



**IFMA**<sup>TM</sup>  
International Facility Management Association  
Empowering Facility Professionals Worldwide



**In-Touch  
Advisory**  
... connecting you with solutions for your Built Environment

# ISO 41000 series empowering FM worldwide

## ISO 41000系列为全世界FM赋能

**24 June 2021, Shanghai (virtual keynote)**



**IFMA**<sup>TM</sup>  
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**In-Touch  
Advisory**  
... connecting you with solutions for your Built Environment



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## Stephen Ballesty

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

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在悉尼的咨询公司**In-Touch Advisory**为利益相关者提供跨越房地产-建设-设施生命周期的建筑环境解决方案。*

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).

*Stephen是ISO国际FM标准倡议的澳大利亚代表，(ISO41000自2012)，ISO/TC267与ISO/TC251 (ISO55000资产管理自2015年) 全球联络员。*

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

*他是澳大利亚皇家测量师学会全球成本预测工作组代表 (2017-2020)*

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

*Stephen是IFMA董事会前成员，IFMA基金会和澳大利亚设施管理协会前主席。*

**FM is complex, and becoming more so ...**  
 FM工作是复杂的，并且会变得越来越复杂

**Standards Matter, in the pursuit ...**  
 标准很重要，我们在追求 ....

a common language 一种共同的语音	consistent reporting 一致的报告	greater transparency 更大的透明度
increased confidence through reduced risk 在降低风险的同时增强信息	ability to performance benchmark 能够为绩效评估制定基准	data capture, costing, analysis and forecasts 数据采集，成本计算，分析和预测

... of global market transparency, comparability and performance benchmarking.  
 .... 全球市场的透明度，可比性，和绩效基准。



What is FM?  
什么是FM



Not just cleaning!!  
不仅仅是保洁

## ISO/TC 267 Facility Management (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”

FM是“将人、地点、过程整合在建筑环境中的组织功能，目的是为了**提高人们的生活质量和核心业务的生产力。**”

Source: ISO 41011:2017



What is FM?  
什么是FM



## ISO/TC 267 Facility Management (FM)

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**What is ISO?**  
**什么是ISO?**



## ISO/TC 267 Facility Management (FM)

International Standards Organization (**ISO**), founded in **1947**. *ISO组织成立于1947年。*

Membership of **165** countries, via national standards bodies. *通过国家标准组织，成员遍布165个国家。*

Promoting worldwide consensus-based proprietary, industrial, and commercial **Standards**. *促进世界范围内基于所有者共识的，工业和商业标准的发展*

[www.iso.org/about-us.html](http://www.iso.org/about-us.html)

