ISO 41014:2020 (E)

Facility management — Development of a facility management strategy

Contents

Foreword

Introduction

1 Scope

2 Normative references

3 Terms, definitions and abbreviated terms

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
3.9 Abbreviated terms

4 Understanding the demand organization

4.1 Organization
4.1.1 General
4.1.2 Structure
4.1.3 Human capital
4.1.4 Value system and organizational culture
4.1.5 Management style
4.2 Governance
4.2.1 General
4.2.2 Ownership and use
4.2.3 Leadership
4.2.4 Regulation and compliance
4.2.5 Policy and procedures
4.2.6 Maturity of activities, processes and systems
4.3 Context
4.3.1 General
4.3.2 Business strategy
4.3.3 Objectives, needs, constraints and value drivers
4.3.4 Measuring success
4.3.5 Performance metrics
4.3.6 Markets and competitive analysis
4.3.7 Relationship between core and non-core activities
4.3.8 Target operating model
4.3.9 Current and planned non-core activities
4.3.10 Targets for improvement
4.3.11 Information and communication technology
4.3.12 Information management
4.4 Risk management
4.4.1 Threats and opportunities
4.4.2 Continuity and recovery planning
4.5 Strategic alignment

5 Developing FM requirements

5.1 Current and future interest in facilities
5.1.1 General
5.1.2 Nature of facilities

5.1.2.1 General
5.1.2.2 Existing facilities
5.1.2.2.1 General
5.1.2.2.2 Physical assets and space provision
5.1.2.2.3 Space utilization
5.1.2.2.4 Facility services review
5.1.2.2.5 Resources audit
5.1.2.3 Refurbished and new facilities
5.1.2.4 Serviced workspace
5.1.3 Sustainable space provision
5.2 Maturity of FM
5.2.1 General
5.2.2 Current competences
5.2.3 Targets for improvement
5.3 Briefing for refurbished or new facilities
5.4 Stakeholders
5.4.1 General
5.4.2 Facility users
5.4.3 Level of specification
5.5 Accessibility, inclusiveness and equalities
5.6 Functional requirements
5.7 Scope of services
5.7.1 General
5.7.2 Technical services
5.7.3 Business support
5.7.4 Integrator model
5.8 Service specifications
5.9 Outputs and targets
5.9.1 General
5.9.2 Environmental performance
5.9.3 Social performance
5.9.4 Economic performance
5.10 Service levels
5.11 Service delivery options
5.12 Sourcing
5.12.1 General
5.12.2 Internal service provision
5.12.3 External service provision
5.13 Innovations in service delivery
5.14 Market audit
5.15 Verification and feedback

6 Formulating the FM strategy

6.1 Compiling the strategy
6.2 Format and content
6.3 Budgetary requirements
6.4 Procurement
6.5 Communication and feedback
6.6 Implementation plan

7 Managing performance

7.1 Monitoring and control of performance
7.2 Performance indicators
7.3 Performance measurement
7.4 Performance review
7.5 Corrective actions
7.6 Feedback and lessons learned

8 Improving outcomes

8.1 Applying lessons learned
8.2 Reassessing outputs and targets
8.3 Updating the FM strategy
8.4 Updating the FM policy

Annex A (informative) Examples of threats and opportunities

Annex B (informative) Examples of factors affecting business strategy

Annex C (informative) Considerations when formalizing the FM strategy document

Annex D (informative) Example of an FM strategy

Page count: 41