
**Facility management — Development
of a facility management policy**

*Facility management — Élaboration d'une politique de facility
management*

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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).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation of 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 www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 267, *Facility management*, in collaboration with the European Committee for Standardization (CEN) Technical Committee CEN/TC 348, *Facility Management*, in accordance with the Agreement on technical cooperation between ISO and CEN (Vienna Agreement).

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

0.1 General

Facility management (FM) integrates multiple disciplines in order to have an influence on the efficiency and productivity of economies of organizations, societies and communities, as well as the manner in which individuals interact with the built environment. FM affects the safety, well-being and quality of life of much of the world's societies and population through the services it manages and delivers (see ISO 41001).

This document makes reference to the demand organization and to the organization responsible for FM and facility services. A distinction is necessary because of the variable nature in which FM is organized and where facility services are delivered through personnel within the demand organization, through external service providers or a combination of the two.

The guidance in this document applies principally to the FM organization. In situations where there is presently no formal FM organization, a person (or body) should be appointed to take an active role in developing the FM policy. Unless otherwise stated in this document, "organization" refers to the FM organization.

ISO 41001 makes reference to an FM policy in the context of an FM system.

The benefits of developing an FM policy include:

- a framework for setting FM objectives;
- support for the management of risk;
- a commitment to the continual improvement of the FM system;
- leadership and commitment by top management or an agent of the demand organization to the operation of the FM system;
- reduced likelihood of a disconnect between the FM strategy and operational FM requirements;
- improved efficiency in the provision of FM in general and in the delivery of facility services in particular;
- a commitment to the protection of people, property and the environment;
- strengthening of related policies of the demand organization.

In a hierarchy of decision-making and actions, the FM policy is positioned between the FM strategy and operational plans. The FM policy is derived from the FM system, which is all-encompassing in its scope although not in terms of detailed requirements or recommendations.

This document is intended to complement the current provision of guidance on FM policy in the context of the FM system (see ISO 41001). The aim is to promote awareness, competence development and expertise by providing advice on those decisions that affect the management of the facility and the delivery of facility services.

Specifically, this document is applicable to any organization that wishes to:

- utilize a methodology for developing an FM policy;
- assure itself of the alignment of the FM policy with the FM strategy (see ISO 41014);
- provide a framework for setting FM objectives and operational FM requirements.

This document provides guidance for internal or external audit programmes. Users of this document can compare practices for developing an FM policy with an internationally recognized benchmark, providing sound principles for the effective management of those practices.

0.2 Process approach

This document provides a common basis for understanding the factors that the organization should consider when developing an FM policy. It promotes a methodology to assist the organization in determining the most appropriate approach to, and arrangements for, the development of an FM policy as a basis for the implementation of operational FM requirements to support the demand organization's core business, primarily its business activities.

This document emphasizes the decisions, activities, information, data and interested parties that have to be coordinated into a manageable process for the development of an FM policy and the stages within it, including:

- defining the FM policy framework (see [Clause 4](#));
- compiling the FM policy (see [Clause 5](#));
- implementing the FM policy (see [Clause 6](#));
- review and revision of the FM policy (see [Clause 7](#)).

The methodology is intended to be scalable, meaning that this document's provisions are applicable to any organization to a greater or lesser extent. As such, the organization can determine which of the provisions apply fully or partially to the development of the FM policy.

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Facility management — Development of a facility management policy

1 Scope

This document gives guidance on the development of a facility management (FM) policy when the organization:

- a) intends to establish a framework for setting FM objectives and the effective management of risk;
- b) intends to achieve alignment between the FM strategy and operational FM requirements;
- c) wants to improve the usefulness and benefits provided by the FM system;
- d) aims to meet the needs of interested parties and applicable FM requirements consistently;
- e) aims to be sustainable.

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*

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 terminology databases for use in standardization at the following addresses:

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

3.1

acceptance criteria

evidence required for considering that requirements have been fulfilled

[SOURCE: ISO 22263:2008, 2.1]

3.2

after-action review

structured review or debriefing process for analysing an event, capturing lessons learned and identifying opportunities for improvement

3.3

facility management policy

FM policy

course or principle of action adopted or proposed that is intended to achieve defined outcomes

Note 1 to entry: Example principles include net zero carbon operations, workplace well-being, zero incidents and minimal whole-life cost.

