ISO 41000 series empowering FM worldwide

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jointly organized by IFMA China and Shanghai Property Association

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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 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 since 2015).

In addition he was an Australasian representative to the RICS's Global Cost Prediction working group (2017-20) .

Stephen is a former member of the IFMA Board of Directors and Past Chairman of both the IFMA Foundation and FMA Australia.

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FM is complex, and becoming more so …

Standards Matter, in the pursuit …

| a common language | consistent reporting | greater transparency |

| increased confidence through reduced risk | ability to performance benchmark | data capture, costing, analysis and forecasts |

… of global market transparency, comparability and performance benchmarking

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

Not just cleaning!!

ISO/TC 267 Facility Management (FM)

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ISO/TC 267 Facility Management (FM)

What is ISO?

International Standards Organization (**ISO**), founded in **1947**.

Membership of **165** countries, via national standards bodies.

Promoting worldwide consensus-based proprietary, industrial, and commercial **Standards**.

www.iso.org/about-us.html

'... when the world agrees'

ISO/TC 267 Facility Management (FM)
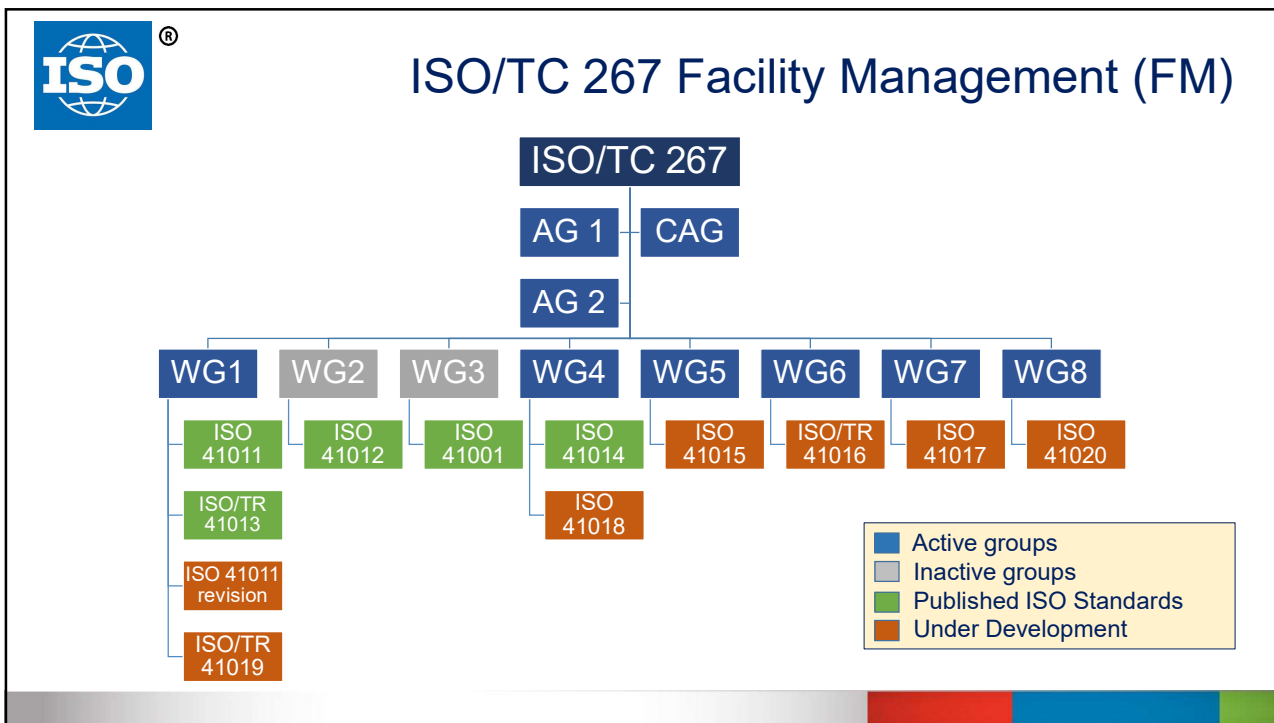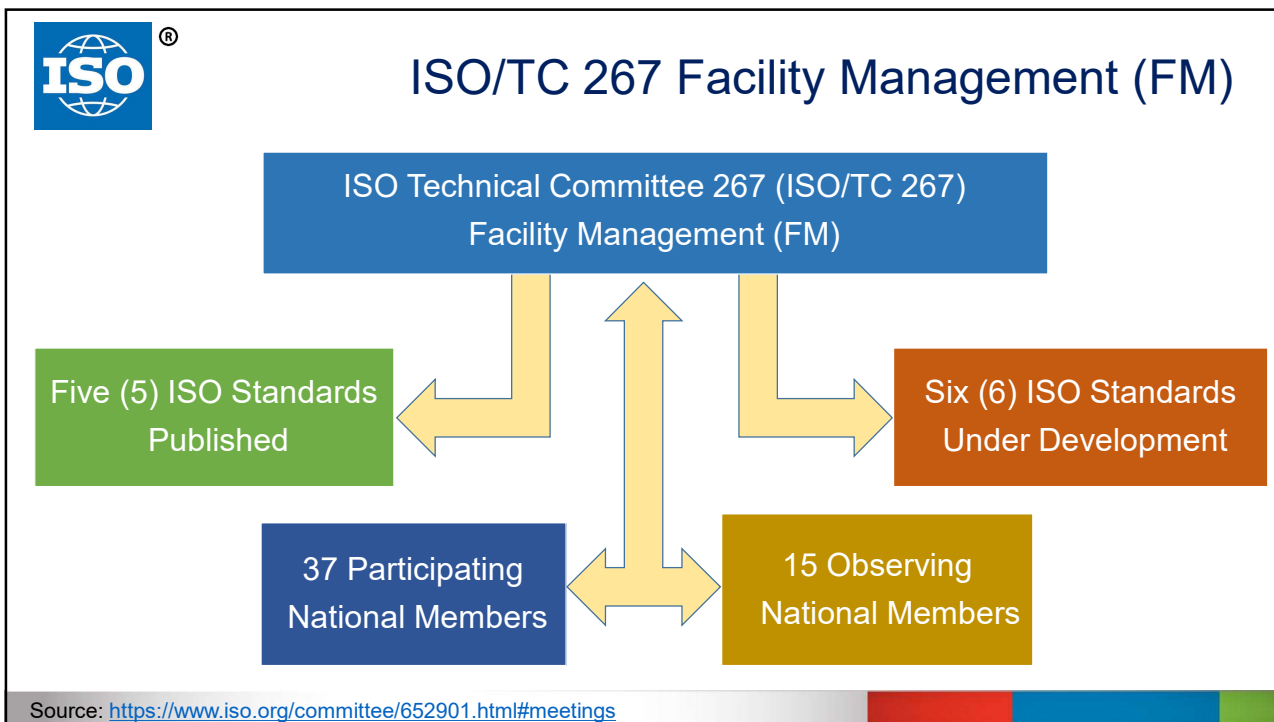
ISO Standards?

