

# Facility Management —

## Part 1: Terms and definitions

The European Standard EN 15221-1:2006 has the status of a British Standard

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## National foreword

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## Facility Management - Part 1: Terms and definitions

Facilities management - Partie 1 : Termes et définitions

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## Foreword

This document (EN 15221-1:2006) has been prepared by Technical Committee CEN/TC 348 "Facility Management", the secretariat of which is held by NEN.

This European Standard shall be given the status of a national standard, either by publication of an identical text or by endorsement, at the latest by April 2007, and conflicting national standards shall be withdrawn at the latest by April 2007

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## Introduction

Facility Management is developing in various European countries. Driven by certain historical and cultural circumstances, organisations and business areas have built different understandings and approaches. In general, all organisations, whether public or private, use buildings, assets and services (facility services) to support their primary activities. By coordinating these assets and services, using management skills and handling many changes in the organisation's environment, Facility Management influences its ability to act proactively and meet all its requirements. This is also done to optimize the costs and performance of assets and services.

The main benefits of Facility Management approaches in organisations are:

- Clear and transparent communication between the demand side and the supply side by dedicating persons as single points of contact for all services, which are defined in a Facility Management agreement.
- Most effective use of synergies amongst different services, which will help to improve performance and reduce costs of an organisation.
- Simple and manageable concept of internal and external responsibilities for services, based on strategic decisions, which leads to systematic insourcing or outsourcing procedures.
- Reduction of conflicts between internal and external service providers.
- Integration and coordination of all required support services.
- Transparent knowledge and information on service levels and costs, which can be clearly communicated to the end users.
- Improvement of an organisation sustainability by implementing a life cycle analysis for the facilities.

The market of Facility Management (internal and external) in Europe with an estimated volume of several hundred billion Euros clearly shows that this field needs to be defined and described more clearly. Optimization of Facility Management requires a broad and clear understanding of the interdependencies of the organisation's processes and Facility Management processes. In order to have a common language, this standard aims to describe the basic functions of Facility Management and defines the relevant terms, which are needed to understand the context.

The purpose of this European standard is to define the terms in the area of Facility Management in order to:

- Improve communication between stakeholders.
- Improve effectiveness of primary activities and Facility Management processes, as well as the quality of their output.
- Develop tools and systems.

This European standard is a lead document in terms of standards in Facility Management that other initiatives should follow. Initiatives for other standards, guidelines and technical specifications cannot be made without reference to this lead document.

For better understanding of the terms and definitions used in this document, it is recommended to read the model and explanation in Annex A first. The Facility Management model is derived from several existing and highly developed solutions thus should not describe a status quo. The principles of developing the Facility Management model are also to keep it as simple as possible and also be adaptable to other specific tasks of organisations.

## 1 Scope

This European standard gives relevant terms and definitions in the area of Facility Management. It also provides insight into the scope of Facility Management.

## 2 Terms and definitions

For the purposes of this European Standard, the following terms and definitions apply.

**NOTE** More Facility Management related terms are defined in the specific Facility Management standards. In case of discrepancies this document is the ruling document.

### 2.1 benchmarking

process of measuring performance (including price) of facility services and comparing the results internally and/or externally

### 2.2 client

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

**NOTE** 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.

### 2.3 customer

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

**NOTE** The customer acts on a tactical level.

### 2.4 end user

person receiving facility services

**NOTE** A visitor could also be an end user.

### 2.5 facilities management

facility management

integration of processes within an organisation to maintain and develop the agreed services which support and improve the effectiveness of its primary activities

### 2.6 facility

tangible asset that supports an organisation

### 2.7 facility management agreement

written or oral agreement stating the terms and conditions for provision of facility services between a client and an internal or external service provider

### 2.8 facility management contract

legally binding Facility Management agreement between different legal entities

**2.9**

**facility management contractor**

organisation that contracts to provide facility services and is the accountable for contract performance

**2.10**

**facility management service provider**

organisation that provides the client with a cohesive range of facility services within the terms and conditions of a Facility Management agreement

NOTE A Facility Management service provider can be internal or external to the client.

**2.11**

**facility service**

support provision to the primary activities of an organisation, delivered by an internal or external provider

NOTE Facility services are services related to Space & Infrastructure and to People & Organisation.

