



International
Organization for
Standardization



ASSET MANAGEMENT COUNCIL



ISO 41000: International FM Standards

AMC Sydney Chapter – 19 July 2018

Stephen Ballesty

In-Touch Advisory

Standards Australia & ISO/TC-267

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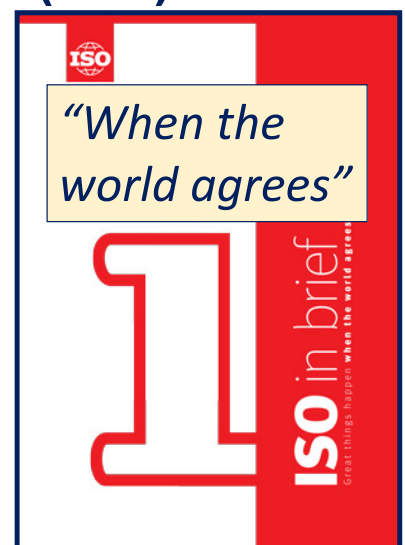


International
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Standardization

ISO/TC-267 Facility Management (FM)

International Standards Organization (ISO)

- Founded in 1947.
- An independent, non-governmental international organization with membership of **163 national standards bodies**.
- Through its members, ISO brings together experts to share knowledge and develop voluntary, consensus-based, market relevant International Standards that support innovation and **provide solutions to global challenges**.
- www.iso.org/about-us.html

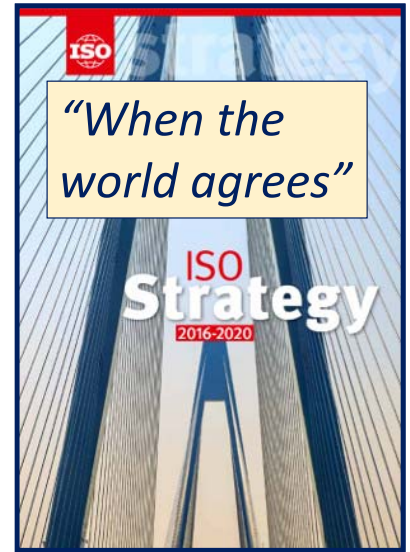


ISO/TC-267 Facility Management (FM)

What are standards?

- International Standards **make things work**.
- Standards provide world-class specifications for **products, services and systems**, to ensure quality, safety and efficiency. They are instrumental in facilitating international trade.
- ISO has published **22,102 Standards** and related documents, covering almost every industry, from technology, to food safety, to agriculture and healthcare.
- ISO Standards **impact** everyone, everywhere.

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ISO/TC-267 Facility Management (FM)

What is FM?



FM is an *“organizational function which integrates people, place and process within the Built Environment with the purpose of improving the quality of life of people and the productivity of the core business”*

Source: ISO 41011:2017

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ISO/TC-267 Facility Management (FM)

What is FM?



FM is an “organizational function which integrates people, place and process within the **Built Environment** with the purpose of improving the **quality of life** of people and the **productivity** of the core business”

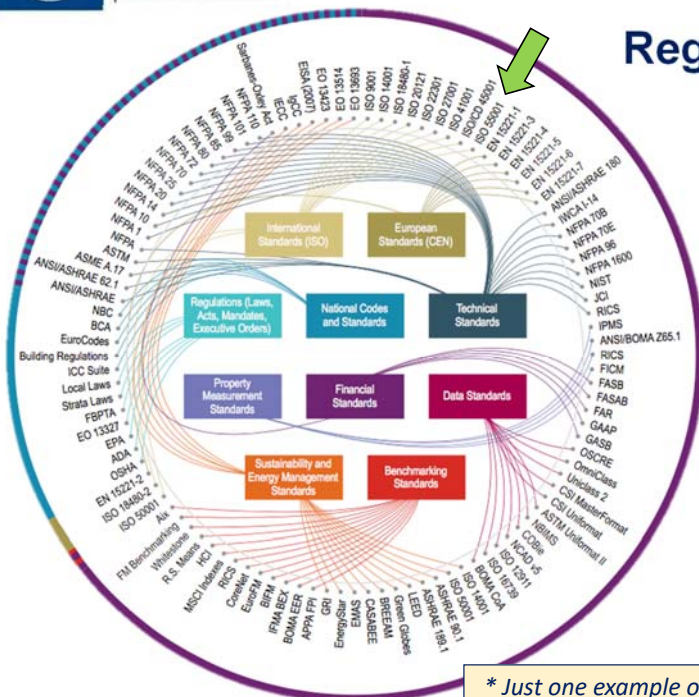
Source: ISO 41011:2017

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ISO/TC-267 Facility Management (FM)

