



International
Organization for
Standardization





World Workplace // ASIA
Conference & Exhibition // 3-5 April, 2019 // Marina Bay Sands, Singapore

**ISO 41000 series:
International FM Standards Update**
Singapore – 4 April 2019

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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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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 9000 etc, ISO 55000 series)
- 👤 What next?



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



FM's role in solving UN challenges before global crisis?
The time for ISO 41000 adoption is critical.

one's safety at risk? Immediately
be the emergency notification system.

Guidelines for prioritizing **CRISIS** communications during the first **48** minutes

External Communication

Remind staff about news media & social media policies

- Who is authorized to serve as spokesperson/s?
- Who is authorized to post on official social media channels?

Equip front-line teams to handle the first wave of inquiries

- Website
- Social media
- Customer service/hotline/front office

1 NO POVERTY
12

2 ZERO HUNGER

3 GOOD HEALTH AND WELL-BEING
Provide key facts. What is the trend? What are the relative facts?

4 QUALITY EDUCATION
Define the audience. Who is directly affected? Who is in a position to help?

5 GENDER EQUALITY
Focus on action. What should people do to reduce inequalities and help women, low-employment, and disadvantaged persons?

6 CLEAN WATER AND SANITATION

7 AFFORDABLE AND CLEAN ENERGY

8 DECENT WORK AND ECONOMIC GROWTH

9 INDUSTRY, INNOVATION AND INFRASTRUCTURE
Provide a timeline. When can people expect the next update?

10 REDUCED INEQUALITIES
Identify official sources. Where can people turn to for the most accurate and current information?

11 SUSTAINABLE CITIES AND COMMUNITIES

12 RESPONSIBLE CONSUMPTION AND PRODUCTION

13 CLIMATE ACTION

14 LIFE BELOW WATER

15 LIFE ON LAND

16 PEACE, JUSTICE AND STRONG INSTITUTIONS

17 PARTNERSHIPS FOR THE GOALS

Activate Crisis Communications Team

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

Establish communications control center

Standards Matter

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

a common language
across borders

increased transparency
and professionalism

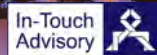
greater confidence
and reduced risk

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

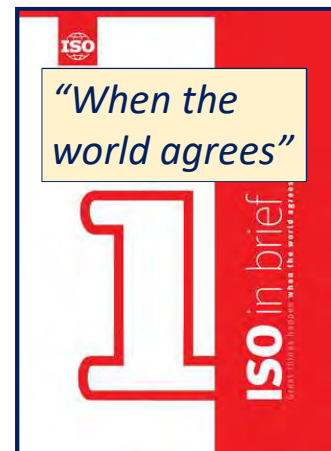


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ISO/TC267 Facility Management (FM)

International Standards Organization (ISO)

- Founded in **1947**.
- An independent, non-governmental international organization with membership of **164 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 **???** **International Standards** and related documents, covering almost every industry, from technology, to food safety, to agriculture and healthcare.
- ISO Standards **impact** everyone, everywhere.

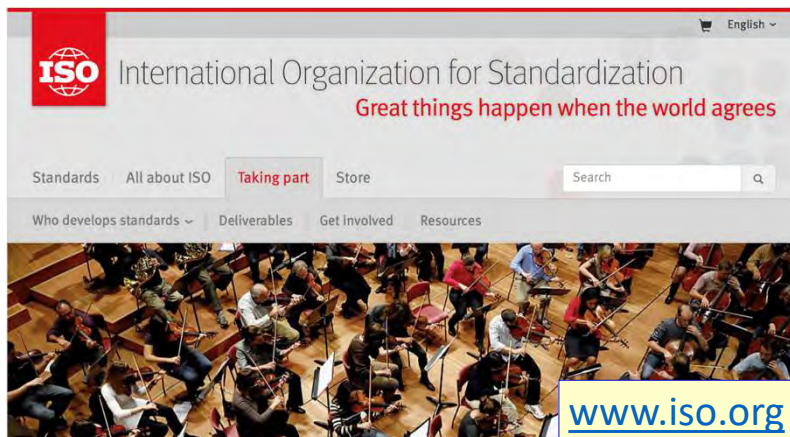


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ISO/TC267 Facility Management (FM)

ISO Process Overview



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ISO Process Vocabulary

SHALL	<ul style="list-style-type: none"> • “Is required to ...” • “It is required that ...” • “Has to ...” • “It is necessary ...”
SHOULD	<ul style="list-style-type: none"> • “It is recommended that ...” • “Ought to ...”

