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Facility management — Vocabulary

Facility management — Vocabulaire

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

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For an explanation on the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see the following URL: www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 267, *Facility management*.

Introduction

The International Standards on facility management (FM) developed by ISO/TC 267 describe the characteristics of facility management and are intended for use in both the private and public sectors.

NOTE The terms “facility management” and “facilities management” can be used interchangeably.

International cooperation in the preparation of these International Standards has identified common practices that can be applied across a wide variety of market sectors, organizational types, process activities and geographies, and their implementation will help to:

- improve quality, productivity and financial performance;
- enhance sustainability and reduce negative environmental impact;
- develop functional and motivating work environments;
- maintain regulatory compliance and provide safe workplaces;
- optimize life cycle performance and costs;
- improve resilience and relevance;
- project an organization’s identity and image more successfully.

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Facility management — Vocabulary

1 Scope

This document defines terms used in facility management standards.

2 Normative references

There are no normative references in this document.

3 Terms and definitions

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

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

3.1 Terms related to facility management

3.1.1

facility management
facilities management
FM

organizational function which integrates people, place and *process* (3.5.1) within the *built environment* (3.2.3) with the purpose of improving the *quality* (3.7.1) of life of people and the productivity of the *core business* (3.1.7)

3.1.2

internal service provision
in-house service provision

delivery and management of a *service* (3.5.3) by staff employed by the *demand organization* (3.3.1.1)

3.1.3

support service

non-primary *activity* (3.5.2) delivered in support of *core business* (3.1.7)

3.1.3.1

facility service

support provision to the *primary activities* (3.7.4) of an *organization* (3.3.1), delivered by an internal or external provider

3.1.3.2

facility process

process (3.5.1) which is integrated and managed by a *facility management* (3.1.1) *organization* (3.3.1)

3.1.4

need

expectation, specific or abstract, from the *demand organization* (3.3.1.1) which is essential to enable the achievement of the core purpose and key *objectives* (3.7.8)

**3.1.4.1
requirement**

need (3.1.4) or expectation that is stated, generally implied or obligatory

Note 1 to entry: "Generally implied" means that it is custom or common practice for the *organization* (3.3.1) and *interested parties* (3.3.3) that the need or expectation under consideration is implied.

Note 2 to entry: A specified requirement is one that is stated, for example in *documented information* (3.7.7).

**3.1.4.2
demand**

stated *requirement* (3.1.4.1) for a *services* (3.5.3) or *products* (3.5.1.1) to be delivered

**3.1.4.3
service level**

complete description of *requirements* (3.1.4.1) of a *product* (3.5.1.1), *process* (3.5.1) or *system* (3.5.4) with their characteristics

**3.1.4.3.1
service level agreement**

SLA

document which has been agreed between the *demand organization* (3.3.1.1) and a *service provider* (3.1.5) on *performance* (3.8.3), *measurement* (3.8.1) and conditions of *service* (3.5.3) delivery

**3.1.5
service provider**

organization (3.3.1) that delivers one or more *facility services* (3.1.3.1)

Note 1 to entry: A service provider can be internal or external to the *demand organization* (3.3.1.1).

**3.1.6
workplace**

physical location where work is performed

**3.1.6.1
work station**

location containing furniture and supporting equipment (including telephony, IT and power connections), specifically designed or suitable for work-related *activities* (3.5.2) and is suitable for permanent use

**3.1.7
core business**

entity (3.7.11) from which *needs* (3.1.4) are derived

3.2 Terms related to assets

**3.2.1
asset**

item, thing or *entity* (3.7.11) that has potential or actual value to an *organization* (3.3.1)

[SOURCE: ISO 55000:2014, 3.2.1, modified — Notes to entry have been removed.]

**3.2.1.1
asset management**

coordinated *activity* (3.5.2) of an *organization* (3.3.1) to realize value from *assets* (3.2.1)

[SOURCE: ISO 55000:2014, 3.3.1, modified — Notes to entry have been removed.]

**3.2.2
real estate**

immoveable property including structures, grounds and undeveloped land

3.2.3**built environment**

collection of buildings, external works (landscaped areas), *infrastructure* (3.2.3.1) and other construction works within an area

3.2.3.1**infrastructure**

system (3.5.4) of *facilities* (3.2.3.2), equipment and *services* (3.5.3) needed for the operation of an *organization* (3.3.1)

[SOURCE: ISO 9000:2015, 3.5.2]

3.2.3.2**facility**

collection of *assets* (3.2.1) which is built, installed or established to serve an *entity's* (3.7.11) *needs* (3.1.4)

3.3 Terms related to people**3.3.1****organization**

person or group of people that has its own functions with responsibilities, authorities and relationships to achieve its *objectives* (3.7.8)

Note 1 to entry: The concept of organization includes, but is not limited to sole-trader, company, corporation, firm, enterprise, authority, partnership, charity or institution, or part or combination thereof, whether incorporated or not, public or private.

