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FM: Reflect, Reconnect, Recalibrate
Darwin Convention Centre
4 – 7 September 2022

ISO 41000 series: Australian context & update

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❑ Stephen's consulting firm **In-Touch Advisory** connects stakeholders with solutions for the Built Environment across the property–construction–facilities life cycle.

❑ He is the AIQS' representative to Standards Australia's MB-022 Committee for FM standards, and in turn an Australian delegate ISO/TC-267 (ISO 41000 facility management since 2012), ISO/TC-267's global liaison to ISO/TC-251 (ISO 55000 asset management since 2013).

❑ Stephen is the currently a member of the IFMA Standards Committee and the Regional Director – Australasia for IFMA's FM Consultant Council.

❑ He is also a former member of the IFMA Global Board of Directors and a Past Chairman of both the FMA Australia and IFMA Foundation.

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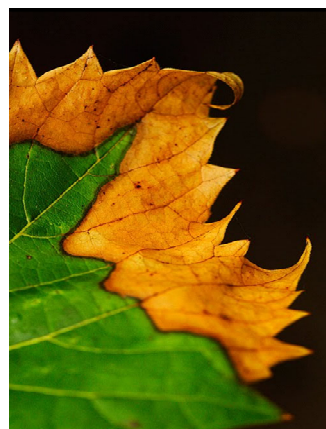
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ISO 41000 series: Australian context & update

❑ FM Standards – Objectives & FM defined

❑ ISO Governance, Structure & Outputs

❑ Sustainable Development Goals (SDGs)

❑ ISO 41000 series journey, and the SDGs

❑ ISO 41000 series outputs & an AU context

❑ ISO 41001 Certification Options

❑ ISO 41019 What to expect

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Standards Matter in the pursuit of …

a common language

consistent reporting

greater transparency

data capture, costing, analysis and forecasts

ability to performance benchmarking

increased confidence through reduced risk

… a basis for global consistency, comparability and collaboration on solutions.

ISO/TC 267
Facility management

10 YEARS
2012 – 22

FM Standards – objectives

- ❑ To enable the widest participation;
- ❑ To create meaningful standards with global relevance that will assist enabling practitioners to improve operational efficiencies;
- ❑ To develop standards for FM as the leading professional discipline for the management of the Built Environment and services sector;
- ❑ To develop standards that provide practitioners with guidance and methodologies that enhance the value that they can deliver; and
- ❑ To ensure that outputs are of benefit to society, commerce and industry as a whole.

Source: ISO/TC 267 Strategic Business Plan (2018), as summarised by Stephen Ballesty

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Facility Management – defined

What is FM?

