



International Organization for Standardization



ICEC-PAQS Conference 2018 Sydney, Australia

In-Touch Advisory



ISO 41000 series: International FM Standards

ICEC-PAQS, Sydney – 19 November 2018

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International Organization for Standardization



Today's Presenter

Stephen Ballesty, FRICS, FAIQS, ICECA, CQS, CFM, IFMA Fellow

- Stephen is an award winning international industry leader and is this year being recognised as an IFMA Fellow.
- Stephen's Sydney based consulting firm In-Touch Advisory connects stakeholders with solutions for the Built Environment across the property–construction–facilities life cycle.
- Stephen is currently an Australian delegate for the ISO international FM standards initiative (ISO 41000 since 2012), ISO/TC267's global liaison to ISO/TC251 (ISO 55000 asset management). He is also the Oceania representative to the RICS's Global Cost Prediction working group.
- He is former member of the IFMA Board of Directors and Past Chairman of both the IFMA Foundation; and FMA Australia.



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ICEC-PAQS Conference 2018 Sydney, Australia





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Today's Presentation

ISO 41000 series: International FM Standards

- 👤 About Standards
- 👤 Facility Management / Facilities Management / FM
- 👤 ISO international FM standards initiative (ISO 41000 series)
- 👤 Other Standards, and asset management (ISO 55000 series)
- 👤 What next?



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Today's Context

ICEC-PAQS 2018

- 👤 *Theme:* Grassroots to Concrete Jungle
- 👤 *Sub text:* Dynamics in the Built Environment

Australian Government's FM Action Agenda 2008

- 👤 *Theme:* '...recognition of FM as the foremost contributor to a more productive and sustainable Built Environment'
- 👤 *Sub text:* Managing the Built Environment



ISO 41011:2017 : '*...improving the quality of life...*'





Standards Matter

Standards are fundamental to operating in a truly sustainable global environment, and offer:

a common language across borders

increased transparency and professionalism

greater confidence and reduced risk

consistent and accurate reporting

ability to benchmark and forecast accurately

ability to predict cost and performance

"Our world is suffering from a bad case of Trust Deficit Disorder"
 António Guterres, UN General Assembly Address - New York, 25 September, 2018

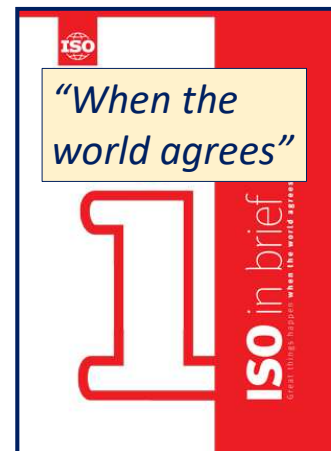


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ISO/TC267 Facility Management (FM)

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



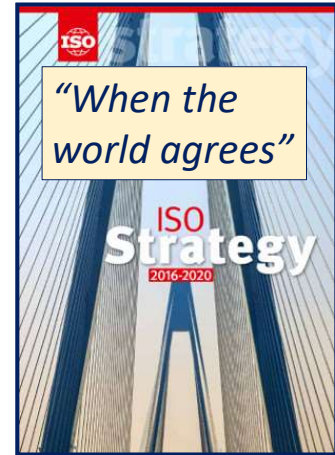


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ISO/TC267 Facility Management (FM)

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 **22,308 International Standards** and related documents, covering almost every industry, from technology, to food safety, to agriculture and healthcare.
- ISO Standards **impact** everyone, everywhere.