Regulations & Standards Affecting FM*



INTERNATIONAL (ISO)	EUROPEAN (CEN)
REGULATIONS (Laws, Acts, Statutes etc)	NATIONAL CODES & STANDARDS
TECHNICAL REQUIREMENTS	PROPERTY MEASUREMENT
ACCOUNTING & FINANCIAL	DATA & REPORTING STANDARDS
SUSTAINABILITY & ENERGY	PERFORMANCE BENCHMARKING

* Just one example of FM's inherent complexity

Source*: <http://www.jll.com/services/corporates/future-of-cre-outsourcing/compliance-and-standards>



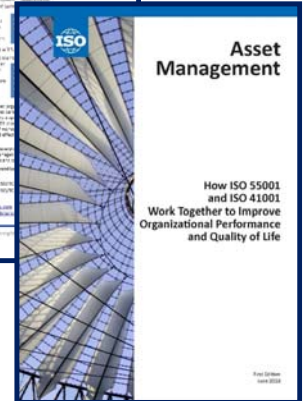


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ISO/TC-251 & ISO/TC-267 collaboration

TC251 / TC267 Joint article #1 initiative 26 June 2018

- **ISO 55001:2014** helps organizations derive greater value from their assets.
- **ISO 41001:2018** helps organizations manage, operate and maintain facilities, assets and services in order to meet ever-changing operational requirements in an efficient and effective manner.
- ...basis and a framework for organizations to ensure facilities, assets and services are effectively and efficiently managed to improve operational activities and risks, achieve **organizational performance** objectives and contribute to our **quality of life**.
- <https://committee.iso.org/home/tc267> in 6 languages



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ISO/TC-267 Facility Management (FM)

Value of ISO Standards to FM?

“FM practitioners require a rare mix of specialist technical skills, rounded business understanding, and general management expertise. We are now in a position to provide consistency for the profession internationally and to provide a framework for standards on a worldwide scale.”

~ Stan Mitchell
Chairman, ISO/TC-267
Facility Management



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“The ability of FM practitioners to speak the same professional language around the world is the foundation of a robust global community that will be better situated to tackle the challenges of the future.”

~ Jim Whittaker
Past Chair, US Mirror
Committee for ISO/TC 267
Convenor, ISO/TC-267/WG3
FM Management System





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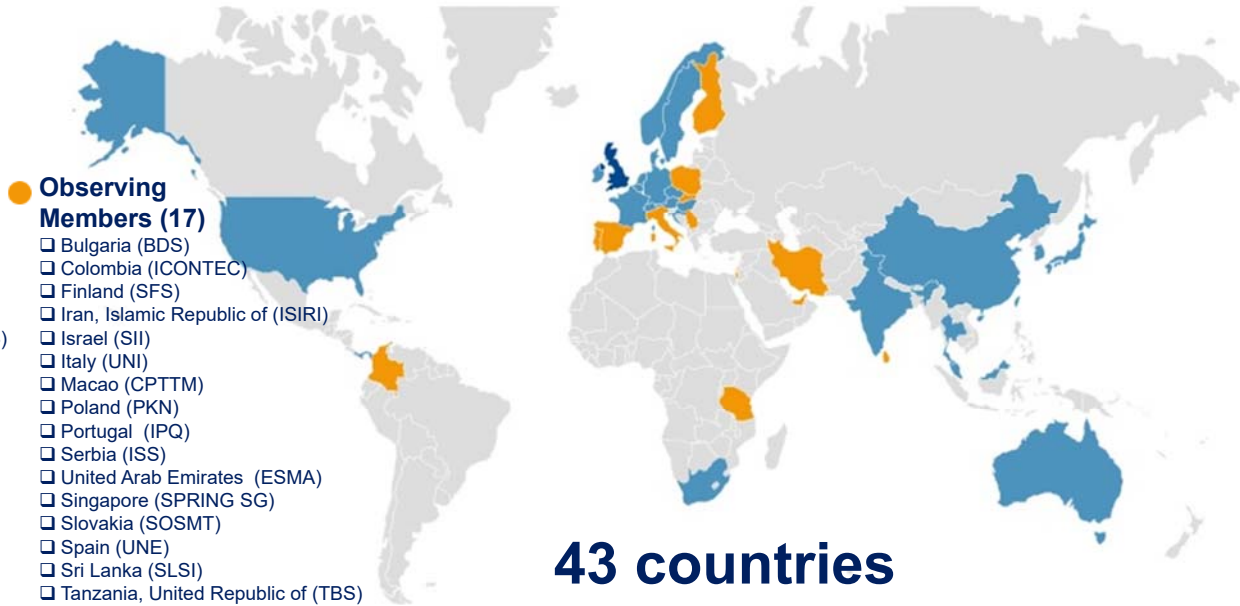
ISO/TC-267 Facility Management (FM)

