



FUNCTIONS AND PERFORMANCE MODEL WITHIN FACILITY MANAGEMENT

Model derived from DIN EN 15221 for mapping to
the operational practices of private corporations and
the public sector

RealFM e.V., SVIT FM und FMA

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Translator’s note

This booklet was translated from its German original into English with the non-German speaking professionals in mind to transport the theories and practical approaches of the functions and performance model. The German original of this booklet was created after many controversial discussions amongst a number of native speakers with regards to correct terms and expressions, etc. The translation is thought to be a guide in general and is not to be used as a linguistic guideline to the correct facility management terms - a lot of which have not been defined in detail anyway. It has been translated from the German original and in case of any discrepancies between the German original and the English translation, the original German version will prevail.

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Preface

Dear members, dear readers, dear interested parties,

The development in and towards Facility Management (FM) has reached a decisive point in its development phase. So far it has been described in management terms and it has been well standardised. However, to allow a practical implementation of the normative basis, one urgently needs to substantiate the defined management functions. The main goal is to create a consistent understanding of the tasks and competencies necessary in FM in order to contribute to the further shaping of the activity areas in FM.

A consistent usage of terms and concepts at a detailed level of functional and task description, a uniform usage of management terms and a homogenous image of the generally valid process scheme when executing services are a very helpful assistance for a successful future development of the FM performance processes.

Such a further detailing basic work is the prerequisite for allowing the professional development of competencies and certification of respective competencies necessary at a level that is sufficient for the demands that users, service providers, consultants and professional bodies place on this professional development. At the same time it is of course essential that all current laws, standards, regulations and guidelines are completely accounted for and incorporated into this works. On this basis, it is possible to carry out further contents or country-specific adaptations of the developed models.

The benefit of this work is obvious. The (further) development of the internal organisational and operational structures in FM, the efficient design of FM organisations and their respective processes as well as consistent design of interfaces within the FM processes are only possible in their necessary variety and following a uniform model when based on this fundamental works.

The orientation framework also supports the operational implementation of the mission statements of the professional bodies involved. This is a further milestone which is used by the professional bodies to help their respective members in their fulfilment of their important tasks.

We would like to wish those who read the information in this document much profit in knowledge and gains as well as a lot of success in applying the content of the functions and process model.

Kindest regards,

Yours,

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List of abbreviations

CB	Core business
CEN	European Committee for Standardization
CREM	Corporate Real Estate Management
DIN	Deutsches Institut für Normung (German institution for standardisation)
EM	Executive management
FM	Facility Management
FMA	Facility Management Austria
FOM	Facility object management
FPM	Facility performance management
FRM	Facility resource management
FS	Facility services
FSM	Facility services management
GEFMA e.V.	German Facility Management Association e.V.
PREM	Public real estate management
RealFM e.V.	Association for Real Estate and Facility Managers e.V.
REM	Real estate management
SC	Sub-contractor
SM	Service management
SPM	Support management

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1. For the target audience and how to apply this booklet

The models for Facility Management described within this booklet have been developed on the requirement profile as observed in corporate entities. This includes all organisations whose core-business is not Facility Management but instead who adamantly need facility structures (space, real estate, technical installations, infrastructure, etc.) to successfully carry out their respective core businesses. Beyond that this booklet is focused at public authorities.

Deliberately, the loop was closed from the above organisations to property business, as there are many links and interfaces between the Real Estate and the Facility Management. In diagram 4 these correlations are explicitly shown. For this it is aim and a worthwhile task for the future development to specify and substantiate the functions and tasks with respect to the service area in Facility Management for Real Estate companies. Everybody who is interested in furthering this development process is invited to place their inputs.

The target audience of this booklet are decision-makers, senior management at all levels and personnel of the supporting organisational units. Furthermore, service providing organisations, which support core-business with their respective services, are addressed.

Developing and forming FM organisations as well as creating requirement specific FM processes within corporates and public bodies are specific use cases that can be implemented by using this booklet.

It is explicitly desired that these models are used in teaching and training of all organisations that work in FM.

2. Initial situation of the development of a functional and performance model in FM

Significant strategic and operational potential for improving productivity in the core business of organisations can be found in effective support processes that are aligned with the organisation's primary activities. Close dovetailing of key processes and support processes in this context represent a major focus in the design of business processes in companies and public institutions.

The first standards covering Facility Management in Europe were published in 2006 (DIN EN 15221 series).

