

Quality of Life: alignment of FM with the SDGs

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Abstract

The ISO 41000 series of Facility Management (FM) standards, with 51 countries participating, contributes directly to the future of the FM profession and its value proposition.

These FM standards, with seven (7) published plus five (5) more under development in 2022, provide a common language and framework for FM worldwide to support the consistent delivery of services, enhanced performance and the managing of risks.

The United Nations 2030 Agenda has at its heart the 17 Sustainable Development Goals (SDGs), which are an urgent call for action by all countries, developed and developing, in a global partnership to meet the challenge. The development of ISO/TR 41019 'The role of FM in sustainability and resilience' (2022 working title) will be a technical report demonstrating the alignment of FM standards with the SDGs for improved effectiveness, efficiency and wellbeing of organisations and individuals.

Australia has taken the lead on the delivery of this defining project for Sustainable FM in the pursuit of a more productive, sustainable and liveable Built Environment for all.

1. ISO and its role

The International Organization for Standardization (ISO) was founded 1947 as an independent, non-governmental organization whose membership as of 2022 consists of 167 national standards bodies, with each country having only one member. Through its members, the ISO brings together experts to share knowledge and develop voluntary, consensus-based, market relevant Standards that support innovation and provide solutions to global challenges.

ISO standards support the three pillars of sustainable development: economic, social and environmental, and has committed to supporting the United Nations' Sustainable Development Goals (SDGs). Specifically, the ISO is actively identifying which ISO standards make the most significant contribution to our global challenges via alignment with the SDGs, along with guidance on improved standards. [1, 2, 3]

2. ISO 41000 series overview

ISO technical committee (ISO/TC 267) was established in 2012 by 26 member countries (17 participating members and nine observing members) to be responsible for progressing to develop the international Facility Management (FM) standards initiative. ISO/TC 267 has now published seven (7) FM international standards, and currently has five (5) more publications (including one revision) under development.

Today (December 2022), the ISO 41000 series of FM standards now involves 51 countries (34 participating members and 17 observing members) and envisages the future of FM as contributing to a more productive, sustainable and liveable Built Environment for all.

ISO/TC 267 began over 10-years ago with a shared vision of elevating the professional discipline through standardisation, and increased awareness. The current Strategic Business Plan (2018) sets out the following objectives:

- To enable the widest participation of country experts in TC 267 as possible;
- To continue to build upon the existing diverse, experienced and cohesive TC membership with the collective vision and commitment to create meaningful standards with global relevance that will assist enabling practitioners to improve operational efficiencies within their respective working environments;
- To develop standards that articulate and enhance the awareness and understanding of Facility Management as the leading professional discipline related to the management of both the built environment and services sector;
- To develop standards that provide practitioners with practical guidance and methodologies that will enhance the value that they can deliver to the organizations that they serve; and
- To ensure that all outputs from the TC are of value and benefit to society, commerce and industry as a whole.

Currently ISO/TC 267 comprises multiple Advisory and Working (AG and WG) Groups each led by a volunteer Convenor and some with volunteer Secretaries and Project Leaders to suit the approved work items and progress of each AG or WG. Each AG and WG may from time-to-time form task groups and project teams as required to progress specific deliverables. There is a coordinating group executive, the Chair's Advisory Group (CAG) comprising the volunteer TC 267 Chair, and AG and WG Convenors plus a salaried ISO Committee Manager.

In addition, ISO/TC 267 maintains 16 liaisons, including with ISO/TC 251 for the ISO 55000 series of asset management standards.

