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Upravljanje objektov - Razvoj politike upravljanja objektov (ISO/DIS 41018:2021)

Facility management - Development of a facility management policy (ISO/DIS 41018:2021)

Facility Management - Entwicklung einer Facility-Management-Politik (ISO/DIS 41018:2021)

Facility management - Élaboration d'une politique de facility management (ISO/DIS 41018:2021)

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Facility management — Development of a facility management policy

ICS: 03.080.10

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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 [or Project Committee] ISO/TC 267, Facility management,

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A list of all parts in the ISO 41018 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.

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).

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.

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.

NOTE 3 A facility management (FM) organization is an entity that is responsible for facility management (see ISO 41014:2020, 3.1.2), e.g. a department, division, unit or group within the demand organization defined for this purpose, or a supplier of multiple facility services that offers a distinct facility management function.

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) ought to 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.

Policy is defined as the intentions and direction of an organization, as formally expressed by its top management (see ISO 41011:2017, 3.7.2). FM policy is a course or principle of action adopted or proposed by the FM organization that is intended to achieve defined outcome(s) (e.g. net zero carbon operations, workplace well-being, zero incidents and minimal whole-life cost).

NOTE 4 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.

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This document is intended to fill a gap in 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 FM 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;
- 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.

0.2 Process approach

This document provides a common basis for understanding the factors that the FM organization ought to consider when developing an FM policy. It promotes a methodology to assist the FM 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 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 policy.

Facility management — Development of a facility management policy

1 Scope

This document gives guidelines for the development of a facility management (FM) policy when the FM organization:

- a) intends to establish a framework for setting FM objectives and the effective management of risk;
- b) intends to achieve alignment between the FM strategy and the demand organization's operational FM requirements;
- c) wants to improve the usefulness and benefits provided by the FM system;
- d) aims to meet the needs of interested parties and applicable FM requirements consistently;
- e) 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*
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<https://standards.iteh.ai/catalog/standards/sist/36e9abb2-de36-4c60-8233-22a9b0fb8b00/osist-pr-en-iso-41018-2021>

3 Terms, definitions and abbreviations

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

3.1 Terms

3.1.1

acceptance criteria

evidence required for considering that requirements have been fulfilled

[SOURCE: ISO 22263:2008, 2.1]

3.1.2

after-action review

structured review or debriefing process for analysing an event, what happened, why it happened and how it can be done better

3.1.3

FM policy

text of the definition

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3.1.4

operating procedure **standard operating procedure**

authorized, documented procedure or set of procedures, work instructions and test instructions for production and control

[SOURCE: ISO 37500:2014, 3.22]

3.1.5

operational plan

documented collection of procedures and information that is developed, compiled and maintained in readiness for the conduct of operations

[SOURCE: ISO 24516-3:2017, 3.16]

3.2 Abbreviations

RACI responsible, accountable, consulted and informed

RASCI responsible, accountable, supported, consulted and informed

4 Defining the FM policy framework

4.1 Key principles

The organization should be guided by the demand organization's business objectives, FM system and FM strategy when developing, implementing, maintaining and updating the FM policy. Specifically, the FM policy should be:

- aligned with the business objectives of the demand organization;
- supported by top management;
- appropriate to the nature and scale of the organization and its operations;
- part of the daily work of the organization;
- clear, unambiguous and actionable, stating the actions that are acceptable and those that are not acceptable;
- coordinated with interested parties, with interdependent policy and with statutory and regulatory requirements;
- communicated to interested parties responsible for implementation and maintenance;
- periodically reviewed and updated.

NOTE ISO 41001 provides requirements for an FM system and ISO 41014 gives guidance with recommendations for the development of an FM strategy.

4.2 Strategic intent

The organization should establish an FM policy that is appropriate to the nature and scale of the organization and its operations. The FM policy should, at all times, be aligned with the organization's business plan and be consistent with other relevant organizational policies, including those of the demand organization.

The organization should communicate the FM policy regularly within the organization and with the demand organization and other interested parties. The FM policy should be reviewed periodically and the findings of that review reported to top management.

The FM policy should inform FM procedures and operations (see [Figure 1](#)).

NOTE There can be overlap where the organization influences other demand organization objectives (e.g. occupational health and safety, environmental impact and sustainability); however, in a hierarchical context, FM must yield to, adopt and support, as applicable, policies developed by the demand organization (e.g. sourcing, procurement, information and data, quality, employment, inclusiveness and equity, and corporate social responsibility).

The distinction between the strategic, tactical and operational levels of the organization's management should be made clear. Policy declares the intent or guiding principle. Procedures are then the tactical level output that implements the policy in terms of operations. [Figure 1](#) shows the relationships.

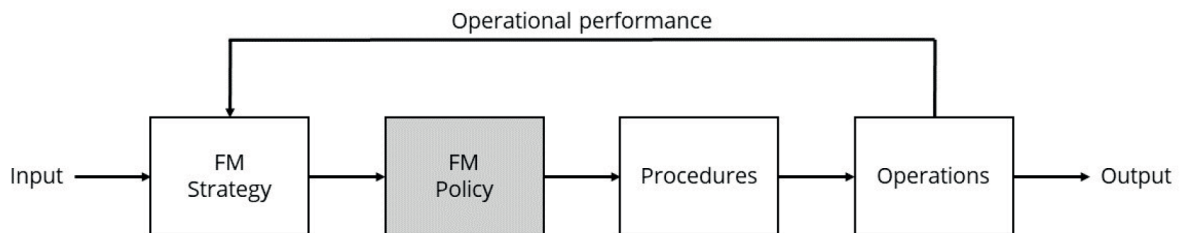


Figure 1 — Relationship between FM policy and FM strategy, procedures and operations

The FM policy should provide guidance on the following:

- approach to work and or other human-centred activities and functions;
- the way in which business is conducted in the organization;
- beliefs, values, attitudes and behaviour of people within the organization, taking into account cross-cultural impacts;
- roles, responsibilities and relationships with external bodies.

4.3 Expected impacts

4.3.1 General

NOTE 1 Appropriate behaviour will create a safe, healthy and secure environment for users and visitors. For the demand organization, there are likely to be benefits in terms of more efficient and effective FM operations, which can be expected to continue to support the core business. The FM policy can provide greater awareness of what is acceptable and what is not, and have the potential to reform inappropriate behaviour. Even so, it is possible that the effects of the FM policy might prove to be other than intended, with consequences that were not envisaged (see [4.3.3](#)).

The FM policy should provide users and all other interested parties with a frame of reference for their day-to-day work, or other role, as well as guidance on the operation and use of the facility and the behaviour expected of everyone. In framing the FM policy, the organization should make explicit the type and nature of facility services that are delivered so that intended effects (see [4.3.2](#)) are achieved and unintended consequences are avoided (see [4.3.3](#)).

The extent to which users might be satisfied or dissatisfied with any aspect of facility management and the delivery of facility services should be established through periodic surveys or other forms of inquiry. Care should be exercised when canvassing the opinions of users so that it is seen as a genuine attempt to understand the suitability of the facility and facility services.

NOTE 2 User satisfaction is a key success factor in FM. Understanding what users will accept and what they will not accept are important considerations when drafting the FM policy. ISO 10001 gives guidelines for planning, designing, developing, implementing, maintaining and improving customer satisfaction codes of conduct.