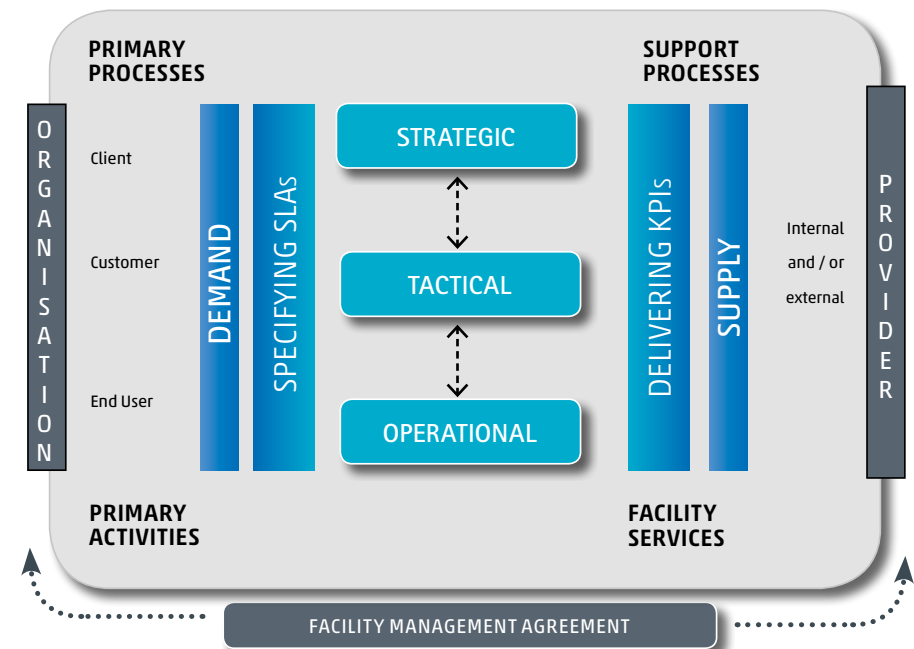


Diagram 1: Facility Management model (DIN EN 15221)

These standards were established on a basis of intensive discussion and agreement that took place in a process lasting several years, under the aegis of the European Committee for Standardization (CEN). Building on this work, the two German FM associations, the German Facility Management Association e.V. (GEFMA e.V.) and the Association for Real Estate and Facility Manager e.V. (RealFM e.V.) adopted a number of agreements including their occupational profile for Facility Managers.

Both DIN EN 15221 and the "Facility Managers" occupational profile have made a significant contribution to aligning what was previously a wide range of terminology and reducing the confusion that resulted from the variety of different usages.

An indicator for the further improving professionalisation of FM is the resulting demand for further definition, differentiation and specification of processes and functions, tasks and activities in the Facility Management. The following description of all tasks and activities of the object & services based management functions, which form a significant part of FM, has been drawn up and transformed into this functions and performance model with the aim of further driving and supporting this development. These management terms and definitions are allocated to management levels, to which the key activity areas and tasks are then aligned with a generally applicable performance model. This enables a process-oriented overview to be created of all management activities in the support area for each of the core businesses, irrespective of the specific way in which the associated operational services may be implemented.

As prerequisite for the creation of this booklet a working committee comprising of more than one hundred representatives of FM organisational units in companies from a range of industries and service providing organisations as well as academics and FM consultants was established. The result was a comprehensive task analysis of the functions and roles in Facility and Services Management, and a broad-based process mapping of the general provision of services between core business and support areas. The following descriptions provide the basis from which the skill requirements for those working in Facility and Service Management and transfer models that are necessary for operational implementation of the functions model can be established. With the requirements

for the development of models in FM described below, additional defining components have been made available to the business sector, and the overview of the functions, roles and activities within the Facility Management has been refined.

The usage of this functions and performance model will provide further advantages or benefits. Such as

- creation of a clear and unambiguous understanding of the tasks, functional contents and interfaces within the Facility Management.
- a broader understanding in the application of and work with the codes of practice and guidelines of other professional organisations.
- validation of a targeted development of competencies.
- the illustration of vocational perspectives and demonstration of the connectivity among the different roles of activity.
- the precise positioning of the Facilities Services and the managing of the Facilities Services in the context of the other functions and activities.

3. Functions, management levels and interfaces

3.1 The functions model in FM

Facility Management comprises the planning and management of all support processes that are not directly part of the primary activities of an organisation and therefore also do not form a direct part of the organisation's value-added processes, but that influence the effectiveness and efficiency of these value-adding processes indirectly, or at least in part. Facility Management is a function in every organisation. Provision of these operational services such as Facility Services, as well as operational management tasks, may be done internally or may be outsourced.

Diagram 2 below identifies the fundamental functions in Facility Management as well as Real Estate Management. The characteristics of these functions in Facility Management may differ from one organisation to the next. These differences may lie within the precise definition of the functions and tasks, and thus resulting in different responsibilities associated with the corresponding positions. The key factors that influence these specific characteristics of the functions are the types of primary activities and the resulting division between core and supporting processes. Furthermore, the type of operational form of the organisation in relation to the decision-making competencies and responsibilities, and the type of infrastructure that supports the core business also influence the characteristics of the respective positions in FM.

Depending on the purpose of the space and infrastructure in respect to the primary activities, a distinction shall be made between

- **corporates**, in which the area and infrastructure act as a means of production to support the primary processes and the profit-making intention is implemented **on** the space or with the assistance of the infrastructure, or
- **properties**, in which the area and infrastructure act as a commercial and the profit-making intention is pursued **with** the space. (cf. diagram 3).



Diagram 2: Cascading functions model in FM

Specification of services

Properties

Real estate industry

Assuming responsibility for real estate and facilities / assets

Assuming responsibility for cash flow and asset values

Ensuring return on investment

Control of services

Assuming responsibility for owner's obligations

Ensuring demand-compliant fulfilment with regards to tenants

Assuming responsibility for the facilities

Ensuring compliance with requirements with regards to the facilities

Performance of services

Assuming responsibility for the agreement

Ensuring the performance of services

Assuming responsibility for the agreement

Ensuring the performance of services

Assuming responsibility for the services execution

Provision of services

Assuming responsibility for the services execution

Provision of services

Assuming responsibility for the services execution

Provision of services

Assuming responsibility for the services execution

Provision of services

One characteristic of FM responsibility can only be identified among corporates. In purely property-related organisations, the tenant is the owner of the core business, and therefore assumes the role of the corporate. The property company in this case does not secure the support processes of the corporate, but rather "just" the management processes of the space let out.