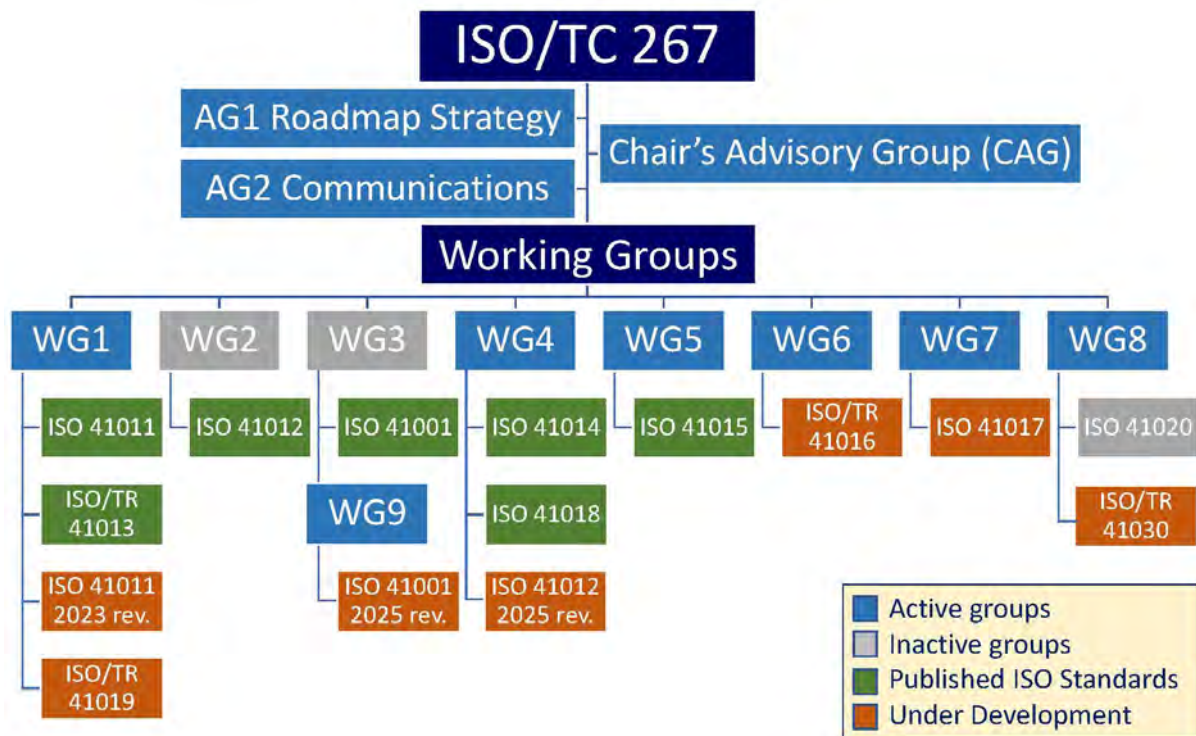


Figure 1: ISO/TC 267 Facility Management organisation chart (updated May 2023).

The current groups, deliverables and status (*under development* in italics) is as follows:

- CAG ISO/TC 267 Chair's Advisory Group
- AG1 ISO/TC 267 Roadmap Advisory Group
- AG2 ISO/TC 267 Communications Advisory Group
- WG1 Working Group 1: Concepts and Context
 - ISO 41011:2017 Facility Management – Vocabulary (**published**) [4]
 - *ISO/DIS 41011 Facility management – Vocabulary (revision)*
 - ISO 41013:2017 Facility Management – Scope, key concepts and benefits (**published**) [5]
 - *ISO/AWI/TR 41019 Facility Management – The role of FM in sustainability and resilience*
- WG2 Working Group 2: Operations (currently inactive)
 - ISO 41012:2017 Facility Management – Guidance on strategic sourcing and the development of agreements (**published**) [6]
- WG3 Working Group 3: Management Systems (currently inactive)
 - ISO 41001:2018 Facility Management – Management systems – Requirements with guidance for use (**published**) [7]
- WG4 Working Group 4: Strategy and Policy
 - ISO 41014:2020 Facility Management – Development of a facility management strategy (**published**) [8]
 - ISO 41018 Development of Facility Management Policy (**published**) [9]

- WG5 Working Group 5: Human Experience
 - ISO 41015:2023 Facility Management – Influencing behaviours for improved outcomes and user experience (**published**)
- WG6 Working Group 6: Digital, Data and Technology
 - *ISO/DIS 41016 Technology and Data in Facility Management – Scope, key concepts and benefits*
- WG7 Working Group 7: Emergency Management
 - *ISO/DIS 41017 Facility management – Guidance on emergency preparedness and management of an epidemic*
- WG8 Working Group 8: Performance Measurement and Improvement
 - *ISO/PWI 41020 FM Performance management – Measures and improvements*
- WG9 Working Group 9: Management Systems (new for May 2023)
 - *ISO 41001 Facility Management – Management systems – Requirements with guidance for use (revision)*

3. ISO 41001 certification

ISO 41001:2018 is FM's management systems standard (MSS) which following the specific conformity requirements can lead to certification of FM systems (FMS). The assessment of an FM organization's conformity with ISO 41001 must follow the ISO Committee on Conformity Assessment (CASCO) per ISO 19011:2018 Guidelines for auditing management systems and ISO/IEC TS 17021-11:2018 Conformity assessment (abbreviated) which sets out the competence required by those involved in auditing and certifying an FMS.