3.3.1.1**demand organization**

entity (3.7.11) which has a *need* (3.1.4) and the authority to incur costs to have *requirements* (3.1.4.1) met

Note 1 to entry: This is typically an authorized representative within a functional unit of an *organization* (3.3.1).

3.3.2**top management****executive management**

person or group of people who directs and controls an *organization* (3.3.1) at the highest level

Note 1 to entry: Top management has the power to delegate authority and provide resources within the organization.

Note 2 to entry: If the scope of the *management system* (3.7.5) covers only part of an organization, then top management refers to those who direct and control that part of the organization.

3.3.3**interested party****stakeholder**

person or *organization* (3.3.1) that can affect, be affected by, or perceive itself to be affected by a decision or *activity* (3.5.2)

3.3.4**competence**

ability to apply knowledge and skills to achieve intended results

3.3.5**end user**

person or *organization* (3.3.1) which uses *products* (3.5.1.1) or *services* (3.5.3) from a supplier

3.4 Terms related to sourcing

3.4.1 agreement

statement agreed between the *demand organization* (3.3.1.1) and the provider of *services* (3.5.3) or *products* (3.5.1.1)

Note 1 to entry: This should be in the form of a written statement agreed between the demand organization and the provider of services or products setting out the *requirements* (3.1.4.1), conditions, costs, the level of resources and outputs required.

Note 2 to entry: For complex multi-country or multi-service agreements, the type of documentation and content outlined in ISO 41012:2017, Annexes C and D, could be required. For small or single service agreements, a one page document setting out the important terms and conditions can suffice.

3.4.1.1 contract

agreement (3.4.1) under which two parties undertake to exchange a *product* (3.5.1.1) for a payment

3.4.1.2 specification

detailed description of the essential *performance* (3.8.3) and/or technical *requirements* (3.1.4.1) for *services* (3.5.3) or *products* (3.5.1.1) and *processes* (3.5.1) set out by the *demand organization* (3.3.1.1) to make clear to the *service provider* (3.1.5) the requirements to be fulfilled

Note 1 to entry: This is the documentary interface between the *needs* (3.1.4) of the demand organization and the *activities* (3.5.2) of the service provider.

3.4.1.3 mobilization

phase to establish and implement all resources, *systems* (3.5.4), data and procedures prior to taking full responsibility for the *facility services* (3.1.3.1) to be delivered as specified in the *facility management* (3.1.1) *agreement* (3.4.1)

Note 1 to entry: Start up can also be used in this context.

3.4.1.4 demobilization

phase to transfer *facility services* (3.1.3.1) back to the *demand organization* (3.3.1.1) or to a new *service provider* (3.1.5) as specified in the *facility management* (3.1.1) *agreement* (3.4.1)

3.4.2 subcontracting

process (3.5.1) of engaging a *subcontractor* (3.4.2.1)

3.4.2.1 subcontractor

organization (3.3.1) engaged by the *service provider* (3.1.5) to perform a specific portion of a *facility service* (3.1.3.1)

3.4.3 sourcing

practice which identifies, evaluates and engages internal and external *service providers* (3.1.5) to deliver a *service* (3.5.3) or *products* (3.5.1.1) to meet a *specification* (3.4.1.2)

3.4.3.1 procurement

activity (3.5.2) of acquiring goods or *services* (3.5.3) from suppliers

Note 1 to entry: The procurement *process* (3.5.1) considers the whole life cycle from identification of *needs* (3.1.4) through to the end of a *services contract* (3.4.1.1) or the end of the life of goods, including disposal.

Note 2 to entry: *Sourcing* (3.4.3) is a part of the procurement process that includes planning, defining *specifications* (3.4.1.2) and selecting suppliers.

[SOURCE: ISO 20400:2017, 3.1.8]

3.4.3.2 supply chain

system (3.5.4) of *organizations* (3.3.1), people, *activities* (3.5.2), information, and resources involved in delivering a *product* (3.5.1.1) or *service* (3.5.3) to an *end user* (3.3.5) from a supplier

3.4.3.3 outsource (verb)

make an arrangement where an external *organization* (3.3.1) performs part of an organization's function or *process* (3.5.1)

Note 1 to entry: An external organization is outside the scope of the *management system* (3.7.5), although the outsourced function or process is within the scope.