**2.12**

**integrated facility services**

set of facility services that interact with each other

**2.13**

**key performance indicator (KPI)**

measure that provides essential information about the performance of facility services delivery

**2.14**

**primary activities**

activities that constitute the distinctive and indispensable competencies of an organisation in its value chain

NOTE The distinction between the primary activities and support services is decided by each organisation individually; this distinction has to be continuously updated.

**2.15**

**service level agreement (SLA)**

agreement between the client or customer and the service provider on performance, measurement and conditions of services delivery

NOTE A Facility Management agreement consists of general clauses, applicable to the whole agreement, and SLA specific clauses, only applicable to a facility service. In a Facility Management agreement several SLAs are included.

**2.16**

**service provider**

organisation that is responsible for the delivery of one or more facility services

NOTE A service provider can be internal or external to the client's organisation.

**2.17**

**supplier**

provider of a facility service or a product



### 3 Scope of Facility Management

Facility Management covers and integrates a very broad scope of processes, services, activities and facilities. The distinction between the primary activities and support services is decided by each organisation individually. Annex B illustrates the relation between facility services and other support services.

The field of Facility Management can be grouped around client demands, which can be summarised under two main headings:

- Space and Infrastructure;
- People and Organisation.

The intended focus on demand is to underline the client orientation of Facility Management. For each type of client demand, Annex B provides examples of services that respond to these demands to illustrate the scope of Facility Management. Due to the complexity and the changing markets, client demands are subject to change.

The basic concept of Facility Management is to provide integrated management on a strategic and tactical level to coordinate the provision of the agreed support services (facility services). This requires specific competencies and distinguishes Facility Management from the isolated provision of one or more services.

**Annex A**  
(informative)

**Facility Management model**

**A.1 General**

Annex A presents the Facility Management model which provides a framework describing how Facility Management supports the primary activities of an organisation. It deals with the demand and supply relationship and presents the different levels of possible Facility Management interaction.

