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Secretariat:	**SN (Norway)**	**Merete Holmen Murvold**
	Address:	Standards Norway Lilleakerveien 2A NO-0283 Oslo
	E-mail:	mmu@standard.no
	Phone:	+47 920 55 485
Chairman:		**Ian van der Pool**
	E-mail:	ian@iso41001csi.com ihp@visionfm.eu
	Phone:	+31 6 4641 4343

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Committee:	**CEN/TC 348** **Facility Management**

Draft standard ISO/CD2 41015 "Facility management - Influencing organizational behaviours for improved facility outcomes" For CEN/TC 348 comments until 2021-09-22

CEN/TC 348 and ISO/TC 267 *Facility management* have agreed to develop ISO 41015 “Facility management - Influencing organizational behaviours for improved facility outcomes” under the Vienna Agreement, see Decision 103.

The Vienna agreement gives CEN/TC 348 the possibility to

- comment on working draft and committee drafts
- vote on the document in parallel with ISO on enquiry and formal vote stages
- appoint representatives to participate in the meetings of the responsible committee ISO/TC 267 and working group WG 5 “Human experience”.

ISO/TC 267 has launched the second Committee Draft ISO/CD2 41015 and the draft is on vote until 29 September 2021. CEN/TC 348 members are invited to:

- give your comments on the draft ISO/CD2 41015 (enclosed) by using the CEN commenting table
- appoint representatives to join ISO/TC 267 WG 5 “Human experience”

A committee internal ballot (CIB) has been made and CEN members are invited to comment on the draft and to let us know if you would like to appoint expert(s).
You are kindly invited to respond by **2021-09-22** (one week before the ISO/TC 267 deadline).

Best regards
Merete H. Murvold
CEN/TC 348 Secretary

ISO/TC 267 **N 441**

Date: 2021-08-03

Secretariat of ISO/TC 267

Facility management
E-mail: bernd.borchert@bsigroup.com
Web: www.bsigroup.com

Committee Draft (CD2) 41015 – Facility management - Influencing organizational behaviours for improved facility outcomes

Dear Member

Attached please find 'ISO/CD2 41015 Facility management - Influencing organizational behaviours for improved facility outcomes

Please submit any comments you might have

by 29 September 2021 the latest

using the ISO CIB system.

Kind Regards

Bernd Borchert
Committee Manager to ISO/TC 267
bernd.borchert@bsigroup.com

ISO 41015

ISO TC 267/WG 5/N 441

Secretariat: BSI

Facility management - Influencing organizational behaviours for improved facility outcomes

CD2 stage

ISO copyright office
CP 401 • Ch. de Blandonnet 8
CH-1214 Vernier, Geneva
Phone: +41 22 749 01 11
Fax: +41 22 749 09 47
Email: copyright@iso.org
Website: www.iso.org

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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*.

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

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 service life performance and costs;

— improve resilience and relevance;

— manage demands of end users and other interested parties; or

— project an organization’s identity and image more successfully.

This standard is intended for owners, operators, and service providers (internal and/or external) at a facility. The aim is to identify the different ways facility improvements can enhance how the desired behaviours can be influenced to improve both the outcomes and the contribution the facility makes within the built environment. Whilst behaviours are subjective, the recommendations and guidance on how these can be clearly defined and measured will enable a collective, collaborative and common objective to be reached by all parties. Behaviour needs to be seen in the context of the way in which individuals act or conduct themselves.

Efficient and effective facility management will ultimately fulfil the demand organization’s requirement for optimal performance. The FM organization should be able to determine the potential impact that its approaches have on meeting the demand organization’s mission so that the FM organization aligns and delivers its services accordingly. The aim is to provide recommendations and guidance on the appropriate operation of the facility so that its contribution to meeting the demand organization’s mission and goals can be clearly defined and measured.

Facility management - Influencing organizational behaviours for improved facility outcomes

1 Scope

The standard specifies requirements and provides guidance on the ways a facility management organization can engage, empower, and influence facility managers, facility users, and other interested parties for improved outcomes and user experience, which contribute substantially to strategic alignment and performance of the demand organization objectives and goals.

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 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 development of agreements*

ISO 41014:2020, *Facility management – Development of a facility management strategy*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 41011:2017 – *Facility management – Vocabulary* and the following apply.

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

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at http://www.electropedia.org/

NOTE: For the purposes of this document, the term “organization” will refer to the FM organization unless otherwise stated.

3.1
output
end product of a process

Note 1 to entry: The outputs and outcomes may affect each other through a circular process

3.2
outcome
final result or consequence of the output

Note 1 to entry: The outputs and outcomes may affect each other through a circular process

4 Context of the organization

4.1 Understanding the organization

The facility management organization can, by undertaking its expected role within any organization, influence decisions related to the provision of many aspects that can affect achievement of organizational goals, business objectives and user experience.

The basic assumption is the acknowledgement that business performance, stakeholder satisfaction and well-being is dependent on having appropriate operational facilities and services to support business delivery of the demand organization. Therefore, support functions have a direct role in delivery of core business services and contribute to the competitive advantage of the enterprise.

It is also key for the demand organization to appreciate the context of the facility management strategy and the facility management organization itself has been developed, and their impact on elements such as:

- mission
- vision
- values
- infrastructure
- workspace
- processes
- marketing relationship
- talent attraction and people development
- communication
- sustainability
- finance
- risk
- performance
- executive team
- productivity

The facility management organization should map the external and internal factors that could impact or influence the demand organization. These factors could include:

- External context: economic, social, spatial, environmental

- Internal context: people (user experience, culture), place (image, collaboration, flexibility, cost), and process (productivity, reliability, innovation)

The facility management organization should periodically identify how all these elements impact and influence the demand organization's outcomes, behaviors, and user experience in the different levels of operation – strategic, tactical, and operational – and in the different stages of the service life (i.e., feasibility, design, occupancy, operation, end of use, disposal).

4.2 Identifying organizational goals and objectives

The facility management organization should be familiar with and evaluate the demand organization's goals and objectives at all organizational levels. In this evaluation, the organization should consider all goals and objectives that can affect outcomes and user experience, taking into consideration past experience, current scenario, and future plans.

4.3 Alignment of goals

When the demand organization's goals and objectives have been identified and evaluated, the facility management organization should identify how to influence improved outcomes and better user experience. This understanding can be reflected in the facility management organization's strategy and operational plan.

The facility management organization should map how its activities affect each one of the goals and objectives identified and how current practice aligns with those identified goals and objectives.

The practices that do not align with or contribute to the desired goals and objectives should result in changes to the facility management strategy and subsequent services operational plan. This realignment should consider any unintended impacts on existing outputs in order not to compromise them.

The alignment of terminology/vocabulary can guarantee a more tangible correlation between the goals and objectives of the demand organization and the facility management organization, and can be a factor that influences culture and behavior at all levels of the organization.