3.4.3.4 out-task

provision of a single *service* (3.5.3) from an external *service provider* (3.1.5)

3.4.3.5 insource (verb)

make an arrangement to move external *service* (3.5.3) provisions to *internal service provision* (3.1.2)

3.4.4 due diligence

compilation, comprehensive appraisal and validation of information of an *organization* (3.3.1) required for assessing accuracy, commercial integrity, financial stability and functional *competence* (3.3.4) integrity at the appropriate stage of the *agreement* (3.4.1) *sourcing* (3.4.3) *process* (3.5.1)

3.4.5 method statement

document in which the *service provider* (3.1.5) translates the *demands* (3.1.4.2) set out in the *specification* (3.4.1.2) and *service level agreement* (3.1.4.3.1) into a delivery plan with resources, allocations and methodologies

3.5 Terms related to process

3.5.1 process

set of interrelated or interacting *activities* (3.5.2) which transforms inputs into outputs

3.5.1.1 product

result of a *process* (3.5.1)

Note 1 to entry: There are four generic product categories, as follows:

- *services* (3.5.3);
- software;
- hardware;
- processed materials.

Note 2 to entry: Products can be tangible or intangible.

[SOURCE: ISO/IEC 17065:2012, 3.4.2, modified – Notes to entry have been modified]

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3.5.2 activity

task or tasks that contribute to completion of *deliverables* (3.7.9)

3.5.3 service

time-perishable, intangible *activity* (3.5.2) performed for an *entity* (3.7.11)

3.5.4 system

contained set of interrelated *processes* (3.5.1), technologies and/or procedures

3.5.4.1 conformity

fulfilment of a *requirement* (3.1.4.1)

3.5.4.2 nonconformity

non-fulfilment of a *requirement* (3.1.4.1)

3.5.4.3 corrective action

action to eliminate the cause of a *nonconformity* (3.5.4.2) and to prevent recurrence

3.5.4.4 continual improvement

recurring *activity* (3.5.2) to enhance *performance* (3.8.3)

3.6 Terms related to finance

3.6.1 zero-based budget

methodology which uses detailed *asset* (3.2.1) lists and engineering and *performance* (3.8.3) standards to assess resource *needs* (3.1.4), and market unit costs to create a total budget without reference to previous expenditure levels

3.6.2 business case

document which summarizes the scope, benefits, costs and *risks* (3.7.3) of a proposed solution to a business *need* (3.1.4)

3.6.2.1 life-cycle cost

total costs (in present-value terms) expected to be spent on an *asset* (3.2.1) during its operational existence

3.6.3 open-book

transparent exchange of relevant information (especially costs) between the *facility management* (3.1.1) *service provider* (3.1.5) and the *demand organization* (3.3.1.1)

3.7 Terms related to general business

3.7.1 quality

degree to which a set of inherent characteristics of an object fulfils *requirements* (3.1.4.1)

[SOURCE: ISO 9000:2015, 3.6.2, modified — Notes to entry have been deleted.]

3.7.2 policy

intentions and direction of an *organization* (3.3.1), as formally expressed by its *top management* (3.3.2)

3.7.3 risk

effect of uncertainty

Note 1 to entry: An effect is a deviation from the expected — positive or negative.

Note 2 to entry: Uncertainty is the state, even partial, of deficiency of information related to, understanding or knowledge of, an event, its consequence, or likelihood.

Note 3 to entry: Risk is often characterized by reference to potential “events” (as defined in ISO Guide 73:2009, 3.5.1.3) and “consequences” (as defined in ISO Guide 73:2009, 3.6.1.3), or a combination of these.

Note 4 to entry: Risk is often expressed in terms of a combination of the consequences of an event (including changes in circumstances) and the associated “likelihood” (as defined in ISO Guide 73:2009, 3.6.1.1) of occurrence.

3.7.4 primary activities

activities (3.5.2) that constitute the distinctive and indispensable *competencies* (3.3.4) of an *organization* (3.3.1) in its value chain

Note 1 to entry: The distinction between the primary activities and *support services* (3.1.3) is decided by each organization individually; this distinction needs to be continuously updated.

3.7.5 management system

set of interrelated or interacting elements of an *organization* (3.3.1) to establish *policies* (3.7.2) and *objectives* (3.7.8) and *processes* (3.5.1) to achieve those objectives

Note 1 to entry: A management system can address a single discipline or several disciplines.

Note 2 to entry: The *system* (3.5.4) elements include the organization’s structure, roles and responsibilities, planning and operation.

Note 3 to entry: The scope of a management system may include the whole of the organization, specific and identified functions of the organization, specific and identified sections of the organization, or one or more functions across a group of organizations.

3.7.6 effectiveness

extent to which planned *activities* (3.5.2) are realized and planned results achieved

Note 1 to entry: In the context of *facility management* (3.1.1), it is important that results are achieved within planned budgets.

3.7.7 documented information

information required to be controlled and maintained by an *organization* (3.3.1) and the medium on which it is contained

Note 1 to entry: Documented information can be in any format and media, and from any source.

