs. The FM organization is fully responsible for the accommodation of the primary activities, including renting, leasing or new construction.

The potential benefits of integrating construction and operation under the same responsibility is often a major argument for public-private partnership models. It is hoped that new initiatives (e.g. building information management) will help to reduce the interface problem irrespective of the organizational form.

7.6 Identity

FM advises top management on the way in which the built infrastructure of the demand organization contributes to the visual quality of the outside world and how the organization, in turn, is perceived by the outside world. Depending on the objectives and mission of the organization, FM also executes the exposure symbolically representing the organization in relation to the surrounding world and helps to create an atmosphere of feeling comfortable in the workplace. This includes the way in which the demand organization cares for their guests and customers.

7.7 Cost and quality

All decisions about the configuration of support services and FM are related to a value judgement on what constitutes an acceptable cost to deliver acceptable outcomes. FM aims to balance demand and supply inside an organization, in order to reach the optimized mix between requirements/service levels and capabilities/constraints/costs of support services. To optimize performance and the value of assets, FM aligns demand and supply based on the economic, organizational and strategic objectives.

The economic and added value should be linked to the desired level of service(s) expected by the demand organization. Consequently, the business case should include the following statements:

- a clear alignment of services with the requirements and needs of the demand organization;
- how the services will enable alignment with the demand organization's strategic intent;
- performance criteria for services and their impact on the related core business key performance indicators;
- how the services will help to provide a competitive advantage for the organization;
- risk analysis;