ISO 41000 **FACILITY MANAGEMENT**
A SERIES OF GLOBAL STANDARDS

By : PETER PRISCHL

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1 WHAT IS FACILITY MANAGEMENT? DEFINITION

The term "Facility Management" had been used since the 1950s. But its definition by ISO, the International Standardization Organization, only became fully valid as part of the ISO 41000 series of standards in 2018:

**"Facility Management is the 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."**

This is one dense sentence, and it is worth to look at its elements which together make up this definition:

IS THE ORGANIZATIONAL FUNCTION
Facility Management is a function, a task or a set of activities to be performed so that an organization can fulfill its purpose

Facility Management may also be understood as an area of expertise, a discipline, a profession, a field of study, an economic sector etc., but first and foremost it is a function of an(y) organization.

WHICH INTEGRATES PEOPLE, PLACE AND PROCESS
The integration of all three elements is the essence of the function of Facility Management for and in an organization.

Not singular management of any one of these elements,
not integration of any two of them,
only integration or integrative management of all three constitute Facility Management.

Facility Management, according to ISO 41001, is a management system and must be performed as such.

WITHIN THE BUILT ENVIRONMENT
Facility Management is applicable only in situations where an organization needs or uses a built environment of any sort.

Facility Management is not performed when e.g. people perform a process in nature, such as playing a game in the woods or hiking up a mountain.

WITH THE PURPOSE OF
Facility Management has a purpose which it must fulfill as its organizational function,
actually, two purposes.

IMPROVING THE QUALITY OF LIFE OF PEOPLE
The first purpose of Facility Management

AND [IMPROVING]
THE PRODUCTIVITY OF THE CORE BUSINESS
And the second, equally important purpose!
Productivity is commonly defined as the ratio of output to input, applied here to the core business.
This core business does not have to be a market economy type of product or service creation,
the core business, and thus the organization, can equally well be non-profit or public administration.

2 WHAT IS A MANAGEMENT SYSTEM?
A management system is defined by ISO as

**"Set of interrelated or interacting elements of an organization
to establish policies and objectives
and processes to achieve those objectives."**

An organization, in the ISO framework of terms, is

**"person or group of people
that has its own functions with responsibilities, authorities and relationships
to achieve its objectives."**

The elements of such a system include the organization's structure, roles and responsibilities, planning and operation.
A management system's scope may include the whole of the organization, specific functions of it, or one or more functions across a group of organizations.

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3 MANAGEMENT SYSTEM STANDARDS (MSS) VS. OTHER STANDARDS

There are more than 20.000 ISO "normal" standards of all kinds.

LESS THAN 100 STANDARDS ARE MANAGEMENT SYSTEM STANDARDS ("MSS").

The most popular MSS which has reshaped the way we think about quality, productivity and organization is the ISO 9000 Quality management series of standards.

A normal standard, often called "technical standard", standardizes, for example, the exact shapes and further properties of nuts and bolts – which is necessary so that they can fit together and fix a connection.

A management system standard ensures the "fit" and a "good connection" between and among people as they undertake something together (a process, or a set of processes) in an organization or between and among several organizations.

"ISO management system standards (MSS) help organizations improve their performance by specifying repeatable steps that organizations consciously implement to achieve their goals and objectives, and to create an organizational culture that reflexively engages in a continuous cycle of self-evaluation, correction and improvement of operations and processes through heightened employee awareness and management leadership and commitment.

The benefits of an effective management system to an organization include:

• More efficient use of resources and improved financial performance,

• Improved risk management and protection of people and the environment, and

• Increased capability to deliver consistent and improved services and products, thereby increasing value to customers and all other stakeholders.

Management system standards can be implemented by any organization, large or small."

4 HISTORY OF INTERNATIONAL FACILITY MANAGEMENT STANDARDS

Some national standards began to be developed by national standardization organizations in the 1990s. Interestingly, the big national standardization organizations such as in the US, in Great Britain or in Germany never did undertake development effort, possibly because there have been large and prominent Facility Management associations such as International Facility Management Association / IFMA with its headquarters in the United States, British Institute of Facility Management / BIFM or German Facility Management Association / GEFMA. Standards were developed in countries such as the Netherlands or Austria.