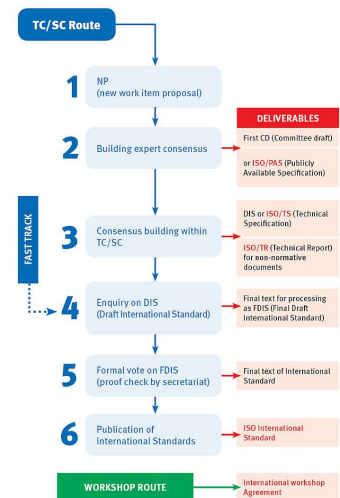
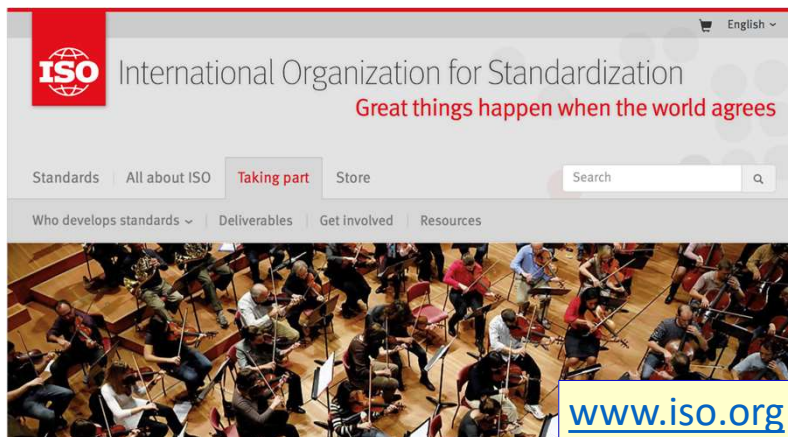
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ISO Process Overview



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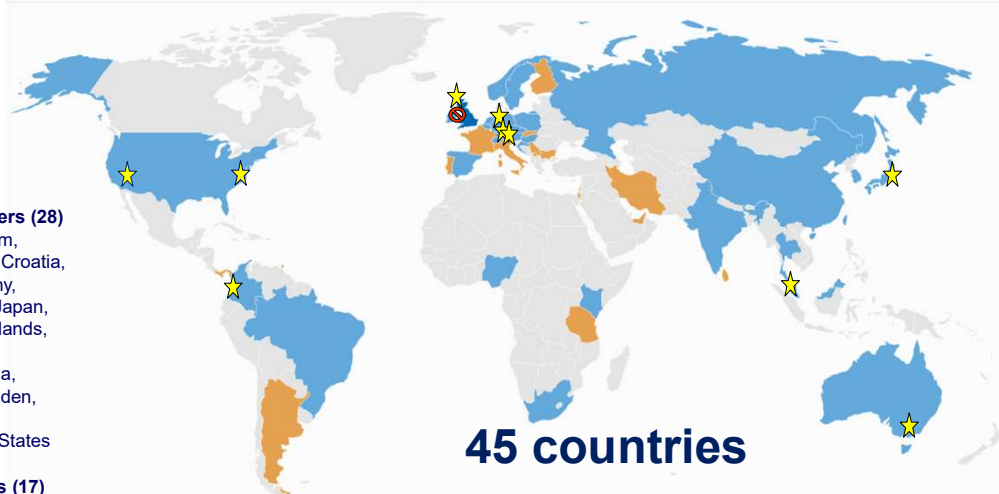
ISO/TC267 Facility Management (FM)