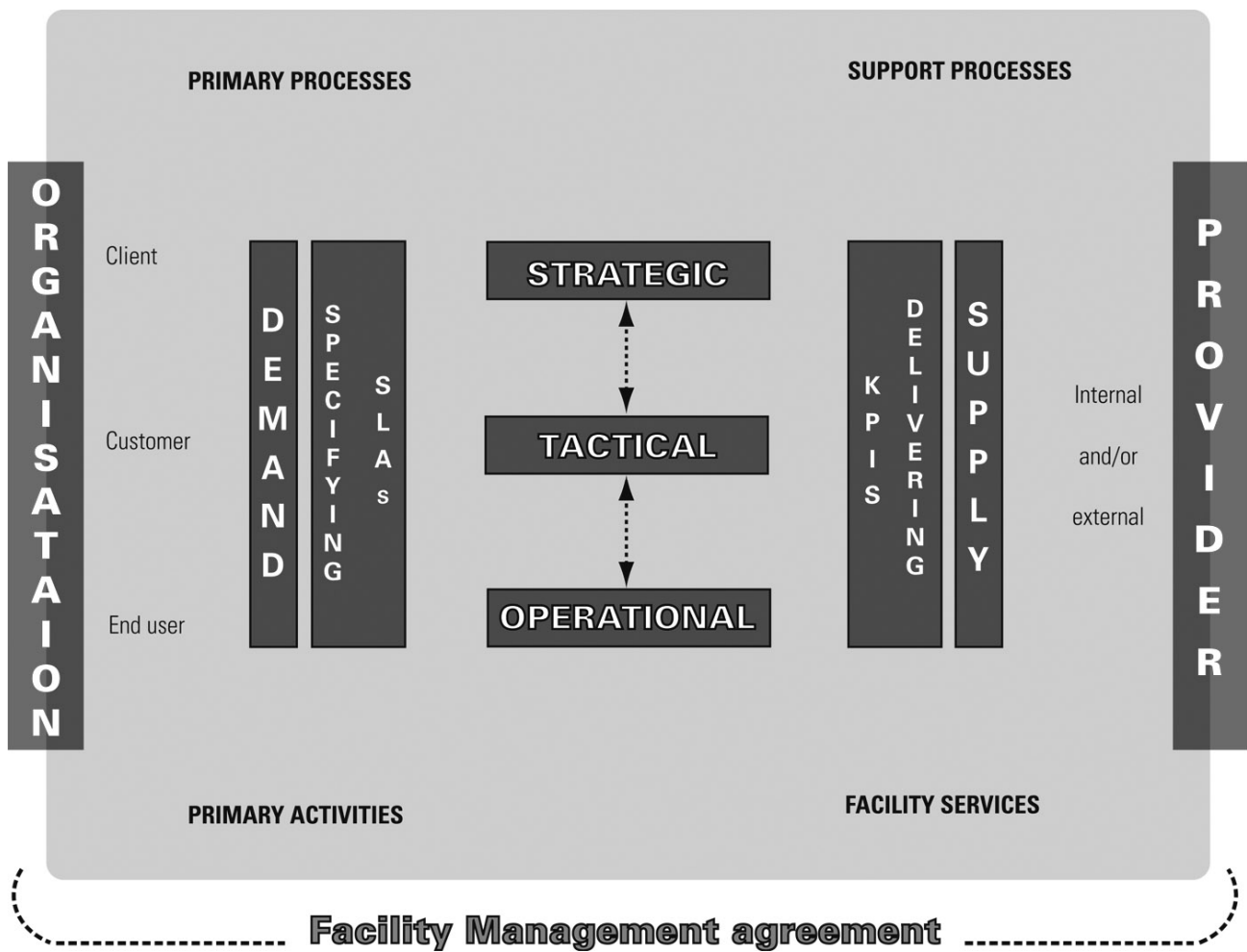


Figure A.1 – Facility Management Model

**A.2 Organisation**

An organisation relies on its primary processes in order to achieve its strategic objectives. Changing market forces and developments from legislation, technology and mergers constantly influence these processes. These changes shall be managed and structured in strategic, tactical and operational levels, in order to remain viable and compliant to changing demands.

The support processes, which can be delivered by internal or external service providers, have a direct impact on the efficiency and effectiveness of the primary activities. The distinction between primary activities and facility services is decided by each organisation individually; this distinction has to be continuously updated.

The organisation is made up of client, customer and end user. It's the responsibility of the client to procure the required facility services, whereas the customer specifies and orders the delivery of these services within the conditions of a Facility Management agreement. On an operational level, the end users receive these support services where appropriate.

### A.3 Demand and supply

Facility Management aims at balancing demand and supply inside an organisation in order to reach the optimized mix between requirements/service levels and capabilities/constraints/costs:

- **Demand:** internal requirement of the primary activities for facility services (space & infrastructure and/or to people & organisation). Facility Management demand is driven by the primary activities. It is the responsibility of the client (at an organisational level) to clearly define the Facility Management strategy and requirements.
- **Supply:** provision of a broad scope of services as defined in the Facility Management agreement. Supply is managed and delivered by internal and/or external service providers.

To optimise performance and the value of assets, it is crucial to align demand and supply based on the economic, organisational and strategic objectives.

Once demand requirements are clearly expressed, services are specified and formalized through service Level Agreements (SLAs). SLAs define the level of service and may be changed over time.

Key Performance Indicators (KPIs) are established in order to measure performance and monitor progress over time. KPIs management is primarily the responsibility of the demand side. They can be used to monitor against the SLAs and to benchmark them across organisations to identify best practices.

### A.4 Levels of interaction (strategic, tactical, operational)

In order to succeed and deliver required results, Facility Management shall be in close synchronization with the mission and vision of the organisation and its objectives. Therefore, Facility Management acts on the main levels: strategic, tactical and operational.

**Strategic level:** to achieve the objectives of the organisation in the long term through:

- defining the Facility Management strategy in compliance with the organisation's strategy;
- policymaking, elaborating guidelines for space, assets, processes and services;
- active input and response;
- initiating risk analysis and providing the direction to adapt changes in the organisation;
- initiating service level agreements (SLAs) and monitoring key performance indicators (KPIs);
- managing the impact of facilities on the primary activities, external environment and community;
- maintaining relations with authorities, lessees and tenants, strategic partners, associations etc.;
- supervision of the Facility Management organisation.

**Tactical level:** to implement the strategic objectives in the organisation in the medium term through:

- implementing and monitoring guidelines for strategies;
- developing business plans and budgets;
- translating Facility Management objectives into operational level requirements;
- defining SLAs and interpreting KPIs (performance, quality, risk and value);
- monitoring compliance to laws and regulations;
- managing projects, processes and agreements;
- managing the Facility Management team;
- optimising the use of resources;
- adapting to and reporting on changes;
- communicating with internal or external service providers on a tactical level.