Participating Members (26)

- Australia (SA)
- Austria (ASI)
- Belgium (NBN)
- China (SAC)
- Croatia (HZN)
- Czech Republic (UNMZ)
- France (AFNOR)
- Germany (DIN)
- Hungary (MSZT)
- India (BIS)
- Ireland (NSAI)
- Japan (JISC)
- Kenya (KEBS)
- Korea, Republic of (KATS)
- Malaysia (DSM)
- Netherlands, The (NEN)
- Nigeria (SON)
- Norway (SN)
- Panama (COPANIT)
- Russia (RSS)
- South Africa (SABS)
- Sweden (SIS)
- Switzerland (SNV)
- Thailand (TISI)
- United Kingdom (BSI)
- United States (ANSI)

Observing Members (17)

- Bulgaria (BDS)
- Colombia (ICONTEC)
- Finland (SFS)
- Iran, Islamic Republic of (ISIRI)
- Israel (SII)
- Italy (UNI)
- Macao (CPTTM)
- Poland (PKN)
- Portugal (IPQ)
- Serbia (ISS)
- United Arab Emirates (ESMA)
- Singapore (SPRING SG)
- Slovakia (SOSMT)
- Spain (UNE)
- Sri Lanka (SLSI)
- Tanzania, United Republic of (TBS)
- Trinidad and Tobago (TTBS)



43 countries

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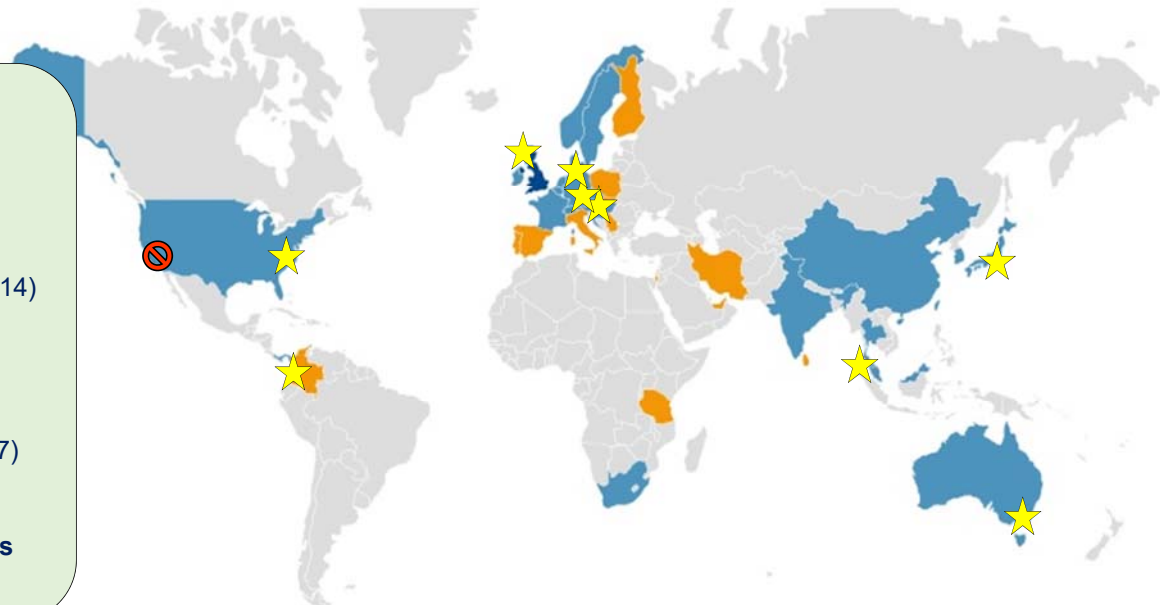