It is important for the facility management organization to develop its goals, objectives, and performance indicators to monitor performance and to adopt the same business terminology used by the demand organization. Also, to the extent possible, it should adopt the same business terminology used by the demand organization in control, planning, and monitoring of those elements.

4.4 Stakeholder evaluation

The facility management organization should identify and map all stakeholders involved, who influence or can influence the elements described in 4.3 (see Figure 1); it also should understand its own ability to influence improved outcomes and a better user experience.

The facility management organization should identify its level of maturity and its intentions to improve and, where possible, clarify how the demand organization can sponsor and support the improvement.

The organization should map its ability to influence end users and other interested parties based on the specific competencies, tools, and processes required to achieve such influence.

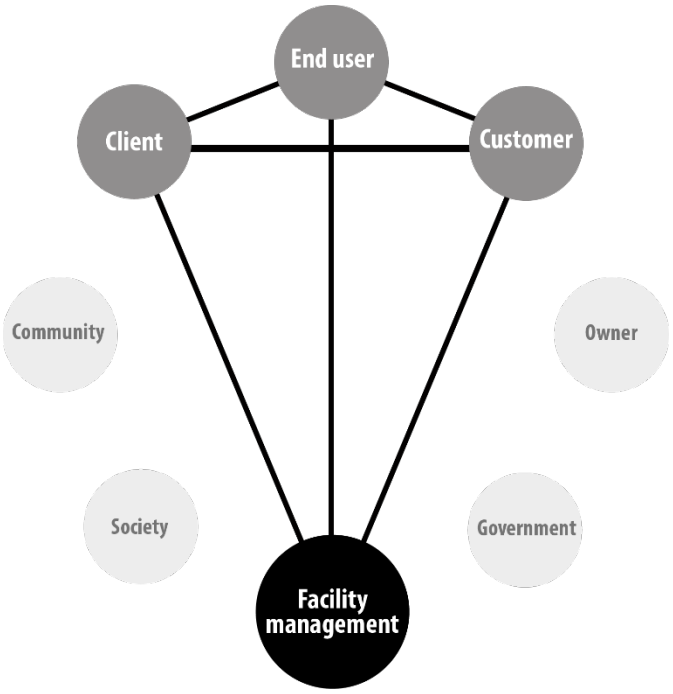

Figure 1: Key Stakeholders of Value in Facility Management

Relationship management plays an important role in this process. To achieve the desired outcomes, relationships with a range of parties within the demand organization should be established. The organization should develop a relationship map to ensure all parties that have an ability to influence behavior through culture or operating environment have a defined role. Not all end users/occupants will have the same role; they have different drivers and consequently behave differently.

5 Influences and behaviors

The purpose of focusing on influencing behavior is to ensure that all stakeholders within a facility are aware not only that their behaviors impact efficient operation of the facility, but behaviors can also contribute to improved outcomes in that facility. Therefore, a focus on appropriately influencing behavior can provide improved outcomes with minimal investment. In some respects, this is an opportunity to have all stakeholders aware of facility management's role and importance within the demand organization, and can lead to better informed decisions.

5.1 Understanding organization and stakeholder behavior

For the facility management organization to deliver better value for the demand organization and to align stakeholder needs, it is often imperative for stakeholder behavior to be influenced in such a way that behavior supports the organization's delivery strategies. First, there is a requirement to understand the needs of the demand organization. These needs, once articulated, can provide the outline of interventions or actions required to influence behavior. Identification of the needs then allows gaps that exist between current practice and the preferred state to be the focus for change.

The organization should develop a comprehensive matrix of user needs and expectations. This will enable management of those factors that affect business performance by identifying gaps between user expectations and service delivery outcomes.

Needs and expectations of other stakeholder groups should also be identified and assessed to ensure clarity of every factor that is impacting the opportunity to influence outcomes. This will allow the demand organization to make a final determination of the preferred needs and expectations.

Having identified the expectations and the current behavior will result in a gap analysis that can be used to determine or identify behaviors requiring change to achieve the direction of the demand organization with enabling strategies.

Influencing behaviors is complex given the different drivers for different stakeholders. For the facility management organization to understand how to influence behavior, it should determine different strategies based on the key stakeholder group and the identified gaps.

The facility management organization should map its ability to enable influence over the different dimensions identified at the demand organization, organization, and end user or stakeholder level. The map should establish the relevant key relationships to obtain support at the different levels from the demand organization.

5.2 Developing key relationships

To successfully influence stakeholder behavior requires a relationship between the influencer and the stakeholders being influenced. This relationship will determine the degree to which stakeholders can be influenced and the extent to which behavioral change can be achieved.

Information and communication are key to developing relationships of influence. The information related to needs and expectations and the current practice are key to enabling the relationship.

A relationship is often able to deliver greater behavioral change where there is a higher level of engagement. Where strong engagement exists, this may result in and be characterized by higher levels of trust, clarity of purpose, and desired outcome, leading to positive connection with the suggested change.

Conversely, a relationship that has low engagement may be characterized by a lack of trust, lack of clarity or provision of information, or other factors that detract from a stakeholder having a positive

outlook in the relationship. Therefore, a low level of engagement will make influencing behavior more difficult and less effective.

Obviously, the higher engagement provides a greater opportunity for success in achieving the desired outcome.

An organization that wants to build a strong relationship with stakeholders it wants to influence should first examine the current relationship and identify the level of engagement. This will determine the action required to either strengthen the level of engagement in the relationship (if that is deemed appropriate) or if the desired outcome can be achieved with the current level of engagement.

Ultimately, a relationship with strong engagement provides greater opportunity to have stakeholder commitment, ownership, and influence of the change being sought.

5.3 Behavioral change

Behavioral change is evident when a current practice by a stakeholder is changed to achieve a different (hopefully improved) outcome, creating greater alignment between the new outcome and the need or expectation of the demand organization.

To affect behavioral change, there needs to be an understanding of whether the change being sought is mandatory or voluntary. This may impact the methodology for behavioral change, the timing of the change, and the necessity for a higher level of engagement.

The most effective methodology for changing behavior of one or many stakeholder groups is a change management process that understands what influences, beyond the relationship, the behavior of end users and other interested stakeholders. When the influencing factors are understood, the ability to alter the current situation as part of a change management process is simplified.

After change management has been implemented, there should be a set of metrics for measuring and tracking any behavioral changes achieved. This would include the impact on the desired need or expectation.

These metrics should at a minimum include the following prerequisites:

- Quantify the strategic objectives of the demand organization.
- Consist of dynamic data sets that are agreed to by the demand organization.
- Be readily understood when communicated to impacted parties.

The organization should create a framework around which to organize and report on its behavior performance outcomes including:

- The methods for monitoring, measuring, analysing, and evaluating as applicable to ensure valid results.
- A schedule of when the monitoring and measuring will be performed;
- A schedule of when the results of monitoring and measurement will be analysed and how the process may be reviewed and improved.