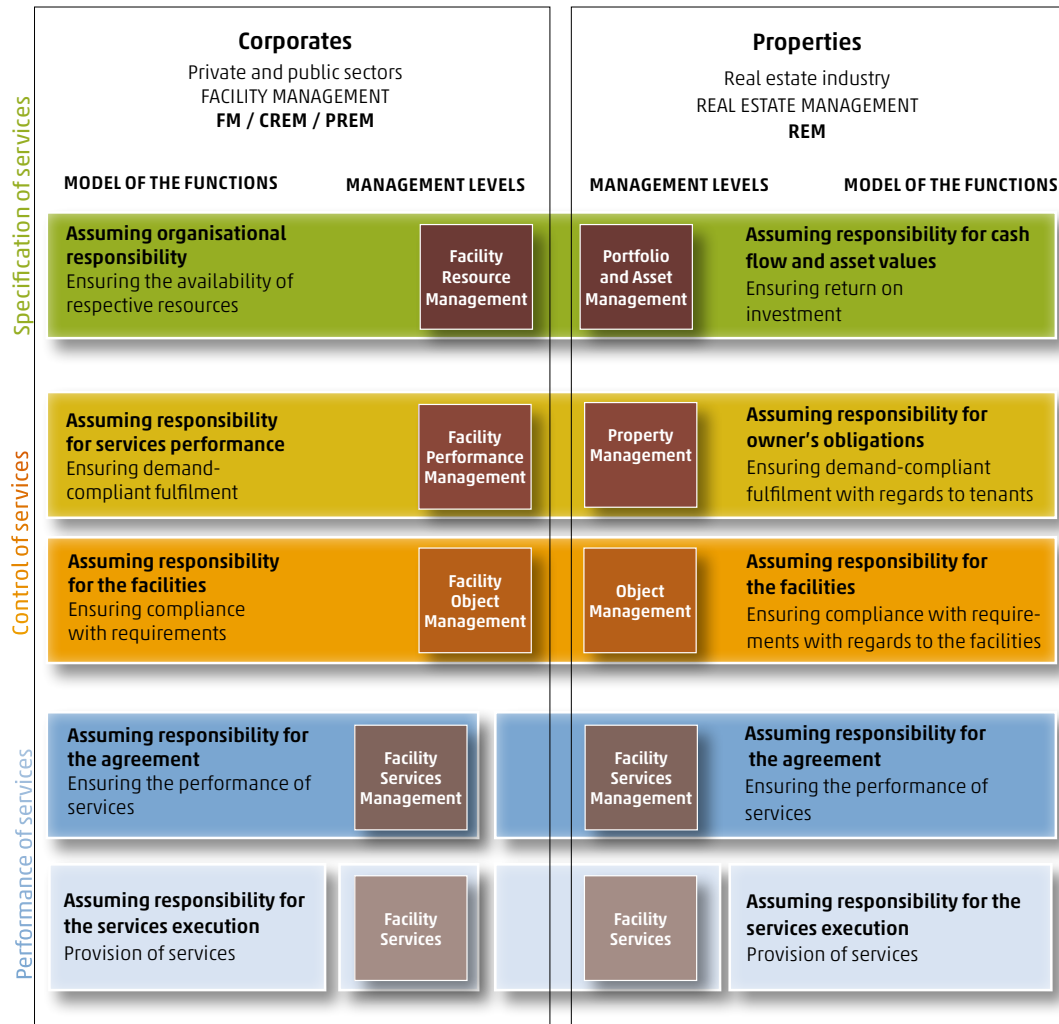
3.2 The management levels within the functions model

The functions in the support sector are reflected in four hierarchical cascading management levels and one operational level. The management levels control all services from the definition of demands through to the operational service provision. These are derived from DIN EN 15221. The underlying processes are described in DIN EN 15221-5.

The definition of the demands at the strategic level is used to set the standards or guidelines and ensures availability of all supporting resources. At the tactical level, the specific core business-compliant demands and infrastructure-compliant requirements are ensured evenly for all facilities and provided for each specific facility at the operational level. The fourth management level is responsible for assuring the quality of a defined service provision on the basis of service level agreements.

Specific management terminology is used to segregate functions at the four management levels, as shown in diagram 4. In the right hand section of the diagram the established management terms of the Real Estate Management are assigned to their corresponding functions as shown in diagram 3, This is then contrasted with the levels of hierarchy found in the "corporate" world.

