



**Ideation.23**  
 SECURING OUR FUTURE

The Star Gold Coast  
 4 - 5 September 2023




# Sustainable FM: Standards Charting the Course

**Stephen Ballesty**  
 FMA Australia Life Member  
 IFMA Fellow, FRICS, FAIQS  
 CFM, CQS, ICECA

**In-Touch Advisory**  
[in-touchadvisory.com](http://in-touchadvisory.com)






### Stephen Ballesty FMA Australia Life Member, IFMA Fellow, FRICS, FAIQS, CFM, CQS, ICECA



[Stephen.Ballesty@in-touchadvisory.com](mailto:Stephen.Ballesty@in-touchadvisory.com)

- 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 & Southeast Asia 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.

**Acknowledgements:** Support of the ISO, Standards Australia, AIQS and the UN in making today’s content possible.

This document has been prepared for the FMA Australia Ideation.23 event on 5 September 2023 on the Gold Coast. It should be noted that this document represents a summary of the issues addressed and does not constitute advice. The author makes no representation as to its accuracy or completeness and the information should not be relied upon as such. Although care has been exercised in its preparation, the author accepts no legal responsibility for any loss or damage suffered as a result of any inadvertent inaccuracy. This document reflects the author’s current and personal views only. This document should not be relied upon without seeking, professional advice and obtaining the full version of the publications and sources referred to herein.

**Ideation.23**  
SECURING OUR FUTURE  
The Star Gold Coast  
4 - 5 September 2023

**FMA**

**ISO**

**STANDARDS Australia**

**AIQS**

**In-Touch Advisory**

## Sustainability 101

### Types of Carbon in Buildings



<p><b>Embodied Carbon</b> The emissions from manufacturing, transportation, and installation of building materials.</p>	<p><b>Operational Carbon</b> The emissions from a building's energy consumption.</p>
---	--

© In-Touch Advisory. All Rights Reserved.

**Ideation.23**  
SECURING OUR FUTURE  
The Star Gold Coast  
4 - 5 September 2023

**FMA**

**Our industry**  
In 2021, Buildings and Construction sector accounted for **37% of carbon emissions** and over 34% of energy demand globally.

Source: [2022 UNEP Global Status Report for Buildings & Construction](#)

**In-Touch Advisory**

# Sustainability 101

"Sustainable development meets the needs of the present without compromising the ability of future generations to meet their own needs"

Gro Harlem Brundtland, Chair / Author, the UN's Our Common Future, also known as the Brundtland Report, October 1987



**Ideation.23**  
 SECURING OUR FUTURE  
 The Star Gold Coast  
 4 - 5 September 2023

**FMA**  
**Agenda 2030**  
 UN's 2015 report:  
*Transforming our world: the 2030 Agenda for Sustainable Development.*  
 Source: [United Nations, Dept. of Economic and Social Affairs \(un.org\)](https://www.un.org/sustainabledevelopment/)



© In-Touch Advisory. All Rights Reserved.

# Sustainability 101



**Ideation.23**  
 SECURING OUR FUTURE  
 The Star Gold Coast  
 4 - 5 September 2023

**FMA**  
**Our future**  
 17 SDGs are interlinked goals for a "shared blueprint for peace and prosperity for people and the planet, now and into the future".  
 Source: [Sustainable Development \(sdgs.un.org\)](https://www.sustainabledevelopment.un.org/)



© In-Touch Advisory. All Rights Reserved.

## Sustainable FM: Standards Charting the Course

- ❑ ISO/TC 267 background and ISO 41000 series status
- ❑ Sustainable Development Goals (SDGs)
- ❑ ISO/TR 41019 “FM’s role in sustainability, resilience and adaptability”
- ❑ Towards “Sustainable FM” and its implications



The Star Gold Coast  
4 - 5 September 2023



© In-Touch Advisory. All Rights Reserved.

## Standards Matter, in the pursuit ...



- a common language
- consistent reporting
- greater transparency
- data capture, costing, analysis and forecasts
- ability to performance benchmarking
- increased confidence through reduced risk



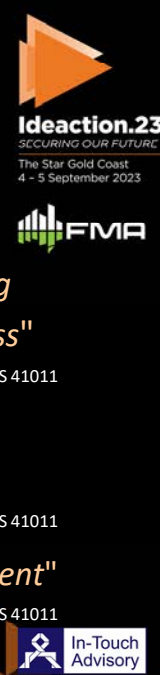
... of global transparency, comparability and collaboration on solutions.