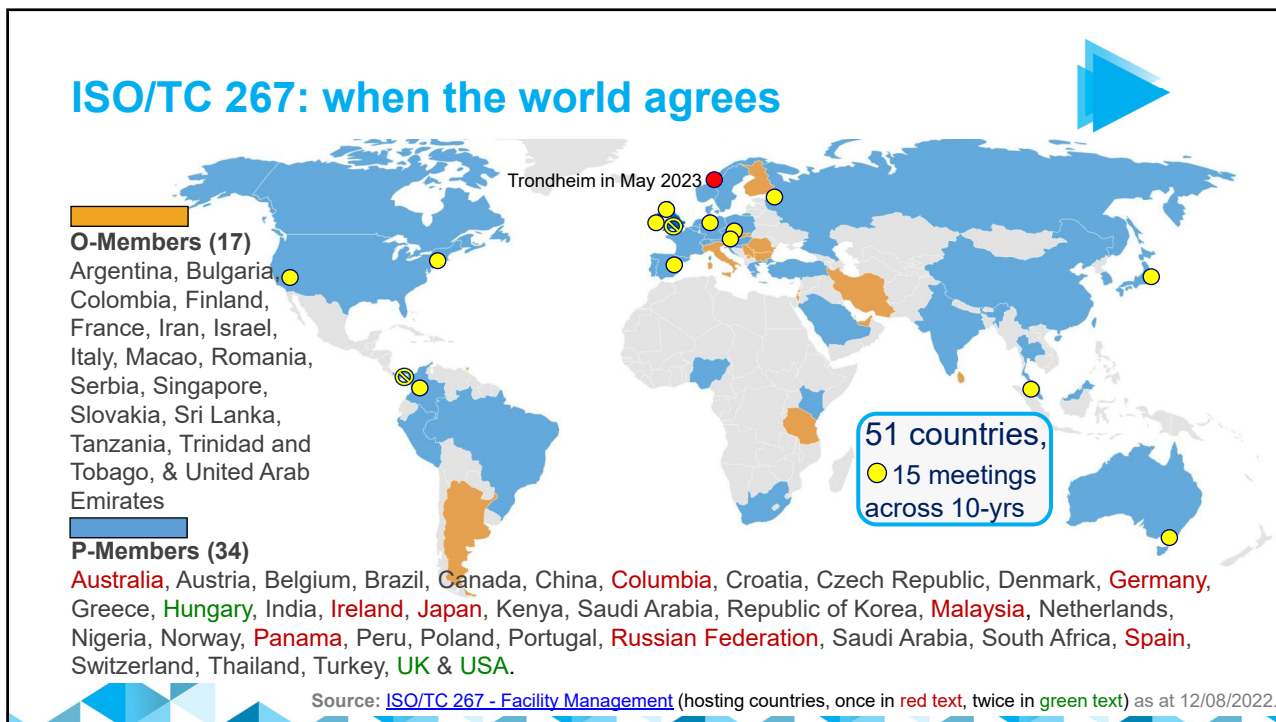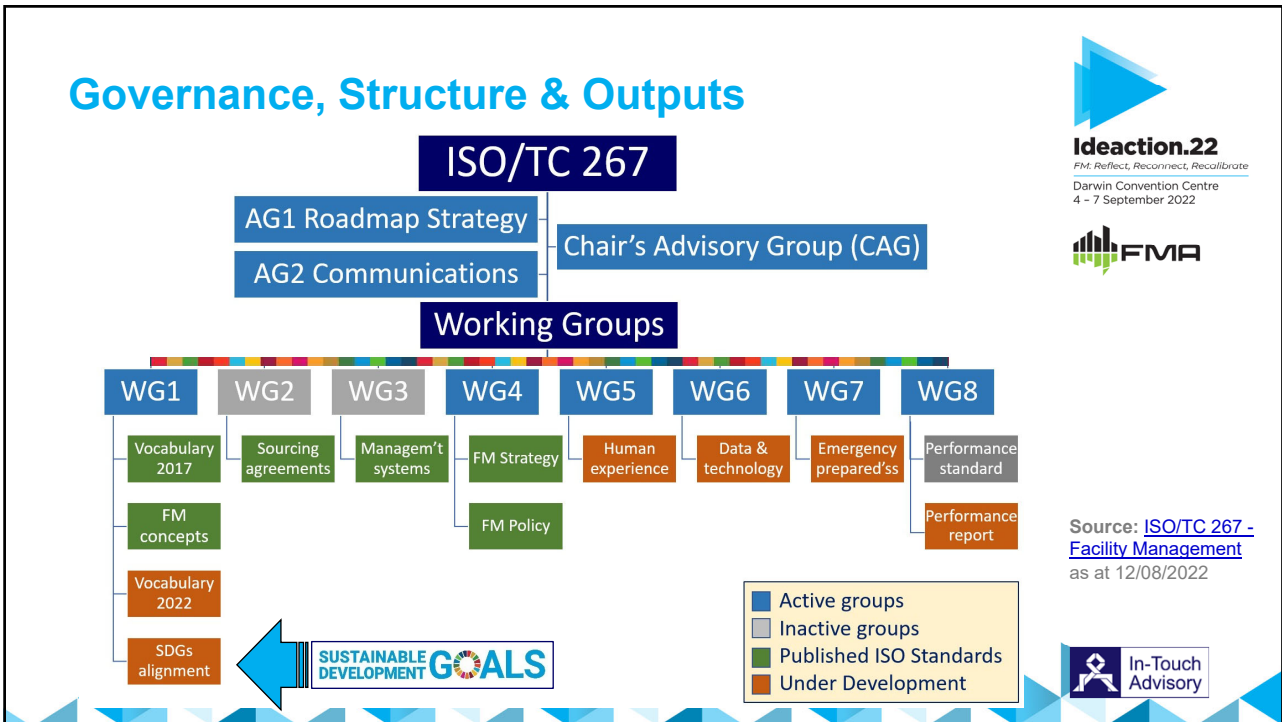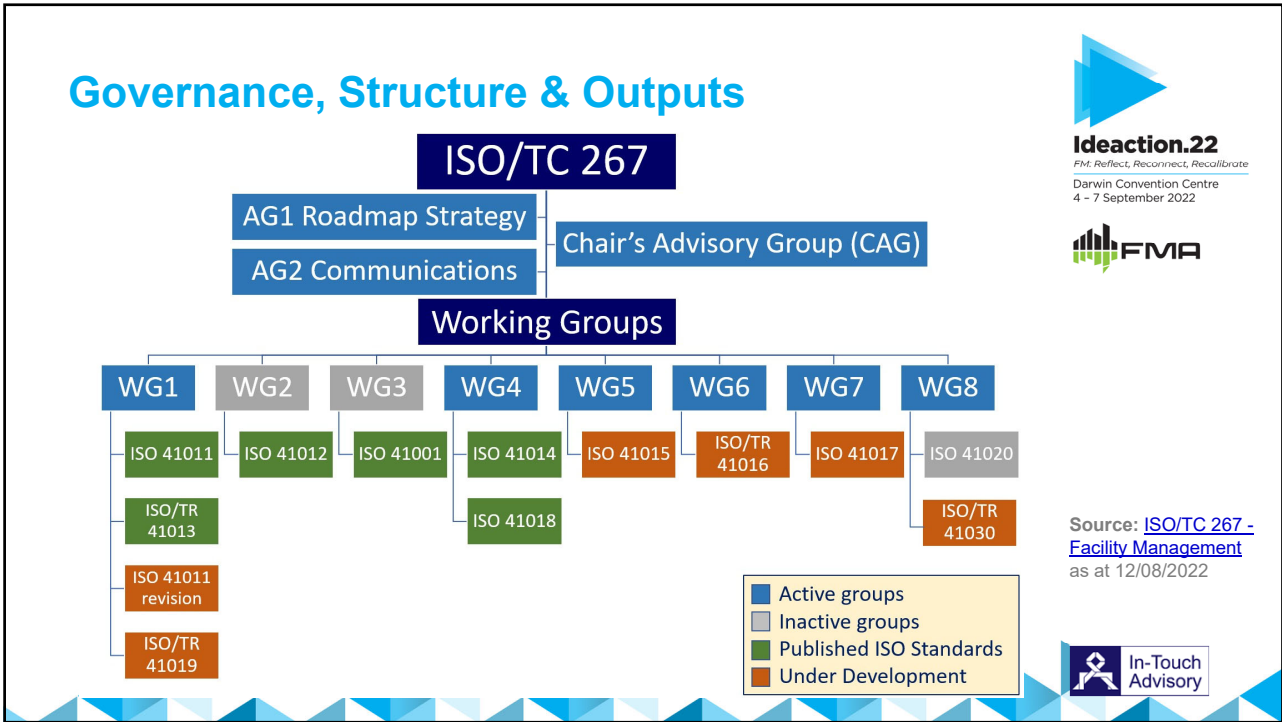**FM** is an "*organizational function which* <u>*integrates people, place and*</u> <u>*process*</u> *within the* Built Environment *with the purpose of improving the* quality of life *of people and the* productivity *of the core business*"