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ISO/TC-267 Facility Management (FM)

ISO/TC-267 Meetings

- ★ Berlin (2012)
- ★ Budapest (2013)
- ★ Tokyo (2013)
- ★ Washington DC (2014)
- ★ Glasgow (2015)
- ★ Melbourne (2016)
- ★ Budapest (2017)
- ★ Kuala Lumpur (2017)
- ★ Bogotá (2018)
- ⊘ Next stop: Las Vegas
7-9 November 2018

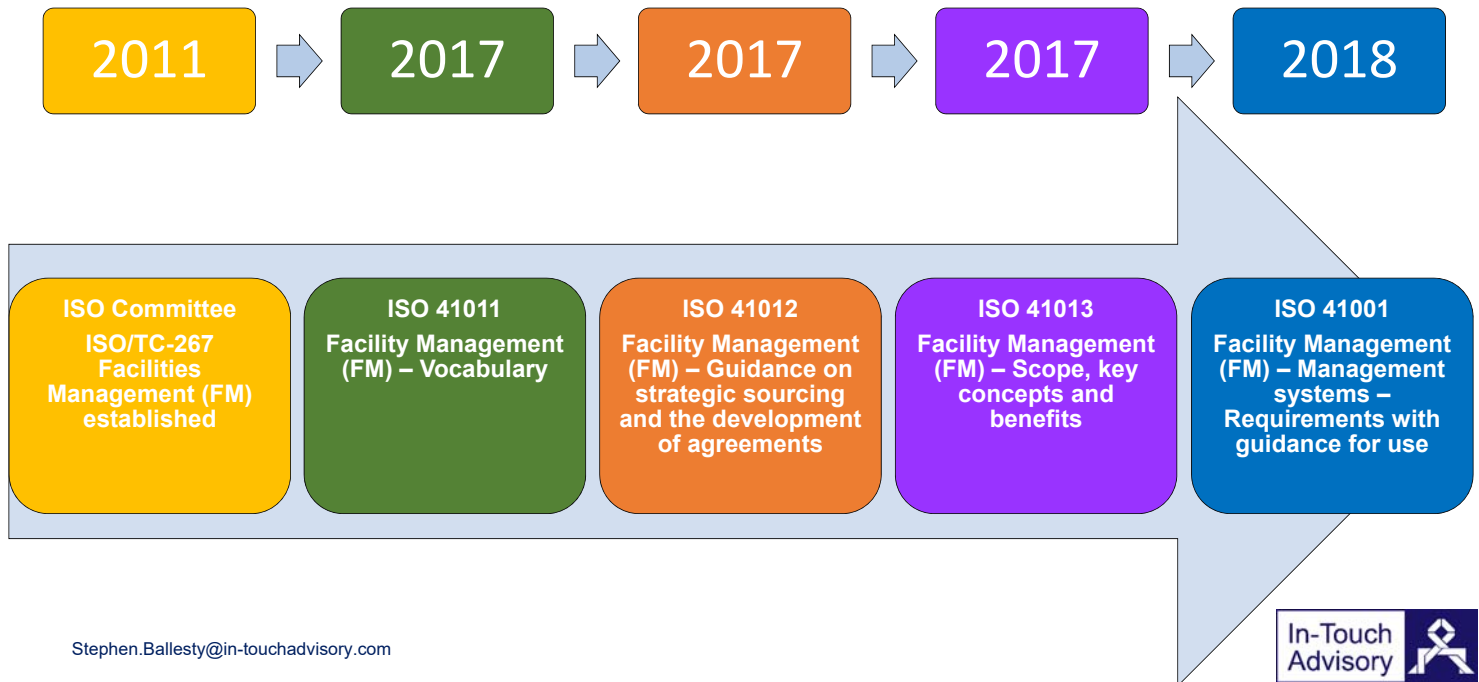


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ISO/TC-267 Facility Management (FM)

Chairman: Stan Mitchell (UK)

Secretariat: BSI (Bernd Borchert)

WG1 – Convenor: Jay Drew (USA)

- ISO 41011:2017 Facility Management (FM) vocabulary

- ISO 41013:2017 Facility Management scope, key concepts and benefits

WG2 – Convenor: Olav Egil Sæbøe (Norway)