The demand organization should provide feedback on progress reported through the metrics. This feedback should be to both the demand organization and any other stakeholders impacted or being influenced to make the change. The level of information reported to each stakeholder group will vary according to their needs and the applicability of the available content.

In collaboration with the demand organization, the organization should determine if the desired rate of change is being achieved and establish a plan for corrective action as applicable.

5.4 Value drivers (critical success factors)

Value drivers are those activities that in some way give rise to greater alignment with the demand organization's strategy (i.e., improved performance, reduced risk, positively impacted outcomes). In the case of this standard, this means influencing activities that promote behavioral change would be considered value drivers.

Value drivers may be developed from the demand organization's strategic plan, goals, or objectives. Value drivers set priorities for the facility management organization's plans to change or improve service delivery to both the demand organization in general and to the end user and other stakeholders.

Being clear about the value drivers will enable behavioral change to be focused on those specific influencing drivers that result in the desired outcome by the demand organization.

5.5 Opportunities to influence and influencing factors

The organization should identify the influencing factors that impact value and can be most easily affected for positive outcomes. This should include the tools and/or techniques that can be applied at the strategic, tactical, and operational levels.

The opportunities to influence and factors associated may be reflected in the three levels below:

- **Strategic level** – aligned with the key objectives and direction of the demand organization including objectives, policies, and structures.
- **Tactical level** – aligned with the facility management organization's strategy and the demand organization's strategy for operational performance.
- **Operational level** – aligned with the organization's strategy and tactical levels and the methods used to respond to stakeholders' concerns. In simple terms it is a feedback loop from the operational level to the strategy.

The organization should continually assess and respond to both the internal and external influences imposed on it and the demand organization. The desired behaviors should be linked to the strategic objectives set by the demand organization and should be tracked and measured.

In aiming to achieve the desired outcomes of the demand organization, the facility management organization should manage end user and other stakeholder expectations, particularly where the individual expectations are not aligned with organizational expectations. This means focusing on aligning/influencing user expectations to meet organizational imperatives.

A key factor affecting the ability to influence is the internal competencies of the organization. The organization should clearly understand its capability in stakeholder engagement and change management. Where these capabilities are deemed to be less than those required for successful influence of behavioral change, this should be addressed as part of the gap analysis with a strategy developed to overcome the shortcoming.

The opportunities to influence behavior will equally play a part in the success or failure of the desired behavioral change program. An assessment of the optimum timing, relative to other activities, should be recognized so that additional barriers to success of outcome are removed as part of the behavioral change program.

6 Planning for change

Organizations should adopt an intelligent approach to planning, coordinating, and controlling the process of change. Many processes exist to manage this change, such as the one outlined in Figure 2. The approach should include clear plans to communicate the need for change, how the changes will be

identified, what metrics will be used to measure the outcomes associated with the changes, what the changes will be, when the changes will be initiated, reporting on the change metrics, and when the changes have been completed and are standard practice.

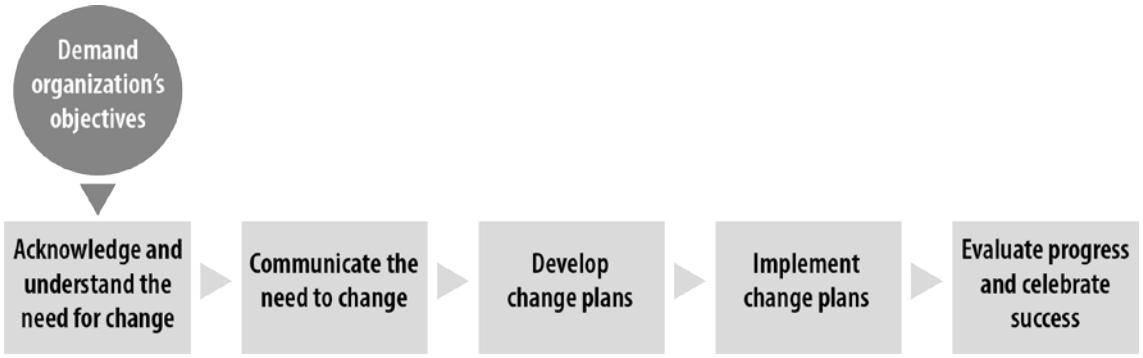

Figure 2: Example Change Management Process

Targeted change management can lead to results that dramatically improve the viability of the demand organization and its competitiveness. Improvements to the organization can be measured by more efficient or effective use of inputs and by desired changes in the outputs or outcomes for the organization.

Consultation with all stakeholders is essential to reduce the risk of dissatisfied individuals eroding the success of the initiative. This is accomplished with a clear communication plan that identifies key points when communication should occur. A successful plan will also address the needs or concerns of potentially dissatisfied individuals.

Change management is about where an organization aims to be, how it will get there, and how it will involve people. Each of these can be treated as individual projects or combined into a single project and managed as such.

6.1 Areas to influence change

Change can occur in various ways and at various levels and is often influenced by decisions and behavior that are both people-oriented and/or process-oriented. Change can promote positive behaviors and promote effective and efficient outcomes.

Change may also be employed to overcome organizational issues. For example, business cultures have evolved over time where teams operate in “silos” resulting in poor communication between groups and impacting collaboration. Effective space planning that locates interdependent functional units adjacent to or in close proximity delivers benefits for productivity. In this example, the people orientation is addressed by promoting communication and the process orientation is delivered by reducing separation between interdependent activities.

The facility management organization should identify opportunities to influence the change not only within the facility management services or facility management strategy itself, but in other relevant corporate areas such as the following.

6.1.1 Space management and optimization

Space optimization is of primary importance to the demand organization. Physical space is expensive to acquire, operate, and maintain. Ensuring the efficient and effective use of space avoids high annual expenses and increases the sustainability of the demand organization and the environment. Space can be optimized by using a regular evaluation process that determines current and future space needs of the occupants and considers whether the space is appropriate.

6.1.2 Space programming and utilization

The services delivered to a facility can be expensive and complex. The operation and maintenance of these services can also lead to higher costs for the organization as well as the demand organization. Spaces that are underutilized or misallocated for the occupant's needs may result in poor occupant outcomes. The organization should develop and maintain a process that periodically reviews both the services provided in a space and the service needs of the occupants. The reviews should include consideration of basic requirements for temperature, humidity, and fresh air. Other services including electricity, lighting, and other utility services should be recorded and evaluated.

6.1.3 Construction to occupation and operation

Space planning and general design layout (e.g., traffic flows, access, adjacencies, etc.) are an integral part of the construction and fit-out phase of a project. It is recommended that the facility management organization is engaged by the project team, acting on behalf of the demand organization, from the design stage through to handover and occupancy. It is the role of the facility management organization to provide support and feedback to the project team on the practical issues associated with space utilization, material use, equipment installation, etc., so that the space is optimized and is fit for purpose post occupancy.

