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ISO 41000 series *Facility management*, in brief, with implications for FM consultants

Introduction

This article draws directly from free, online, mostly ISO, sources. Some of the ISO documents cited are reserved for licensed users but may be quoted or summarized.
The objective is for readers to become acquainted with the ISO 41000 series, devoted exclusively to Facility Management. We will focus on **ISO 41001, *Facility management – Management systems – Requirements with guidanc***e. ISO 41001 is the centerpiece of the series and the point of departure for implementing ISO 41000 provisions in an FM organization. It is the only standard in the series eligible for third party certification. The 41000 series of normative and informative documents is the ongoing work of ISO Technical Committee 267. ISO/TC 267 draws volunteers from national standards bodies in 51 countries.

Perspective - ISO

ISO/TC 267 advisory and working groups have engaged continuously since 2012 on a variety of projects. On a global scale, the 41000 series is "the foremost contributor to a more productive, sustainable, and livable Built Environment, ultimately achieving an improved Quality of Life for all."

Eleven working groups have so far published seven standards. Seven more are either under development or in review and update. Developing a new standard is a consensus project which typically takes two years or more.

Tech Committee 267 standards

- ISO 41001:2018 Facility management – Management systems – Requirements with guidance for use*
- ISO 41011:2017 Facility management – Vocabulary*
- ISO 41012:2017 Facility management – Guidance on strategic sourcing and the development of agreements*
- ISO/TR 41013:2017 Facility management – Scope, key concepts and benefits
- ISO 41014:2020 Facility management — Development of a facility management strategy
- ISO 41015:2023 Facility management — Influencing organizational behaviours for improved facility outcomes
- ISO 41018:2022 Facility management — Development of a facility management policy

- ISO/IEC 17021-11:2018 Competence requirements certification of Facility MS (*Not a 41000 series member per se. Required for third party certification, type A standards only. ISO 41001 is such a standard. ISO 9001 Quality management systems, was the first*.)

* Under review and update

Once published, a standard will be revised after three or more years. Three (marked * above) are in this stage. Four under development and not issued previously are:

- 41016 Facility management: a digital technology framework
- 41017 Guidance on emergency preparedness and management of an epidemic
- 41019 The role of FM in sustainability, resilience, and adaptability (Technical Report)
- 41030 Existing performance management in facility management organizations — State of the industry. (Technical Report)

ISO/TC 267 maintains technical liaisons with nine Technical Committees:

- Buildings and civil engineering works
- Terminology and harmonization of languages
- Organization and digitization of information about buildings and civil engineering works, including building information modelling.
- Quality management and quality assurance
- Asset management
- Occupational health and safety management
- Collaborative business relationship management
- Security and resilience
- Healthcare organization management

Standards comprise a management system

A standard is a recognized way of doing something - distilled wisdom of people with expertise in their subject and who know the needs of the organizations they represent. As documents, ISO standards provide requirements, specifications, guidelines, or characteristics that can be used consistently to ensure that materials, products, processes, and services are fit for their purpose. A closely related type of document, informative rather than normative, but included with standards in the ISO 41000 series, is the Technical Report. A technical report contains information of a different kind from that normally published in a normative document - not closely bounded by practice, inclusive of background and viewpoint.

The ISO 41000 series taken together guide implementation of a *management system* for FM. "A management system is the way in which an organization manages the inter-related parts of its business in order to achieve its objectives." Distinct fields and disciplines, in their roles and

functions, warrant separate management systems standards, thus the ISO 41000 series for FM, another (9000 series) for quality, another (55000 series) for asset management, and so on.

Standards require solid justification and intervals of defined, cooperative work to develop and vet to consensus. The ISO 41000 series brings large and prolonged benefits to FM and FM stakeholders. How can consultants help to bring speed, economy, and confidence to FM organizations adopting ISO 41000 standards and informative documents, focusing on ISO 41001?

Thorough and Essential

Let's look at ISO 41001**. The table of contents and crucial introduction to ISO 41001 appear first. The main topics and details shown will be familiar to FMs. The standard is thorough yet limited to essentials. Adoption is adaptable and scalable for any FM organization.

Printed on one side on business grade stock, the standard weighs 250 g, or about 9 oz and fits on fewer than 50 pages. What is inside?

The first three sections (called clauses)

1. Introduction to ISO and standards development and use.
2. Introduction of a process approach to FM system implementation and performance to meet requirements and to enhance customer satisfaction.
3. A diagram showing the operational clauses (major headings) of the standard, employing plan–do–check-act concludes the introduction.

The next four guide implementation.

1. Scope, Normative references, Terms and definitions.
2. Seven pages specify foundations: Context of the demand organization, Leadership, Planning, and Support - where support encompasses capabilities and resources of the FM Organization.
3. Seven more pages complete the standard, addressing planned Operations, Performance evaluation, and Improvement – all working from an FM Policy.
4. Annex, Guidance on the use of this Document, elaborates the clauses above.

**(English - others available): https://www.iso.org/obp/ui/#iso:std:iso:41001:ed-1:v1:en.

How could document so brief not be trivial or too general?

ISO 41001 can guide implementation and operations in any FM organization of any size in a satisfactory way as circumstances change and FM evolves. The standard refers formally to *FM Organization* as an organ of any enterprise which makes use of facilities. The latter is termed the *Demand Organization*. The *FM Organization* supports core business strategies of the *Demand Organization*, forming, accommodating, reforming, and always following an *FM policy*

and strategies as the bases to derive FM initiatives and assess performance. All FM organizations that perform well do this, each in its own context.

Implications for FMs and FM consultants

The emergence of ISO 41001 is well timed for the recognition of FM as a worldwide industry. There is widespread international interest. ISO 41001 implementation projects will become more numerous, and consulting opportunities with them.

To progress toward ISO 41001 certification, small projects using the ISO 41001 structure and provisions serve to frame FM work and document results, setting the stage for certification when ready. This approach has advantages of economy and learning.

The ISO 41001 Annex ("*Guidance on the use of this document"*) is necessary and sufficient for planning, explaining, and listing FM functions to assign and assess. For example, control of operations involves "delivering prescribed, measurable results", "achievement through scheduled, consistent and replicable planned mechanisms", and "providing documented reporting of results." How these elements come about, the specifics of why, what, when, and how - the standard does not offer, only that they must demonstrably fit circumstances, needs, and culture. Each solution is different, but the framework is universal.

Notes -

ISO catalog to purchase standards: https://www.iso.org/store.html

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