3.4 operational plan

documented collection of procedures and information that is developed, compiled and maintained in readiness for the conduct of operations

[SOURCE: ISO 24516-3:2017, 3.16]

4 Defining the FM policy framework

4.1 Key principles

The organization should be guided by the demand organization’s business strategy and objectives, and the FM strategy when developing, implementing, maintaining and updating the FM policy. Specifically, the FM policy should be:

- aligned with the business objectives of the demand organization;
- supported by top management;
- appropriate to the nature and scale of the organization and its operations;
- consistent with other relevant organizational policies, including those of the demand organization;
- part of the daily work of the organization;
- clear, unambiguous and actionable, stating the actions that are acceptable and those that are not acceptable;
- coordinated with interested parties, with interdependent policy and with statutory and regulatory requirements;
- communicated to interested parties responsible for implementation and maintenance;
- periodically reviewed and updated.

NOTE ISO 41001 provides requirements for an FM system. ISO 41014 gives guidance with recommendations for the development of an FM strategy.

4.2 Strategic intent

The FM policy should inform FM procedures and operations.

The distinction between the strategic, tactical and operational levels of the organization’s management should be made clear. Policy declares the intent or guiding principle. Processes and procedures are then the tactical level output that implements the policy in terms of operations. [Figure 1](#) shows the relationships

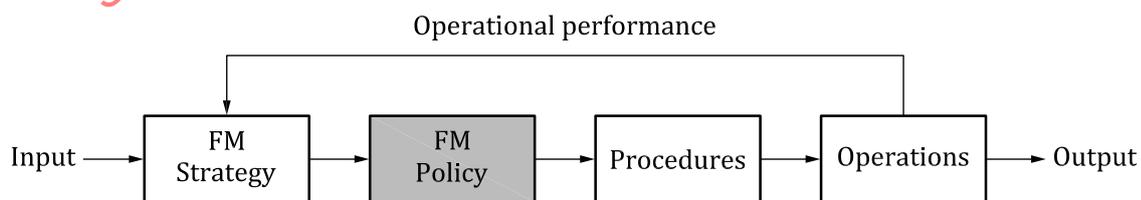


Figure 1 — Relationship between FM policy and FM strategy, procedures and operations

There can be overlap where the organization influences other demand organization objectives [e.g. occupational health and safety (OH&S), environmental impact and sustainability]; however, in a hierarchical context, FM should yield to, adopt and support, as applicable, policies developed by

the demand organization (e.g. sourcing, procurement, information and data, quality, employment, inclusiveness and equity, and corporate social responsibility).

The FM policy should provide guidance on the following:

- approach to work and or other human-centred activities and functions;
- the way in which business is conducted in the organization, including environmental, social and corporate governance;
- beliefs, values, attitudes and behaviour of people within the organization, taking into account cross-cultural impacts;
- roles, responsibilities and relationships with external bodies.

4.3 Expected impacts

4.3.1 General

Appropriate behaviour can be expected to create a safe, healthy and secure environment for users and visitors. For the demand organization, there are likely to be benefits in terms of more efficient and effective FM operations, which can be expected to continue to support the core business. The FM policy should raise awareness of what is acceptable and what is not, and have the potential to reform inappropriate behaviour.

The FM policy should provide users and all other interested parties with a frame of reference for their day-to-day work, or other role, as well as guidance on the operation and use of the facility and expected behaviour. In framing the FM policy, the organization should make explicit the type and nature of facility services that are delivered so that expected outcomes (see [4.3.2](#)) are achieved and unintended consequences are avoided (see [4.3.3](#)).

The extent to which users are satisfied or dissatisfied with any aspect of FM and the delivery of facility services should be established through periodic surveys or other forms of inquiry. Care should be exercised when canvassing the opinions of users so that it is seen as a genuine attempt to understand the suitability of the facility and facility services.

NOTE User satisfaction is a key success factor in FM. ISO 10001 gives guidelines for planning, designing, developing, implementing, maintaining and improving customer satisfaction codes of conduct.

4.3.2 Expected outcomes

Policies that are intended to create awareness and appropriate behaviour are more likely to succeed if they are explained, practicable and backed-up by leadership and commitment from top management (see [4.5](#)).

Top management should review its decisions before committing to them to determine if they are likely to achieve the expected outcomes.

EXAMPLE A procedure for waste reduction and elimination is more likely to be followed by users if understood from their perspective and supported by practical guidelines.

4.3.3 Unintended consequences

A well-intended policy can fail to meet its intended outcome for a variety of reasons. The following factors should be avoided:

- its impracticality for users to implement;
- a conflict with an individual's beliefs or values;
- an implicit conflict of interest with an individual's performance expectations;

- failure to consider the impact on related functions.