*'... when the world agrees'*



**ISO Standards?**  
**ISO标准?**



## ISO/TC 267 Facility Management (FM)

# 23,574

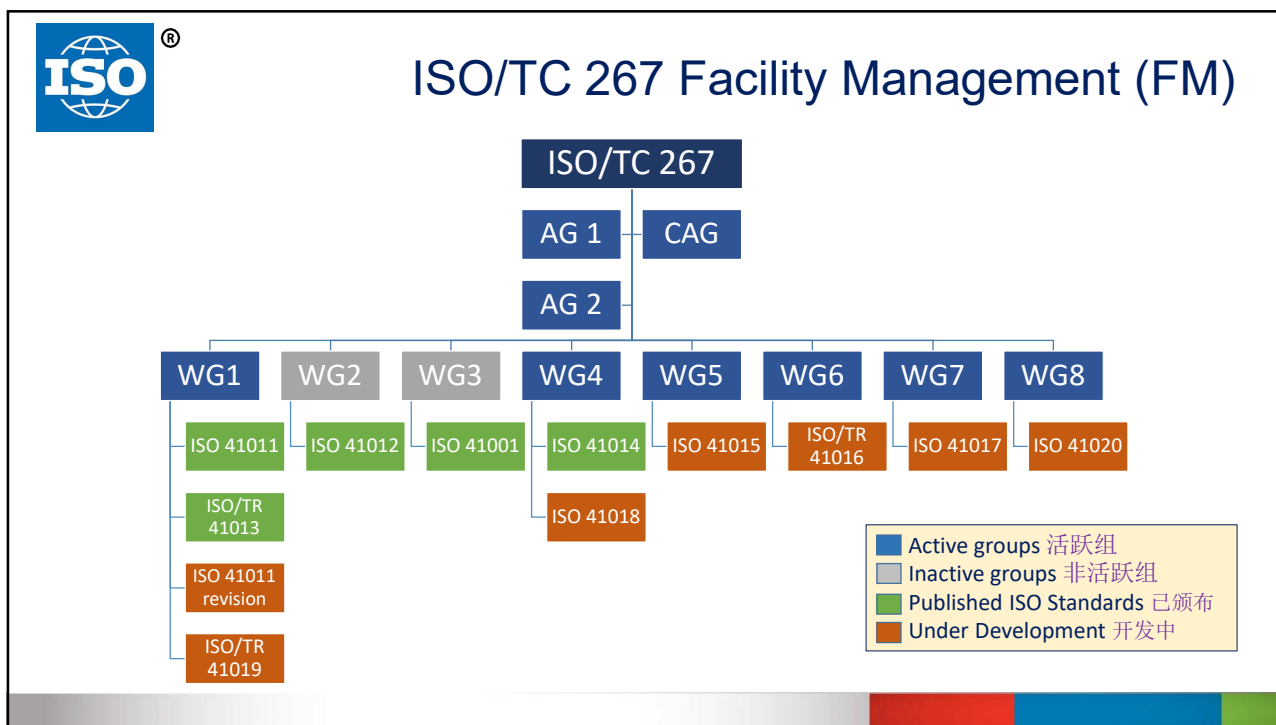
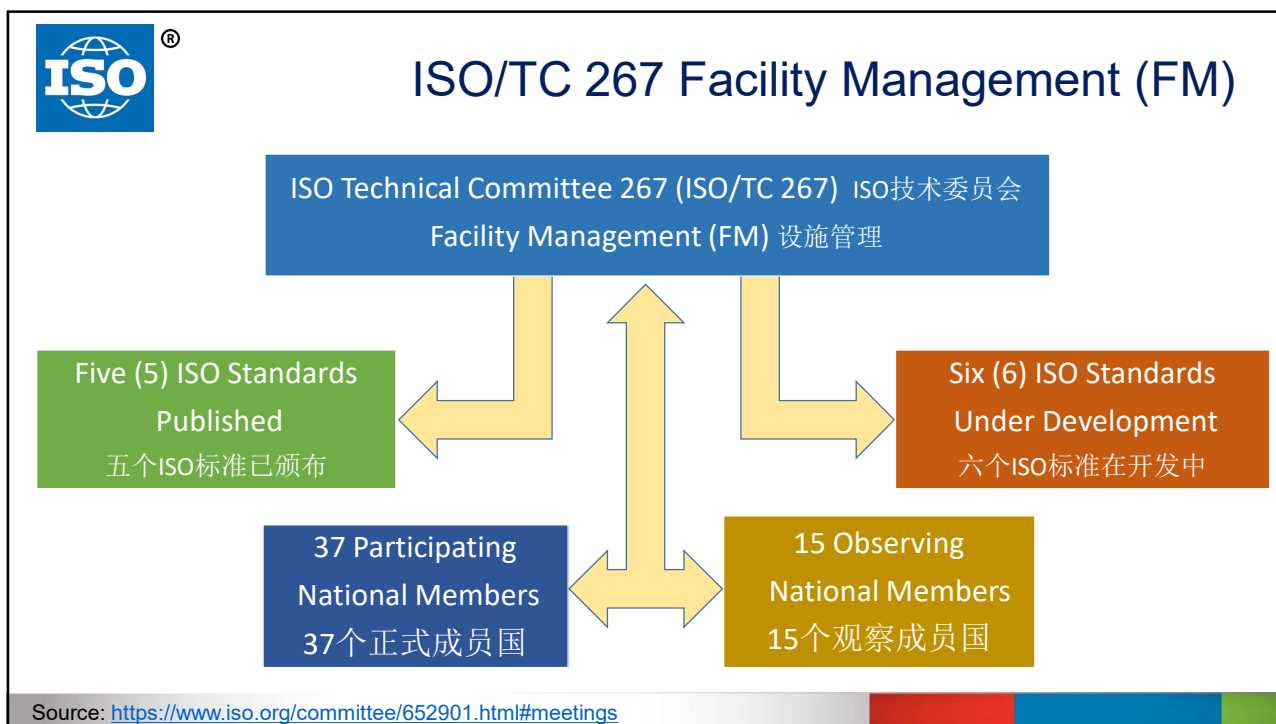
## ISO standards