6.1.4 Carbon reduction and environment protection

Carbon reduction targets have formed a key part of demand organizations' environmental management systems for many years. Many demand organizations have either achieved or have committed to achieving net zero carbon emissions. The facility management organization has a significant part to play in achieving such targets. It is important that the facility management organization aligns with the environmental targets of the demand organization and sets quantifiable reduction targets that support the overall goals of the demand organization. [see ISO 14001: Environmental Management]

In order to support the demand organization's goals, the facility management organization has an important role in influencing behavior of its key stakeholders through clear communication, education, and training. Measurement and reporting play an important role in achieving set targets.

6.1.5 Strategic sourcing

Strategic sourcing relates to the development of supply channels for the acquisition of goods and/or services with the aim to fulfill the sustainability, social, and performance goals of the demand organization at the lowest total cost. The facility management organization should develop a supply chain sourcing strategy that is aligned to the overall aims of the demand organization.

6.1.6 Social responsibility

Social responsibility involves acting with a duty of care in a manner that contributes to the benefit of society and the environment in the delivery of services and the acquisition and consumption of goods and resources from providers who comply with the requirements of the demand organizations. The facility management organization should align its services to support the demand organizations goals.

6.1.7 Emergency preparedness

The facility management organization has a significant role to play in the development of emergency preparedness/emergency response plans. The facility management organization should identify threats and potential disruptions to the normal business operation of the demand organization and then develop plans to eliminate, mitigate, or control the threats and to restore normal operations of the demand organization in the shortest possible time.

6.1.8 Productivity optimization

The facility management organization can contribute to the overall productivity of the demand organization by

1) implementing a comprehensive Asset Management Strategy that will maximise the efficient operation of the assets throughout their life cycle.
2) providing a workplace environment that is people-oriented in form, function, and services.

6.1.9 Wellness in the workplace

Wellness in the workplace recognizes that the built environment and the facility management operations add significant value by providing a workspace that contributes to occupant health and well-being while improving occupant satisfaction and productivity.

6.1.10 Technology

Developments in facility management technology have increased exponentially over the last decade. There are many technologies to choose from. It is important that the facility management organization develops an overall strategy for the deployment of technology in the workplace so it supports its needs and the needs of the demand organization.

6.1.11 Occupant experience

Since there are many specific guidelines, standards, and technical documents around these areas, occupant experience can become a valuable tool for the facility management organization. The organization can explore how elements can be incorporated to ultimately produce improved outcomes and better user experience. Elements can include, but are not limited to, specification of desired behaviors from partners, changes in contract's KPIs, SLAs, and models or utilization of specific technologies or materials for specific purposes.

6.2 Other areas to influence change

Facility management organizations can influence change in many areas where they may not have direct control and should apply appropriate measures to achieve the demand organization's goals. There are many facets of demand organization operations that may be supported and influenced by the facility management organization. These include, but are not limited to:

Health and safety	Environmental matters	Transportation and logistics
Risk management	Project management	Real estate/tenant management
Recruitment and hiring	Compliance matters	Industrial production
Communications	Community and social engagement	Quality
Forecasting	Innovation	Contracts management
Procurement	Security	Construction
Catering/food services	Events management	Concierge services

Lobbying for legislative change	Negotiations with government agencies

The facility management organization's responsibilities vary widely by region, culture, and other factors.

6.3 Risks and opportunities

For each one of the potential elements that can be influenced outside the traditional facility management organization services and strategy, there can be multiple risks or opportunities in the process of improving outcomes and user experience.

The facility management organization should identify the risks associated with existing outcomes of service delivery and the opportunities for changes to improve service delivery. This may be achieved through developing a matrix of facility service outputs and the outcomes resulting from the services. The facility management organization may commence the process by reviewing the opportunities to make changes to service outputs and in doing so should engage with key stakeholders to identify the risks of both the existing service delivery and the potential risks for each identified opportunity for improved service delivery.

Subsequent to development of a matrix of risks and opportunities related to improving facilities and their operations, the identified opportunities should be organized or prioritized against the associated risks for the organization (both facility management and demand organizations).

Associated with the risk assessments should be reviews of the impact of loss of facilities and services/support to occupants and business units within the demand organization that could arise from disruptions and catastrophic events.

Cost estimates that address financial, operational, and implementation (time) should be developed. These estimates may be used to further identify opportunities for changes to improve response times and outcomes.

6.4 Frameworks and models

Frameworks and models should be developed for each of the areas of influence so that the facility management organization can guarantee that definitions, processes, and guidelines developed can be incorporated to the specific areas and a continuous improvement process can be established.

The facility management organization should develop a framework to organize physical, operational, and other changes that will improve outcomes associated with the facility service outputs. The framework should be designed in such a way as to identify a baseline of deliverables and to benchmark operations to devise a prioritized improvement plan to include any category of interest for the demand organization. For instance, the demand organization may wish to prioritize outcomes based on risks or costs to the demand organization or based on benefits to facility occupants. A robust framework for a wide variety of prioritization schemes will benefit both the facility management organization as well as the demand organization.

The facility management organization should develop a continuous improvement program including key performance indicators (KPI's) specific to each work process. Key performance indicators should be as few and as meaningful as possible for accurate, available process monitoring and improvement.

7 Strategic outcomes and tactical outputs

The previous chapter provides the facility management organization with the rationale and approaches to impart value to the demand organization by

1) Recognizing areas where facility management can and should influence the performance of the demand organization.
2) Expecting, seeing, and managing risks and opportunities.
3) Establishing and maintaining a framework and model for facility management involvement and initiative.

This chapter builds on the previous by filling the identified framework with outcomes sought by the demand organization and modelling how facility management can best produce outputs to support each desired outcome. Outcomes are different from outputs in that outcomes are demand organization strategic perspectives of value accruing to the organization and stakeholders. Outputs are tactical perspectives of activities designed, developed, targeted, and managed to support outcomes. This chapter focuses on becoming familiar with outcomes envisioned by the demand organization then creating outputs targeted to achieve best value. In every instance, value arises from alignment of the facility management and demand organizations, then performance.

7.1 Demand organization strategies and planned outcomes

1. It is imperative for the facility management organization to understand current demand organization tenets, policies, strategies, and initiatives so the facility management organization can map the internal and external contexts applying to facility management and impact the outcomes sought by the demand organization.
    a. Corporate strategic planning is a process that creates value for customers and stakeholders and results in a more proactive delivery of goods and services to stakeholders, including a roadmap for achieving the demand organization objectives. Facility management goals are directly linked to demand organization strategies. The outputs of a corporate strategic plan include key topics for the facility management organization such as the type, quantity, and location of spaces needed in the future to accommodate growth or downsizing.
    b. There is inherent risk associated with managing any facility. Risk analysis compares the risk exposure to the risk appetite. The facility management organization should perform risk analysis of the entire portfolio and determine which assets warrant resources, and which assets are potentially expendable. Once the risk has been determined, the facility management organization should determine whether the risk is acceptable or warrants an economic tradeoff to mitigate or reduce.
    c. Risk planning is the process of deciding which risks are acceptable and which risks require an economic tradeoff, and then determining which tradeoffs result in the most value to the demand organization.
2. It is key to acquire and make use of planning conventions, methods, and language of the demand organization in facility managment plans and communications so as to align with existing or intended demand organization culture and objectives.
3. Facility management must understand the demand organization structure. Identify people in key positions, especially executives and executive support staff, as well as those who directly affect the development of facility management policies and the sphere of facility management influence.
    a. Become acquainted with operations, finance, human resources, and supply/purchasing.
    b. Understand the roles and areas of influence of each executive in relation to supporting or depending on facility management services.