★ **TC267 meetings**
Ten since 2012

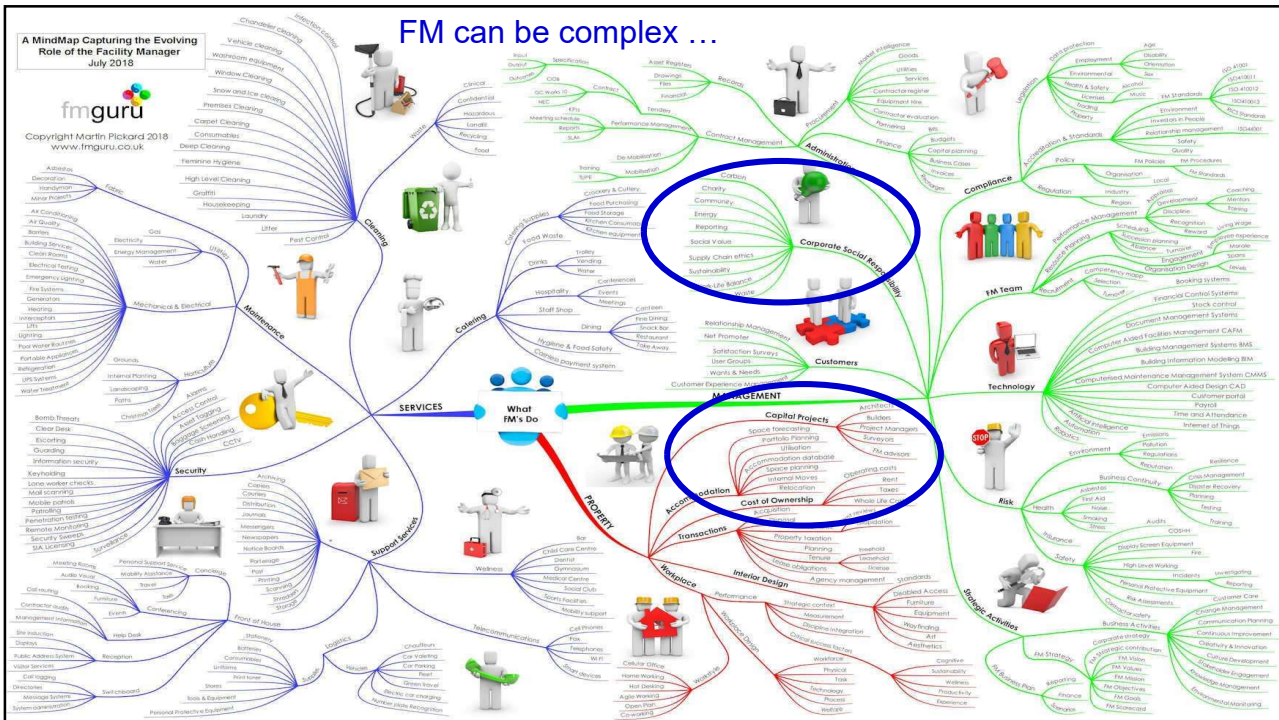
🛑 **Next stop**
Dublin, Ireland
10-12 June 2019

● **Participating (P) Members (28)**
Australia, Austria, Belgium, Brazil, China, Columbia, Croatia, Czech Republic, Germany, Hungary, India, Ireland, Japan, Kenya, Malaysia, Netherlands, Nigeria, Norway, Poland, Republic of Korea, Russia, South Africa, Spain, Sweden, Switzerland, Thailand, United Kingdom, United States

● **Observing (O) Members (17)**
Argentina, Bulgaria, Finland, France, Islamic Republic of Iran, Israel, Italy, Macao, Panama, Portugal, Serbia, Singapore, Slovakia, Sri Lanka, United Republic of Tanzania, Trinidad and Tobago, United Arab Emirates



45 countries





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ISO/TC267 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/TC267 Facility Management (FM)

What is FM?