23,574
ISO standards
as at 31 December 2020

For products, services and systems, to ensure quality, safety and efficiency **solutions** to global challenges.

'... when the world agrees'

ISO/TC 267 Facility Management (FM)

ISO Technical Committee 267 (ISO/TC 267) Facility Management (FM)

Five (5) ISO Standards Published

Six (6) ISO Standards Under Development

37 Participating National Members

15 Observing National Members

Source: https://www.iso.org/committee/652901.html#meetings

ISO/TC 267 Facility Management (FM)

ISO/TC 267

AG 1 — CAG

AG 2

WG1	WG2	WG3	WG4	WG5	WG6	WG7	WG8
ISO 41011	ISO 41012	ISO 41001	ISO 41014	ISO 41015	ISO/TR 41016	ISO 41017	ISO 41020
ISO/TR 41013			ISO 41018				
ISO 41011 revision							
ISO/TR 41019							

■ Active groups
■ Inactive groups
■ Published ISO Standards
■ Under Development

ISO/TC 267 Facility Management (FM)

ISO/TC267	WORKING GROUP (WG)	PUBLISHED ISO STANDARDS
WG 1	Concepts & Context	**ISO 41011: 2017** FM vocabulary **ISO/TR 41013: 2017** FM Scope, key concepts and benefits
WG 2	Operations	**ISO 41012: 2017** FM Guidance on strategic sourcing and the development of agreements
WG 3	Management Systems	**ISO 41001: 2018** FM Management systems - Requirements with guidance for use
WG 4	Strategy & Policy	**ISO 41014: 2020** Development of FM strategy

ISO/TC 267 Facility Management (FM)