7.2 Facility management fit to the demand organization initiatives

As a result of the preceding section's activities to understand the demand organization, the facility management organization should be able to identify current instances where it can be a productive influence.

Two channels, which complement each other, are open to facility management for this purpose:

1. Attend to the activities and output of the demand organization's strategic planning office or, absent a separate business unit for strategic planning, the executive support roles concerned with strategic planning. Strategic initiatives arise from the business view taken by top executives and call for degrees of response across the demand organization. Initiatives involving the built environment can involve:
    a. personnel numbers, locations, and accommodations
    b. supply chains
    c. internal versus external work force
    d. community and environment
    e. purchasing or leasing – and disposal of – facilities
    f. capital construction (new and renovation)
    g. business information and information systems.
2. Regular attention to and communication with facility management's internal customers and other stakeholders concerning:
    a. expectations for facility management services and performance within the organization
    b. sharing of data and analytics
    c. collegial communication about issues, needs, ideas, and expectations
    d. maintaining presence and interest throughout business, professional, compliance, and community groups, organizations, and individual acquaintances
    e. build relationships at executive level through regular interaction and support.

Facility management must propose optimum benefits from the invested cost, time, and risks associated with achieving the outcomes desired by the demand organization. The facility management context for planning and proposing the preferred fit with the outcome envisioned by the demand organization includes people and assets/ facilities. Elements are:

1. Goal setting
    a. efficiency goals (efficiency of resources)
    b. effectiveness goals (user satisfaction, productivity, health, and well-being)
2. Timeframes
3. Stakeholder experience focus (roadmap with touchpoints)
4. Communication plan.

Annex A distinguishes tactical management of producing outputs from strategic management of the facility management organization itself. Different tools are presented allowing for appropriate approaches.

7.3 Determine and plan facility management actions and outputs

Applying the provisions of sections 7.1 and 7.2 leads to familiarity within the facility management organization of the circumstances, leadership, culture, strategies, and operations of the demand organization. The facility management organization can then recognize opportunities to apply its influence to gain engagements that realize value for the demand organization and itself. Explicit understanding of business outcomes envisioned by the demand organization in any given instance informs the facility management organization what outputs to produce in order to match demand organization needs and expectations.

7.3.1 Value drivers

Specify and produce target outputs in appropriate quality, quantity, timing, and cost, maximizing their value individually and collectively. *(See 5.4 Value Drivers*).

7.3.2 Target outputs

Facility management contributes to the demand organization using target outputs. Each output is achieved through the use of the facility management organization's capabilities and resources. Characteristics and behaviors of both the facility management and demand organizations drive the value of facility management outputs in the context of a project or program. Fifteen characteristics and behaviors compose the complete set of value drivers such that the value of every facility management output in any context will reflect one or more of the value drivers shown in Table 7.1.

Category	Value driver	Example interventions *Result*s
People	Satisfaction	Establish and maintain reliable, accessible, even-handed, consistently applied, smoothly integrated, progressive, and objective policies and processes. *Assess staff manner, turnover, and recruitment.*
	Image	Advance positive perceptions internal and external, among stakeholders, the public, the media, and other organizations including competitors and government. *Assess recognition, impressions.*
	Culture	Demonstrate human centric culture by encouraging competence, communication, collaboration, resilience, inclusion, and diversity. Prefer process analysis and improvement over politics of blame. *Assess customers and staff, setting benchmarks.*
	Wellness in the workplace	Establish and maintain active safety and health policies and programs responsive to staff and customers and anchored in mission. *Assess ad hoc and spontaneous awareness, interest, actions, developments, and improvements.*
Process and product	Risk and compliance	Recognize, profile, and manage hazards as risks, prioritizing as to likelihood and severity. *Assess critical process interruptions, impacts, costs.*
	Productivity	Establish and maintain smoothly integrated systems and processes. Shepherd staff in use of time and energy. Encourage collaboration. *All tiers monitor, benchmark, change, improve.*

Category	Value driver	Example interventions *Results*
	Performance	Substantially involve staff in process design and implementation, especially leading indicators, and due responses. *Assess facility management awareness, mobilization, and outputs that reflect demand organization initiatives.*
	Governance	Establish and maintain practical, steady, fair, open, and transparent governance, conveniently engaged. *Assess utility of provisions*.
	Quality	Build a culture and capabilities of quality and reliability, adopting technical provisions and engaging staff across disciplines. *Benchmark results (re: goals) and establish valid, timely measures as bases for improvement.*
	Agile/adaptability	Maintain active awareness of changing demands, circumstances, priorities, opportunities, problems, and challenges within and outside of facility management and demand organizations. *Update and diversify SWOT. Derive options and initiatives*.
	Innovation and creativity	Encourage individuals and collaborations who bring forward innovations and ideas. Track those implemented and results. *Personally, and over internal media, recognize and acknowledge new and changed processes.*
Economy	Financial matters	Manage all costs attentively, adjusting spending, evaluating present options, and informing budgeting. *Continually update and budget from cost data and projections, making use of evolving technology.*
	Value of assets	Calibrate all aspects of asset O&M against market values, depreciation, whether critical for business, replacement cost and availability, and found reliability. *Optimize balance sheet (re: assets). Optimize value produced by assets. Optimize asset O&M.*
Society	Sustainability	Develop, manage, promote, and monitor throughput of energy and materials and sustainable practices. Communicate with stakeholders and maintain liaison with local community. *Assess feedback, especially social media.*

Category	Value driver	Example interventions *Results*
	Corporate social responsibility	Become a prominent community member and corporate citizen with programs, events, and sponsorship. *Assess feedback, especially social media.*
Technology		

Table 7.1 FM Value Drivers

7.3.3 Value drivers in practice – target outputs

Identifying a match between facility management areas of influence and needs or opportunities of the demand organization leads to facility management organization plans to deliver in accord with demand organization priorities and objectives. Familiarity with demand organization structure, leadership, culture, and ways of operating (discussed above) combines with the value drivers just discussed when setting facility management organization output targets. Identifying and meeting output targets are keys to facility management performance and value in the view of the demand organization.