... the language of compliance

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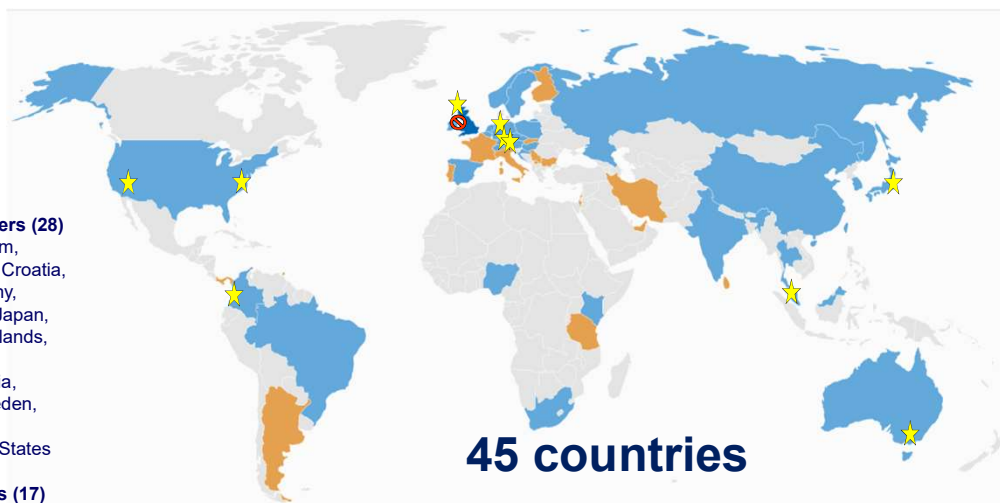
ISO/TC267 Facility Management (FM)

★ **TC267 meetings**
Ten since 2012

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

● **Participating (P) Members (28)**
Australia, Austria, Belgium, Brazil, China, Colombia, 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





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?