Certification can be achieved via three (3) forms of audits: first-party, second-party, and third-party.

First-party involves 'self-assessment' or 'self-declaration' based on internal audits. While second and third-party involves external audits. All can claim to provide "certification", but only the latter, third-party audit can provided "accredited certification". A third-party audit can be performed by an external certification body that uses the relevant CASCO standard.

There is no specific obligation to be certified to ISO 41001, but such certifications may be a prerequisite consumer confidence or working with certain client organizations. Relevant adoption of the ISO 41000 series demonstrates an organization's commitment to managing the Built Environment for more productive, sustainable and liveable outcomes for all and in contributing to our quality of life.

4. ISO/TR 41019 - The role of FM in Sustainability and Resilience

Facility management, facilities management and FM is defined within ISO 41011:2017 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.*” ISO 41011:2017 also defines the Demand Organization as the “*entity which has a need and the authority to incur costs to have requirements met.*” [4]

In 2020, ISO/TC 267 formed an SDG Task Group (SDGTG) to determine the extent of the alignment of ISO 41000 series standards with the United Nations Sustainable Development Goals (SDGs). The SDGTG concluded that not only current and future FM standards could support the SDGs, but that use of the SDGs in the development of new and revision of existing FM standards will lead to improved relevancy and effectiveness of the ISO 41000 series.

The SDGTG recommended the development of this Technical Report as an informative publication providing a broader societal context and practical guidance for FM practitioners, creating awareness and promoting the adoption of the ISO 41000 series.

In 2021, ISO/TC 267 committed to produce ISO/TR 41019 as a technical report detailing the role of FM in sustainability and resilience. When published in late 2023, ISO/TR 41019, will demonstrate the wide-ranging and positive contribution that FM can make in managing the built environment.

It is acknowledged that this topic is dynamic and evolving, so the proposed ISO technical report needs to provide FM practitioners with a concise and informative insights into:

- Corporate Social Responsibility (CSR).
- Environmental, Social, and Governance (ESG).
- United Nation’s 2030 Agenda, the Sustainable Development Goals (SDGs). [10]

In the context of Climate Change, Net-Zero and the Circular Economy, etc. in accordance with ISO guidance [1, 2, 3] and other industry resources.

5. Performance Reporting

In recent years there has been an increasing requirement for ESG reporting worldwide. Specifically, investors are looking beyond financial and economic value in their assets to demonstrate their ESG credentials, with carbon profiles and scope for decarbonization as key considerations.

Sustainable FM makes good business sense, contributing to the triple bottom line: profit, people and the planet. Purpose-driven leaders can effect positive change in the world without hampering financial performance. Adopting ESG initiatives can support business success.

Increasingly multiple industry surveys and reports attest to the links between sustainability as a driver of an organization’s innovative, performance indicators and associated financial risks. Financial risks are always relevant to FM budgets and capital projects, with substantive evidence of the focal areas for performance measuring and reporting, of such issues as:

- Sustainability reporting;
- Third party assurance and integrated reporting;
- Greenhouse gas (GHG) emissions (predominately carbon dioxide (CO₂) reduction goals;
- Risks with respect to climate change, and loss of biodiversity; and
- Alignment of activities with SDGs, linked to economic growth, climate change, and responsible consumption getting priority.

If FM practitioners wish to play a key role in taking the bold and transformative steps required to shift the world onto a more sustainable, resilient and adaptive path, then aligning their business cases and FM reporting to recognized standards is essential. This requirement should be verified via an organization's policies and strategic plan.

ESG reporting can constitute an important part of corporate strategy and become a substantial task for FM. Topic standards where FM may be called upon to support reporting include economic performance, procurement, water, effluents, wastes, health and safety, training, security, resourcing areas, and others.

6. Sustainable Development Goals (SDGs)

In 2015 the United Nations General Assembly formally adopted "Transforming our world: the 2030 Agenda for Sustainable Development" (also referred to as "Agenda 2030") a plan for achieving a better future for all.

Agenda 2030 has at its heart the 17 SDGs and associated 169 targets and 248 indicators, covering five (5) main themes: humankind, planet, prosperity, peace and partnership.



Figure 2: United Nations' Sustainable Development Goals (SDGs). [10]

The SDGs were developed for governments, primarily to be actionable by countries, not investors and businesses. With the SDGs addressing an array of global challenges it can seem difficult to translate them into the core business strategy and meaningful FM actions. There is no common or agreed methodology of measuring the SDGs contribution or impact from an investment portfolio perspective.

