

BS 8572:2018



BSI Standards Publication

**Procurement of facility-related services  
— Code of Practice**

**Publishing and copyright information**

The BSI copyright notice displayed in this document indicates when the document was last issued.

© The British Standards Institution 2018

Published by BSI Standards Limited 2018

ISBN 978 0 580 97041 2

ICS 03.100.99

The following BSI references relate to the work on this document:

Committee reference FMW/1

Draft for comment 17/30354416 DC

**Amendments/corrigenda issued since publication**

Date	Text affected
------	---------------

---

# Contents

	<b>Page</b>
<b>Foreword</b>	<b>iii</b>
0 Introduction	1
1 Scope	1
2 Normative references	2
3 Terms, definitions and abbreviations	2
4 Primary processes	6
4.1 Roles, responsibilities and accountabilities	6
4.2 Planning for procurement	6
<i>Figure 1 — The procurement process</i>	8
4.3 Facilities management strategy	8
4.4 Establish needs	9
4.5 Develop procurement strategy	9
4.6 Request for information (RFI) and prequalification	9
4.7 Request for proposal (RFP)	9
4.8 Evaluation and commercial/financial close	9
4.9 Mobilization/go-live	9
4.10 Performance review	9
5 Establish needs	9
5.1 General	9
5.2 Business strategy, objectives and outcomes	10
5.3 Main drivers and constraints	11
5.4 Scope of services	11
5.5 Stakeholder engagement	12
5.6 End-user needs	12
5.7 Portfolio and space audit	13
5.8 Services audit	14
5.9 Market audit	14
5.10 Risk management	15
5.11 Development of options for service delivery	16
5.12 Criteria for evaluating options	17
5.13 Outsourcing policy and decision	20
5.14 Statutory/regulatory considerations and current best practice	20
5.15 Innovation in service delivery	20
6 Develop procurement strategy	21
6.1 General	21
6.2 Centralized vs. decentralized management of service contracts	23
6.3 Geographical location and limits	23
6.4 Single vs. multiple (or bundled) service contracts	24
6.5 Local, regional and national service providers	24
6.6 Tendering process	25
7 Request for information (RFI) and prequalification	26
7.1 Prequalification of service providers	26
7.2 Financial appraisal	27
7.3 Organization culture	28
7.4 Health, safety, security and sustainability	28
7.5 Access, inclusion and equality	30
7.6 Social responsibility policy	30
7.7 Assessment criteria	30

	<i>Table 1 — Assessment of service providers (at RFI stage)</i>	31
8	Request for proposal (RFP)	32
8.1	General	32
8.2	Service definition process	32
8.3	Service specifications	33
8.4	Service levels	34
8.5	Performance measurement and reporting	35
9	Evaluation and commercial/financial close	36
9.1	General	36
9.2	Assessment criteria and weightings	37
	<i>Table 2 — Assessment of service providers (at commercial/financial close)</i>	37
9.3	Operational considerations	38
9.4	Pre-contract meeting	38
9.5	Contract award	38
10	Mobilization/go-live	39
10.1	General	39
10.2	Terms of reference	40
10.3	Interface management	40
10.4	Statutory and regulatory considerations	41
10.5	Supply chain considerations	41
10.6	Operational processes and procedures	41
10.7	Management information and reporting	43
11	Performance review	43
11.1	General	43
11.2	End-user review	44
11.3	Operational review	44
11.4	Financial review	45
11.5	Human resources review	45
11.6	Statutory/regulatory compliance review	46
11.7	Performance indicators	46
11.8	Action plans	47
11.9	Termination of service contract	47
<b>Annex A</b>	(informative) <b>Checklist of actions</b>	<b>48</b>
	<i>Table A.1 — Checklist of actions</i>	48
<b>Annex B</b>	(informative) <b>Example of an option evaluation matrix</b>	<b>56</b>
	<i>Table B.1 — Example of an option evaluation matrix</i>	56
<b>Annex C</b>	(informative) <b>Examples of innovative technology and its implications</b>	<b>57</b>
<b>Annex D</b>	(informative) <b>Example scope of a prequalification questionnaire (PQQ)</b>	<b>59</b>
	<b>Bibliography</b>	<b>61</b>

### Summary of pages

This document comprises a front cover, and inside front cover, pages i to iv, pages 1 to 62, an inside back cover and a back cover.

---

# Foreword

## Publishing information

This British Standard is published by BSI and came into effect on 28 February 2018. It was prepared by Technical Committee FMW/1, *Facilities management*. A list of organizations represented on this committee can be obtained on request to its secretary.

## Supersession

This British Standard supersedes [BS 8572:2011](#), which is withdrawn.

## Information about this document

The initial drafting of this British Standard was produced in association with the Department for Business, Energy and Industrial Strategy (BEIS) as part of their ongoing programme of support for standardization.