Depending on location, many workforces and interested parties are likely to reflect a mix of different ethnic, religious and cultural backgrounds.

The organization should consider the implications of its policymaking so that it avoids unintended consequences for users, its own personnel and other interested parties arising from incompatibilities between their beliefs and values, and the organization's policies.

NOTE A health, safety, security and environment policy that has the aim of minimizing accidents and which is linked with a reward scheme, even if unintentional, can result in the underreporting of accidents.

4.4 Sustainability goals

4.4.1 Environmental performance

The organization should document the legislation applicable to environmental performance in the context of achieving the FM objectives (e.g. energy use, CO₂ emissions, water quality, water consumption, waste reduction, recycling) and all supporting standards and procedures in the FM system.

The organization should state how it intends to be compliant with the legislation and supporting standards and procedures. This statement should form part of the FM policy (see [Clause 5](#)).

Actions to improve the organization's environmental performance over the short-, medium- and long-term should be recorded, for example:

- reduction in energy use from non-renewable sources;
- reduction of greenhouse gas emissions and airborne pollutants;
- reduction in water consumption;
- increased recycling of water and rainwater harvesting;
- reduction of waste to landfill or other environmentally damaging location;
- increased re-use or recycling of materials and products;
- reduction in the use of toxic and hazardous substances in new-built, refurbished and repurposed facilities;
- recovery and regeneration of products and materials at the end of their service life;
- more efficient use of space;
- more efficient use of resources (e.g. consumable resources and materials during operation and use).

NOTE ISO 14001 provides requirements for an environmental management system. ISO 50001 provides requirements for an energy management system. ISO 14005 provides advice on the integration and use of environmental performance evaluation techniques. ISO 46001 provides requirements and guidance on a water efficiency management system.

4.4.2 Social performance

The organization should identify social performance factors that are applicable to FM and state how it intends to support the demand organization's social strategic objectives, for example:

- responsibility, accountability, transparency and ethical behaviour towards all interested parties;
- inclusiveness, well-being, safety and security of users.

The organization should state how it intends to be compliant with legislation and supporting standards and procedures in regard to social performance. This statement should form part of the FM policy (see [Clause 5](#)).

NOTE ISO 26000 provides guidance on how businesses and organizations can operate in a socially responsible way.

4.4.3 Economic performance

The organization should express its business plans in terms of clear, measurable financial objectives for its FM so that the economic performance in regard to FM is not in conflict with the organization's business objectives.

4.5 Leadership and commitment

4.5.1 Alignment with the demand organization

The organization's top management should verify that the FM policy is compatible with the FM strategy and the business objectives of the demand organization.

The organization should consider its resources in terms of capability and capacity when developing the FM policy.

4.5.2 Management decision-making

The organization should make its decision-making process explicit, including identifying the role(s) within the organization and demand organization where decision-making affecting FM takes place.

The organization should verify that management decision-making in regard to the FM policy is consistent with decision-making in other functional areas. In all instances, account should be taken of the needs of interested parties before decisions are finalized.

NOTE An organization's culture and management practices will dictate decision-making behaviour for estate-related, operational, performance-related, financial and personnel matters (see ISO 26000).

The organization should recognize the importance of collective agreement in organizing and managing change, and that a risk-based approach to decision-making is necessary (see [4.6.4](#)). All approved changes affecting FM should be documented in the FM system and their implications for the FM policy should be determined.

4.5.3 Access, inclusiveness and equality

The organization should make its arrangements for accommodating people with mobile, sensory or cognitive impairment clear in the FM policy.

The organization should promote understanding and acceptance of diverse opinion, beliefs, culture and experience so that no individual or group of people should be disadvantaged in their use of the facility (see ISO 41014).

4.5.4 Health, safety and security

The organization should communicate the importance of health, safety and operational security to all users, including service personnel and visitors, to the extent that everyone has a duty to report any act, event or other occurrence where health, safety or security is called into question.

NOTE 1 Security has become a major concern for some organizations because of the threat of criminal activity, including the supply chain for goods and services, and the need to remain vigilant at all times.

The organization should document how it intends to reduce the risk of incidents that have the potential to cause injury or harm to users, property and the environment.

The organization should state how it intends to inform users of the arrangements, both active and passive, to protect them in the event of fire or other emergency and the means of escape from the facility, including provisions for those with mobility, sensory or cognitive impairment.