**Operational level:** to create the required environment to the end users on a day-to-day basis through:

- delivering services in accordance with the SLA;
- monitoring and checking the service delivery processes;
- monitoring the service providers;
- receiving requests for service e.g. via a help desk or service line;
- collecting data for performance evaluations, feedback and demands from end users;
- reporting to tactical level;
- communicating with internal or external service providers on an operational level.

## A.5 Conclusion

Effective Facility Management will:

- foster integration of the different service processes;
- streamline the link between the strategic, tactical and operational levels;
- ensure consistent communication (bottom up and top down);
- develop and cultivate the relationship and partnership between clients/end users and suppliers/service providers;
- support the connection between historical facts, current tasks and future requirements.

With the use of the Facility Management model, the practitioners will evolve and shape the future of Facility Management.

**Annex B**  
(informative)

**Scope of Facility Management**

**B.1 General**

**Scope of Facility Management**

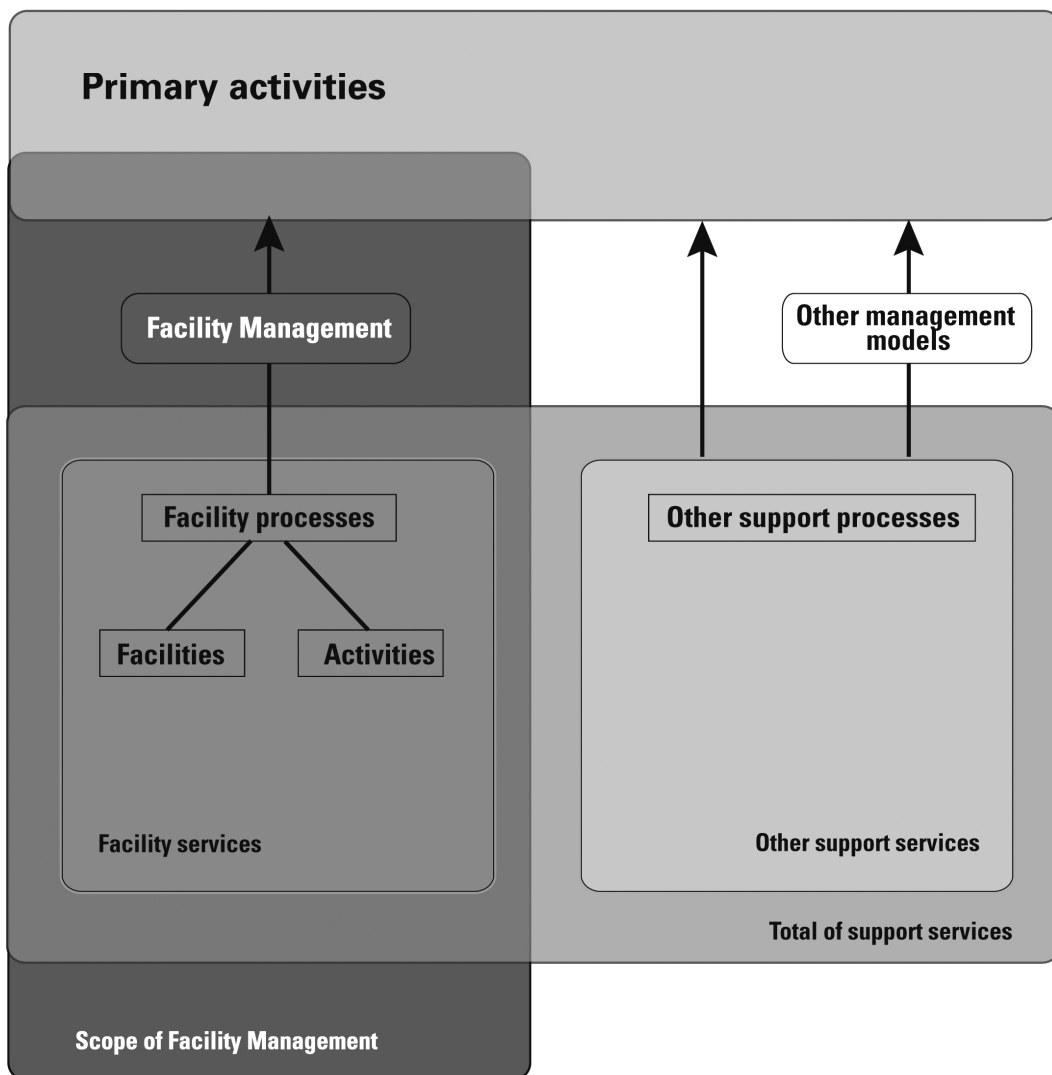


Figure B.1 – Scope of Facility Management

The terms used in this standard are based on common business process models with primary activities and support services. The primary activities need to be defined by each organisation individually. Facility Management aims at integrating and coordinating some support services, which then become facility services.