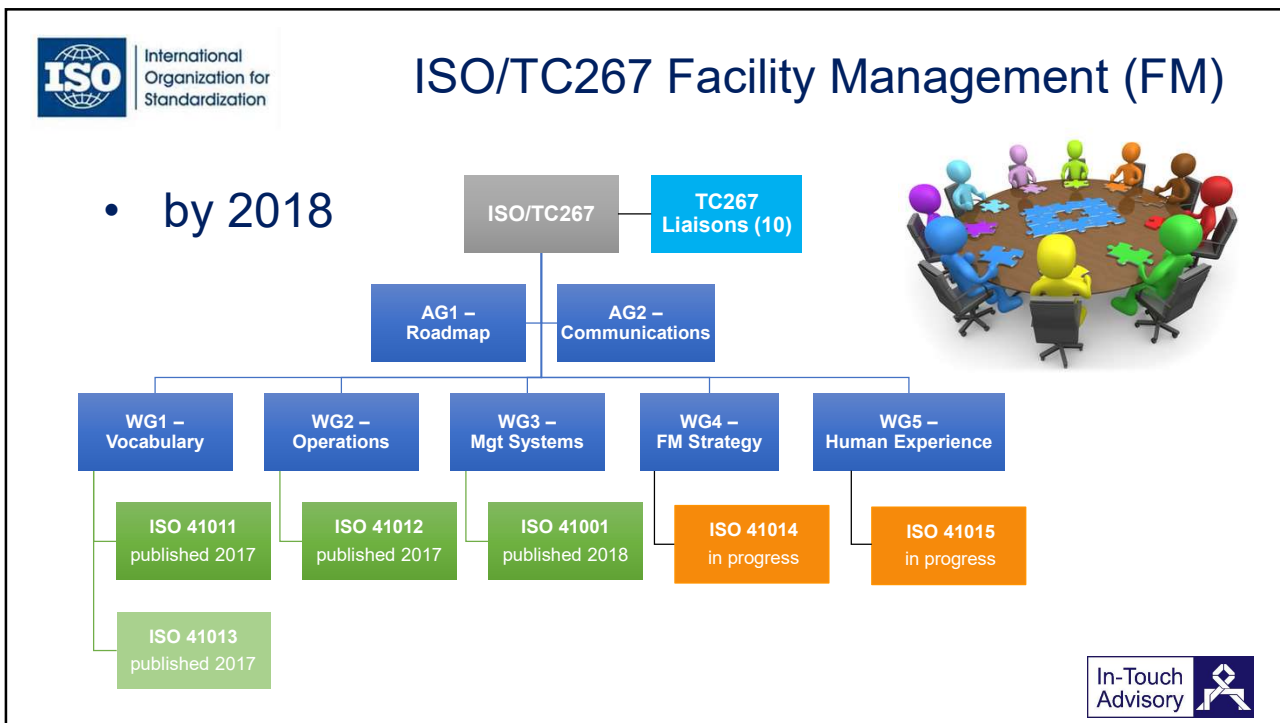
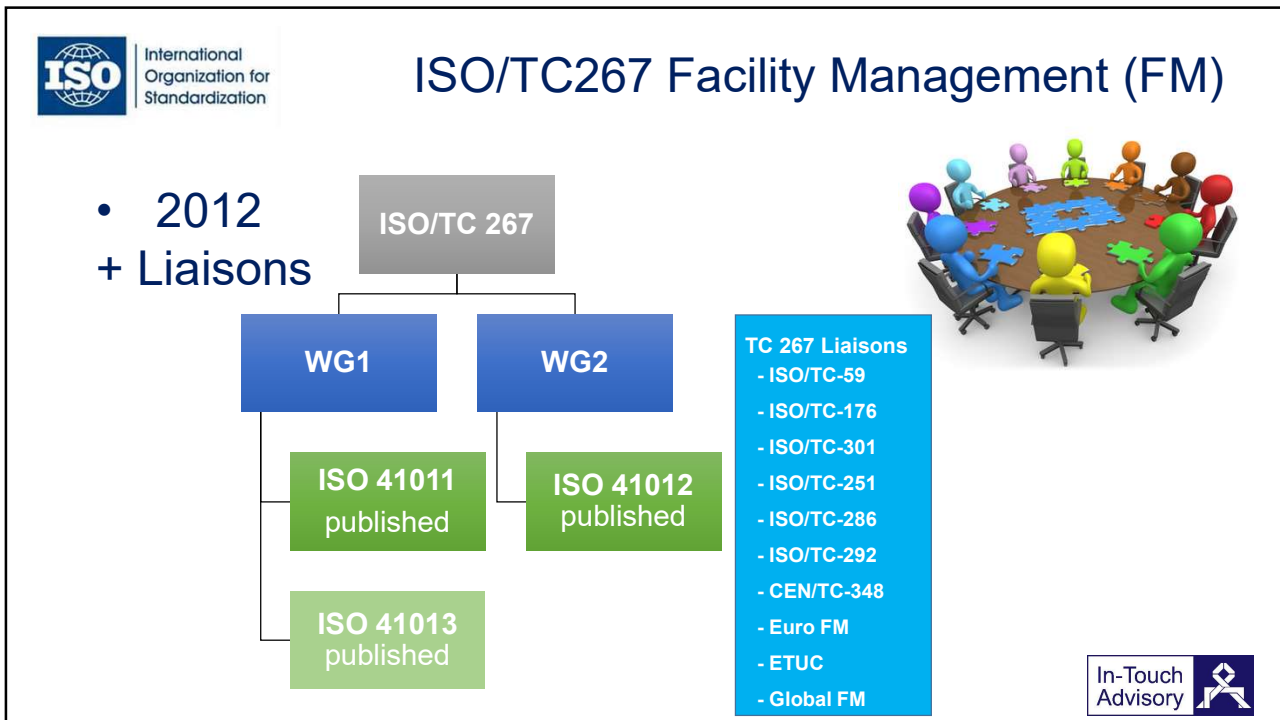