- ISO 41012:2017 Guidance on strategic sourcing and the development of agreements

WG3 – Convenor: Jim Whittaker (USA)

- ISO 41001/DIS, Facility Management – Management system – Requirements with guidance for use

Advisory Groups:

- AG1: FM Roadmap, Ian van der Pool (Netherlands)

- AG2: Communication Strategy, Stephen Ballesty (Australia)

TC-267 Liaisons

- ISO/TC-59 Jozsef Czerny (Hungary)

- ISO/TC-176 Jay Drew (USA)

- ISO/TC-301 Casey Martin (USA)

- ISO/TC-251 Stephen Ballesty (Australia)

- ISO/TC-286 Laverne Deckert (USA)

- ISO/TC-292 George Huff (USA)

- CEN/TC-348 Olav Egil Sæbøe (Norway)

- Euro FM Ondrej Strup (Czech Republic)

- ETUC Bernadette Ségol (Belgium)

- Global FM Jozsef Czerny (Hungary)

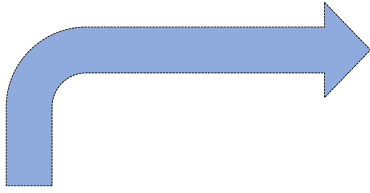
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ISO/TC-267 Facility Management (FM)



WG1

EUROPEAN STANDARD
NORME EUROPÉENNE
EUROPÄISCHE NORM

EN 15221-1

October 2006

ICS 01.040.03; 91.040.01; 01.040.91; 03.080.99

English Version

Facility Management - Part 1: Terms and definitions

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ISO 41011 Facility Management - Vocabulary

Introduction

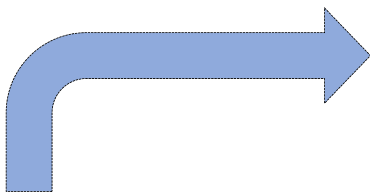
Clause 1, 2 & 3

“	3.1	Scope, Normative references, Terms and definitions
“	3.2	Terms related to facility management
“	3.3	Terms related to assets
“	3.4	Terms related to people
“	3.4	Terms related to sourcing
“	3.5	Terms related to process
“	3.6	Terms related to finance
“	3.7	Terms related to general business
“	3.8	Terms related to measurement



International
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ISO/TC-267 Facility Management (FM)



WG2

EUROPEAN STANDARD
NORME EUROPÉENNE
EUROPÄISCHE NORM

FINAL DRAFT
prEN 15221-2

June 2006

ICS 03.080.99; 91.040.01

English Version

Facility Management - Part 2: Guidance on how to prepare Facility Management agreements

Stephen.Ballesty@in-touchadvisory.com

ISO 41012 Guidance on strategic sourcing and the development of agreements

Introduction

Clause 1, 2, 3

“	4	Scope, Normative references, Terms and definitions
“	5	Sourcing strategy and understanding the core business context
“	6	Sourcing process in FM
“	7	Facility services provision
“	8	Main characteristics of FM agreements
“	9	Common considerations in agreements
“	9	Preparation and development of an agreement
“	10	Measure service provision performance

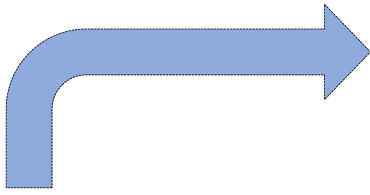
Annex	A	(informative) Example of requirements for a service
“	B	(informative) Example of a business case content
“	C	(informative) Structure of an agreement – General clauses
“	D	(informative) Service level agreements – Benefits, preparation and structure of an agreement (SLA clauses)





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ISO/TC-267 Facility Management (FM)



WG1

EUROPEAN STANDARD
NORME EUROPÉENNE
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EN 15221-1

October 2006

ICS 01.040.03; 91.040.01; 01.040.91; 03.080.99

English Version

Facility Management - Part 1: Terms and definitions

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ISO 41013 Facility management scope, key concepts and developments

Foreword	
Introduction	
Clause 1, 2 & 3	Scope, Normative references, Terms and definitions
“ 4	Scope of facility management
“ 5	Business process background of FM
“ 6	Key concepts in FM
“ 7	Benefits of FM (purpose)

Annex A Evolution of terms & definitions from EN 15221 to ISO 41011



Outline of ISO 41001:2018 (MSS)