as at 31 December 2020 截止2020年12月31日

For products, services and systems, to ensure quality, safety and efficiency **solutions** to global challenges. *围绕产品，服务，系统，提供质量、安全及有效性保证，以应对全球挑战的解决方案。*

*'... when the world agrees'*





ISO/TC 267 Facility Management (FM)		PUBLISHED ISO STANDARDS 已颁布标准
ISO/TC267	WORKING GROUP (WG) 工作组	
WG 1	Concepts & Context 概念与背景	ISO 41011: 2017 FM vocabulary FM词汇表 ISO/TR 41013: 2017 FM Scope, key concepts and benefits FM范围, 关键概念和优点
WG 2	Operations 运作	ISO 41012: 2017 FM Guidance on strategic sourcing and the development of agreements 2017战略寻购及协议发展指南
WG 3	Management Systems 管理系统	ISO 41001: 2018 FM Management systems - Requirements with guidance for use 2018FM管理系统-要求和使用指南
WG 4	Strategy & Policy 战略与政策	ISO 41014: 2020 Development of FM strategy 2020FM战略发展

ISO/TC 267 Facility Management (FM)		UNDER DEVELOPMENT (titles may be subject to revision) 开发中
ISO/TC267	WORKING GROUP (WG)工作组	
WG 1	Concepts & Context 概念与背景	ISO 41011 FM vocabulary (2 <sup>nd</sup> edition revision) FM术语 (第二版修订) ISO/TR 41019 The role of FM in sustainability and resilience FM在促进可持续发展及弹性方面所扮演的角色。
WG 4	Strategy & Policy 战略与政策	ISO 41018 Development of FM policy FM政策的发展
WG 5	Human Experience 人的体验	ISO 41015 FM influencing organizational behaviours for improved facility outcomes FM在改善设施成果方面如何影响组织的行为
WG 6	Technology in FM FM中的技术	ISO 41016 Technology in FM - Scope, key concepts and benefits FM中的技术-范围, 关键概念和优点
WG 7	Emergency Management 应急管理	ISO 41017 FM guidance on emergency management of epidemic prevention in the workplace 工作场所流行病防疫应急管理指南
WG 8	Performance Measurement & Improvement 绩效评估与改进	ISO 41020 FM performance measurement and improvement FM 绩效评估与改进



## ISO/TC 267 Facility Management (FM)

### Why are FM Standards important? FM标准为什么重要

- Improved procedures, productivity and performance 流程，生产力和绩效的改进
- Maintain regulatory compliance and provide safe workplaces 提供安全合规的工作场所
- Develop functional and motivating Built Environments 提高建筑环境的功能性及激励性
- Optimize life cycle performance and cost controls 优化生命周期及成本控制
- Enhance organizational identity and reputation 提高组织的认同感和声誉
- Improve sustainability and resilience 提高可持续性和韧性
- Focus on **Quality of Life** for all 关注“生活质量”

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



## ISO/TC 267 Facility Management (FM)

### What is a Management Systems Standard (MSS)?

#### 什么是管理系统标准 (MSS)

The basis for objectives, auditable outcomes and ISO certification.

