Standards for FM – Which ones do you need?

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Facilities Management   Standards

Is that a Standard?

Provisions, practices and guidance from authoritative sources, typically structured for compliance, fit the conventional idea of a standard. Some standards are designed to be auditable. Related documents from authoritative sources can contain approaches, methods, and recommendations that are informative and advisory. These are frequently spoken of as standards and can add appreciable value for those fortunate to know about them – though they are not always easy to identify. "There may be a standard for this" can lead to time-taking searches and asking around, with uncertain outcome. Is there a way to obtain published standards recognized to fit FM needs in a particular situation?[i]

Standards and regulations – aren't they the same thing?

Standards, unless specifically adopted as enforceable requirements by a chartered body or ordered within an organization, are informative and advisory. That is not to diminish their importance and utility. Standards mainly arise using consensus of experts to convey knowledge. Following a disciplined sequence of development ensures that a standard, whether or not used in a regulation, leads to support of people and organizations to obtain intended results. The value of standards derives from their sources and purposes, and only secondarily from appearance in a regulation.

Finding a standard to fit

Identifying documents to use, even from just one or a few sources can be manageable but limiting. Does the standard found address the practical need at the time? "There's the rub" as Shakespeare pointed out in a tragic scene.[II] This approach has advantages of familiarity, timely revision by the source, and conveniently identifying documents to add when needed. Much of value can be missed, however. Finding and applying standards can add dimensions and competence to an FM organization.

Example: the ISO 41000 family of documents (facility management) has grown considerably since an article that I wrote in 2019.[III] More are in development. At the same time, other organizations publishing standards applicable to aspects of FM from different perspectives also maintain their products as valid and current. Which to use? Standards often apply together. For example, managing indoor air quality involves well being and preferences of occupants, monitoring and maintenance, air distributions, energy management, equipment and supplies, maintenance management, and more.

Even with a standard from a familiar source, compliance can involve substantial work, especially at the start. For example, ISO STD 41001:2018 *Facility management — Management systems — Requirements with guidance for use*.[IV] totals just 44 pages. The standard body is 14 pages, with 30 pages to guide adoption. Adopting ISO 41001 involves choosing and fitting the provisions of the standard to the particular FM organization. The rest of the 41000 family are advisory and informative to help shape FM to perform. Every FM organization using ISO 41001 must determine how every provision fits, then demonstrate the capability described.

Another example shows how extensive a group of related standards from a single source can become. ASTM Waste Management Standards[v] includes mainly technical standards for use in "collection, transport, processing, and recycling or disposal (whichever is applicable) of waste materials for health, environmental, and/or aesthetic purposes." The standards are conveniently listed and summarized by category, but they are still a crowd - several hundred – to explore when looking for which ones to use under the circumstances.

Improving efforts to identify standards that match needs

The examples cited ISO and ASTM products pertinent to FM. There are many more, even from just these two sources. In ISO, for example, the 55000 series applies for managing physical assets not specifically included in building systems.

A sampling of sources pertinent to FM yields an alphabet soup: AVIXA, SMPTE, ASHRAE, BICSI, BOMA, CEI, IFRS, OSCRE, USGBC, BREEAM, NFPA… of organizations that publish standards. A colleague recently undertook constructing a maintainable, general search and identification tool for standards to use in FM. The tool (in Excel) lists standards by category and subcategory, title and source, date, primary region where used, and a link. The tool so far includes 14 categories with 49 subcategories: 85 documents in total. The approach taken to develop and maintain the tool appears promising, with work underway on guidelines for editing, adding, and updating.

A principal question for users is what should be included, and what left out? As yet no systematic way of finding and selecting entries exists beyond user referrals based on knowledge and experience. This suggests a Wiki. Another prospect could be to establish a purpose-designed Retrieval Augmented Generation (RAG) database, coupled with a large language model (LLM). This approach may soon prove worthwhile in consideration of identifying standards to apply in a particular case.

Conclusion

Identifying and applying standards that add value is what is needed. In some cases, the demand organization or client will specify standards to apply. More often, it is FM that selects and makes use of standards to build organizational and individual competence and performance, adding value for all stakeholders. Various specialized lists and summaries of standards and associated guidance exist but are not necessarily maintained. They can, however, serve as entry points for exploration. In the era of AI, search tools can be expected to reliably identify applicable standards. Still, standards originate from many, sometimes overlapping, interests and sources. Identifying standards and corralling their titles, purposes, and fit to circumstances will remain a challenge.

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[I] Ad hoc, provisional, news and recommendations from colleagues from conversations, or methods and explanations received in articles, webinars, podcasts, conferences, and so on, while not standards per se, can be instrumental in identifying sources of guidance to investigate.

[II] Shakespeare, William, c. 1623, Hamlet, Act 3, Scene 1,"To sleep, perchance to Dream; aye, there's the rub..." in a speech by Prince Hamlet lamenting his circumstances. Wikipedia, https://en.wikipedia.org/wiki/To_be,_or_not_to_be.

[III] ISO 41000 Series in Brief, with Implications for FM Consultants. Reynolds, David, FMCC Newsletter feature, September, 2019 https://fmcc.ifma.org/iso-41000-series-in-brief-with-implications-for-fm-consultants/#:~:text=The%20ISO%2041000%20series%20taken,system%2Dstandards.html

[IV] ISO 41001:2018 update expected 2025 or 2026.

[V] ASTM Waste Management Standards; summary list: https://store.astm.org/products-services/standards-and-publications/standards/waste-management-standards.html includes various sections of interest that would typically be outsourced. For FM, Workplace Air Quality stands out, but contains 46 standards.