How does the facility management organization remain on target, ensuring delivery of value in the judgement of the demand organization? Spotting, accepting, and specifying key outputs to target falls largely to the facility management organization. Facility management organization should utilize the value drivers of Table 7.1 when forming and managing processes to meet output targets. Value drivers decidedly affect design, planning, and production. Table 7.2 points out the relevance of value drivers in a generalized project – possibly the expansion and partial renovation of an occupied building, starting before a demand organization takes initiative and progressing until the facility is again in full operation and the outcome realized. The story plot in the table, however, applies as well when facility management organization initiates changes within, for example, when adopting evolving technologies. Value drivers inform actions taken at every stage, with emphasis shifting as a project or program progresses.

Facility management role as project or program progresses	**Value drivers to emphasize**
Prior to demand organization initiative Examples: Operations & maintenance, risk management, condition assessment, capex projections.	All
Demand organization initiates strategies, policies, programs, or projects Examples: Matching with FM areas of influence, clarifying outcomes, understanding contexts.	Governance, culture, image, performance, financial matters
FM prepares to perform in a principal role Examples: Scope of processes established and refined, target outputs derived and budgeted, risks identified, studied, and mitigated.	Performance, innovation and creativity, risk and compliance, financial matters, and asset values

Facility management role as project or program progresses	Value drivers to emphasize
FM produces outputs Examples: Designing, proving, and managing processes and measures, communicating with the demand organization, active liaisons with all participating entities and stakeholders.	Productivity, quality, agility and adaptability, financial matters, wellness in the workplace, environmental sustainability, social responsibility
Facility operations continue through outcome Examples: Responding to issues and interests of facility management customers and stakeholders, continuous improvement.	All

649 ***Table 7.2: Operant value drivers in a facility management engagement***

650 # 8 Evaluation

651 This section provides guidance on how to measure the result/outcome of a realised intervention in
652 dialogue with key stakeholders. It will consider and explain:

653 - The importance of setting the adequate scope of the evaluation
654 - Value parameters and how these could be measured with examples of various interventions
655 - Evaluation methodologies to collect data and analyse outcome
656 - Stakeholder alignment to compare facility management provisions against the needs and
657 expectations of the stakeholders.

658
659 Evaluation of behavioral performance shall be measured with the support of a behavioral skills
660 framework suitable for facility management.
661
662 The purpose could be:
663 - assess whether the effort(s) works as intended
664 - gain a knowledge base that future changes can be based on
665 - become wiser on a facility management issue, where data is not yet available
666 - live up to external requirements for evaluation
667 - gain insight into processes that have importance for facility management value creation.
668
669 Within facility management, evaluation is a constant and ongoing theme and is an integral part of what
670 facility managers do.

671 ## 8.1 Scope of the evaluation

672 The scope of evaluation should include personality, leadership traits, communication skill, knowledge
673 level, attitude towards work, responsibility, and emotional quality, and embrace change or innovation.

674 The overarching principles to be considered in the evaluation process would include

675 · A suitable personality model can be referred to determine the desired attributes for the parties
676 involved in the process of the delivery of facility management services.
677 · Together with the interested parties, the facility management organization shall establish a
678 positive and constructive communication approach with all relevant parties to ensure success.
679 · Measure the outcome on the improvement or services extended to the demand organization
680 through effective organizational and personality behavior.

681 A high-level outline of the evaluation process should address the following key questions.

1. What changes have occurred and do the changes align with expectations of positive outcomes? Evaluations should give an account of what the project has achieved, or not achieved, and compare this with expectations.
2. What outcome was obtained and what were the reasons for success or failure? It is important to know why things happened as they did, and analyse the factors which influenced the way the project progressed.
3. What actions should now be taken? Evaluators should suggest courses of action, in the light of answers to the first two questions.

8.2 Indicators used in evaluation

An indicator is a specific, observable, and measurable accomplishment or change that shows the progress made toward achieving the desired output or outcome. The evaluation indicators should address the evaluation questions and help determine whether the project objectives have been achieved.

Indicators should be identified at the outset of a project. At the start of the project evaluation indicator can be collected as part of the initial activities of the project.

The project should specify both quantitative and qualitative indicators. Quantitative indicators are generally objective and easier to measure. Quantitative information needs qualifying information to ensure they can be measured in an objective manner.

Within facility management, evaluation indicators are often considered as Critical Success Factors (CSFs). CSFs are defined as elements of a project critical to success, or critical to a project in achieving its mission or goals. Critical Success Factors are, therefore, events, activities, or metrics needed to make a project successful. These can be identified at different levels (e.g., organizational and for individual stakeholders). The process of establishing such factors will be discussed: the perspectives of Critical Success Factors and how they can be established and form the basis of evaluation.

Identifying Critical Success Factors enables organizations to track and measure progress toward achieving strategic goals or initiatives and to fulfil the organization's mission.

The key Critical Success Factors could be aligned to the definition of facility management *(ISO 41011: 2017 – Facility management – vocabulary*) as:

- People (personnel, staff, learning and development, interdependencies, stakeholders, communication, service providers, material suppliers)
- Place (space, site, facility, etc.)
- Process (operations, marketing, finance, supply chain, strategic focus)

8.3 Evaluation methodologies

Success of a measurement framework is determined by how useful the measurement framework is in assisting users to achieve their objectives. This considers two elements:

1. The measurement framework must be adopted and used systematically and integrated across the entire project, and
2. The measurement framework should influence decisions that will cause behavioral change and/or a decision that will effectively change the condition that contributes to the achievement of the objective.

8.4 Evaluation outcomes

An evaluation outcome identifies whether or not a project achieved its goals. An evaluation outcome measures a project's results and determines whether the intended or expected outcomes were achieved.

An evaluation outcome measures project effects by assessing the progress in the outcomes that the project intends to address. An evaluation outcome should begin with a review of the outcome expectations of the project and the key areas of influence plotted within a matrix. The FM can then plot the key areas of influence that facility management may offer against all stakeholders within the organization.

A stakeholder map identifies key areas of interest against relevant stakeholders (e.g., procurement and tender projects will be mapped against the procurement team within the organization).

All stakeholders should be identified, including:

1. The demand organization
2. Interdependencies
3. External interested parties – visitors, government agencies, vendors, social groups etc.
4. The facility management organization

The stakeholder map should be divided into a set of higher-level balanced perspectives and should be further divided as appropriate across all stakeholders so that specific focus groups or individuals can be quickly identified.

This matrix can be further expanded to include stakeholder needs. The demand organization may want to see the needs of internal and external parties identified separately. By including all stakeholders, the organization will arrive at a comprehensive Stakeholder Needs Matrix.

8.5 Stakeholder alignment

The needs and objectives of all stakeholders should be in alignment and be compared to the current facility management strategy, plan, and operation.

The facility management organization shall align its communication and engagement strategy against its stakeholders' needs to achieve effectiveness in this area.

The outcome from gap analysis conducted may be used to align the "Areas of Potential Influence" to meet stakeholder needs and user experience.

Identified gaps, complete with their perceived benefits, may be presented to the appropriate stakeholder group as the basis for key decisions to be made concerning the facility management initiatives and/or services recommended within the plan.

The improvements must be re-evaluated following successful completion of the project.