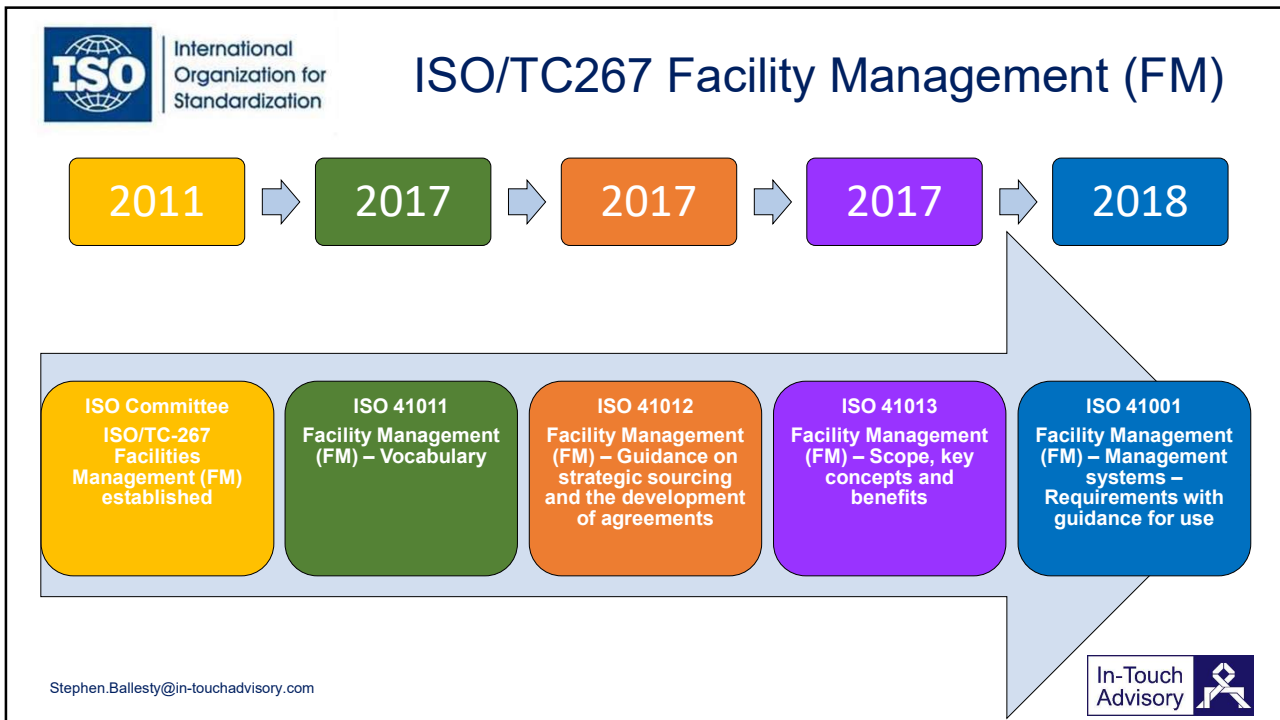
FM is an *“organizational function which integrates people, place and process within the **Built Environment** with the purpose of improving the **quality of life** of people and the **productivity** of the core business”*

Source: ISO 41011:2017

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ISO/TC267 Facility Management (FM)

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WG1

ISO 41011 Facility Management - Vocabulary

EUROPEAN STANDARD **EN 15221-1**
 NORME EUROPÉENNE
 EUROPÄISCHE NORM

October 2006


ICS 01.040.03; 91.040.01; 01.040.91; 03.080.99

English Version
 Facility Management - Part 1: Terms and definitions

Introduction	Scope, Normative references, Terms and definitions
Clause 1, 2 & 3	
“ 3.1	Terms related to facility management
“ 3.2	Terms related to assets
“ 3.3	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