Diagram 3: Cascading functions model in REM



The four management levels comprise the following contents described in greater detail below:

Facility Resource Management (FRM)

The core function of the **Facility Resource Management** is to align the FM strategy with the corporate objectives of the core business (CB) and to derive the necessary performance requirements for the support processes. It makes available the necessary resources on the basis of the quality and quantity of the defined performance requirements. These resources include, in particular, infrastructure, personnel, materials, time and money (both in terms of capital and cash); the so-called production factors or value added factors. Facility Resource Management focuses primarily on assuring requirements for the core business within the corporate or production cycle based on the core business product. The functional area can therefore be outlined as follows:

- Service Level Agreements with core business / implementation of the demand ordered
- Complete responsibility for resources with regard to life- and demand cycles
- Derivation of realisable demands and requirements into standard and guidelines
- Consideration of the requirements arising from the existence of the infrastructure
- Provision of according resources (people, infrastructure, materials, time, money)
- Adaptation of the respective resource strategy to the CB cycles
- Focal point: **Corporate and production cycle of the core-business organisation**

Diagram 4: Comparison of cascading management levels

Facility Performance Management (FPM)

The key function of the Facility Performance Management (management of service provision) is to control the performance demands arising from the core business across all facilities and to control the performance according to the requirements on the basis of the laws, standards and guidelines. Facility Performance Management focuses primarily on guaranteeing facility and service-specific requirements from the perspective of the customer's core business within its demand cycle, adjusting the service provision to meet changes in the basic parameters and needs, and allocating the resources provided to the facilities and services. The functional area of Facility Performance Management can therefore be outlined as follows:

- Facility-comprehensive control of the realisation of defined demands, requirements, standards and guidelines
- Responsibility for the provision of services in line with the requirements
- Synchronisation of value development with usage and ownership strategies
- Focal point: **Demand cycles of the core business areas**

Facility Object Management (FOM)

The key function of **Facility Object Management** is to guarantee the economical operation of the facility at the appropriate level of quality and to assume all transferred obligations in respect of the operator's liabilities in line with the requirements within the facilities life cycle, beginning at the handover, through ongoing economical operation, to needs-compliant adjustment of the services within the facility in case of changes to the general framework conditions. The functional area of the Facility Object Management can therefore be outlined as follows:

- Overall responsibility for the operation of the facilities (objects) (plots of land, constructional facilities and technical installations) at a good economic value with the appropriate quality
- Assumption of all facility-related obligations arising from the operator's liability and also assuming good economic value
- Focal point: **Life cycle of facilities (objects)**

Facility Services Management (FSM)

The key function of **Facility Services Management** is to lead and assume responsibility for the specific operational activities that are carried out - normally by separate trades, or in some cases trade-comprehensive. It focuses on the complete and compliant provision of services or service bundles and the assumption of the operator duties associated with the services within a specific **agreement cycle**. The functional area of Facility Services Management can therefore be outlined as follows:

- Lead and responsibility for the operational activities within the facility
- Guaranteeing both specific trades and services that apply to all trades
- Focal point: demand-compliant fulfilment of obligations within the **agreement cycle**

3.3 The interface model in FM

In the scope of the service provision a range of interfaces shall be taken into consideration. These interfaces arise on the one hand among the cascading Facility Management functions and on the other hand relating to third parties.

Overall, five interfaces can be identified with respect to the Facility Management. The extent to which they are considered and compliantly handled is key to ensuring a good quality of the overall service provision.

The first interface connects the primary activities and the support processes. If the organisation is structured according to multiple primary activities, one such interface exists for each primary activity. A clear demand definition of the support services required for the organisation's primary activities determines the subsequent requirements and quality-compliant provision of the objects and the Facility Services. This is governed by the service level agreement laid out between the primary activities and the facility resource management.

The second interface connects Facility Resource Management with the Facility and Service-specific service management (Facility Performance Management). It realises the facility and service-specific demands at the desired levels of quality in the required quantity. This interface determines how demands in all facilities are realised in line with the resources as well as the corporate identity and the associated standards.

The third interface connects Facility Performance Management and Facility Object Management within the scope of the facility-specific service management. In particular, this interface determines the legally compliant and value-retaining provision of services within or on the facility. This service has to be specifically synchronised with the user requirements according to the organisation's demands.

The fourth interface connects the OM level with the Facility Services Management. It determines mainly the user's satisfaction with working conditions and with the services provided in the facility. This interface is especially exposed to the challenge of synchronising the specific requirements of the facility's life cycle and the demand cycles with the interests of actors who are focused on the

agreements cycles. As the FSM acts in very close contact with the end user, it is advisable to actively manage this interface by FPM/FOM.

A fifth interface connects FSM and the Facility Services employees actively delivering services. Thus this interface covers the supply of Facility Services in the respective field of responsibility according to agreements or contracts.

Some of these interfaces may represent market interfaces. This means that they are characterised by tendering processes and govern the services between market participants at a contractual level. Equally, these interfaces may also exist between service partners within the same company. The decision regarding which services are provided internally and which are outsourced shall be made from the perspective of their proximity to the core business or their influence on the success of the core business.

Ultimately these interfaces are determined by the individual insourcing/outsourcing strategy of the organisation; as a rule of thumb this strategy is shaped by core business and often imposed upon the secondary service processes.