9 Improvement

Improvements should be demonstrably linked to the circumstances, understandings, and actions described previously, as shown through evaluation of outcomes.

Success may be described as the outcome of the process described above where

- the associated approaches to influence the behaviors of stakeholders resulted in positive outputs, and
- where positive user experience is evident.

The plan will have met its objectives if the approaches applied to align stakeholders with the facility management strategy are successful. However, it is important that the plan also provide an opportunity to sustain such approaches and outcomes over the long term.

The ability of facility management to be the catalyst of sustained continual positive outcomes and user experience will ensure that facility management is considered a key stakeholder and indeed as a key organizational influencer.

9.1 Achieving improvement

"Business Improvement" can be described as the process of transition from one state to another, where the latter is considered to be better, usually through action or intervention intended to bring about that change and improvement.

Within the context of this standard, improvement may be considered as measuring the output of the adopted process or approach, then modifying the process or procedure to increase the output, increase efficiency, or increase the effectiveness of the process or procedure. This state is directly related to the desired outputs required to influence behaviors. Improvement which can be identified accordingly will enable positive behavioral change.

Continual improvement is the ability to demonstrate ongoing improvement of processes or approaches through incremental and breakthrough improvements.

The facility management organization may demonstrate improvement through a number of ways that may demonstrate that value has been achieved and/or efficiencies established. One primary tool used to demonstrate improvement is the benchmarking of outputs achieved. Benchmarks should be established for:

1. Stakeholder position and satisfaction levels relating to facility management
2. Key relationships that exist within the organization
3. Productivity levels of end users and of facility management, if possible, and
4. Facility management perspectives relating to performance, risk, and value.

A scale may be defined and established to plot the maturity of the organization and/or the facility management function and this may provide a roadmap towards demonstrable best value and best practice.

9.2 Improvement process

The user can meet the desired objectives and expectations of the stakeholders when successfully applying the techniques and processes selected. Verification of success is measured through the stakeholder needs matrix.

In arriving at this position, shortcomings between the desired or expected state and the actual state, through evaluation will be identified. This shortfall can be described as "desired output gaps," and cumulative total of all identifiable gaps will be the difference between the actual position and the expected/desired position.

Improvement can be demonstrated through closing the identified gaps between the desired/expected state and the actual state.

9.3 Demonstrating and communicating value

The facility management organization may demonstrate value as a key stakeholder by

1. Aligning outputs and outcomes achieved with organizational goals, targets, and objectives
2. Negating, mitigating, or transfering organizational risk
3. Reducing direct cost, and/or
4. Delivering intangible or indirect value through reputation.

The facility management organization may change behaviors for improved outcomes and user experience, but it can only do so through 1 through 3 above; anything less is anecdotal or coincidental.

Annex A
Guidance

A.1 Scope

This document specifies requirements to plan, create, implement, measure, monitor, and influence changes in several aspects of the demand´s organization that ultimately will drive improved outcomes and better user satisfaction.

This annex presents examples, proven practices, and strategic options for use. It is not intended to prescribe detailed elements, as the implementation will vary based on the demand organization's mission, market, and goals.

The extent of application of these requirements depends on the demand organization's operating environment and complexity: its mission and policies, the nature of its activities, its products and services, geographical location, and the conditions in which it functions.

A.2 Normative references

No guidance needed.

A.3 Terms and definitions

No guidance needed

A.4 Context of the organization

Organizations take many forms: small to large; local to international; vertical, horizontal, or matrix. The range of stakeholders can be small or wide and include visitors to the facility. These variations should be considered as the plan is developed.

A.4.1 Understanding the organization

The complexity of an overall organization should be recognized. This standard applies to organizations both large and small. Small organizations with limited facilities portfolios can be straightforward. However, for large or global organizations, there may are often complex internal structures (e.g., multiple business units, service lines, or even distinct companies) with regional and cultural differences. Variations in decision making processes are possible. It is important to ensure an understanding of the hierarchy of organizational structures and potentially differing strategies.

A.4.2 Identifying organizational goals and objectives

Goals and objectives are not static, but time centric. Organizational goals change with evolving corporate strategies and need to be re-assessed on a periodic basis. How often the facility management organization should revisit organizational goals and objectives depends on the general frequency of the demand organization's strategic planning process. External factors such as major economic, market segment, or even regional geo-political changes may also necessitate a revision of an organization's goals and objectives. While an organization's culture and long-term financial goals may be relatively consistent, short- and mid-term objectives can vary more frequently. It is important that the facility

management organization find the right cadence of revisiting goals and objectives to ensure strategic alignment.

A.4.3 Alignment of goals

The facility management organization can play an important role in managing expectations by the correct alignment of goals, especially on a short/mid-term perspective. Its ability to influence the achievement of improved outcomes and better user experience relies on the fact that the facility management organization can support the organization in avoiding ambiguous goals or ambiguous messages across business units, organizations, and departments. While this can be a not critical factor on smaller and less complex organizations, it can become an important aspect to be addressed on larger and more robust ones.

A.4.4 Stakeholder evaluation

The size and complexity of the organization, breadth of the plan, and scope of the organization helps determine the appropriate stakeholders to identify and define metrics to measure changes. The use of graphical methods, networks, flowcharts, tables, and other tools can assist with the identification of stakeholders and priorities.

Other tools such as surveys and interviews can help identify those stakeholder measures that can be used to monitor the success of the plan.

A.5 Influences and behaviors

A.5.1 Understanding organization and stakeholder behavior, and development of key relationships

Examples of dimensions that can influence the organization's ability to exert influence over different dimensions include:

- Risk appetite
- External opportunities
- Change management processes
- Culture and established policies.

A.5.2 Behavioral change

Example of factors and elements that influence of behavior of end users and other interested parties:

- Alignment between the organization and the delivery of the demand organization's strategic intent;
- The organizational culture for both individuals and the core business;
- How the demand organization's culture shapes decision making and behaviors;
- Professional attitudes, motivations, and skills;
- The level of maturity of both the demand organization and the organization;
- Relationship of the facility management staff with the end users and other interested parties; and
- Real and perceived authority of the organization.

A.5.3 Opportunities to influence

Here are examples of factors, dimensions, gaps, and elements that can be identified by the organization that can influence behaviors or impact the achievement of optimal end user satisfaction.