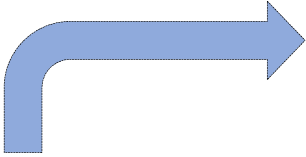
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ISO/TC267 Facility Management (FM)



WG2

ISO 41012 Guidance on strategic sourcing and the development of agreements

Introduction	
Clause 1, 2, 3	Scope, Normative references, Terms and definitions
“ 4	Sourcing strategy and understanding the core business context
“ 5	Sourcing process in FM
“ 6	Facility services provision
“ 7	Main characteristics of FM agreements
“ 8	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)

EUROPEAN STANDARD **FINAL DRAFT**

NORME EUROPÉENNE **prEN 15221-2**

EUROPÄISCHE NORM


June 2006


ICS 03.080.99; 91.040.01

English Version

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


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ISO/TC267 Facility Management (FM)



WG1

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

EUROPEAN STANDARD **EN 15221-1**

NORME EUROPÉENNE

EUROPÄISCHE NORM


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/TC267 Facility Management (FM)



WG3

Management Systems Standard (MSS)

1. Scope
2. Normative References
3. Terms & Definitions
4. Context of the Organization
6. Leadership
7. Planning
8. Support
9. Operation*
10. Performance evaluation
11. Improvement

* contains bulk of the requirements

PRODUCTIVITY

- Streamline processes
- Minimize waste
- Accelerate delivery of services
- Enhance quality of services
- Lower cost of compliance
- Optimize use of resources

INNOVATION

- Encourage process innovation
- Optimize staff potential
- Promote exchange of knowledge
- Accelerate spread of innovation
- Create a framework for creativity
- Enable continual improvement

GLOBALIZATION

- Optimize global supply chains
- Overcome barriers to trade
- Enhance ability to compete globally
- Improve transparency
- Foster confidence in service delivery
- Improve transparency/confidence

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Outline of ISO 41001:2018 (MSS)

Context of the Organization

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

Planning

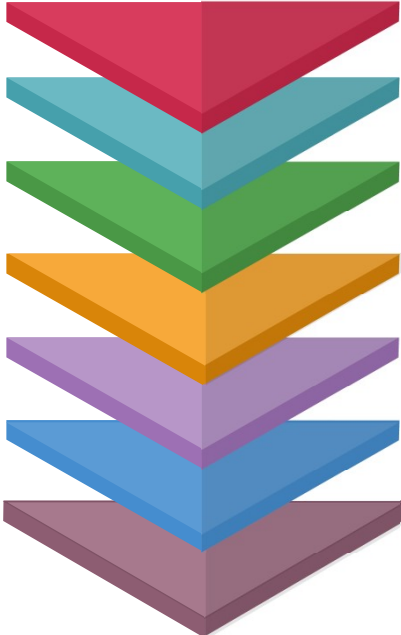
- Risks & Opportunities
- Plan / Address Risks
- Requirements of Stakeholders
- FM Objectives
- Implementation Plan
- Planning Horizons

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





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ISO/TC267 Facility Management (FM)

Value of a Management Systems Standard (MSS)



Flexibility



Discipline




Consistency

“Management systems are those activities used to *anticipate, prevent, and resolve known problems.*”

Source: Harvard Business School, 2008

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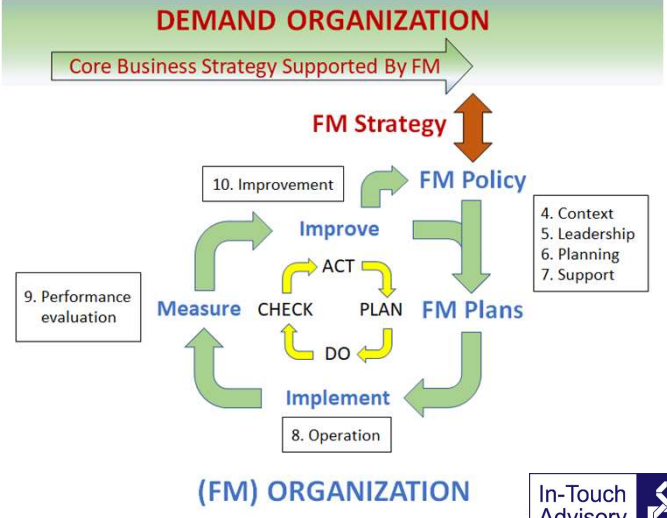
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ISO/TC267 Facility Management (FM)