This is a full revision of the standard, and introduces the following principal changes:

- a) conversion from a guidance document to a code of practice;
- b) general updating to align with, and cross-reference, recently published standards on facilities management;
- c) new provisions relating to a procurer's target operating model and integrator model;
- d) recommendations on the management of the direct cost of a service;
- e) recommendations on managing innovation and transformation in service delivery (including the use of novel devices and other disruptive technology);
- f) elaboration of provisions for the prequalification of service providers (including the outline content of a prequalification questionnaire);
- g) alignment with the recently published NEC4 Term Service Contract [1];
- h) new provisions covering termination of a service contract; and
- i) additional provisions for the demobilization of an existing service provider.

The standard focuses on the procurement process for the delivery of facility-related services, incorporating purchasing and supply considerations. Guidance on strategic sourcing and the development of agreements is given in ISO 41012.

## Use of this document

As a code of practice, this British Standard takes the form of guidance and recommendations. It should not be quoted as if it were a specification and particular care should be taken to ensure that claims of compliance are not misleading.

Any user claiming compliance with this British Standard is expected to be able to justify any course of action that deviates from its recommendations.

It has been assumed in the preparation of this British Standard that the execution of its provisions will be entrusted to appropriately qualified and experienced people, for whose use it has been produced.

### **Presentational conventions**

The provisions in this standard are presented in roman (i.e. upright) type. Its recommendations are expressed in sentences in which the principal auxiliary verb is “should”.

*Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.*

Where words have alternative spellings, the preferred spelling of the Shorter Oxford English Dictionary is used (e.g. “organization” rather than “organisation”).

### **Contractual and legal considerations**

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

### **Compliance with a British Standard cannot confer immunity from legal obligations.**

In particular, attention is drawn to the following specific Acts and Regulations and any subsequent amendment thereof whilst this standard remains current:

- Equality Act 2010 [2];
- Competition Act 1998 [3];
- The Transfer of Undertakings (Protection of Employment) Regulations 2006 [4];
- The Public Contracts Regulations 2015 [5];
- Freedom of Information Act 2000 [6];
- Environmental Protection Act 1990 [7];
- Health and Safety at Work etc. Act 1974 [8];
- The Construction (Design and Management) Regulations 2015 [9];
- Modern Slavery Act 2015 [10];
- Bribery Act 2010 [11];
- Landlord and Tenant Act 1988 [12];
- Data Protection Act 1998 [13];
- The Working Time (Amendment) (No. 2) Regulations 2009 [14].

---

## 0 Introduction

Facility-related services form supporting structures to the core business of an organization. The range and extent of such services can be broad and are subject to the specific needs of the procurer and its end users. Facility-related services might include, for example, cleaning, security, waste disposal, inspection, pest control, building maintenance, building services maintenance, minor construction works, reprographics, help desk, catering, energy supplies and IT. In procuring facility-related services externally, an organization has taken the decision to outsource. However, the procurement of such services extends beyond purchase and supply decisions to represent a major and integral part of an organization's facilities management. For this reason, it is important to ensure that it is carried out in a way that is both consistent and thorough, taking into account all necessary factors that are most likely to result in end-user satisfaction and the selection of a service (or services) that demonstrates best value for money.

While this British Standard has been developed on the basis that contracts for the provision of facility-related services are likely to be awarded following a tender competition, it is also acknowledged that it is possible to procure facility-related services in other ways. For example, a contract could be negotiated with one or more service providers or a partnership could be formed between the procurer and the service provider. In such cases, procurers are not precluded from using the recommendations in this standard, but are advised to decide which clauses apply and which do not, and to communicate this to the other parties involved.

Other aspects of the procurer, such as its size and the size of its facilities, can be factors in determining the extent to which some areas of this standard apply. In such cases, the approach might be scaled so that benefits from following an integrated method and procedures are realized. Where multiple facilities or locations are involved, application of this standard across all facilities can bring additional benefits from a more consistent approach to procurement. These include improved transparency within the decision-making process and the ability to benchmark performance and costs, thus enabling inefficiencies and waste to be highlighted and removed. Ultimately, the procurer is likely to gain advantage from an increasingly efficient use of resources and a defined and streamlined approach to procurement.

---

## 1 Scope

This British Standard gives recommendations and offers guidance for the procurement of a broad range of services that are required to support the physical assets making up a facility and the needs of users of that facility who are the ultimate recipients of the services, i.e. its end users. It covers both new and existing facilities.

This British Standard is applicable to organizations facing retendering of facility-related services and those entering directly into the later stages of the procurement process, notably mobilization and performance review.

While this British Standard covers the procurement of facility-related services within the private sector, it does not cover those areas of public sector procurement of facility-related services which are subject to public procurement regulations. Notwithstanding, the standard indicates where certain practices might strengthen the approach that has to be taken.