**Standards Matter, for understanding of ...**

**□ Facility Management, Facilities Management or FM:**  
*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 – AS ISO 41011:2019 – ISO/FDIS 41011

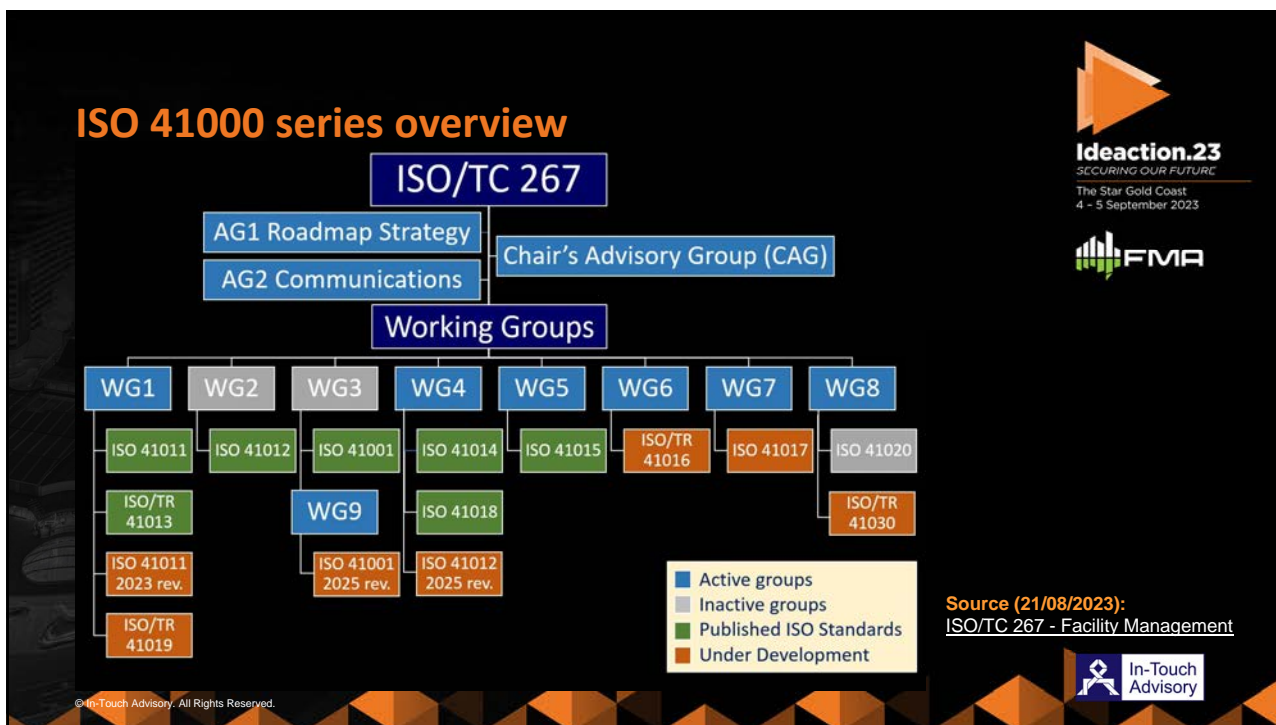
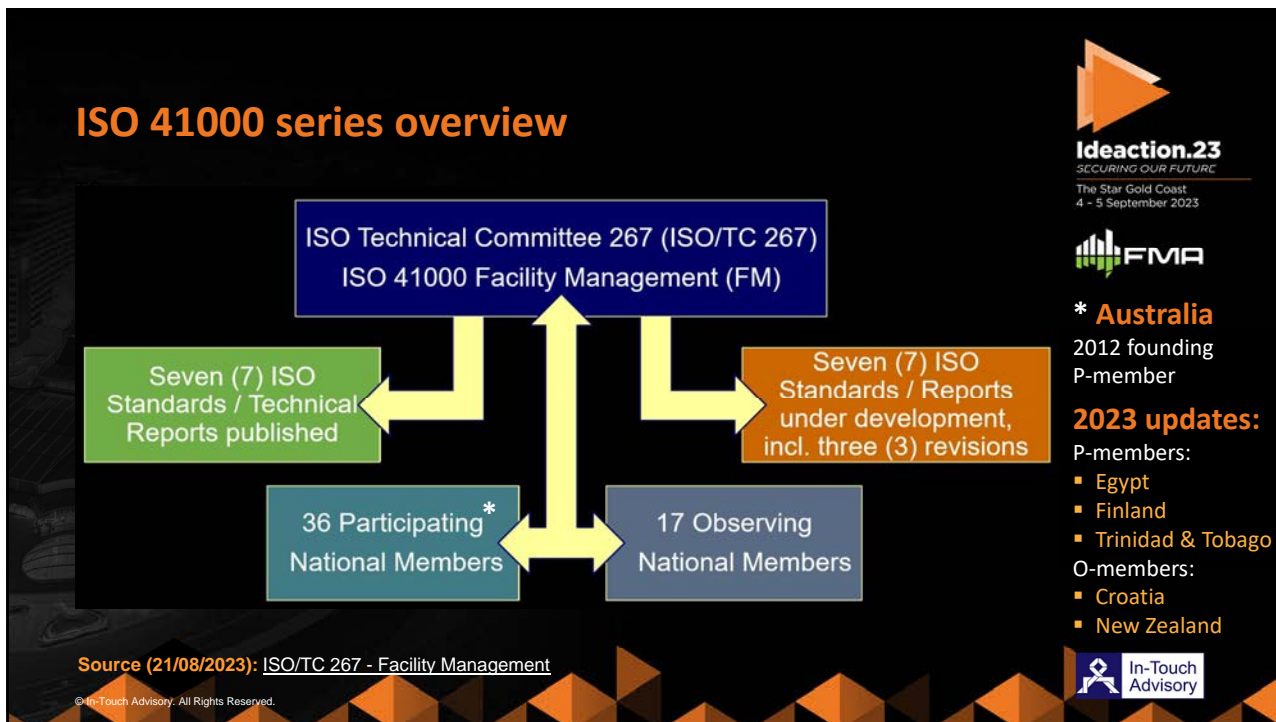
**□ Demand Organization:** *the "entity which has a need and the authority to incur costs to have requirements met"*  
 ISO 41011:2017 – AS ISO 41011:2019 – ISO/FDIS 41011