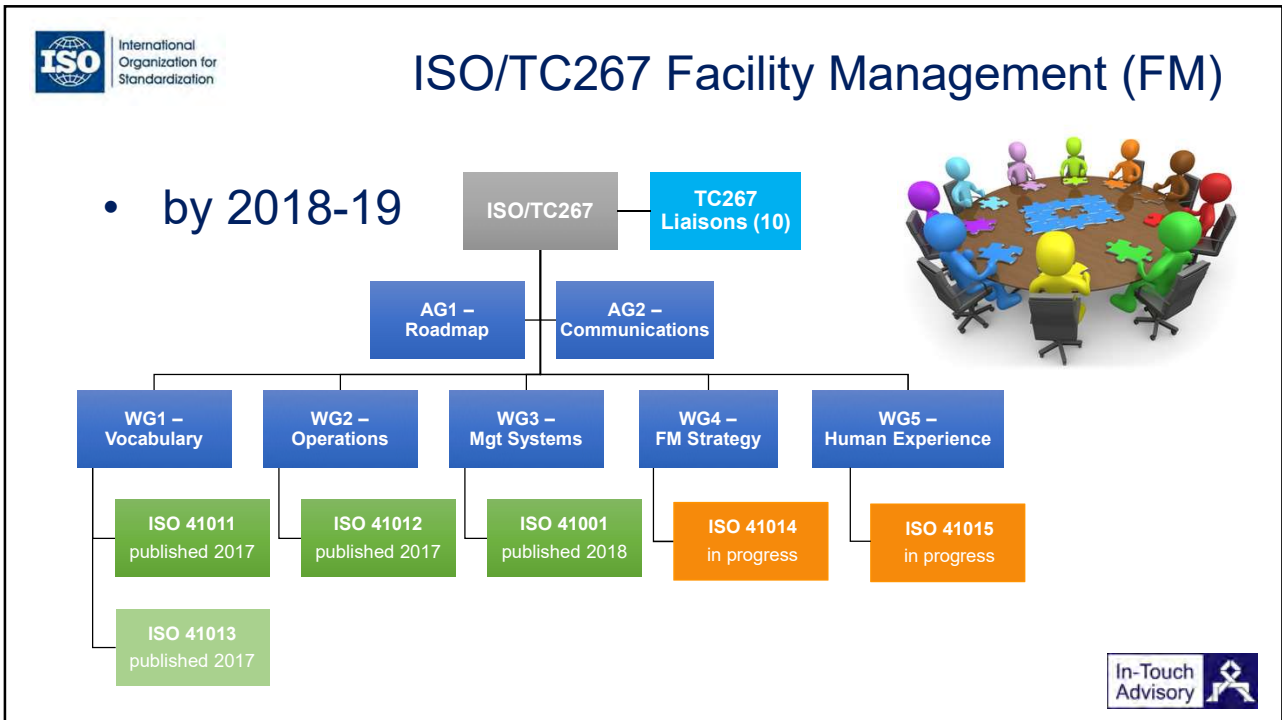
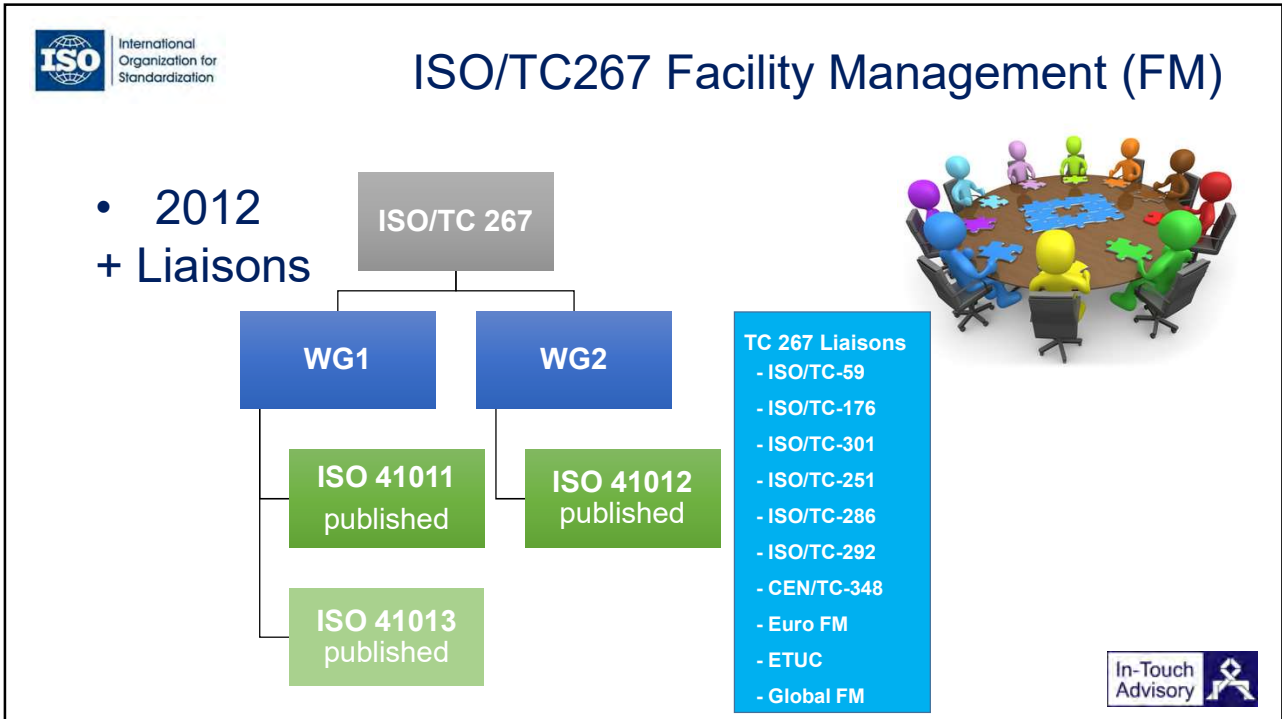