On the European level, as series of standards has been developed with the designation EN 15221 parts 1-7. These standards created a good resonance in the market and sparked off the efforts to develop a series of standards within ISO International Standardization Organization.

ISO TC (Technical Committee) 267 Facility Management was constituted in 2011 and took up its work in 2012. Three work groups were formed and created the following standards:

ISO 41011 Facility Management (FM) – Vocabulary

ISO 41012 Facility Management (FM) – Guidance on strategic sourcing and the development of agreements

ISO 41013 Facility Management (FM) – Scope, key concepts and benefits

ISO 41001 Facility Management (FM) – Management systems – requirements with guidance for use

According to international agreements, the European standards part 1 and 2 are being replaced by ISO 41011 and 41012. Parts 3 to 7 continue to be valid, it remains to be seen how ISO Facility Management standards development will proceed.

5 ISO 41011 FACILITY MANAGEMENT (FM) – VOCABULARY – CORE CONTENT

Clause 1, 2, 3 Scope, Normative references, Terms and definitions

- " 3.1 Terms related to facility management
- " 3.2 Terms related to assets
- " 3.3 Terms related to people
- " 3.4 Terms related to sourcing
- " 3.5 Terms related to process
- " 3.6 Terms related to finance
- " 3.7 Terms related to general business
- " 3.8 Terms related to measurement

6 ISO 41012 FACILITY MANAGEMENT (FM) – GUIDANCE ON STRATEGIC SOURCING AND THE DEVELOPMENT OF AGREEMENTS – CORE CONTENT

Clause 1, 2, 3 Scope, Normative references, Terms and definitions

- " 4 Sourcing strategy and understanding the core business context
- " 5 Sourcing process in FM
- " 6 Facility services provision
- " 7 Main characteristics of FM agreements
- " 8 Common considerations in agreements
- " 9 Preparation and development of an agreement
- " 10 Measure service provision performance

Annex A (informative) Example of requirements for a service
- " B (informative) Example of a business case content
- " C (informative) Structure of an agreement General clauses
- " D (informative) Service level agreements Benefits, preparation and structure of an agreement (SLA clauses)
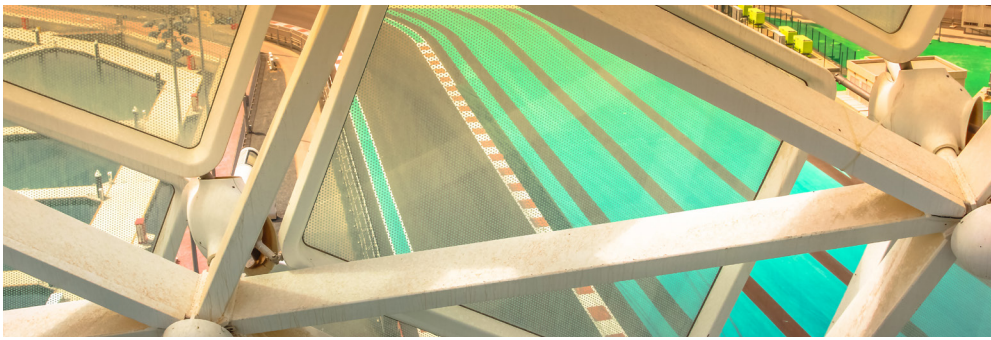
7 ISO 41013 FACILITY MANAGEMENT (FM) – SCOPE, KEY CONCEPTS AND BENEFITS – CORE CONTENT

Clause 1, 2, 3 Scope, Normative references, Terms and definitions

- " 4 Scope of facility management
- " 5 Business process background of FM
- " 6 Key concepts in FM
- " 7 Benefits of FM (purpose)

Annex A Evolution of terms & definitions from EN 15221 to ISO 41011

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8 ISO 41001 FACILITY MANAGEMENT (FM) – MANAGEMENT SYSTEMS – REQUIREMENTS WITH GUIDANCE FOR USE CORE CONTENT

Context of the Organization
- External & Internal Issues
- Interested Party Requirements
- Establish Scope
- Document Scope
- FM Management System

Planning
- Risks & Opportunities
- Plan / Address Risks
- Requirements of Stakeholders
- FM Objectives
- Implementation Plan
- Planning Horizons