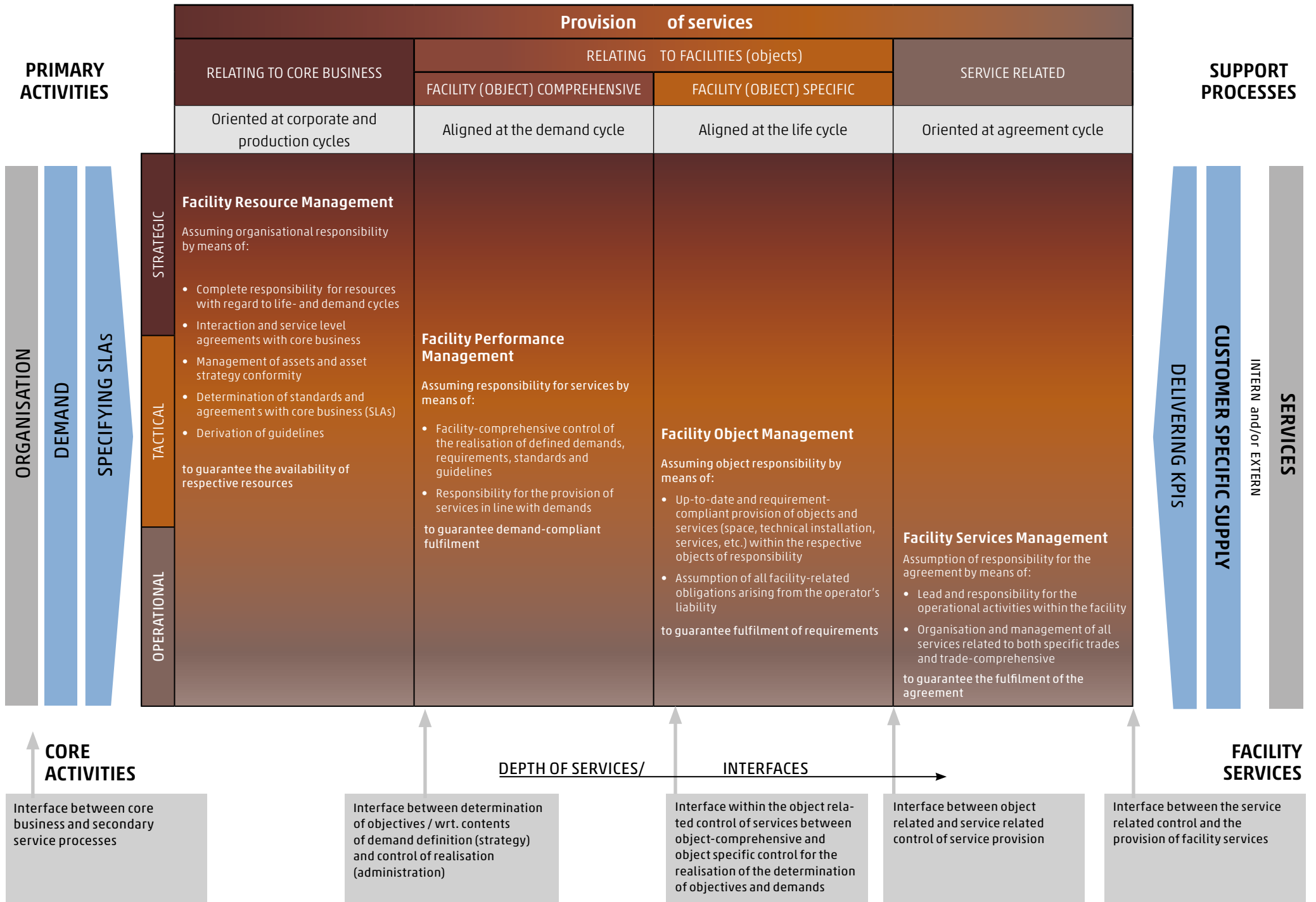


Diagram 5: Functional interfaces in the model (based on DIN)