Source: ISO 41011: 2017

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ISO/TC 267: when the world agrees

Trondheim in May 2023

O-Members (17)
Argentina, Bulgaria, Colombia, Finland, France, Iran, Israel, Italy, Macao, Romania, Serbia, Singapore, Slovakia, Sri Lanka, Tanzania, Trinidad and Tobago, & United Arab Emirates

51 countries,
15 meetings across 10-yrs

P-Members (34)
Australia, Austria, Belgium, Brazil, Canada, China, Columbia, Croatia, Czech Republic, Denmark, Germany, Greece, Hungary, India, Ireland, Japan, Kenya, Saudi Arabia, Republic of Korea, Malaysia, Netherlands, Nigeria, Norway, Panama, Peru, Poland, Portugal, Russian Federation, Saudi Arabia, South Africa, Spain, Switzerland, Thailand, Turkey, UK & USA.

Source: ISO/TC 267 - Facility Management (hosting countries, once in red text, twice in green text) as at 12/08/2022.

ISO/TC 267 has formal liaisons with:

- ❑ ISO/TC 59 – Building & civil engineering (various)
- ❑ ISO/TC 146 – Air quality (various)
- ❑ ISO/TC 176 – Quality management (ISO 9001)
- ❑ ISO/TC 251 – Asset management (ISO 55001)
- ❑ ISO/TC 283 – OHS management (ISO 45001)
- ❑ ISO/TC 286 – Collaborative business relationship (ISO 44001)
- ❑ ISO/TC 292 – Security & resilience / business continuity (ISO 22301)
- ❑ ISO/TC 301 – Energy management (ISO 50001)
- ❑ ISO/TC 304 – Healthcare organization management
- ❑ CASCO, CEN, TMBG, ETUC, EuroFM and Global FM

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ISO 9001
ISO 55001
ISO 22301
ISO 50001
MSS
ISO 41001
ISO 45001
ISO 44001

Source: ISO - Management System Standards list

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Governance, Structure & Outputs

ISO/TC 267

AG1 Roadmap Strategy

AG2 Communications

Chair's Advisory Group (CAG)

Working Groups

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/TR 41030
ISO 41011 revision							
ISO/TR 41019							

Source: ISO/TC 267 - Facility Management as at 12/08/2022

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

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Governance, Structure & Outputs

ISO/TC 267

AG1 Roadmap Strategy

AG2 Communications

Chair's Advisory Group (CAG)

Working Groups

WG1	WG2	WG3	WG4	WG5	WG6	WG7	WG8
Vocabulary 2017	Sourcing agreements	Managem't systems	FM Strategy	Human experience	Data & technology	Emergency prepared'ss	Performance standard
FM concepts			FM Policy				Performance report
Vocabulary 2022							
SDGs alignment							

SUSTAINABLE DEVELOPMENT GOALS

Source: ISO/TC 267 - Facility Management as at 12/08/2022

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

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Governance, Structure & Outputs

ISO Technical Committee 267 (ISO/TC 267)
Facility Management (FM)
comprising National Standard Bodies (NSB) delegates

Six (6) ISO Standards
Published

Six (6) ISO Standards
Under Development,
including one (1) revision

34 Participating
National Members

17 Observing
National Members

**Source:** ISO/TC 267 -
Facility Management
as at 12/08/2022

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

Source:
ISO - Sustainable
Development Goals

ISO 41000 series: a journey
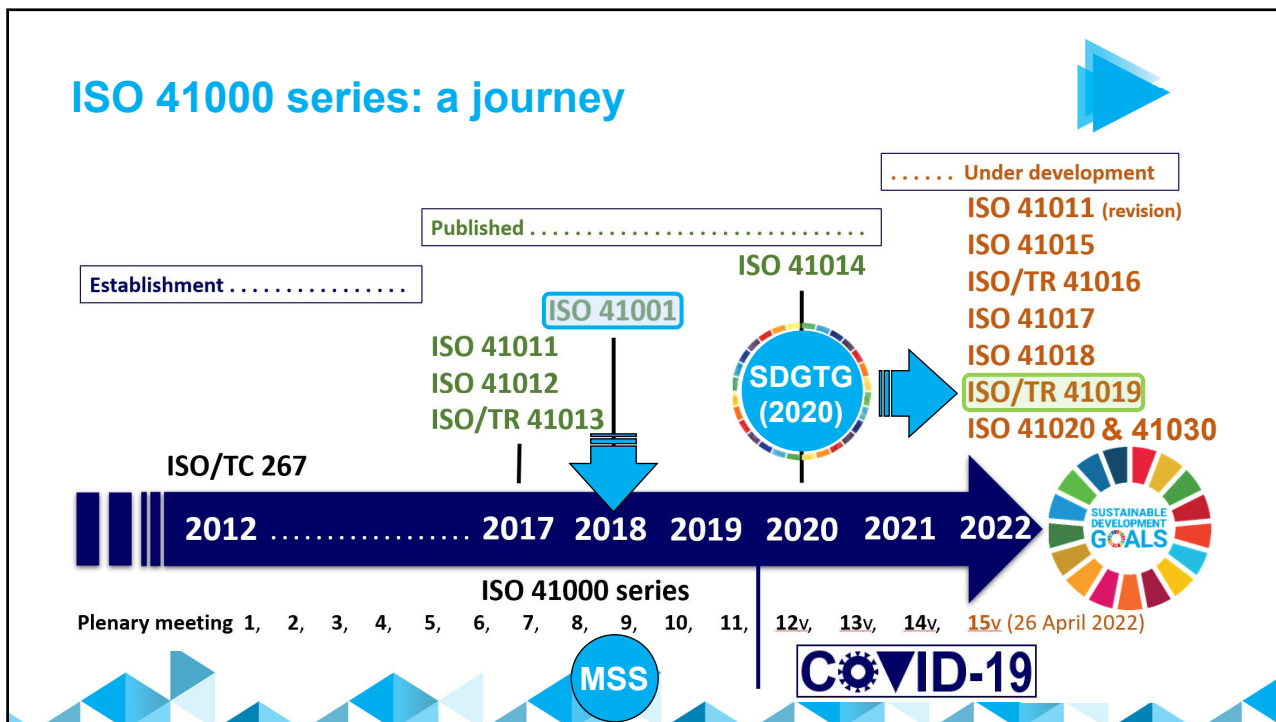
ISO 41000 series: outputs