890
891 **A.5.3.1 Building life cycle**

892 - **Feasibility** – aligned with the overall demand organization's goals for facility performance and
893 preferred delivery methods;
894 - **Design** – descriptive information addressing physical size, operational expectations, location,
895 environmental characteristics, facility systems, facility information tools, sustainability goals,
896 maintenance plans, security, health and safety, local resources;
897 - **Document production** - description of facility contextual data required for the facility
898 construction and service life maintenance and operations;
899 - **Occupation and use** – end user fit out;
900 - **Operation and maintenance** – including repairs and utilities;
901 - **Renewal and repurpose** – periodic refurbishment of the facility;
902 - **End of use** – policy on disposal of excess or redundant facilities.
903

904 **A.5.3.2 Resource, response, and influence gaps**

905 Resource gaps, resulting from shortfalls in time, money, people, facilities, materials, supplies, or
906 equipment. These gaps can include:
907 - Time available or allowed vs. what is needed;
908 - Funding allocation vs. what is needed;
909 - Amount and skill level of labor accessible vs. what is needed;
910 - Facilities accessible vs. what is needed;
911 - Materials and supplies provided vs. what is needed;
912 - Equipment obtainable vs. what is needed.
913

914 **Response gaps:**
915 - Bureaucratic procedures conflict with flexible customer needs;
916 - Facility management department structure is mismatched to organizational needs;
917 - Current demands interfere with future needs planning.
918

919 **Perception gaps:**
920 - Customer quality demands unmet by facility management quality provided;
921 - Customer perceptions regarding the facility management department;
922 - Customer perceptions regarding facility management perceptions of customers.

923 **A.6 Planning**

924 No guidance needed.

925 **A.7 Outputs and outcomes**

926 No guidance needed

927 **A.8 Evaluation**

928 **A.8.1 Scope of the evaluation**

929 A structured approach to establishing the scope of the evaluation would consider the following
930 questions and answers in respect of this standard:
931

Question to be answered	Answer to the question
What is the purpose of the evaluation?	The purpose of the evaluation is to measure the overall facility management organization culture, behaviors of interested parties and their satisfactions in meeting expectations.
What is the focus and the primary evaluation question?	The focus and the primary evaluation: Are all interested parties satisfied with the outputs from facility management.
What is the knowledge basis of the evaluation?	Establish a comprehensive knowledge basis for the evaluation which could include but not be limited to reports and data for facility management system, e.g., minutes of meetings, surveys, and documents.
What resources are available for the evaluation? Time, economy, competencies?	Plan the evaluation according to the available resources, e.g., time, economy, and competencies.
What is the methodological approach in relation to the purpose?	Chose a comprehensive methodological approach including qualitative and quantitative evaluation relevant to the behavior of the interested parties.

Evaluation criteria

The criteria that should be considered in shaping the evaluation questions include:

- **Effectiveness –** Is the project meeting its desired objectives? Achievements at this level are project outputs, or what was done. The inputs are the human, financial, and material resources that were provided to achieve the objectives.
- **Efficiency –** What is the cost of achieving the objectives? To be be efficient, the project should be sustainable, meaning that the objectives are being met within a defined program and budget. These factors are intrinsically linked.
- **Relevance –** Is the project relevant? The overall approach and strategy of the project should be consistent with the aims of the project and intended or expected outcomes.
- **Outcomes –** What were the outcomes of the project? Can the outcomes be measured and do they suggest that the project has succeeded in full or in part. In this instance, the desired outcome would lead to a positive change in behavior and user experience.
- **Sustainability –** Will behaviors continue to change in a positive way towards facility management initiatives and activities beyond the initial project scope? Another aspect of sustainability is the effect the project has on the environment and natural resources.
- **Progress –** Is the project achieving the intended or desired objectives, or have these changed? An evaluation can also question the objectives and design of the project itself. It may be concluded that a project is progressing very well, even though it is far from meeting the original objectives. These may have been too ambitious or irrelevant.

A.8.2 Indicators used in the evaluation

There are a number of factors to consider when establishing Critical Success Factors (CSFs), including:

- **Internal factors (Organization)** – Internal policies and guidelines that might have an influence over the organization's culture.

- **Industry factors** – The characteristics that reflect the aspects that are important to the facility management sector. Typically, these would be cost, quality, availability, etc.
- **Environmental factors** – The macro-environmental influences on the organization such as the economy, business climate, competition, and technological advantages. A Politics, Economic, Social, Technology, Legal and Environment (PESTLE) analysis would assist in gaining a better understanding of the environmental factors.
- **Strategic factors** – Based on the competitive strategy that an organization follows. This could include the way the organization choses to position itself in terms of cost, services delivered, and targeted sectors.
- **Temporal factors** – The factors which result from organizational changes and are usually short-lived.

Once the CSFs are defined, metrics can be developed to measure the CSFs. It will be the metrics that will determine whether the CSFs have been met.

A.8.3 Evaluation methodologies

Similarly, a set of balanced perspectives, influence metrics, and outcome planning which forms a measurement framework should be designed and developed so that the results and outputs are compelling and will enable key decisions to be made that will inform positive outcomes and user experiences.

A measurement framework should be adopted to ensure that the planning system and key inputs as described in this section can be effectively measured in a balanced way that meets the cross-sectional needs of all stakeholders and with the ultimate aim of establishing "stakeholder improved outcomes and user experience."

Evaluation methodology defines the criteria for evaluating the success of the project. Evaluation methodology is the process for establishing whether the project goals and objectives have succeeded. An evaluation plan should be prepared to establish the following criteria:

- Which evaluations to use (e.g., tests, surveys, etc.)
- Methods used to collect evaluation information
- Methods used to analyse the evaluation information
- When to conduct the evaluations (milestones, quarterly, annually)

The three main types of evaluation methods are goal-based, process-based, and outcomes-based. Goal-based evaluations measure if objectives have been achieved (e.g., SMART-based goals). Process-based evaluations analyse strengths and weaknesses. Outcomes-based evaluations examine broader impacts and often investigate what greater good was served by the project. Systems thinking should also be used.

A number of processes and tools exist within each of the three evaluation methodologies. These can be arranged:

Goal-based evaluation methodologies	Process-based evaluation methodologies	Outcome-based evaluation methodologies
- Critical success factors from corporate strategy - Stakeholder surveys - Group discussions - Financial benchmarking - Workshops	- Interviews - Measurement against service level agreement - Customer satisfaction surveys - Measurement	- ROI - Building performance assessment - Employee surveys - Financial – cost savings or cost reduction

	- Risk and opportunities - FM context analysis (i.e., using PESTLE Analysis) - Workplace Assessments - Workshops	- Social network analysis - Stakeholder surveys - Group discussions - Customer complaints/compliments - Observations

Possible tools for improvement

- Building performance assessment, i.e. using Flex 2.0 or Flex 2.0 Light
- Continuous review process
- Critical success factors from corporate strategy
- Employee surveys
- Employee surveys
- Estimate the annual potential gross income and annual operational expenses
- Estimate the cost of new development
- Interviews
- Logbooks on knowledge- sharing activities
- Market -valuation
- Measuring risk expenses
- Measuring space, number of workstations and FTE (full time equivalent)
- Measuring the time spent or saved
- Measuring time of business interruptions
- National FM context analysis i.e. using PESTLE Analysis (Politics, Economy, Social, Technology, Legal and Environment)
- Observations
- Social network analysis
- Spatial network analysis
- Stakeholder surveys Group discussions
- Survey with multi-criteria scoring methodology
- Walk-throughs
- Workplace H&S assessment
- Workshops

A.9 Sustainable improvement

No guidance needed