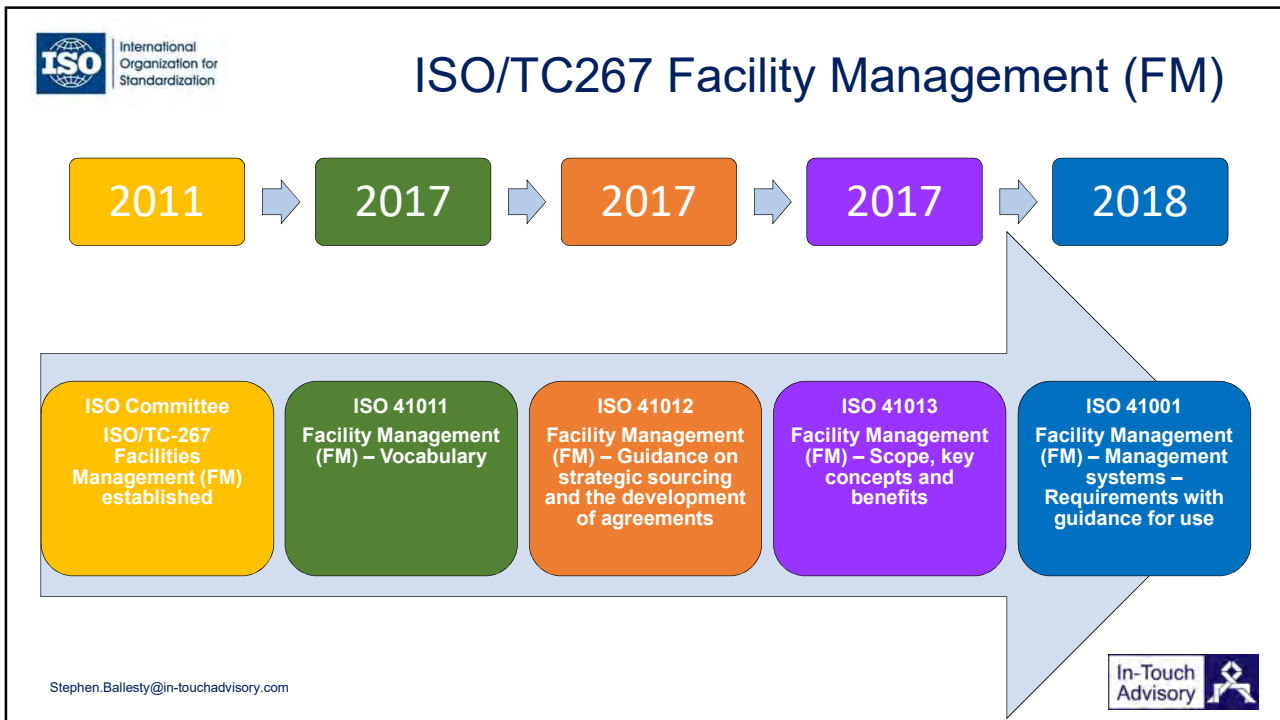
FM is an “*organizational function which integrates people, place and process within the **Built Environment** with the purpose of improving the **quality of life** of people and the **productivity** of the core business*”

Source: ISO 41011:2017

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ISO/TC267 Facility Management (FM)