The Sustainability Accounting Standards Board (SASB)'s "Industry Guide to the SDGs" (2020) provides guidance on SDG mapping for business, noting that six (6) of the 17 SDGs likely to present the greatest opportunity for business to contribute were: SDGs 3, 7, 8, 9, 12, and 13. [11]

A separate study by the World Green Building Council has identified that a sustainable built environment or green buildings can impact 11 of the 17 SDGs (3, 6, 7, 8, 9, 10, 11, 12, 13, 15 and 17). [12, 13]

In 2021, ISO/TC 267's SDGTG found that FM aligns with 14 of the 17 SDGs (being SDG 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15 and 16). [14]

In this context, relative to industry, sector and maturity of your Demand Organization, it is estimated that FM has a direct or indirect role to play in 30% - 40% of the 248 SDG indicators. To the extent it is anticipated that FM has the potential to indirectly contribute to all or most of 17 SDGs, and in collaboration with other built environment professions, significantly influence on:

- SDG 3: Good health and well-being;
- SDG 6: Clean water and sanitation;
- SDG 7: Affordable and clean energy;
- SDG 8: Decent work and economic growth;
- SDG 9: Industry, innovation, and infrastructure;
- SDG 11: Sustainable cities and communities;
- SDG 12: Responsible consumption and production;
- SDG 13: Climate action; and
- SDG 16: Peace, justice and strong institutions.

7. Towards Sustainable FM

ISO 41001:2018 states that “*The benefits of an integrated system standard for FM include:*

- *improved workforce productivity, safety and health and well-being;*
- *improved communication of requirements and methodologies among and between public and private sector organizations;*
- *improved efficiency and effectiveness, thus improving cost benefits to organizations;*
- *improved service consistency;*
- *providing a common platform for all types of organizations”*. [7]

FM is central to sustainable development, and underpins aspects of economic growth and delivers the services that are essential to supporting the productivity of the core business and improving the quality of life of people. At the same time, an unsustainable, poorly planned, delivered and maintained built environment can have disastrous effects on organizations, communities, and individuals.

Sustainable FM can also contribute to mitigating risks, increasing resilience, integrating technologies, generating decent jobs, addressing inequalities and delivering on broader sustainability objectives. For example, accepting SDG 13 climate change FM could, in conjunction with a range of other initiatives, contribute to significant carbon dioxide (CO₂) emission savings by:

- Extending the life cycle of facilities.
- Improving facility design and construction.
- Increasing reuse and recycling rates.

In broader terms, based on a review of the work of the United Nations Environment Programme (UNEP) [15, 16], which has produced guidance for the Banking, Insurance and Infrastructure sectors, a generic three (3) step process for Sustainable FM could start with:

1. Impact analysis: identifying the most significant impacts of facilities and services.
2. Target setting and implementation: setting and achieving measurable targets in the areas of most significant impact with set milestones and defined actions.
3. Regular reporting: in terms of transparency and accountability about facility life cycles, impacts, assessments and performance.

Sustainable FM is intended to support Demand Organizations pursuing sustainability and can be justified for a range of reasons (listed alphabetically):

- Compliance with regulatory or statutory requirements.
- Compliance with industry guides and best practice.
- Demonstration of industry leadership and enhanced reputation.
- Increased end-user amenity and return on investment (ability to charge).
- Increased productivity and profitability (changes to processes or access to resources).
- Reduced capital costs during the design and construction phases.
- Reduced life cycle costs during the operational phases.
- Social responsibility.

There could be others and are likely combinations applied to FM decision-making, regardless international standards, industry guides, benchmarking and continuous improvement have a substantial role to play. By adopting extensive integration of performance reporting, such as the GRI, shall increasingly require the identification, development, monitoring and maintenance of an organization's sustainable development activities and investments. FM can provide the strategic, tactical and operational level support to ensure the cost:benefit expectations are met. But doing so involves prolonged and progressive development of capability, including top management commitment, stakeholder engagement, responsible investment, documented life cycle planning, ESG targets, systems and resourcing, and performance reporting.