NOTE 2 Many organizations target zero incidents and redesign their work practices so they are safer by reducing risk to “as low as reasonably practicable”. This is the point at which the cost (in time, money and effort) of further risk reduction is grossly disproportionate to the risk reduction achieved.

NOTE 3 ISO 45001 specifies requirements for an OH&S management system, and gives guidance for its use, to enable organizations to provide safe and healthy workplaces by preventing work-related injury and ill health, as well as by proactively improving its OH&S performance.

4.6 Governance

4.6.1 General

The organization should review any existing policy for its facility or facility services in light of its governance. Any aspect of the demand organization’s governance that currently impacts or is likely to impact the facility or facility services should be recorded. Errors or omissions in the organization’s existing policies, standards, practices and procedures should be identified and corrective action taken to rectify them.

Top management should determine its reporting requirements, including the information to be reviewed and the frequency of review.

The organization should conduct a periodic internal audit to ensure adherence to its policies. The audit findings should be documented and communicated to top management.

NOTE ISO 21505 provides guidance on governance.

4.6.2 Authority and approval

The organization should make its decision-making practices and expectations explicit (e.g. escalate to a higher level, decide and announce, seek input and decide, build consensus, delegate) and document them in the FM system (see ISO 41001 and [4.5.2](#)).

The organization should identify how thresholds for authorizing expenditure can impact the FM policy and what, if any, unintended consequences can arise.

The needs of interested parties should be validated before decisions are finalized.

The organization should define where higher-level authorization and/or demand organization authorization is required, since decisions do not always align with the FM strategy and can have unintended consequences (see [4.3.3](#)).

4.6.3 Roles and responsibilities

Roles and responsibilities should be defined for all entities and personnel, internal and external, under an outsourcing arrangement (see ISO 41012).

The organization’s top management should determine the accountability and responsibilities of relevant roles with respect to the development, implementation, maintenance and updating of the FM policy and how they are assigned and communicated within the organization. The involvement of interested parties in this context should be made explicit.

The organization should define the roles to be exercised by its personnel and the expectations for their fulfilment in regard to FM. Attention should be paid to the processes, activities, tasks and outputs that are assigned at the lowest level with the organization.

NOTE 1 Any lack of clarity can lead to duplication of effort, unassigned tasks, failure to meet objectives and performance criteria, frustration and an inability to hold personnel accountable for their performance. Defining ownership at the correct positions in the organization can increase engagement and accountability on the part of personnel and, in turn, lead to more efficient and effective performance, while instilling a sense of pride and accomplishment on the part of the individual.

Where service provider personnel are acting on behalf of the demand organization, the level of autonomy and operational scope (e.g. standards, conformance, escalation path) should be clearly defined. There should be no misalignment or gaps between the organization and demand organization and between the organization and external service providers on matters of FM policy.

NOTE 2 A responsibility assignment matrix is helpful for identifying and communicating roles such that accountability and responsibility are clearly differentiated and those who are to be consulted and informed or who can provide support are similarly identified. RACI (responsible, accountable, consulted and informed) and RASCI (responsible, accountable, supported, consulted and informed) charts are common examples of a responsibility assignment matrix.

4.6.4 Risk management

A distinction should be drawn between hazards and risks of the kind that can pose a threat to users, service personnel and visitors associated with the normal operation and use of a facility, and a risk event that might or might not occur (e.g. climatic events) and the response to them.

Risk management should apply to both the development and maintenance of FM policy, and as a specific action for users and other interested parties to identify any event which they believe might occur that would impact the FM objectives and/or the business objectives of the organization and the demand organization.

NOTE ISO 31000 provides principles, a framework and a process for managing risk, including the allocation and use of resources for treating identified risks.

5 Compiling the FM policy

5.1 Operational requirements

A facility should be operated and maintained to ensure that it fulfils its intended purpose and continues to function safely, correctly and efficiently throughout its planned life.

The FM policy should reflect the organization's arrangements for operating and maintaining the facility to protect both its asset value and resource value. It should cover anticipated future requirements for the facility, including its sustainable space provision, and take into account performance and functional suitability.

The FM policy should provide guidance for the following:

- acquisition, use, maintenance, alteration or disposal of the facility (see ISO 41014);
- sustainable operation of the facility and its space (see ISO 41014);
- expected contribution of the facility and facility services to the core business of the demand organization (see ISO 41014);
- service delivery, including the type and nature of facility services, and the performance of service providers;
- governance, including organization structure and reporting (see [4.6](#));

- external and internal standards and procedures;
- compliance obligations and consequences of non-compliance;
- business processes and activities, including roles, responsibilities and accountabilities (see [4.6.3](#));
- relationships with interested parties;
- planning, organizing and controlling functions and activities within the facility;
- identifying operating risks, hazards and response activities for all facility services (see [4.6.4](#)).
- emergency preparedness and response;
- measuring the effectiveness of FM activities and processes;
- continual improvement.