Inputs to the facility processes are facilities (tangible assets) and activities. The output of these processes supports the primary activities. By integrating and coordinating facility processes, Facility Management improves the effectiveness of the primary activities.

### Examples of the scope of Facility Management

The following description of the scope of services is given by way of example and is not in any order of priority. The description does not claim to be exhaustive. The examples are a selection from a larger list of terms found in standards and guidelines in the area of Facility Management. They are grouped around basic client demands, which can be summarised under the two main headings "Space & Infrastructure" and "People & Organisation".

## B.2 Space & Infrastructure

- **Accommodation:** client demand for space (accommodation) is satisfied by services such as programming, design and acquisition of space, but also the administration and management of space and its disposal. Examples of services related to this demand are:
  - strategic space planning and management;
  - programming and briefing;
  - design and construction;
  - lease and occupancy management;
  - building operations and maintenance;
  - renovation and/or refurbishment;
  - ...
- **Workplace:** client demand for a working environment (workplace) is satisfied by services related to internal and external environments, fitting out with furniture, equipment and tenants. Examples of services related to this demand are:
  - workplace design and ergonomics;
  - selection of furniture, machinery and equipment;
  - move management;
  - equip internal and external environment;
  - signage, decorations, partitions and furniture replacement;
  - ...

- **Technical infrastructure:** client demand for utilities (technical infrastructure) is satisfied by services resulting in a comfortable climate, lighting/ shading, electrical power, water and gas. Examples of services related to this demand are:
  - energy/utilities management;
  - environmental sustainability management;
  - technical infrastructure operations and maintenance;
  - building management systems operations and maintenance;
  - lighting maintenance;
  - management of waste (hazardous) disposal;
  - ...
- **Cleaning:** client demand for hygiene and cleanliness (cleaning) is satisfied by services that maintain a proper working environment and help maintain the assets in good condition. Examples of services related to this demand are:
  - hygiene services;
  - workplace cleaning, machinery cleaning;
  - building fabric and glass cleaning;
  - cleaning equipment provision & maintenance;
  - outdoor space cleaning and winter services;
  - ...
- **Other space & infrastructure:** specific or individual demands of clients related to space and infrastructure are covered under this title. Examples of services related to these demands are:
  - hiring of special measuring equipment;
  - fitting out with machinery and equipment;
  - retail unit space management;
  - ...

### B.3 People & Organisation

- **Health, safety and security:** client demand for a safe environment (health, safety and security) is satisfied by services that protect from external dangers or internal risks as well as the health and well-being of the people. Examples of services related to this demand are:
  - occupational health services;
  - security management;
  - access control, I.D./smart cards, locks and key holding;
  - disaster planning and recovery;
  - fire safety and protection;
  - ...
  
- **Hospitality:** client demand for hospitality is satisfied by services providing a hospitable working environment makes people feel welcome and comfortable. Examples of services related to this demand are:
  - secretarial and reception services;
  - help desk services;
  - catering and vending;
  - organisation of conferences, meetings and special events;
  - personal services;
  - provision of work wear;
  - ...
  
- **ICT:** client demand for information and communication (ICT) is satisfied by services providing information and telecommunication technologies. Examples of services related to this demand are:
  - Data and telephone network operations
  - Data centre, server hosting and operations
  - Personal computer support
  - IT security and protection
  - Computer and telephone connections and moves
  - ...



- **Logistics:** client demand for logistics is satisfied by services concerned with the transport and storage of goods and information and improving the relevant processes. Examples of services related to this demand are:
  - internal mail and courier services;
  - document management and archiving;
  - reprographic systems, copying and printing;
  - office supplies;
  - freight forwarding, storage systems;
  - people transport and travel services;
  - car park and vehicle fleet management;
  - ...
- **Other support services:** client demand for other support services may be satisfied by a range of additional services. These services can be very individual depending on the definition of the primary activities. Examples of services related to this demand are:
  - accounting, auditing and financial reporting;
  - human resource management;
  - marketing and advertising, photographic services;
  - procurement, contract management and legal advice services;
  - project management;
  - quality management;
  - ...

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