“Strategic FM should also be aware of and apply solutions which can enhance productivity. It should move beyond merely managing buildings and assets ... It should also lead on issues including operational sustainability, energy usage, safety and wellbeing and other issues where facilities operations impact external stakeholders”. [17]

8. Sustainability, Resilience and Adaptability

The sustainable development concept may officially have its origins within the 1987 Brundtland Report, but long before that the idea of living in balance with nature and the logic of long-term lifestyle and business practices were well-understood. During periods of rapid change, uncertainty and risk, there is a need for innovation and new practices to ensure our built environment is capable of supporting well-being and productivity; enabling business continuity; lowering GHG emissions; and preserving biodiversity, while delivering services, affordability and quality of life to all.

For the Demand Organisation the FM function is usually in support its strategic objectives and ensure that productivity practices and operational tasks can be developed, applied, monitored, measured and improved.

The first steps in meeting these challenges are the pursuit of improved governance and decision-making in the integration of sustainability, resilience, and adaptability solutions into FM practices. The adoption of standards, such as the ISO 41000 series of FM standards, can assist in achieving this and contribute to improved systems, procedures and performance.

Sustainability, simply put, involves taking action now to ensure our future. Increased attention on sustainability, has led to more focus on “Sustainable FM” practices, to date a major challenge has been an apparent lack of comprehensive resilience strategies. This is despite the widespread changes, potential disruptions, and acknowledged interdependencies of social, economic and environmental challenges that the communities now face. These combine to create risks, complexities and opportunities for the planning, delivery and management of our built environment.

Resilience, the capacity for systems to cope with a hazardous event, trend or disruption, could be addressed by involving more pre-emptive design, while adaptation implies activities of a retroactive nature. In essence, a 'resilient facility' could be one that is designed for sustainability in the face of anticipated hazards, while an 'adaptable facility' may be one that can be readily modified to meet those challenges. Mitigating climate-induced hazards impacts should reduce the need for short term adaptation significantly. The alternative is accepting increased maintenance scope and costs to cope with changes in ambient conditions and increased frequency of extreme events.

Addressing asset vulnerability via a resilience action plan is essential for raising awareness and preparedness levels, extending facility life cycle expectancy, continuity of services, and avoiding increased performance failure rates and maintenance costs.

Adaptation options for FM and related infrastructure include engineering, technological and operational solutions. All such adaptations will likely require innovative policy, planning, management, and maintenance approaches. Such initiatives may include improving environmental performance, refurbishment/capacity upgrades, life cycle extension or change of use.

Beyond embracing sustainability, and understanding reliance, FM will be more called upon to maintain facilities, services and productivity via risk mitigation strategies and adaptation to changed circumstances. Adapting to climate-induced hazards can require changes in physical and functional aspects of facilities, this may go beyond adjusting existing practices including new approaches to decision-making on facility planning integrate resilience and adaptation actions to advance sustainable development for both new developments and existing facilities.

This transformation to occur it requires FM to develop a global understanding of the risks involved in traditional and current practices; and the role of FM in planning for an uncertain future by addressing:

- Demand Organization priorities, and FM Organization capabilities;
- end-user needs and preferences;
- the ways facilities interact and integrate;
- the systems and performance it influences;
- the sustainable development goals (SDGs) it contributes to;
- the value of resilience and adaptability; and
- responsibilities for managing risks.

9. Conclusions

2022 marked 10-years since ISO/TC 267 was established in 2012 to progress the international FM standards initiative. ISO/TC 267 has now published seven (7) FM international standards, and currently has five (5) more publications (including one revision) under development [14].



Figure 3: ISO/TC 267 Facility Management 10-year banner.

Based on a range of sources the world has no shortage of global challenges, and it is apparent that “business as usual” is no longer an option. To support Demand Organisations, and ultimately equip our community, facing an uncertain future it is imperative that FM embeds the principles of sustainability, resilience and adaptability into its systems and services.

It is clear that FM practitioners will increasingly find themselves on the frontlines of the growing physical risks associated with climate change, which will involve the direct and indirect impacts on assets, people, and services compromising the quality of life issues.

ISO/TC 267 has responded by identifying the alignment of the ISO 41000 series of FM standards, as published and under development, with the UN’s 2030 Agenda with its 17 SDGs and associated targets and indicators to provide an overarching framework for FM to better address these global challenges.

Hence, the development of ISO/TR 41019 ‘The role of FM in sustainability and resilience’ (2022 working title) [14] will be a technical report demonstrating the alignment of FM standards with the SDGs for improved effectiveness, efficiency and wellbeing of organisations and individuals. Australia has taken the lead on the delivery of this defining project for Sustainable FM in the pursuit of a more productive, sustainable and liveable Built Environment for all.

10. References

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