NOTE Compliance obligations can arise from mandatory requirements, such as applicable laws and regulations, or voluntary commitments, such as organizational and industry standards, contractual relationships, codes of practice and agreements with community groups or non-governmental organizations.

5.2 Expected practices

5.2.1 General

The FM policy should provide guidance on, for example:

- governance, authorities, approvals and internal standards, International Standards, quality control and quality assurance, health, safety and security, environmental performance, human capital and finance;
- processes and procedures, including business processes (e.g. budgeting, procurement, purchasing approvals, agreements/contracts, contract management and payments);
- service delivery, including the type and nature of services, and the performance of service providers (internal and external);
- review of facility services for relevance, satisfactory performance and cost efficiency;
- user behaviour and attitude, including safeguards for individuals' ethnicity and beliefs;
- measurement of user satisfaction, including acceptance criteria;
- benchmarking for measuring performance and improvement.

The FM policy should align with the demand organization's policies regarding the following considerations:

- health, safety and security (see [5.2.2.1](#));
- social (see [5.2.2.2](#));
- environmental (see [5.2.2.3](#));
- information security (see [5.2.2.4](#));
- business continuity and recovery (see [5.2.2.5](#)).

Where the demand organization does not have a specific policy, the organization should consider developing a policy to align with the demand organization's business objectives.

5.2.2 Specific considerations

5.2.2.1 Health, safety and security

The FM policy should provide guidance on health, safety and security in which:

- user well-being and the quality of the working environment is promoted;
- hazards and risks are identified and assessed to support safe working practices;
- safe ways of working are identified for all tasks in operating the facility;
- users are made aware of potential hazards and risks;
- users are made aware of arrangements to protect them in the event of fire or other emergency;
- safety training is conducted, where appropriate.
- compliance obligations are identified and taken into account.

5.2.2.2 Social

The organization should identify social factors that are relevant and applicable to FM and ensure there is a policy to address these factors.

Consideration should be given to the following, as a minimum:

- accountability, transparency and ethical behaviour towards all interested parties;
- inclusiveness and well-being;
- working environment;
- utility, usability, maintainability, durability and adaptability of the facility.

NOTE Attention is drawn to environmental, social and governance (ESG) criteria that are set by an organization so that investors can assess its social credentials. These are important considerations but are not to be confused with the United Nations Sustainable Development Goals^[18], which are supported by a focus on environmental, social and economic performance by those organizations whose core business activities are related to social infrastructure such as housing, healthcare and education. ISO 26000 provides guidance on how an organization can operate in a socially responsible way.

5.2.2.3 Environmental

The organization should have a clear statement on its environmental management, especially its position on energy use, water efficiency, actions to minimize waste, physical waste management, reuse and recycling of waste. While recycling can be easy to implement in terms of separate bins and other containers for different types of waste, it requires space for segregation and storage. Areas to which waste can be brought – and sorted if necessary – then stored until it is time to remove it from the facility should be defined.

Arrangements for managing waste, including the identification of any substances that can pose a hazard to the safety of people, property or the environment should be identified together with the arrangements for their containment, transportation and disposal.

5.2.2.4 Information security

The collection, analysis, storage, updating, communication, control, protection and destruction of information and data relating to the facility and its management should be reflected in the FM policy.

Information and data should be classified to align with corporate accounting procedures of the demand organization, wherever practicable.

NOTE Attention is drawn to legislation on data privacy.

Information management should extend to the secure storage of information and data (see ISO/IEC 27001), including the management of access both physically and digitally.

The organization should identify factors that are critical to successful operation and use of the facility so that actions can be taken to avert adverse consequences in the event of a failure to manage them.

5.2.2.5 Business continuity and recovery

The organization should summarize details of the demand organization's business continuity plan in the FM policy. Where no plan exists, the organization should prepare a policy in this regard and incorporate it in the FM policy, and should then seek verification on its appropriateness from the demand organization. The policy should include arrangements for the acquisition of substitute space, re-location and the possible sharing of space with another organization and the associated human and other resource implications, where applicable.

NOTE ISO 22301 specifies requirements for a management system to protect an organization against, and reduce the likelihood of, disruptive incidents.