PUBLISHED ISO STANDARDS	UNDER DEVELOPMENT (titles may be subject to revision)
ISO 41001: 2018 FM Management systems - Requirements with guidance for use	ISO 41011 FM vocabulary (2nd edition, revision)
ISO 41011: 2017 FM vocabulary	ISO 41015 FM influencing organizational behaviours for improved facility outcomes and user experience
ISO 41012: 2017 FM Guidance on strategic sourcing and the development of agreements	ISO/TR 41016 Digital, data and technology - Scope, key concepts and benefits
ISO/TR 41013: 2017 FM Scope, key concepts and benefits	ISO 41017 Guidance on emergency preparedness and management of an epidemic
ISO 41014: 2020 Development of FM strategy	ISO/TR 41019 The role of FM in sustainability and resilience
ISO 41018: 2022 Development of FM policy	ISO 41020 PWI (Preliminary Work Item stage) reserved for performance management standard
	ISO/TR 41030 Existing performance management in FM organizations

Source: ISO/TC 267 - Facility Management   as at 12/08/2022

ISO 41000 series: Australian context

❑ Standards Australia's **MB-022** Committee for Facilities Management.

❑ **MB-022** is primarily an NSB mirror committee to **ISO/TC 267** and is responsible for the identification and endorsement of Australian delegates to work on the development and maintenance of the **ISO 41000 series**.

MB-022 Committee for FM standards currently comprises representatives from:
➢ Australasian Procurement & Construction Council
➢ Australian Institute of Quantity Surveyors
➢ Facility Management Association of Australia
➢ Sustainability Victoria
➢ Sustainable Built Environment National Research Centre
➢ Tertiary Education Facilities Management Association

STANDARDS Australia

Past and inactive representative organisations:
❖ Australian Industry Group
❖ Deakin University
❖ Property Council of Australia
❖ Royal Institution of Chartered Surveyors
❖ Strata Community Australia
❖ Victorian Employers Chamber of Commerce and Industry

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ISO 41000 series: Australian context

PUBLISHED ISO STANDARDS	**STANDARDS** Australia — **via identical adoption**
ISO 41001: 2018 FM Management systems - Requirements with guidance for use	**AS ISO 41001: 2019** FM Management systems - Requirements with guidance for use
ISO 41011: 2017 FM vocabulary	**AS ISO 41011: 2019** FM vocabulary
ISO 41012: 2017 FM Guidance on strategic sourcing and the development of agreements	**AS ISO 41012: 2019** FM Guidance on strategic sourcing and the development of agreements
ISO/TR 41013: 2017 FM Scope, key concepts and benefits	**AS TR ISO 41013: 2019** FM Scope, key concepts and benefits
ISO 41014: 2020 Development of FM strategy	**AS ISO 41014: 2022** Development of FM strategy
ISO 41018: 2022 Development of FM policy	ISO 41018: 2022 Development of FM policy (pending **AS** adoption, MB-022 ballot closing: 21/09/2022)

Source: ISO/TC 267 - Facility Management as at 12/08/2022
Source: Facilities Management - Standards Australia as at 12/08/2022

ISO 41001 – certification options

ISO develop Standards, but are **not** involved in their certification.

This is performed by, and certificates issued by, external certification bodies, refer IAF Certification Bodies - Search.

'**Certification**' can be achieved via three (3) forms of audit:

What best suits your organisation ?

- ❑ **Third-party** audits are external, and conducted by a certification body. A third-party audit is required for ISO's Committee on Conformity Assessment (CASCO) accredited certification.

  CASCO accredited certification

- ❑ **Second-party** audits are also external, but managed internally via either the Demand Organization or FM Organization auditing service providers and suppliers.

  Adoption of ISO 41001 principles

- ❑ **First-party** audits are internal, and better described as 'self-assessment' or 'self-declaration'.

