



**IFMA's  
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**Oct. 16-18, 2019**  
**Phoenix, Arizona**  
Phoenix Convention Center

**ISO 41000:**  
Next-gen FM via International Standards

Session 6.11, N131 A/B, 10:30am, October 18



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## Moderator Introduction



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

- ❑ 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/TC-267's global liaison to ISO/TC-251 (ISO 55000 asset management).
- ❑ Stephen is a former member of the IFMA Board of Directors and Past Chairman of both the IFMA Foundation; and FMA Australia.
- ❑ [Stephen.Ballesty@in-touchadvisory.com](mailto:Stephen.Ballesty@in-touchadvisory.com)



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## ISO 41000: Next-gen FM via International Standards

- 1: Recognize the standards published to date under the ISO 41000 series, and those under development
- 2: Examine the role a management system can play in your strategic FM approach
- 3: Evaluate how standards can support an FM strategy that aligns with the organizational mission
- 4: Assess the best ways to support your organization and add value through the application of FM standards

**SESSION GOAL:** Enhanced awareness of the ISO 41000 series, and preparedness for adoption of international FM standards and support FM career prospects.




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## Presenter Introduction

### JACOBS

### Casey Martin<sup>®</sup>, AIA, AICP, CFM

- ❑ Casey is Program Manager in the Strategic Consulting Group of Jacobs. Her focus is facility and asset management including cultural resources and historic facilities. She works primarily with federal civilian agencies, providing adaptive reuse strategies, facility and business maintenance and operation strategies, life cycle analyses, facility transition planning and sustainability performance planning.
- ❑ Casey also serves as the Chair for the ISO 41000 Facility Management US Technical Advisory Group developing international standards for facility management.
- ❑ [Casey.Martin@jacobs.com](mailto:Casey.Martin@jacobs.com)

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## ISO 41011 – FM Vocabulary

### Terms and definitions

Terms related to:

- Facility management
- Assets
- People
- Sourcing
- Process
- Finance
- General business
- Measurement



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## ISO 41012 – FM Guidance on Strategic Sourcing & the Development of Agreements

- Essential elements in FM sourcing processes;
- FM roles and responsibilities in sourcing processes;
- Development processes and structures of typical agreement models.



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# ISO/TR 41013 – Facility Management Scope, key concepts and benefits

- Scope of FM
- Purpose and key concepts in FM
- Benefits of FM
  - Productivity
  - Impact on people
  - Risk mitigation
  - Sustainability
  - Identity
  - Cost and quality



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## ISO 41001 - MSS

**Context of the Organization**

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

**Leadership**

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

**Planning**

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

**Support**

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

**Operation**

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

**Performance Evaluation**

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

**Improvement**

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

PLAN










DO

CHECK

ACT

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# ISO Documents Under Development



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## ISO 41014 – FM Strategy

- Guidance for developing the FM Strategy
- Influence decision makers
- Alignment of the FM strategy with the core business strategy



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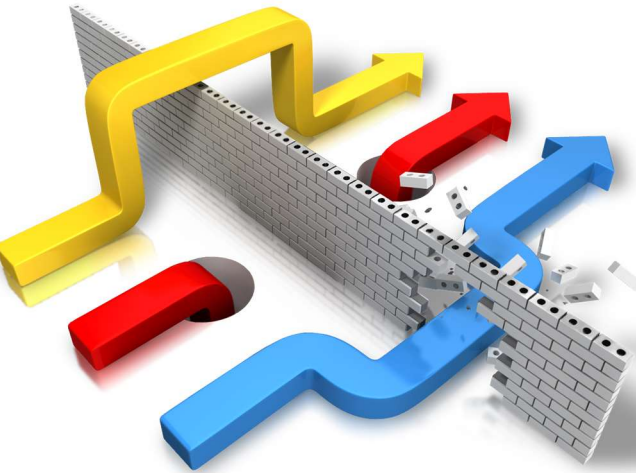
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## ISO 41015 – Influencing Behaviors for Improved Facility Outcomes and User Experience



- Best practices for supporting facility use outcomes and operational performance
- Impacts of efficient communications and operations
- Opportunities to influence throughout the building life cycle

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ISO International Organization for Standardization

## ISO/TC267 Facility Management (FM)



ISO Committee ISO/TC267 Facilities Management (FM) established & meetings

ISO 41011 FM Vocabulary

ISO 41012 Guidance on strategic sourcing and the development of agreements

ISO 41013 FM Scope, key concepts and benefits

AG1 – Roadmap & AG2 – Communications

ISO 41001 FM Management systems – Requirements with guidance for use

ISO 41014 FM Strategy

ISO 41015 Human Experience

2012-16 → 2017 → 2017 → 2018 → 2019

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## Panel Introduction

- ❑ **Casey Martin**, AIA, AICP, CFM  
Jacobs and ISO 41000 US Technical Advisory Group, refer previous.
- ❑ **Matt Dawson**  
EY's Global Operations Leader for Real Estate Services & Business Enablement – Matt has over 25 years of FM leadership experience. Matt is also a Past Chairman of the IFMA Global Board of Directors.
- ❑ **Lisa De Rosa**, CFM, FMP, SFP, CM-Learn  
Sundt Construction's Corporate Facilities Director – Lisa has over 10 years experience in the owning, leasing, and managing the operations and maintenance for Sundt's properties, including the 64,000 sq.ft, LEED Gold® corporate headquarters. Lisa is also the Immediate Past President of the IFMA Greater Phoenix Chapter.
- ❑ **Doug Postema**, LEED GA  
Doug is a Bachelor of Science (FM) student from Ferris State University, and 2019 IFMA Foundation scholarship recipient. Doug is also the Treasurer of the IFMA Student Chapter at Ferris State.

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## Panel Discussion


- ❑ Question 1: **What does ISO 41000 mean to facility management (FM)?**
- ❑ Question 2: **Who should be leading the adoption of FM standards?**
- ❑ Question 3: **How will standards impact FM education / training / careers?**

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




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## To the Audience ... any questions?




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## To you, our panellists and IFMA



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