Management Systems Standard (MSS)

“The **FM organization and the **demand organization** must work together to clearly define needs to meet the core business strategy, and develop FM policies and practices that will enable the core business activities of the demand organization”.**

(ISO 41001)



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Value of a Management Systems Standard (MSS)

Business Case for MSS adoption per ISO 9001 evidence

- Management:** Certified companies **outperformed** the market
- Finance:** **55%** achieved **cost savings**
- Operations:** **75%** boosted their **performance**
- Services:** **75%** improved their **customer service and loyalty**
- Marketing:** **71%** acquired **new customers** and retained **existing clients**



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ISO 41001 Certification *with alignment to ISO/IEC 17021 part 11 Conformity Assessment*

- Establish **criteria** for policies and procedures
- Evaluate **methodology** for document control
- Justify inclusion of any '**should**' statements
- Justify exclusion of any '**shall**' statements
- Define internal and / or external **audit processes**
- Define **certification** parameters and boundaries
- Understand the **impacts** of non-conformity
- Identify **continuous improvement** opportunities
- Communicate the **value proposition** of a MSS



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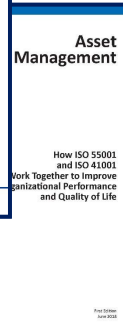


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ISO/TC251 & ISO/TC267 collaboration

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/TC267 Facility Management (FM)

<https://committee.iso.org/home/tc267>



What is Facility Management (FM)?

Facility management has been defined as 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]

FM is a strategic, professional discipline that provides optimum performance of support services to any and all types and sizes of organizations that it serves. The impact of a properly implemented strategic FM program goes beyond operations and maintenance. It can influence employee engagement and retention, support the demand organization's mission-critical assets, and minimize organizational risks.

FM standards provide specific guidance for individual teams and organizations to demonstrate a commitment to quality and continuous improvement through a robust, systems approach to managing the support services needs and working environment of the demand organization. It is incumbent on facility managers worldwide to utilize the ISO

Upcoming FM events:

Find upcoming FM events near you at [Global FM](#).

Published Standards:

[ISO 41011:2017](#) Facility management – Vocabulary

[ISO 41012:2017](#) Facility Management – Guidance on strategic sourcing and the development of agreements

[ISO/TR 41013:2017](#) Facility management – Scope, key concepts and benefits



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ISO/TC267 Facility Management (FM)

What next from TC267?

- ❑ Building on the Joint TC251 / TC267 initiative, providing for greater **collaboration** between FM and allied standards.
- ❑ Create awareness and promote adoption of our ISO 41000.
- ❑ Identify the “**Champions of FM**” and build website content – *please ask how your organisation 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.
- ❑ Progress new FM standards:
 - ❖ WG4 – **ISO 41014**: Facility Management - development of FM strategy.*
 - ❖ WG5 – **ISO 41015**: Facility Management - influencing behaviors for improved facility outcomes and user experience.*



* working titles

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ISO/TC267 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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ISO/TC267 Facility Management (FM)

Closing Thoughts

- ❑ TC267 promotes the consistent definition for the **focus, scope and practice of the FM** profession and others.
- ❑ **ISO 41001:2018** FM Management Systems Standard is here and holistic.
- ❑ **FM** is primarily focused upon managing the Built Environment and its operational performance.
- ❑ **Cost Engineering / Quantity Surveying** is traditionally focused on the management of project capital costs, program and risk analysis.



Inevitably there will be some FM **crossover, integration and collaboration opportunities** relative to organizational culture and project life cycles.

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Thank you & Questions



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