ISO 41001 – certification options

Demand Organization is the "*entity which has a need and the authority to incur costs to have requirements met* " (ISO 41011: 2017)

FM Organization as an "*entity responsible for facility management* "

(ISO 41014: 2020)

Generic Steps
- ❑ Preparation
- ❑ Documentation
- ❑ Implementation
- ❑ Internal audit
- ❑ External certification (if required

ISO 41001: 2018
FM Management System Standard (MSS)

Core Business

Deliver Service

Demand Organization

FM Organization

FM Plans → Implement

Improve ← Measure

Source: Adapted from ISO 41001: 2018

Sustainability & Stewardship (ISO/TR 41019)

ISO impact at a glance: number of ISO standards that are directly applicable to each SDG.

30,881 individual ISO standards alignments with single SDGs

Coming soon:

ISO/TR 41019 The role of FM in sustainability and resilience

ISO 41000 series FM standards

SUSTAINABLE DEVELOPMENT GOALS

This committee contributes with 10 standards to the following

3 4 5 6 7 8 9 10 11 12 13 14 15 16

Source: ISO/TC 267 - Facility Management

14/17 SDGs

| 357 | 555 | 3139 | 559 | 197 | 606 | 938 | 2564 | 13287 | 562 | 2507 | 2805 | 1211 | 317 | 1096 | 179 | 2 |
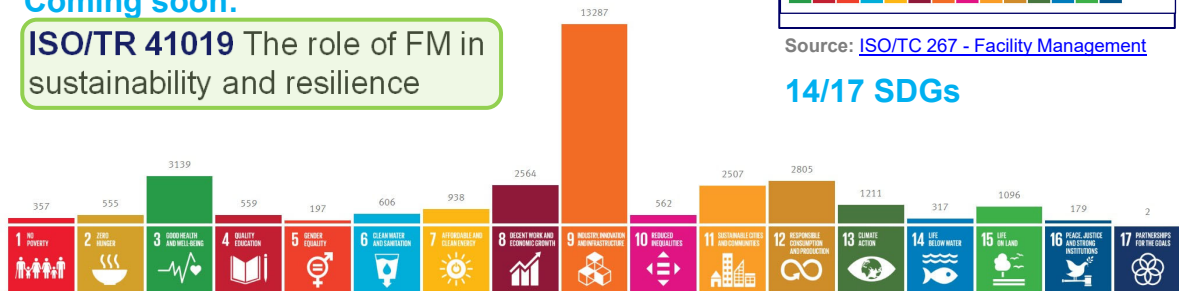
Source: ISO - Sustainable Development Goals as at 12/08/2022

ISO/TR 41019... what to expect

❑ **Deliverable:** an ISO Technical Report (TR) supporting FM standards and the SDGs.
❑ **Status:** research and drafting is underway, planned publication late 2023.
❑ **Scope:** FM's role in sustainability, resilience, adaptability, etc.

- Introduction, terms and definitions.
- Concepts, context, challenges, climate change, and the SDGs.
- Role of ISO standards in supporting the SDGs.
- FM and SDGs for sustainability, resilience and adaptability.
- FM defined per ISO 41011, and SDGs alignment and impacts.
- Role of current and planned ISO 41000 series standards.
- Towards Sustainable FM and transforming our world.
- Annexures – alignment matrices, tools, related standards and bibliography.

❑ **Style:** concise and practical guidance for FM professionals.
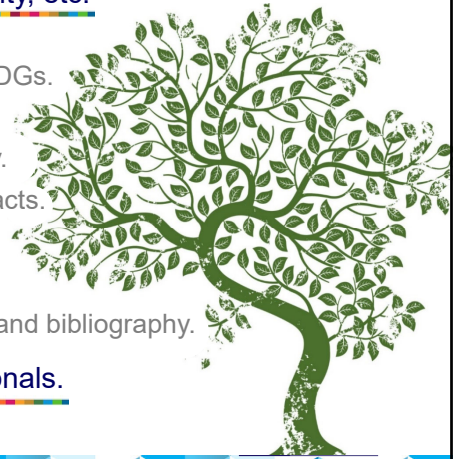
ISO 41000 series: 10-years so far

10 YEARS
2012 – 22

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❑ ISO/TC267 website
https://committee.iso.org/home/tc267

❑ TC267 on LinkedIn, and follow #ISO41000
https://www.linkedin.com/company/iso-tc-267

❑ ISO 41000 series FM standards status
https://www.iso.org/committee/652901.html#meetings

❑ Management System Standards (MSS's)
ISO 55001 & ISO 41001 together to improve Performance and Quality of Life

❑ Standards Australia FM standards adopted
https://www.standards.org.au/standards-catalogue/sa-snz/other/mb-022

❑ UN's 17 Sustainable Development Goals
https://sdgs.un.org/goals

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