4. Services and task assignments

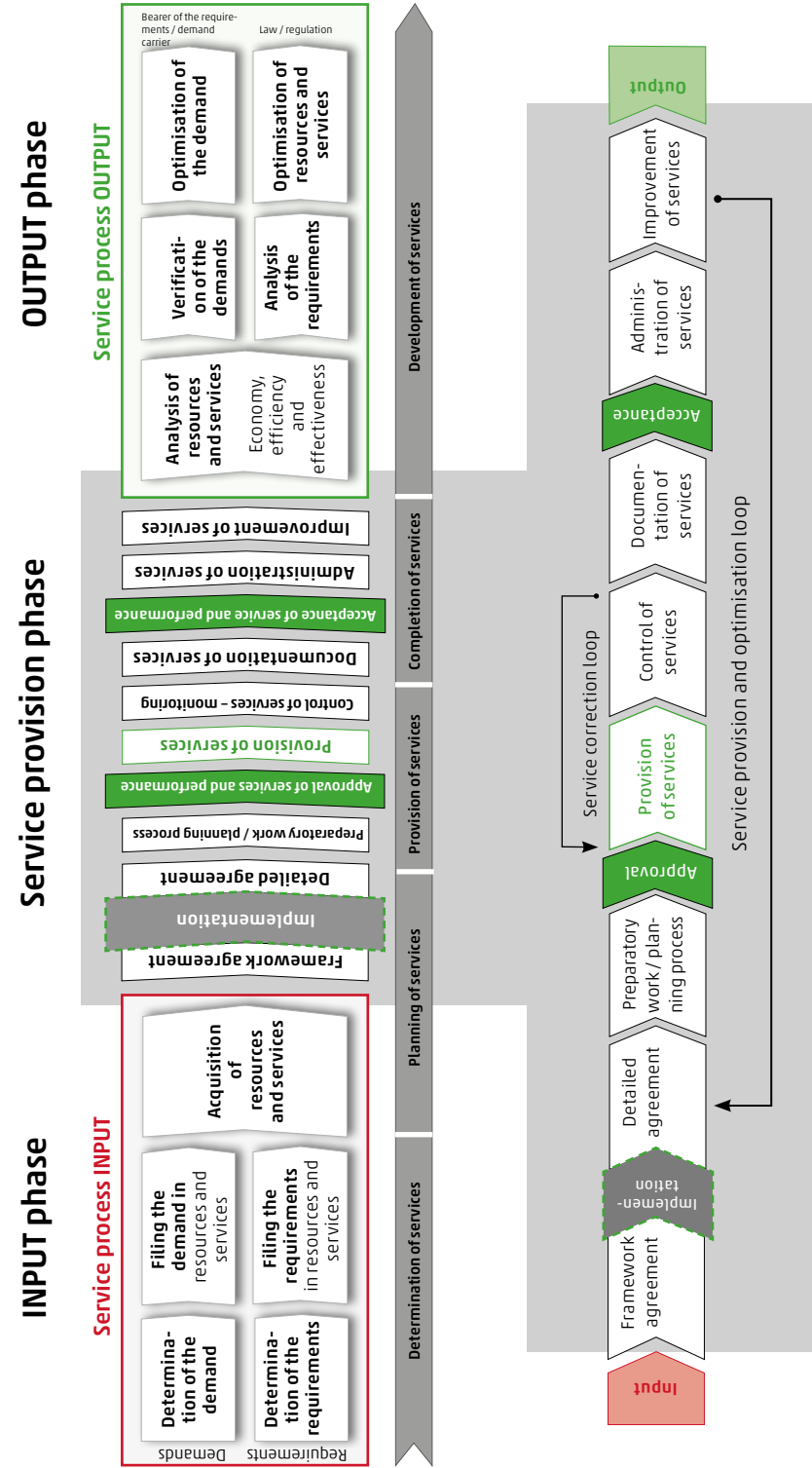
4.1 The performance model in FM

The cascading view of all management functions within Facility Management serves as to systematise and structure the areas of performance and responsibilities. A process analysis is mandatory in order to derive activity areas, roles and tasks from these functions. In this respect, both in the theoretical models and in FM practice, a general services process has become evident that represents the complete standardised process for service provision to support core business across industries and trades. This is shown in detail in the diagram below.

The process flow is a constantly repeating, rolling process that can run in multiple parallels. This is an idealised process for service provision, which has proven itself for a complete service mapping. It is also not specific to Facility Management, but in this form also covers all types of service provision. Determining this service model and the corresponding task matrix which is described in chapter 4.2 allows a further step forward toward a standardisation of services in Facility Management, which in turn draws on the development during the original industrialisation.

The individual process elements are described in more detail in the glossary of this booklet.

Diagram 6: Performance model – standardised process for service provision to support core business



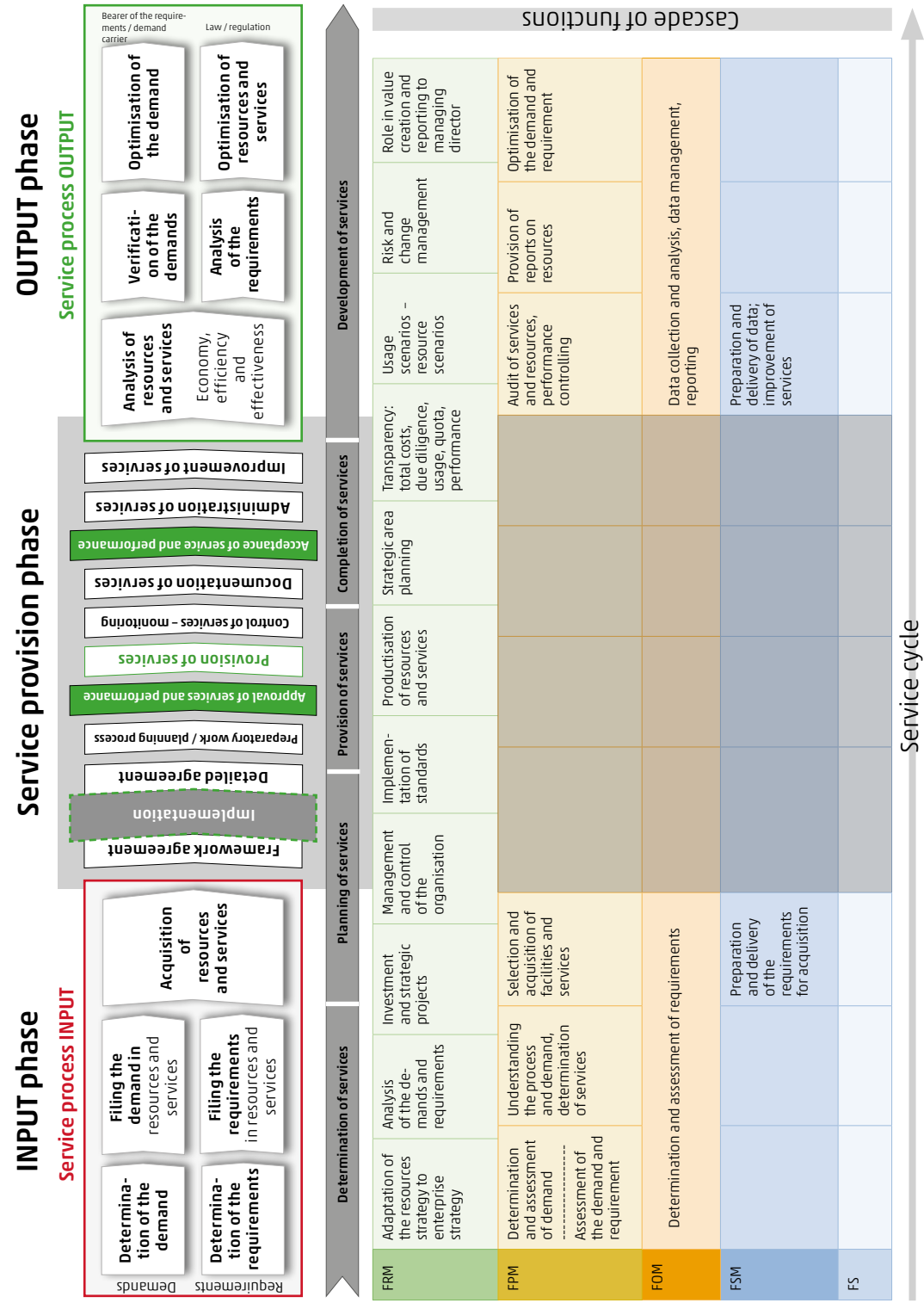
4.2 Task assignments in the functions and performance model