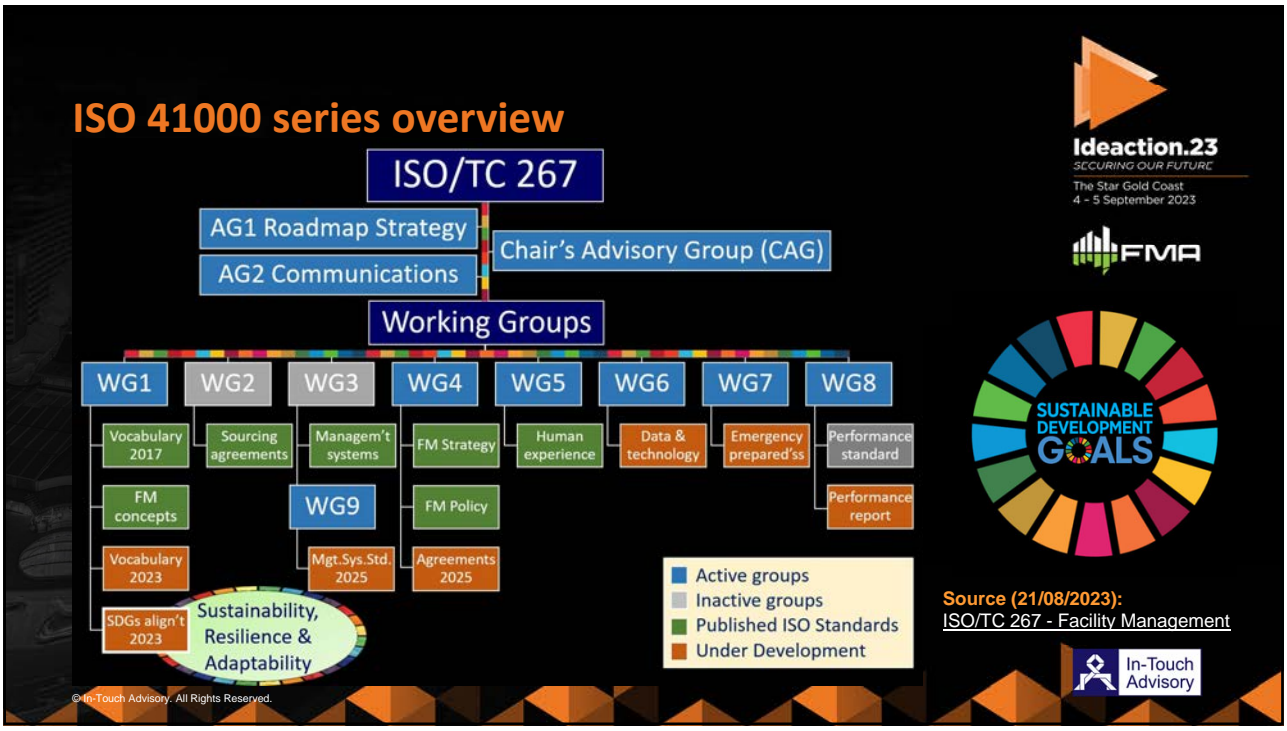
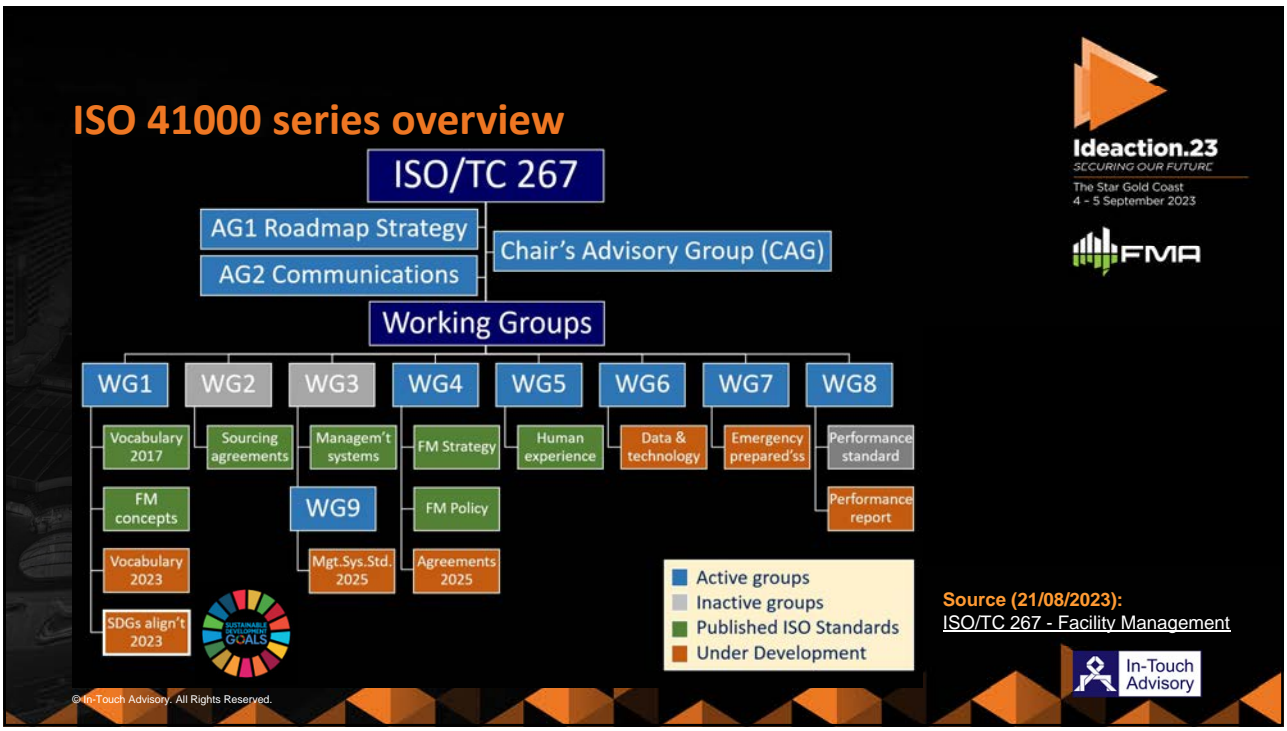
**□ FM Organization:** *the "entity responsible for facility management"*  
 ISO 41014:2020 – AS ISO 41014:2022 – ISO/FDIS 41011