ISO/TC267	WORKING GROUP (WG)	UNDER DEVELOPMENT (titles may be subject to revision)
WG 1	Concepts & Context	**ISO 41011** FM vocabulary (2nd edition revision) **ISO/TR 41019** The role of FM in sustainability and resilience
WG 4	Strategy & Policy	**ISO 41018** Development of FM policy
WG 5	Human Experience	**ISO 41015** FM influencing organizational behaviours for improved facility outcomes
WG 6	Technology in FM	**ISO 41016** Technology in FM - Scope, key concepts and benefits
WG 7	Emergency Management	**ISO 41017** FM guidance on emergency management of epidemic prevention in the workplace
WG 8	Performance Measurement & Improvement	**ISO 41020** FM performance measurement and improvement

ISO/TC 267 Facility Management (FM)

Why are FM Standards important?

- ❑ 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
- ❑ Enhance organizational identity and reputation
- ❑ Improve sustainability and resilience
- ❑ Focus on **Quality of Life** for all

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

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ISO/TC 267 Facility Management (FM)

What is a Management Systems Standard (MSS)?

The basis for objectives, auditable outcomes and ISO certification.

Flexibility

☑ NOW
☐ LATER

Discipline

Consistency

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

Source: Harvard Business School, 2008

ISO/TC 267 Facility Management (FM)

Why is an MSS important?

MSS adoption per **ISO 9001** business case evidence:

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

Source: British Standards Institute (BSI) Report: Bottom line a priority? 2015
Note: ISO 9001 was first published in 1987.

ISO/TC 267 Facility Management (FM)

How many other MSS's are there?

ISO 41001: 2018 FM Management systems

1: ISO Building & Construction sector

12: ISO related or sector groupings

48: ISO MSS Type A, for certification

82: ISO Management System Standards

23,574: current ISO Standards (all topics)

Source: https://www.iso.org/management-system-standards.html, 31 December 2020

ISO 22301

ISO 55001

ISO 41001

ISO 50001

ISO 14001

ISO 45001

ISO 31000

ISO/TC 267 Facility Management (FM)

How is ISO 41001: 2018 structured?ISO41001:2018 如何构成？

Follows an established ISO template, and provides a basis for audit and certification:

1. Scope
2. Normative References
3. Terms & Definitions
4. Context of the Organization
5. Leadership
6. Planning

7. Support
8. Operation*
9. Performance evaluation
10. Improvement

contains bulk of the specific requirements

ISO 41001:2018 (MSS) outline

Context of the Organization
- External & Internal Issues
- Interested Party Requirements
- Establish Scope
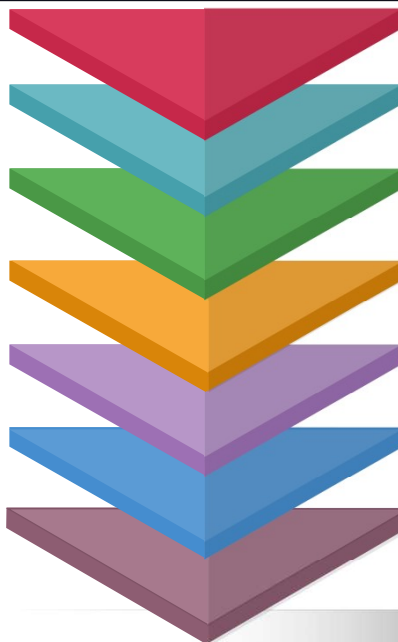- Document Scope
- FM Management System

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
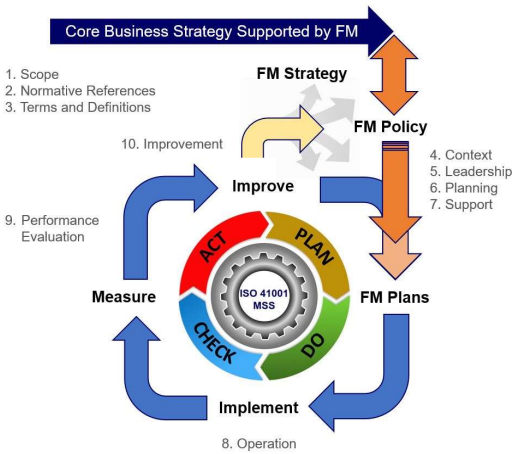
ISO/TC 267 Facility Management (FM)

ISO 41001 MSS

Demand Organization

… is an *"entity which has a need and the authority to incur costs to have requirements met"*