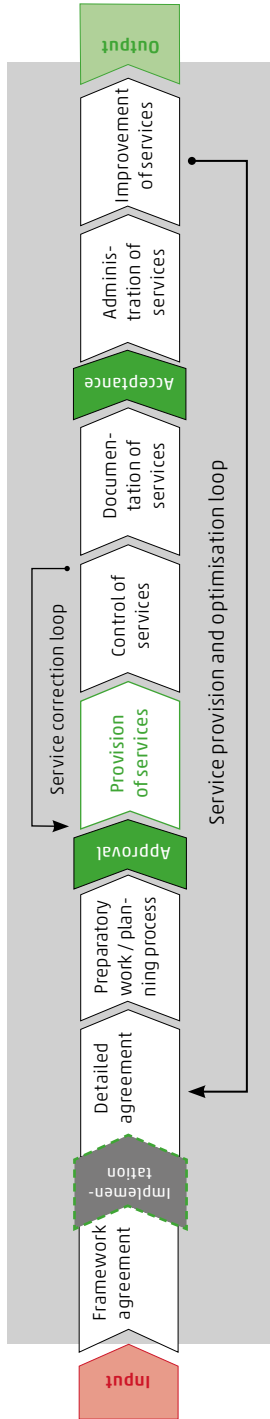
In order to determine the various task areas of the management functions in the performance process of Facility Management, these are assigned to the individual process steps by means of a matrix. This assignment is shown in the following diagrams 7 and 8. The first diagram (diagram 7) focuses on the input/output phase, while the second diagram (diagram 8) focuses on the service provision phase. In each case the respective other phases are hidden or rather greyed out to leave sufficient space to show the task areas.

This procedure allows all activity areas to be synchronised to the corresponding management levels based on the sub-steps of the performance process. Accordingly, it is possible to produce a complete performance map for each management level, which can then be broken down further. This model serves as the basis for its implementation into precise commercial service processes and task descriptions. Within the companies, the individual management functions in Facility Management are translated into job descriptions according to the requirements of the corresponding organisation. These positions on the one hand may be allocated reaching across the functions. However, it is also possible for a function to be assumed by a number of positions in the specific commercial form.

Position titles are entirely at the discretion of the companies. What matters is that the functions and their task areas are fully mapped within the company's organisation; otherwise there is a risk of gaps or breaches occurring in the realisation of the Facility Management services and areas of activity in the company's corresponding process and structural organisation.

Diagram 7: Assignment of task areas to the functional levels in the input / output phase





Cascade of functions

FRM	Adaptation of the resources to enterprise strategy	Management and control of the organisation	Implementation of standards	Productisation of resources and services	Transparency: total costs, due diligence, usage, quota, performance	Usage scenarios - resource scenarios	Risk and change management	Role in value creation and reporting to managing director
FPM	Preparation of the agreement, development of control elements	Verification of planning of work and disposition, ensuring labour rights	Approvals	Ensuring facility usage and availability	Safe-guarding service agreements	Determination of parameters, assessment of services	Arrange for completion of service, control and acceptance of services	Organise and ensure the improvement of services
FOM	Requirements control	Validation of work plans and disposition, ensuring operator's liability	Approvals	Ensuring facility operation, support management	Safe-guarding operating obligations	Responsibility for documentation	Carry out facility assessment	Ensuring the strategic facility development
FSM	Control and implementation of the work order and service provision	Process development, disposition and coordination	Model	Ensuring service provision, adapting to disturbances	Provision / control of services / quality	Acceptance of services, giving evidence of the provision of services and performance of duties	Carry out facility data collection	Analyses, improvement, anchoring of know-how
FS		Providing information for preparatory works		Performing of operational activities in accordance with the complete description of services	Completion or correction of services in case of shortcomings	Preparation of protocols, confirmations and reports	Invoicing, internal documentation, evidence of economy	