Operation
- Processes
- Change Control
- Control Processes
- Customer Relationships
- Integrate Service Delivery

Improvement
- Nonconformity
- Corrective Actions
- Proactive Measures
- Gap Analysis
- Continually Improve
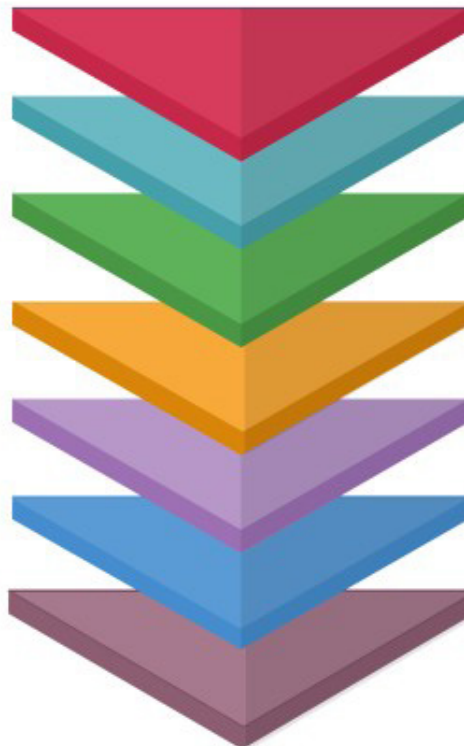
Leadership
- Leadership & Commitment
- Establish FM Policy
- Communicate FM Policy
- Relevant Roles
- Responsibility & Authority

Support
- ID & Secure Resources
- Source & Monitor
- Competencies
- Awareness
- Communications
- Information Required

Performance Evaluation
- Scope of Monitoring
- Monitoring Means & Methods
- Documented Results
- Evaluate Performance
- Performance Audits
- Top Management Review
- Communicate / Act on Results

9 What about "facilities management"?

The official ISO term is Facility Management. The Technical Committee is named Facility Management, Facility Management is used as the name for the series of standards and every iindividual standard uses Facility Management as the term.

However, "facilities management", which is used in some countries (e.g. the United Kingdom), is allowable to be used interchangeably with no difference in meaning.

10 ISO web resource on Facility Management standards

https://committee.iso.org/home/tc267

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About the Author

PETER PRISCHL

Peter Prischl, Managing Director, Drees & Sommer International, has more than twenty years of practice in Real Estate & Facility Management Consulting.

He has led major projects in Facility Management implementation for many government bodies on a community, federal state and national level (as well as the European Union level). Particularly he has been involved in the highly successful reorganization of the whole real estate of the federal government of Austria, and in similar initiatives in Germany. He is an expert member of ISO Technical Committee 267 "Facility Management" which is developing the ISO 41000 Facility Management standards.

Besides his work at Drees & Sommer, which is also taking him to the Middle East, he is a Visiting Professor at the RICS- and IFMA-accredited Kufstein University of Applied Sciences.

E-mail   Peter.prischl@dreso.com

Mobile   +49 160 9099 7587

About Drees & Sommer

For over 45 years, our partner-managed company has been supporting public and private sector principals and investors in all aspects of real estate in more than 40 offices worldwide.

Drees & Sommer provides project management, consulting and engineering services in various aspects of building design, construction and operation.

It serves real estate and facility management, finance, retail, tourism, life science, healthcare, automotive, manufacturing, aviation, mobility, transport and logistics, energy, utility and disposal, and public sectors.

Within our facility management consultancy scope, our team at Drees & Sommer Gulf focuses on the efficient and effective delivery of support value for organizations and tailormade operational FM concepts for assets. Our services ensure the integration of people, system, place, process and technology as part of individual client strategies such as digitization and revitalization.

Company Address: Dubai Internet City, EIB04 (BT) Building, Office No. 210, PO Box: 500128 Dubai

Main Contact:

Federico Minucci - Business Development

Tel: +971 4 365 2522

Email: federico.minucci@dreso.com

MEFMA

Middle East Facility Management Association

جمــعـيـة الـشـــرق الأوسط لإدارة المـرافق

P.O. Box 9525, Dubai, UAE, Email: info@mefma.org

www.mefma.org