Context of the Organization

- External & Internal Issues
- Interested Party Requirements
- Establish Scope
- Document Scope
- FM Management System

Planning

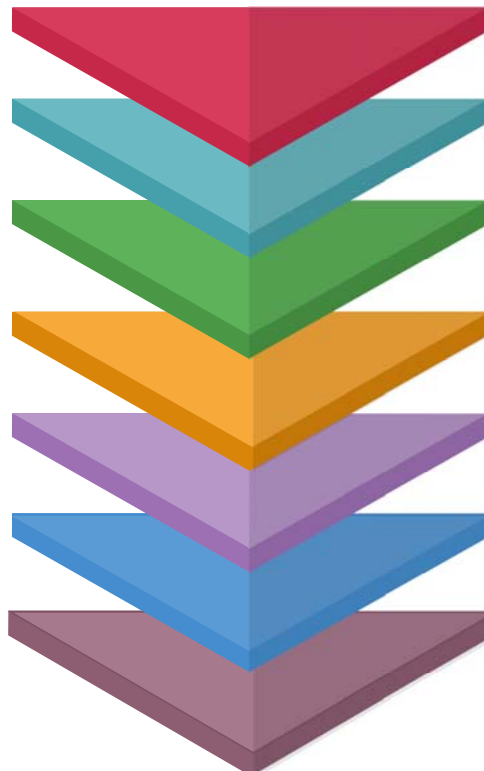
- Risks & Opportunities
- Plan / Address Risks
- Requirements of Stakeholders
- FM Objectives
- Implementation Plan
- Planning Horizons

Operation

- Processes
- Change Control
- Control Processes
- Customer Relationships
- Integrate Service Delivery

Improvement

- Nonconformity
- Corrective Actions
- Proactive Measures
- Gap Analysis
- Continually Improve



Leadership

- Leadership & Commitment
 - Establish FM Policy
- Communicate FM Policy
 - Relevant Roles
- Responsibility & Authority

Support

- ID & Secure Resources
 - Source & Monitor
 - Competencies
 - Awareness
 - Communications
- Information Required

Performance Evaluation

- Scope of Monitoring
- Monitoring Means & Methods
 - Documented Results
 - Evaluate Performance
 - Performance Audits
- Top Management Review
- Communicate / Act on Results





ISO/TC-267 Facility Management (FM)

What next from FM?

- Building on the Joint TC251 / TC267 article, provide for greater collaboration between AM & FM.
- Identify additional TC267 joint initiatives with other ISO management system standards.
- Identify the “Champions of FM” and build website content – *please ask how your organization can participate.*
- Work towards ISO 41001 alignment to ISO/IEC 17021 part 11 Conformity Assessment - requirements for bodies providing audit and certification of management systems.
- Establish WG4 – ISO 41014*, Facility Management - development of FM strategy.*
- Establish WG5 – ISO 41015*, Facility Management - influencing behaviors for improved facility outcomes and user experience.*

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* proposed WG, and working titles



ISO/TC-267 Facility Management (FM)

Value of ISO Standards to FM

- Improved procedures, productivity and performance
- Maintain regulatory compliance and provide safe workplaces
- Develop functional and motivating built environments
- Optimize life cycle performance and cost controls
- Improve resilience and relevance
- Better organizational identity and reputation
- Focus on **quality of life** for all



<https://committee.iso.org/home/tc267> for international FM standards

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Closing Thoughts #1

- ❑ FM is an “*organizational function which integrates people, place and process within the Built Environment with the purpose of improving the **quality of life** of people and the **productivity** of the core business*” ISO 41011:2017.
- ❑ The complexity of modern assets and facilities, and their relationship to risk management provides us with an opportunity to enhance the **strategic significance** of a responsibly managed and operationally efficient and effective Built Environment in a challenging world.

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Closing Thoughts #2

- ❑ **ISO 41001:2018** FM Management Systems Standard is here and relates to ISO 55001.
- ❑ ISO/TC-267 answers the challenge of promoting FM, defining and coordinating the **focus, scope and practice for the FM** profession and others.
- ❑ ISO 55000 Asset Management is primarily focused upon the physical infrastructure value whilst ISO 41000 Facility Management is primarily focused upon the operational performance. Inevitably for AM / FM there will be **crossover, integration and complementary points** relative to organizational culture and life cycle.



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Thank you



**Questions &
Opportunities**

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