Service cycle

4.3 Model character and derivation

The structures, sequences of events and task areas detailed in this booklet have – based on DIN EN 15221 – model character. A model is a theoretical construct to the limited representation of actuality. Models on the basis of functional-, structural or behavioural similarities or analogies are used for problem solving when the reality of these problems is very complex or multi-dimensional. In this respect, the model developed here is limited to general functions, structures and processes in FM. It can be used as a frame of reference when devising the process- and organisational structures in FM.

In any case however, this model is to be adapted to the objective reality actually encountered in the respective organisation. This implies that the functions described in this booklet do not completely correspond to the positions necessary in the business/company and the functional levels are not identical to the corporate hierarchy. It lies in the corporate responsibility to adapt this model to the requirements of the organisation. This entrepreneurial freedom can and should be fully exploited.

Important is, however, that the illustrated processes and task areas are fully taken into account when the model is adapted to the organisation and translated into corporate specific positions and hierarchical structure. Gaps and shortcomings will result, when functions and task areas are forgotten about, neglected or not executed upon by defined positions in the organisation. If responsibilities and task areas are assigned twice, interferences and contradictions in the procedures will arise. Both will result in loss of effectiveness.

In this respect, this model can serve as a framework for designing corporate structures and processes. And thus this model provides a valuable support for the process management and the structuring of organisational charts.

Diagram 8: Assignment of activity areas to the functional levels in the service provision phase

Glossary | Description of process elements:

Audit | Auditing of total quality of condition, implementation and operative provision of services in regular intervals.

Capture requirements | Establish the requirements that arise from the existence of the infrastructure. For example: "The following components and maintenance services are required due to fire protection rules in infrastructure A."

Demand application | Ascertainment of the demand that can be attributed to the corresponding core business. For example: "50 employees shall be able to carry out activity X in the period Y under the conditions Z."

Demand analysis | Reflection of the demands arising from respective infrastructure with regards to resources influencing those.

Detailed/one-off agreement | Agreement on the exact time and content-related aspects of the services, scheduling, coordination, clarification and stipulation set out in the framework agreement, using calendars, plans and documentation.

Due diligence | Risk and plausibility investigation at the level of FRM into the procedures and results of the FRM with a certain standard of care.

Framework agreement | Creation of an effective contractual basis for the collaboration including all necessary effective contractual documentation governing the service.

Implementation requirements | Translation of the requirements captured in respect of the infrastructure and applicable basic parameters into resources and services. For example: "To be able to meet these requirements we need infrastructure X with services Y and money Z."

Implementation | Comprehensive preparation for starting the service in advance of the official service start date generally after conclusion of the framework agreement. Implementation of established structures and process flows in a system allowing for the basic parameters, rules and targets.

Job scheduling | Execution and work planning, time, personnel and materials planning by means of work cards, materials requirements plans, process views, etc.

Optimisation of needs | Realisation of alternative usage types and implementation together with the end user.

Procurement | Ensure a supply chain with procurement planning, bid planning, RFQ, vendor selection (also internally possible), bid selection and award of contract.

Random checks | Individual operational services are evaluated on a sample basis by the client. The client samples the services on the basis its control documentation, he surveys, evaluates and inputs the samples into the assigned statistical evaluation.

Resources and service analysis | Analysis of all service phases with respect to cost effectiveness, efficiency and effectiveness, including application of complex analysis methods.

Reflection of demands | Reflection of the demands arising from the corresponding core business in terms of their necessity or justification, anticipation of other usage types for the core business with quantitative or qualitative impact on demands and their fulfilment.

Realising demand / Delivering supply | Translation of the demand arising from the infrastructure and core business into resources and services. For example: "To deliver the respective services we need material X with services Y and money Z."

Resources and service optimisation | Assessment of the infrastructure behind the requirements and elimination of the requirement costs in terms of technical resources.

Requirements analysis | Reflection on the necessity arising from the corresponding infrastructure in terms of technical resource impact on it.

Service administration | Accounting and organisational completion of the service by way of billing, auditing, approval and archiving/forwarding of information for archiving purposes.

Service approval | Approval of a service plan on the basis of the documentation from the work preparation carried out in advance of starting the actual service.
Service provision Execution of the agreed operational activity including logging of the actual work that is carried out.

Service documentation | The utilisation of information in respect of service execution for the purpose of further usage and evaluation. Capture and preparation of data to document compliance with agreements and statutory requirements by way of logs, check documentation, inspection reports, evaluations, etc.

Service handover | Submission of all service records with respect to the process steps from the services model as well as evidence of services supplied; approval by the service recipient or the recipient's designated representatives on the basis of contracts and agreements.

Service improvement | Direct optimisation of the service provision or service provision process by implementing suggested improvements.

Service monitoring | Monitoring and auditing of the operational service execution in respect of the agreed scope and quality, penalisation of variances, keeping of inspection logs, service documentation and evidence.

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