是目标、可审计的产出和ISO认证的基础。



Flexibility 灵活性



Discipline 原则性



Consistency 一致性

“Management systems are those activities used to **anticipate, prevent, and resolve known problems.**” 管理系统是用来预测、预防和解决已知问题的活动。

Source: Harvard Business School, 2008  
资料来源于哈佛商学院, 2008





## ISO/TC 267 Facility Management (FM)

### Why is an MSS important? 为什么管理系统标准 (MSS) 很重要

MSS adoption per ISO 9001 business case evidence:

MSS采用符合ISO9001商业案例的证据

- ❑ **Management:** Certified companies **outperformed** the market  
 管理：经认证的公司表现**优于**市场。
- ❑ **Finance:** **55%** achieved **cost savings** 财务：约**55%**的公司节约了成本
- ❑ **Operations:** **75%** boosted their **performance** 运营：75%的公司提升了绩效
- ❑ **Services:** **75%** improved **customer service and loyalty**  
 服务：75%的公司客户服务及客户忠诚度有了提高
- ❑ **Marketing:** **71%** acquired **new customers** and retained **existing clients**  
 市场：71%公司得到新客户和保留里老客户。



Source: British Standards Institute (BSI) Report: Bottom line a priority? 2015 资料来源：英国标准协会报告：底线优先？2015  
 Note: ISO 9001 was first published in 1987. 备注：ISO 9001第一版在1987颁布。



## ISO/TC 267 Facility Management (FM)

### How many other MSS's are there? 还有多少个MSS

ISO 41001: 2018 FM Management systems	
2018FM管理系统	
1:	ISO Building & Construction sector ISO 楼宇与建筑
12:	ISO related or sector groupings ISO 相关或关联组
48:	ISO MSS Type A, for certification ISO MSS用于认证
82:	ISO Management System Standards ISO 管理系统标准
23,574:	current ISO Standards (all topics) 当前所有ISO标准



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



## 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: 遵循已建构的ISO模板, 并为认证和审核提供基础。

- |                                     |                                |
|-------------------------------------|--------------------------------|
| 1. Scope 范围                         | 7. Support 支持                  |
| 2. Normative References 引用标准        | 8. Operation* 运营: 其中包含大量的具体要求  |
| 3. Terms & Definitions 术语与定义        | 9. Performance evaluation 绩效评估 |
| 4. Context of the Organization 组织背景 | 10. Improvement 改进             |
| 5. Leadership 领导                    |                                |
| 6. Planning 规划                      |                                |

contains bulk of the specific requirements

### ISO 41001:2018 (MSS) outline (MSS)概要

#### Context of the Organization 组织背景

- External & Internal Issues 外部及内部问题
- Interested Party Requirements 兴趣方的要求
- Establish Scope 建立范围
- Document Scope 文档范围
- FM Management System FM管理系统

#### Planning 计划

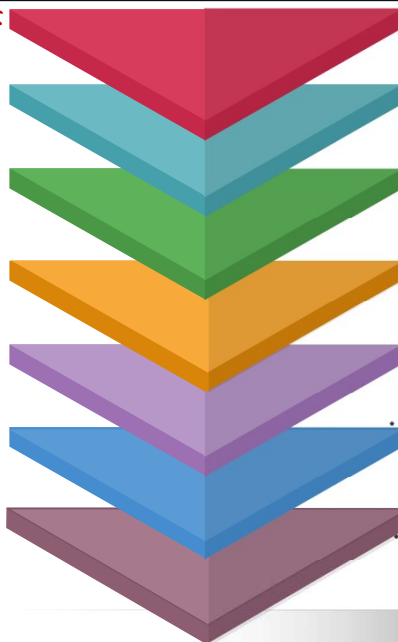
- Risks & Opportunities 风险 & 机会
- Plan / Address Risks
- Requirements of Stakeholders 利益相关者诉求
- FM Objectives FM目标
- Implementation Plan 推行计划
- Planning Horizons 规划视野

#### Operation 运营

- Processes 流程
- Change Control 变更控制
- Control Processes 流程控制
- Customer Relationships 客户关系
- Integrate Service Delivery 集成服务交付