Note 2 to entry: Documented information can refer to:

- the *management system* (3.7.5), including related *processes* (3.5.1);
- information created in order for the organization to operate (documentation);
- evidence of results achieved (records).

3.7.8

objective

result to be achieved

Note 1 to entry: An objective can be strategic, tactical, or operational.

Note 2 to entry: Objectives can relate to different disciplines (such as financial, health and safety, and environmental goals) and can apply at different levels (such as strategic, organization-wide, project, *product* (3.5.1.1) and *process* (3.5.1)).

Note 3 to entry: An objective can be expressed in other ways, e.g. as an intended outcome, a purpose, an operational criterion, as a *facility management* (3.1.1) objective, or by the use of other words with similar meaning (e.g. aim, goal, or target).

Note 4 to entry: In the context of *facility management systems* (3.7.5), facility management objectives are set by the *organization* (3.3.1), consistent with the *facility management policy* (3.7.2), to achieve specific results.

3.7.9

deliverable

measurable and verifiable outcome, result or item to be produced within a specific timeframe to complete a project or part of a project

[SOURCE: ISO 22128:2008, 3.2]

3.7.10

vision

description of what an *organization* (3.3.1) wants to be and how it wants to be seen by *stakeholders* (3.3.3)

3.7.11

entity

actual or abstract thing that exists, did exist, or might exist, including associations among these things

3.7.12

strategic level

level at which an *organization* (3.3.1) defines its *objectives* (3.7.8) and *policies* (3.7.2), and plans and assesses how to achieve its goals

3.7.13

tactical level

level at which an *organization* (3.3.1) plans and manages the specific mechanisms and resources for operational delivery of *products* (3.5.1.1)

3.7.14

operational level

level at which *activities* (3.5.2) are performed in a routine way in support of the *organizations* (3.3.1) functions

3.7.15

sustainability

state of the *global system* (3.5.4), including environmental, social and economic aspects, in which the *needs* (3.1.4) of the present are met without compromising the ability of future generations to meet their own needs

Note 1 to entry: The environmental, social and economic aspects interact, are interdependent and are often referred to as the three dimensions of sustainability.

Note 2 to entry: Sustainability is the goal of sustainable development.

[SOURCE: ISO Guide 82:2014, 3.1]

3.7.16**emergency preparedness**

capability to take actions that will effectively mitigate the consequences of an emergency

3.7.17**business continuity**

capability of the *organization* (3.3.1) to continue delivery of *products* (3.5.1.1) or *services* (3.5.3) at acceptable predefined levels following disruptive incident

[SOURCE: ISO 22300:2012, 2.1.10]

3.7.18**best practice**

documented *process* (3.5.1) or *product* (3.5.1.1) developed by the user community, consisting of suppliers and *end users* (3.3.5), working together for the purpose of establishing industry guidelines

[SOURCE: ISO 20121:2012, 3.29, modified — The term “customers” has been changed to “end users” and the term “teaming” has been changed to “working together”.]

3.8 Terms related to measurement**3.8.1****measurement**

process (3.5.1) to determine a value

3.8.2**monitoring**

determining the status of a *system* (3.5.4), a *process* (3.5.1) or an *activity* (3.5.2)

Note 1 to entry: To determine the status, there may be a *need* (3.1.4) to check, supervise or critically observe.

3.8.3**performance**

measurable result

Note 1 to entry: Performance can relate either to quantitative or qualitative findings.

Note 2 to entry: Performance can relate to the management of *activities* (3.5.2), *processes* (3.5.1), *products* (3.5.1.1) (including *services* (3.5.3)), *systems* (3.5.4) or *organizations* (3.3.1).

3.8.4**key performance indicator****KPI**

measure that provides essential information about the *performance* (3.8.3)

3.8.5**benchmark**

reference point or metric against which *process* (3.5.1), *performance* (3.8.3) and/or *quality* (3.7.1) can be measured

3.8.5.1**benchmarking**

process (3.5.1) of comparing processes, *performances* (3.8.3) and/or *quality* (3.7.1) against practices of the same nature, under the same circumstances and with similar measures

3.8.6

audit

systematic, independent and documented *process* (3.5.1) for obtaining audit evidence and evaluating it objectively to determine the extent to which the audit criteria are fulfilled

Note 1 to entry: An audit can be an internal audit (first party) or an external audit (second party or third party), and it can be a combined audit (combining two or more disciplines).

Note 2 to entry: An internal audit is conducted by the *organization* (3.3.1) itself, or by an external party on its behalf.

Note 3 to entry: “Audit evidence” and “audit criteria” are defined in ISO 19011.

3.8.7

volume

total output of a measurable *activity* (3.5.2) over a period of time

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