Arrangements for the recovery of business activities by the demand organization following a disruptive incident should be reflected in the FM policy.

5.2.3 Support functions

The FM policy should provide guidance on the following:

- information management;
- information and communications technology;
- record-keeping;
- contribution to lessons learned.

6 Implementing the FM policy

6.1 Statement of expectations

The FM policy should summarize the organization's operational FM requirements (see 5.1), expected practices (including FM operations and user behaviour) (see 5.2) and procedures in a format that is easy for users and visitors to follow.

The organization should establish if the FM processes are compatible with the FM policy and FM objectives (see ISO 41001).

NOTE [Annex A](#) gives an example of an outline FM policy. [Annex B](#) gives an example of the wording that can be appropriate in cases where the organization combines health, safety, security and environment into a single statement as an integral part of the FM policy.

6.2 User participation

NOTE Adherence to the expected behaviours on the part of users is likely to be achieved when they, or their representatives, are involved in framing FM policy that affects them.

The organization should ensure that its FM policy does not conflict with any acceptance criteria agreed with users or their representatives and that it remains committed to inclusiveness and equality in its treatment of users and visitors to the facility.

The organization should offer induction and training to users so that they are able to gain the maximum benefit from the facility's safe and correct operation and use.

6.3 Deviations from the policy

Any variance from the FM policy should be recorded, investigated and assessed by the organization to determine if it is a one-time event or if a change to the FM policy is required. Decisions and corrective actions should be documented in the FM system and used to inform top management at the next management review (see ISO 41001).

6.4 Lessons learned

NOTE The FM system is based upon the Plan-Do-Check-Act model (see ISO 41001). Check and Act are the outcomes of a properly conducted after-action review and the incorporation of lessons learned, whether in training, processes, procedures, tools, personnel performance, user satisfaction, communications or other actions that contribute to continual improvement.

The organization should embrace the practice of an after-action review to ensure that any lessons which have been observed and captured during implementation are analysed and, where appropriate, are incorporated into a revision of the FM policy and used to inform the FM strategy and FM objectives.

The organization should expand the review of lessons learned beyond its own organizational boundary and industry or sector to benefit from those lessons which could be considered for incorporation into operational plans subject to validation.

7 Review and revision of the FM policy

7.1 Evaluation of lessons learned

The organization should reinforce the culture of continual improvement by seeking input from all who have been associated with an event or process that has been the subject of a lesson learned and any corrective action that has been applied.

7.2 Corrective and preventive actions

The organization should prioritize, communicate and track follow-on actions and formally recognize improvements achieved as a result of lessons learned and corrective and preventive action.

Corrective action corrects a nonconformity. Preventive action should be recommended to avoid nonconformity. In either situation, the action should be an improvement to achieve the intended outcome.

Caution should be exercised when determining follow-on actions in case they prove to be inappropriate.

NOTE Corrective actions can be resource excessive or discretionary, can miss the intended target adversely influencing efficiency or go beyond what is realistic (i.e. when ambition exceeds practicality).

7.3 Revising the FM policy

Changes to the FM policy should take place in response to strategic change, not to instances where a process or procedure change or addition would be sufficient.

The FM policy should be reviewed at regular intervals or when a significant change in the demand organization's business objectives, FM strategy or FM objectives has occurred. Interested parties should be informed of revisions to the FM policy.

7.4 Updating FM plans

Operational plans should be reviewed against the FM policy and any changes to the plans should be documented in the FM system (see ISO 41001).

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Annex A (informative)

Example of an outline FM policy

A.1 Example

This FM policy was published/updated on [date] and is effective until [date] unless superseded.

1 Policy statement

- Scope of policy.
- Intent and commitment by top management.

2 Terms and definitions

3 Relevant parties

- Key interested parties and their relationship.
- Relationship with other interested parties.

4 Legal and organization

- Statutory authorities having jurisdiction.
- Applicable legislation (e.g. OH&S, employment and food hygiene).
- Governance, including organization structure and reporting.
- Responsibility for functions and activities within the facility.

5 Facility/facilities

- Description of the facility/facilities, extent and boundaries.
- Business activities.
- Contribution of the facility/facilities to the business.
- Transition plans.
- Re-occupation of facility/facilities, where applicable.

6 FM operations

- Target operating model, where applicable.
- Sustainable development, including carbon reduction commitments.
- Emergency preparedness and response.
- Business continuity and recovery.
- Accessibility, inclusiveness and equality.