



SLOVENSKI STANDARD

oSIST prEN ISO 41014:2020

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Upravljanje objektov in storitev - Razvoj strategije upravljanja objektov (ISO/DIS 41014:2020)

Facility management - Development of facility management strategy (ISO/DIS 41014:2020)

Facility Management - Entwicklung einer Facility Management Strategie (ISO/DIS 41014:2020)

Facility management - Élaboration de la stratégie de facility management (ISO/DIS 41014:2020)

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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).

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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, Working Group 4.

This is the first edition.

A list of all parts in the ISO 410XX series can be found on the ISO website.

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 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).

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 A demand organization is an entity which has a need and the authority to incur costs to have requirements met (see ISO 41011); for example, 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 organization for this purpose, 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 a facility management (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 in the FM organization by providing strategic advice on the decisions affecting the management of the facilities and/or the delivery of facility services.

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 cannot be used for certification purposes but does provide guidance for internal or external audit programmes. Users of this document can compare practices for developing a strategy for their FM with an internationally recognised 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 6-8](#) 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.

Facility management — Development of facility management strategy

1 Scope

This document provides guidance on 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 provisions of this document. The latest edition of the referenced document (including any amendments) applies.

ISO 41001, *Facility management — Management systems — Requirements with guidance for use*

ISO 41011, *Facility management — Vocabulary*

ISO 41012, *Facility management — Guidance on strategic sourcing and the development of agreements*

3 Terms, definitions and abbreviations

For the purposes of this document, the terms and definitions given in ISO 41011 and the following apply. [Annex A](#) provides an alphabetical index of terms.

3.1 Terms related to facility management

3.1.1

facility management strategy

statement expressing the analysed needs of the demand organization, proposed FM solution(s) and outline plan for implementation

3.1.2

integrator model

arrangement in which a single supply chain partner coordinates and controls key service providers across a range of business support functions

3.1.3

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

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3.1.4

serviced workspace

serviced workplace

space that is equipped for immediate use usually on flexible terms and conditions

3.1.5

sustainable space provision

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

3.1.6

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

3.1.7

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]

3.2.2

operability

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

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

3.3 Terms related to people

3.3.1

communication plan

document describing when, what and how to communicate with project 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

[SOURCE: ISO 21511:2018, 3.10]

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

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 which specifies at any point in time the relevant needs and aims, resources of the client and user, the context of the project and any appropriate design requirements within which all subsequent briefing (when needed) and designing can take place

[SOURCE: ISO 9699:1994, 2.1]

3.5.3**briefing**

process of identifying and analyzing 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

[SOURCE: ISO 9699:1994, 2.2]

3.5.4**decision gate**

activity that determines whether to continue, recycle or stop the project

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3.5.5

lessons learned

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

3.5.6

management of change

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

3.5.8

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 13824:2009, 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

amount of time that an organization will look into the future when preparing a plan

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