© In-Touch Advisory. All Rights Reserved.











## ISO/TC 267: Current ISO outputs

PUBLISHED ISO STANDARDS	UNDER DEVELOPMENT <small>(titles may be subject to revision)</small>
ISO 41011:2017 FM - Vocabulary	ISO/AWI 41001 FM - Management systems - Requirements with guidance for use (2 <sup>nd</sup> edition, revision)
ISO 41012:2017 FM - Guidance on strategic sourcing and the development of agreements	ISO/FDIS 41011 FM - Vocabulary (2 <sup>nd</sup> edition, revision)
ISO/TR 41013:2017 FM - Scope, key concepts and benefits	ISO/AWI 41012:2017 FM - Guidance on strategic sourcing and the development of agreements
ISO 41001:2018 FM - Management systems - Requirements with guidance for use	ISO/DTR 41016 FM - Overview of available technologies
ISO 41014:2020 FM - Development of FM strategy	ISO/FDIS 41017 FM - Guidance on emergency preparedness and management of an epidemic
ISO 41015:2023 FM - Influencing behaviors for improved facility outcomes	ISO/DTR 41019 FM - Role in sustainability, resilience and adaptability
ISO 41018:2022 FM - Development of a FM policy	ISO/CD TR 41030 FM - Existing performance management in facility management organizations

Source (21/08/2023): [ISO/TC 267 - Facility Management](#)

© In-Touch Advisory. All Rights Reserved.






## ISO/TC 267: AU adopted Likely in 2023

PUBLISHED ISO STANDARDS	UNDER DEVELOPMENT <small>(titles may be subject to revision)</small>
ISO 41011:2017 FM - Vocabulary	ISO/AWI 41001 FM - Management systems - Requirements with guidance for use (2 <sup>nd</sup> edition, revision)
ISO 41012:2017 FM - Guidance on strategic sourcing and the development of agreements	ISO/FDIS 41011 FM - Vocabulary (2 <sup>nd</sup> edition, revision)
ISO/TR 41013:2017 FM - Scope, key concepts and benefits	ISO/AWI 41012:2017 FM - Guidance on strategic sourcing and the development of agreements
ISO 41001:2018 FM - Management systems - Requirements with guidance for use	ISO/DTR 41016 FM - Overview of available technologies
ISO 41014:2020 FM - Development of FM strategy	ISO/FDIS 41017 FM - Guidance on emergency preparedness and management of an epidemic
ISO 41015:2023 FM - Influencing behaviors for improved facility outcomes	ISO/DTR 41019 FM - Role in sustainability, resilience and adaptability
ISO 41018:2022 FM - Development of a FM policy	ISO/CD TR 41030 FM - Existing performance management in facility management organizations

Source (21/08/2023): [ISO/TC 267 - Facility Management](#)

© In-Touch Advisory. All Rights Reserved.





## Sustainable Development Goals (SDGs)

**Ideation.23**  
 SECURING OUR FUTURE  
 The Star Gold Coast  
 4 - 5 September 2023

Source: United Nations  
<https://sdgs.un.org/goals>

© In-Touch Advisory. All Rights Reserved.

## Sustainable Development Goals (SDGs) and Standards

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

**33,531** individual ISO standards alignments with single SDGs

**ISO/TR 41019** FM - Role in sustainability, resilience and adaptability

**ISO 41000 = 14/17 SDGs**

**Ideation.23**  
 SECURING OUR FUTURE  
 The Star Gold Coast  
 4 - 5 September 2023

ISO 41000 series FM standards

**SUSTAINABLE DEVELOPMENT GOALS**

This committee contributes with 10 standards to the following


Source: [ISO/TC 267 - Facility Management](#)

SDG	Number of ISO Standards
1. No Poverty	382
2. Zero Hunger	584
3. Good Health and Well-being	3463
4. Quality Education	614
5. Gender Equality	225
6. Clean Water and Sanitation	690
7. Affordable and Clean Energy	1058
8. Decent Work and Economic Growth	2761
9. Industry, Innovation and Infrastructure	14159
10. Reduced Inequalities	631
11. Sustainable Cities and Communities	2724
12. Responsible Consumption and Production	3087
13. Climate Action	1361
14. Life Below Water	375
15. Life on Land	1180
16. Peace, Justice and Strong Institutions	226
17. Partnerships for the Goals	11

© In-Touch Advisory. All Rights Reserved. Source (07/08/2023): ISO - Sustainable Development Goals