WG1

ISO 41011 Facility Management - Vocabulary

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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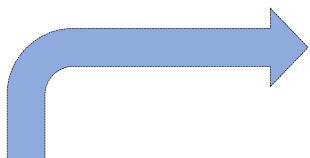
Introduction	Scope, Normative references, Terms and definitions
Clause 1, 2 & 3	
“ 3.1	Terms related to facility management
“ 3.2	Terms related to assets
“ 3.3	Terms related to people
“ 3.4	Terms related to sourcing
“ 3.5	Terms related to process
“ 3.6	Terms related to finance
“ 3.7	Terms related to 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
NORME EUROPÉENNE
EUROPÄISCHE NORM

ICS 03.080.99; 91.040.01

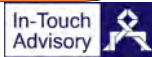
FINAL DRAFT
prEN 15221-2


June 2006

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
NORME EUROPÉENNE
EUROPÄISCHE NORM

ICS 01.040.03; 91.040.01; 01.040.91; 03.080.99


EN 15221-1

October 2006

English Version

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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

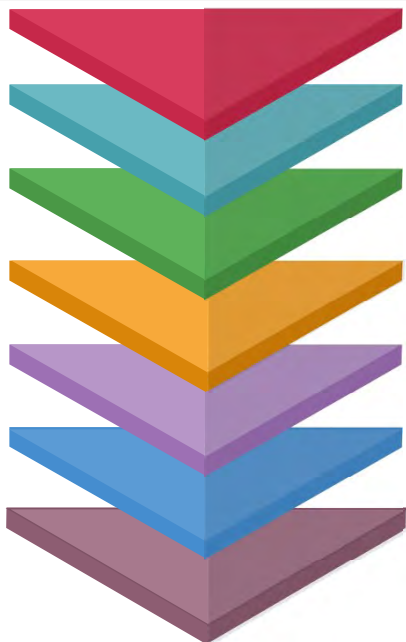
- Risks & Opportunities
- Plan / Address Risks
- Requirements of Stakeholders
- FM Objectives
- Implementation Plan
- Planning Horizons

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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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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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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International Organization for Standardization


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 41001:2018)

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DEMAND ORGANIZATION

Core Business Strategy Supported By FM

FM Strategy

FM Policy

FM Plans

(FM) ORGANIZATION

4. Context
5. Leadership
6. Planning
7. Support

9. Performance evaluation

10. Improvement

8. Operation


ACT
DO
CHECK
PLAN

Improve

Implement

Measure

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ISO/TC267 Facility Management (FM)

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/TC267 Facility Management (FM)

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



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ISO/TC267 Facility Management (FM)

ISO 41001 Certification

with alignment to ISO/IEC 17021 part 11 Conformity Assessment

- 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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ISO Process Vocabulary



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SHOULD	<ul style="list-style-type: none"> • “It is recommended that ...” • “Ought to ...”

... *the language of compliance*

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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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International Organization for Standardization

ISO/TC267 Facility Management (FM)

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

ISO/TC 267 Facility management

#ISO41000

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

International Organization for Standardization

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.*

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ISO/TC267 Facility Management (FM)

What next from TC267?

- ❑ **Conformity Assessment** -- Requirements for bodies providing audit and certification of management systems - ISO/IEC 17021 part 11 - Part 11: Competence requirements for auditing and certification of facility management (FM) management systems - **ACHIEVED**
- ❑ 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, DUBLIN meeting focus

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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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What else from IFMA?

Strategic FM Framework (April, 2018)

- Practical guidance note aligned to ISO 41000 by Dave Wilson FRICS, IFMA Fellow

“FM as a discipline is about much more than the management of buildings and services: it is critical to the successful functioning of every organization which occupies property.”

http://community.ifma.org/knowledge_library/m/members_only_content/1058021

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ISO/TC-267 Facility Management (FM)

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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ISO/TC-267 Facility Management (FM)

Closing Thoughts #2

- ❑ 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.
- ❑ 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 there will be AM / FM **crossovers**, and **integrations** as well as **complementary points** relative to organizational culture and life cycle.

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Thank you & Questions

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Singapore – 4 April 2019

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