

English Version

## Facility Management - Part 5: Guidance on Facility Management processes

Facility management - Partie 5 : Guide relatif au développement et à l'amélioration des processus

Facility Management - Teil 5: Leitfaden für Facility Management Prozesse

This draft European Standard is submitted to CEN members for enquiry. It has been drawn up by the Technical Committee CEN/TC 348.

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Recipients of this draft are invited to submit, with their comments, notification of any relevant patent rights of which they are aware and to provide supporting documentation.

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## European foreword

This document (prEN 15221-5:2018) has been prepared by Technical Committee CEN/TC 348 “Facility Management”, the secretariat of which is held by NEN.

This document is currently submitted to the CEN Enquiry.

This European Standard is one of the series ISO 41000 and EN 15221 “*Facility Management*” which consists of the following parts:

1. *ISO 41011:2017* Facility Management - Vocabulary
2. *ISO 41012*:Facility Management – Guidance on strategic sourcing and the development of agreements
3. *ISO/TR 41013* Facility Management – scope, key concepts and benefits
4. *EN 15221* Part 3: Guidance on quality in Facility Management
5. *EN 15221* Part 4: Taxonomy, Classification and Structures in Facility Management
6. *EN 15221* Part 5: Guidance on Facility Management processes
7. *EN 15221* Part 6: Area and Space measurement in Facility Management
8. *EN 15221* Part 7: Performance Benchmarking

Note With the addition of the ISO standards, Part 1 and Part 2 of *EN 15221* are withdrawn.

## Introduction

In 2013 the initiative was taken to interest parties at ISO level for the FM suite of standards of Europe, the EN 15221 parts 1 to 7. This resulted in the re-development of the standards for vocabulary, sourcing and agreements.

The result consists of the parts:

- ISO 41011 Facility Management – Vocabulary
- ISO 41012 Facility Management – Guidance on strategic sourcing and the development of agreements.
- ISO/TR 41013 Facility Management – Scope. Key concepts and benefits.

These standards also build on widely accepted management principles, in particular value chain (Porter, M E, (1985), “Competitive Advantage: creating and sustaining superior performance”, Free Press, New York) and quality control (PDCA (Plan, Do, Check, Act). Deming, W E (1986), “Out of the Crisis”, MIT, Cambridge). Reference to ISO 10014:2006, *Quality management – Guidelines for realizing financial and economic benefits*.

The principles of the Deming cycle (PDCA) underpin all of the standards but are applied to a different extent and depth in each. In fact there are different types of PDCA cycles depending of the term (e.g. long term, short-term).

These standards align to EN ISO 9000 family of standards for Quality Management Systems and applies specific guidance on the concepts and use of a process-based approach to management systems to the field of Facility Management.

The term “facility services” is used as a generic description in the standards. The term “standardized facility products” refers to the “standardized facility services” defined and described in EN 15221-4, *Facility Management – Part 4: Taxonomy, Classification and Structures in Facility Management*.

Countries can decide to substitute the term “product” into “service”, when they consider that it is important for a good acceptance and use of the standards in their own country.

The aim of all the standards is to provide guidance to Facility Management (FM) organizations on the development and improvement of their FM processes to support the primary activities. This will support organizational development, innovation and improvement and will form a foundation for the further professional development of FM and its advancement in Europe. Therefore, generic examples are provided in the standard to assist organizations.

These standards lay the foundation of the work that has to be done further more in developing Facility Management, for e.g. benchmark standards prEN 15221-7

The aim of the standard is to provide guidance to all stakeholders concerned by Facility Management (FM), especially providers and their clients on the development and improvement of their processes to support the primary activities. This will support organisational development, innovation and improvement and will form a foundation for the further professional development of FM and its advancement in Europe.

Facility Management is defined in ISO 41011, *Facility Management – Vocabulary*, and ISO/TR 41013 *Facility Management – Scope, key concepts and benefits* as the “integration of processes within an organisation to maintain and develop the agreed services which support and improve the effectiveness of primary activities”. Underlying this definition is a process-based, management systems approach, as defined in the EN ISO 9000 series.

Further development of European Standards in Facility Management, based on ISO 41011 and 41013 will rely therefore on a better understanding of the processes involved and the mechanisms for their integration. These processes need to be identified and described, mapped and modelled to produce a framework for Facility Management.

This standard lays the foundations of further work in developing Facility Management standards and further develops the processes involved in creating FM agreements as described within ISO 41012 and 41013. The guidance provided in this standard established the need for the FM processes to start with analysing and having a clear picture of the client organization and its primary processes as a basis for the development of the FM strategy. All major decisions along the route to final specification of service levels and qualities, choice of delivery model and eventually preparation of the appropriate form of procurement and agreements flow from this basis.

This standard has been developed as one of four new standards and adopted an agreed set of principles, underlying the Facility Management approach, to ensure consistency. These are incorporated in the basic principles of a process-based management system upon which this standard is founded.

The standard aligns to EN ISO 9000 family of standards for Quality Management Systems and applies specific guidance on the concepts and use of a process-based approach to management systems to the field of Facility Management. The standard also builds on widely accepted management principles, in particular value chain (Porter, 1985) and quality control (Deming, 1986) which underlie process-based management systems.

The process approach, described in this document, should be widely applicable across the European member countries. In order to do this they must build from the existing model in the previous standard (ISO 41011 and 41013), be generic, and should not be too prescriptive and enable companies and organisations to adapt them to their own processes.

Through applying the standard, organisations should be able to understand the importance of facility management processes to their effectiveness and understand the need to assess the maturity of their existing processes. This will provide a basis for developing and improving the facilities management processes through a consistent, process-based management approach. Generic examples are provided in the standard to assist organisations.

Facility management processes are integrated at three organisational levels - operational, tactical and strategic. Agreements about the outcomes of these processes need also to be made at these three levels: operational agreements with end-users, tactical agreement with business units and strategic agreement with the senior management group (board, managing directors).

#### References:

- Porter, M E, (1985), "Competitive Advantage: creating and sustaining superior performance", Free Press, New York;
- Deming, W E (1986), "Out of the Crisis", MIT, Cambridge.

## 1 Scope

This document provides guidance to FM organisations on the development and improvement of their processes to support the primary processes.

This document also sets out basic principles, describes high-level generic FM processes, lists strategic, tactical and operational processes and provides examples of process workflows.

The document is written from a primary processes, demand perspective for an audience of all stakeholders in FM processes.

## 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*

EN 15221-3, *Facility Management - Part 3: Guidance on quality in Facility Management*

EN 15221-4, *Facility Management - Part 4: Taxonomy, Classification and Structures in Facility Management*

## 3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 41011 and the following apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

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

### 3.1 activities

tasks that are needed to complete deliverables

### 3.2 client

organisation that procures facility services by means of a Facility Management agreement

Note 1 to entry: The client acts on a strategic level and has a general and/or key function in all stages of the relationship with the service provider. The customer specifies the facility services.

[ISO 41011 and ISO/TR 41013]

### 3.3 customer

organisational unit that specifies and orders the delivery of facility services within the terms and conditions of a Facility Management agreement

Note 1 to entry: The customer acts on a tactical level.

[ISO 41010 and ISO 41012]