## ISO/TR 41019 ... what to expect

- ❑ **Deliverable:** an ISO Technical Report (TR) supporting FM standards and the **SDGs**.
- ❑ **Status:** DTR (draft) subject to ISO editorial and ballot, publication **late 2023**.
- ❑ **Scope:** FM's role in sustainability, resilience, adaptability, etc.
  - Introduction, scope, normative references, terms and definitions.
  - Concepts, context and challenges – CSR, ESG, climate change, net-zero & circular economy.
  - Sustainable Development Goals (SDGs).
  - Role of ISO standards in supporting the SDGs.
  - FM and SDGs in context - sustainability, resilience and adaptability.
  - Role of current ISO 41000 series; and Towards Sustainable FM.
  - Annexures – alignment matrices, tools, related standards and bibliography.
- ❑ **Style:** concise and practical guidance for FM professionals.

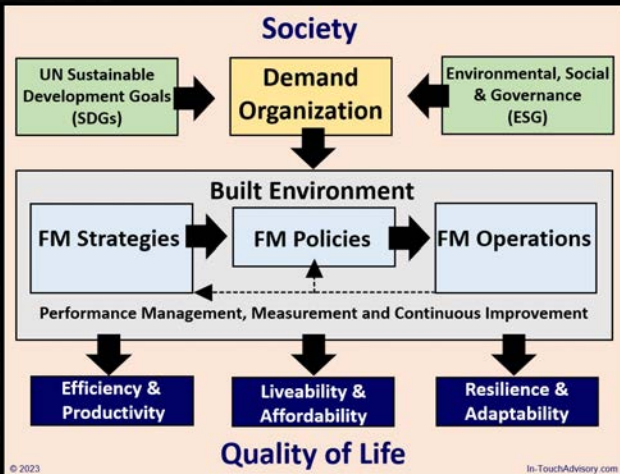



ISO/DTR 41019





© In-Touch Advisory. All Rights Reserved.


## ISO/TR 41019 “FM - Role in sustainability, resilience and adaptability”



- ❑ **Demand Organizations** live within a broader **societal context**.
- ❑ **ISO/TR 41019** demonstrates the wide-ranging and positive contributions that FM can make through responsibly managing the **Built Environment**.
- ❑ **SDGs and ESG** provide frameworks to deliver outputs that support society, and enhance our **Quality of Life**

ISO/DTR 41019



© In-Touch Advisory. All Rights Reserved.

## ISO/TR 41019 Annexures

- ▣ **Annex A (informative): ISO 41000 series alignment with the United Nations Sustainable Development Goals (SDGs)**
  - A.1 SDGs alignment summary for published ISO 41000 series outputs
  - A.2 SDGs alignment summary for planned ISO 41000 series outputs
- ▣ **Annex B (informative): Towards Sustainable FM via the ISO 41000 series**
  - B.1 Sustainable FM a 10-steps approach with ISO 41000
  - B.2 Demand Organization preparation assessment
  - B.3 Examples of FM actions striving for sustainable development
  - B.4 Support for Environmental, Social, and Governance (ESG) reporting
- ▣ **Annex C (informative): Related ISO committees and related standalone standards**
- ▣ **Bibliography (includes over 90 useful references)**

ISO/DTR 41019

In-Touch Advisory

Ideaation.23  
SECURING OUR FUTURE  
The Star Gold Coast  
4 - 5 September 2023

FMA

© In-Touch Advisory. All Rights Reserved.

## Towards Sustainable FM

- ▣ **FM should support Demand Organizations to achieve:**
  - Alignment with the SDGs and adoption ESG framework reporting.
  - Compliance with regulatory or statutory requirements.
  - Compliance with industry guides and best practice.
  - Demonstration of industry leadership and enhanced reputation.
  - Increased value: end-user amenity and return on investment (ability to charge).
  - Increased productivity and profitability (changes in processes / access to resources).
  - Reduced capital costs during the design and construction phases.
  - Reduced life cycle costs during the operational phases.
  - Responsiveness to stakeholder communities.

ISO/DTR 41019

In-Touch Advisory

Ideaation.23  
SECURING OUR FUTURE  
The Star Gold Coast  
4 - 5 September 2023

FMA

© In-Touch Advisory. All Rights Reserved.

## Sustainability, Resilience & Adaptability

### FM challenges: the First Wave

**Change:**

- People
- Place
- Processes

**Sustainability**

**Time**

**Sustainability** - meeting the needs of the present without compromising the ability of future generations to meet their own needs.