#### Improvement 改进

- Nonconformity 不墨守成规
- Corrective Actions 纠正措施
- Proactive Measures 主动改善措施
- Gap Analysis 差距分析
- Continually Improve 持续改善



#### Leadership 领导


- Leadership & Commitment 领导与承诺
  - Establish FM Policy 建立FM政策
- Communicate FM Policy FM政策沟通
  - Relevant Roles 相关角色
- Responsibility & Authority 责任与权力

#### Support 支持

- ID & Secure Resources ID与安全资源
  - Source & Monitor 资源与监控
    - Competencies 竞争力
    - Awareness 意识
  - Communications 沟通力
- Information Required 需要信息

#### Performance Evaluation 绩效评估

- Monitoring Means & Methods 监控手段与方法
  - Scope of Monitoring 监控范围
  - Documented Results 记录结果
  - Evaluate Performance 绩效评估
    - Performance Audits 绩效审核
- Top Management Review 最高管理层评审
- Communicate / Act on Results 沟通/根据结果采取行动



**ISO 41001 MSS**

**Demand Organization**  
需求组织

... is an **“entity which has a need and the authority to incur costs to have requirements met”**

.....是有需求的实体，有权许可因满足需求而产生成本

来源于Source: ISO 41011:2017

## ISO/TC 267 Facility Management (FM)

**DEMAND ORGANIZATION** 需求组织（核心业务战略支持）

1. Scope 范围  
2. Normative References 引用标准  
3. Terms and Definitions 术语与定义  
4. Context 组织背景  
5. Leadership 领导  
6. Planning 计划  
7. Support 支持  
8. Operation 运营  
9. Performance Evaluation 绩效评估  
10. Improvement 改进

**(FM) ORGANIZATION**

Source: Adapted from ISO 41001: 2018



## ISO/TC 267 Facility Management (FM)

*What else from IFMA? IFMA还有什么*

### Strategic FM Framework (April, 2018) FM战略框架

- ❑ Practical guidance note aligned to ISO 41000 series by Dave Wilson FRICS, IFMA Fellow
- ❑ IFMA 院士Dave Wilson FRICS,在提到关于ISO41000系列实际应用指南中说道：  
***“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.”***

FM作为一门学科，不仅仅是关于建筑和服务的管理：它对每个占用物业的组织的成功运作都至关重要。



defme.fm

[http://community.ifma.org/knowledge\\_library/m/members\\_only\\_content/1058021](http://community.ifma.org/knowledge_library/m/members_only_content/1058021)



## ISO/TC 267 Facility Management (FM)

### Why adopt ISO 41001? 为什么采用ISO41001

with alignment to ISO/IEC 17021 part 11 Conformity Assessment

符合ISO/IEC17021 第11部分一致性评估

- Establish **criteria** for policies and procedures 建立政策和流程标准
- Evaluate **methodology** for document control 文件管控的方法评估
- Justify inclusion of any '**should**' statements 说明是否包含任何“应该”的声明
- Justify exclusion of any '**shall**' statements 为排除任何“应该”声明提供理由
- Define internal and / or external **audit processes** 定义内部及/或外部审计流程



## ISO/TC 267 Facility Management (FM)

### Why adopt ISO 41001? 为什么采用ISO41001

with alignment to ISO/IEC 17021 part 11 Conformity Assessment

符合ISO/IEC17021 第11部分一致性评估

- Define internal and / or external **audit processes\*** 定义内部和/或外部审计流程
- Define **certification** parameters and boundaries 定义认证参数和边界
- Understand the **impacts** of non-conformity 理解不一致的影响
- Identify **continuous improvement** opportunities 识别持续改进的机会
- Communicate the **value proposition** of a MSS 沟通MSS的价值主张





**COVID-19**

April 2020 NEWS:  
2020年4月新闻

ISO/TC267 continues to make strides with the ISO 41000 series of international facility management (FM) standards despite the COVID-19 global pandemic. 尽管新冠全球大流行, ISO/TC267仍在ISO41000系列国际设施管理标准下继续大步前进。

Find out why standards are important in a crisis, and recovery. 找出为何标准在危机和复苏中很重要

## ISO/TC 267 Facility Management (FM)

<https://tinyurl.com/yculzf7m>

# Facilities Management, Coronavirus, and the Value of ISO 41001

设施管理, 新冠和ISO41001的价值

... *the role of FM standards in a crisis*  
FM标准在危机中的作用



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



**Sustainable FM**  
设施管理可持续化

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.