Source: **ISO 41011:2017**

DEMAND ORGANIZATION

Core Business Strategy Supported by FM

1. Scope
2. Normative References
3. Terms and Definitions

10. Improvement

FM Strategy

FM Policy

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

Improve

9. Performance Evaluation

Measure

ISO 41001 MSS

ACT   PLAN
CHECK   DO

FM Plans

Implement

8. Operation

(FM) ORGANIZATION

Source: Adapted from ISO 41001: 2018

1. Scope
2. Normative References
3. Terms & Definitions
4. Context of the Organization
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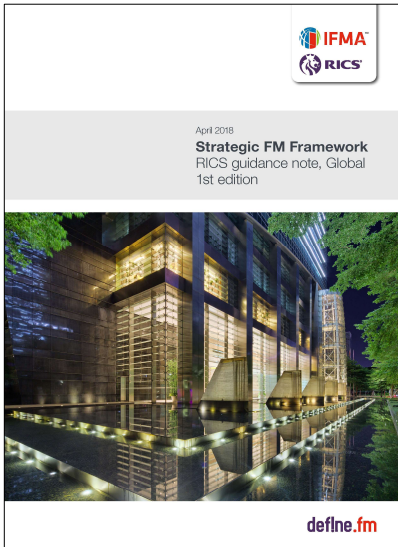

ISO/TC 267 Facility Management (FM)

What else from IFMA?

Strategic FM Framework (April, 2018)

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

"FM as a discipline is about <u>much more than the management of buildings and services</u>: it is critical to the successful functioning of every organization which occupies property."

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

IFMA
RICS

April 2018
Strategic FM Framework
RICS guidance note, Global
1st edition

deflne.fm

ISO/TC 267 Facility Management (FM)

Why adopt ISO 41001?

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**

ISO/TC 267 Facility Management (FM)

Why adopt ISO 41001?

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

ISO/TC 267 Facility Management (FM)

COVID-19

April 2020 NEWS:

ISO/TC267 continues to make strides with the ISO 41000 series of international facility management (FM) standards despite the COVID-19 global pandemic.

Find out why standards are important in a crisis, and recovery.

https://tinyurl.com/yculzf7m

Facilities Management, Coronavirus, and the Value of ISO 41001

… the role of FM standards in a crisis

Source: https://committee.iso.org/sites/tc267/home/news.html

ISO/TC 267 Facility Management (FM)

Sustainable FM

ISO/TC267 have committed to developing **ISO/TR 41019** "*The role of FM in sustainability and resilience*" based on the alignment of the ISO 41000 series with the **UN's SDGs**.

SUSTAINABLE DEVELOPMENT GOALS

1 NO POVERTY
2 ZERO HUNGER
3 GOOD HEALTH AND WELL-BEING
4 QUALITY EDUCATION
5 GENDER EQUALITY
6 CLEAN WATER AND SANITATION
7 AFFORDABLE AND CLEAN ENERGY
8 DECENT WORK AND ECONOMIC GROWTH
9 INDUSTRY, INNOVATION AND INFRASTRUCTURE
10 REDUCED INEQUALITIES
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

ISO/TC 267 Facility Management (FM)

❑ ISO standards status -
https://www.iso.org/committee/652901.html#meetings
❑ ISO/TC267 website -
https://committee.iso.org/home/tc267
❑ TC 267 on LinkedIn and follow #ISO41000 -
❑ https://www.linkedin.com/company/iso-tc-267
❑ ISO standards store (sample ISO 41001 link) -
https://www.iso.org/standard/68021.html
❑ Contact your National Standards Body (NSB)
in your country

New 2020 FAQ feature -
https://committee.iso.org/sites/tc267/home/faq.html

Find out more…

…why not get involved?

ISO/TC 267 Facility Management (FM)

Join the team

Representatives drawn from 52 countries who have been actively progressing the international FM standards initiative since 2012.

The ISO 41000 series defines FM as the foremost contributor to a more productive, sustainable and liveable Built Environment for all.

ISO/TC 267, St. Petersburg, Russia November 2019

… make a difference!!

ISO/TC 267 Facility Management (FM)

Closing thoughts

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**

❑ Recognition of 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.

❑ ISO/TC267 answers the challenge of promoting, defining and coordinating the focus, scope and practice of the **FM profession**.

❑ ISO 41000 series provides a basis improved **FM consistency** and performance in planning, delivery and reporting.

STANDARDS are crucial to …
… the delivery of a more productive, sustainable and liveable Built Environment.

In-Touch Advisory

Reflections and questions please to: Stephen.Ballesty@in-touchadvisory.com