**FMA**

**Ideation.23**  
SECURING OUR FUTURE  
The Star Gold Coast  
4 - 5 September 2023

**In-Touch Advisory**

© In-Touch Advisory. All Rights Reserved.

## Sustainability, Resilience & Adaptability

### FM challenges: the Second Wave

**Change:**

- People
- Place
- Processes

**Sustainability**

**Resilience**

**Time**

**Resilience** - capacity for systems to cope with a hazardous event, trend or disruption, could be addressed by involving more pre-emptive design.

**FMA**

**Ideation.23**  
SECURING OUR FUTURE  
The Star Gold Coast  
4 - 5 September 2023

**In-Touch Advisory**

© In-Touch Advisory. All Rights Reserved.

## Sustainability, Resilience & Adaptability

FM challenges: **the Third Wave**



**Ideation.23**  
SECURING OUR FUTURE  
The Star Gold Coast  
4 - 5 September 2023

**Change:**

- People
- Place
- Processes

**Adaptability** - a process of adjustment, that implies activities of a retroactive nature (modify or maintain).



© In-Touch Advisory. All Rights Reserved.



## Sustainability, Resilience & Adaptability

Is FM ready for the Third Wave? ..... time for **Sustainable FM**



**Ideation.23**  
SECURING OUR FUTURE  
The Star Gold Coast  
4 - 5 September 2023

**Change:**

- People
- Place
- Processes

**New FM metrics:**

- Efficiency
- Productivity
- Liveability
- Affordability
- Resilience
- Adaptability



© In-Touch Advisory. All Rights Reserved.



## Transformation – FM's role

- 1) Sustainable FM practices
- 2) Flexible workplaces and remote teams
- 3) Commitment to the SDGs and long-term thinking
- 4) Integrated data-driven decision-making process
- 5) Demand management and optimize asset utilization
- 6) Re-definition of success and new FM metrics
- 7) Recognition of quality of life: current and future

**Transformation is not easy, but is necessary**  
**FM standards provide a useful performance framework for charting your course.**

**Ideation.23**  
 SECURING OUR FUTURE  
 The Star Gold Coast  
 4 – 5 September 2023

Source: SDG Compass – The guide for business action the SDGs: <https://sdgcompass.org/>

© In-Touch Advisory. All Rights Reserved.

In-Touch Advisory

## ISO 41000 series, so far and more

- ❑ 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 adoption  
<https://www.standards.org.au/standards-catalogue/sa-snz/other/mb-022>
- ❑ UN Sustainable Development Goals  
<https://sdgs.un.org/goals>

**Ideation.23**  
 SECURING OUR FUTURE  
 The Star Gold Coast  
 4 – 5 September 2023

© In-Touch Advisory. All Rights Reserved.

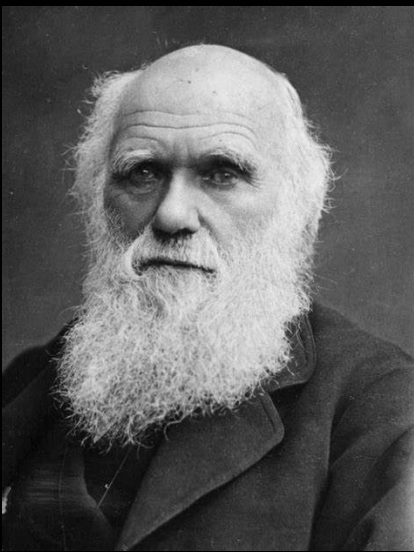



In-Touch Advisory

**Adapt to change, or die**

*"It is not the strongest of the species that survives, nor the most intelligent; it is the one most adaptable to change"*

**On the Origin of Species (1859)**

**Charles Darwin (1809 – 1882)**  
naturalist, geologist, and biologist

© In-Touch Advisory. All Rights Reserved.

**Thank you, and QUESTIONS**

... connecting you with solutions for your Built Environment




[in-touchadvisory.com](http://in-touchadvisory.com)  
[Stephen.Ballesty@in-touchadvisory.com](mailto:Stephen.Ballesty@in-touchadvisory.com)




**Ideaction.23**  
SECURING OUR FUTURE  
The Star Gold Coast  
4 - 5 September 2023



#ideaction23  
#fmaconference  
[ideaction23.com.au](http://ideaction23.com.au)  
[www.fma.com.au](http://www.fma.com.au)  
@FMAAust