ISO/TC267致力于开发ISO/TR41019, FM的可持续性 & 弹性是基于ISO41000与联合国可持续发展目标的一致性。

## ISO/TC 267 Facility Management (FM)

# SUSTAINABLE DEVELOPMENT GOALS

<b>1</b> NO POVERTY 	<b>2</b> ZERO HUNGER 	<b>3</b> GOOD HEALTH AND WELL-BEING 	<b>4</b> QUALITY EDUCATION 	<b>5</b> GENDER EQUALITY 	<b>6</b> CLEAN WATER AND SANITATION 
<b>7</b> AFFORDABLE AND CLEAN ENERGY 	<b>8</b> DECENT WORK AND ECONOMIC GROWTH 	<b>9</b> INDUSTRY, INNOVATION AND INFRASTRUCTURE 	<b>10</b> REDUCED INEQUALITIES 	<b>11</b> SUSTAINABLE CITIES AND COMMUNITIES 	<b>12</b> RESPONSIBLE CONSUMPTION AND PRODUCTION 
<b>13</b> CLIMATE ACTION 	<b>14</b> LIFE BELOW WATER 	<b>15</b> LIFE ON LAND 	<b>16</b> PEACE, JUSTICE AND STRONG INSTITUTIONS 	<b>17</b> PARTNERSHIPS FOR THE GOALS 	



Find out more...



## ISO/TC 267 Facility Management (FM)

- ❑ ISO standards status - ISO标准的状态  
<https://www.iso.org/committee/652901.html#meetings>
- ❑ ISO/TC267 website - ISO/TC267网站  
<https://committee.iso.org/home/tc267>
- ❑ TC 267 on LinkedIn and follow #ISO41000 - linkin上 TC 267及ISO41000  
<https://www.linkedin.com/company/iso-tc-267>
- ❑ ISO standards store (sample ISO 41001 link) - ISO标准商店 <https://www.iso.org/standard/68021.html>
- ❑ Contact your National Standards Body in your country  
联系您所属的国标制定机构。

**New 2020 FAQ feature - 新2020 FAQ特性**  
<https://committee.iso.org/sites/tc267/home/faq.html>

'... why not get involved?' 为什么不参与进来呢?



## ISO/TC 267 Facility Management (FM)

Join the team 加入团队

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

来自52个国家的代表，自2012年以来一直积极推进国际FM标准的倡议。

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

ISO41000系列定义FM：为所有人提供更高效，可持续化和有生命力的建筑环境的最重要贡献者。

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





## 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”.

FM是一种“将人，地点和过程整合在建筑环境中的组织功能，目的是提高人们生活质量和核心业务的生产力。”

- ❑ 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. 承认现代资产和设备的复杂性及其与风险管理的关系，为我们提供了基于负责任的管理、运营效率及有效地建筑环境，以应对挑战的环境的战略意义。 来源 Source: ISO 41011: 2017
- ❑ ISO/TC267 answers the challenge of promoting, defining and coordinating the focus, scope and practice of the **FM profession**. ISO/TC267回应了关于促进、定义、协调FM专业的重点、范围和实践的挑战。
- ❑ ISO 41000 series provides a basis improved **FM consistency** and performance in planning, delivery and reporting. ISO41000系列为改善FM在计划，交付和报告方面的一致性和绩效改善方面的基础。



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

标准对于提供一个更高效、可持续和宜居的建筑环境将至关重要。

In-Touch  
Advisory



Reflections and questions please to: [Stephen.Ballesty@in-touchadvisory.com](mailto:Stephen.Ballesty@in-touchadvisory.com)