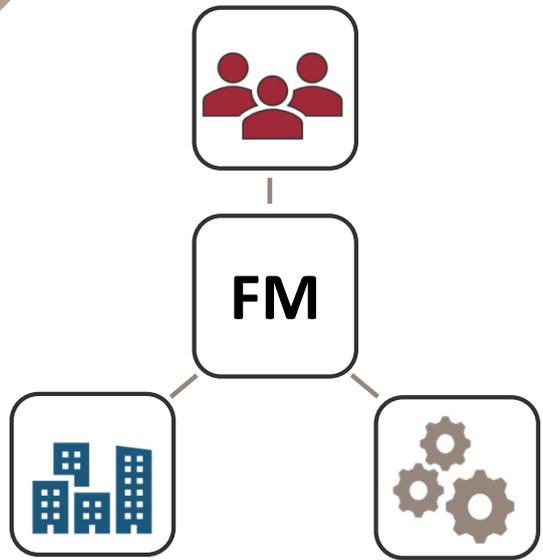




FMA Masterclass One
Adelaide, 20 August 2025

Understanding and Applying the ISO 41000 series in Facilities Management





Presenters

Life Members, FMA Australia



Duncan Waddell
Managing Director
FM Intelligence



- Chair, ISO/TC 267 Committee
- Member, Standards Australia MB-022
- Past-Chair Global FM

Stephen Ballesty
FRICS, FAIQS, IFMA Fellow, CFM
In-Touch Advisory



- AU Delegate, ISO/TC 267 Committee
- Member, Standards Australia MB-022
- Member, RICS Governing Council
- Regional Director - Asia Pacific, IFMA's FM Consultant Council

Who are you?



A Standard...

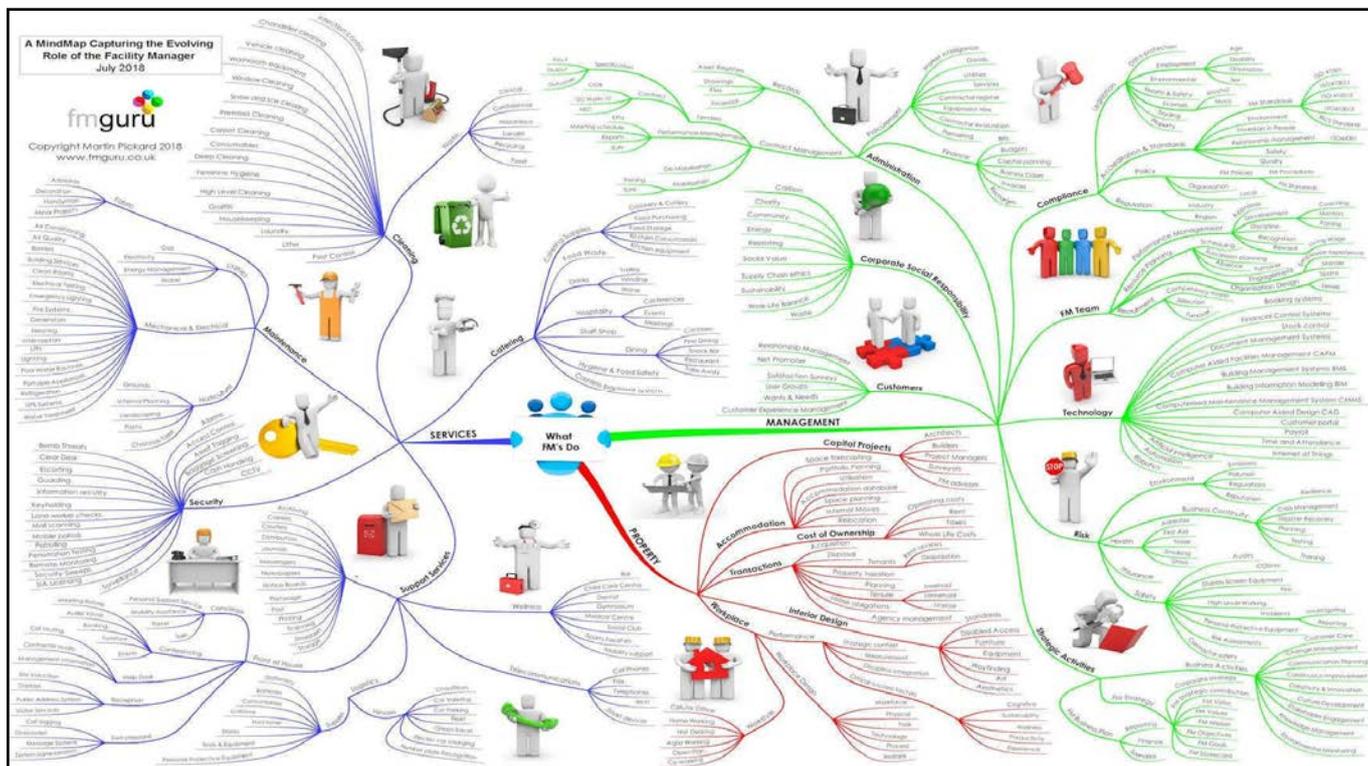
ISO... "when the world agrees"



"A standard is a document that provides **requirements**, specifications, guidelines or characteristics that can be used **consistently** to ensure that materials, products, processes and services are **fit for their purpose.**"



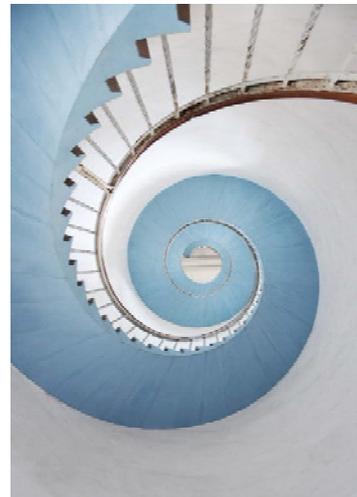
Does your organisation currently have any formal standards in place?



Why we need FM Standards?

- **FM not owned at Executive level**
- **Seen as a cost not an investment**
- **High level of rescoping on tendered work**
- **Lack of FM skills in delivery**

... Cost Spiral?



Source: FMA Australia Industry Census



Why we need FM Standards?

Complexity of Compliance...!

Master service agreements
Labor contracts
Third-party contracts
Pricing agreements



Source: JLL Complexity of Compliance



ISO

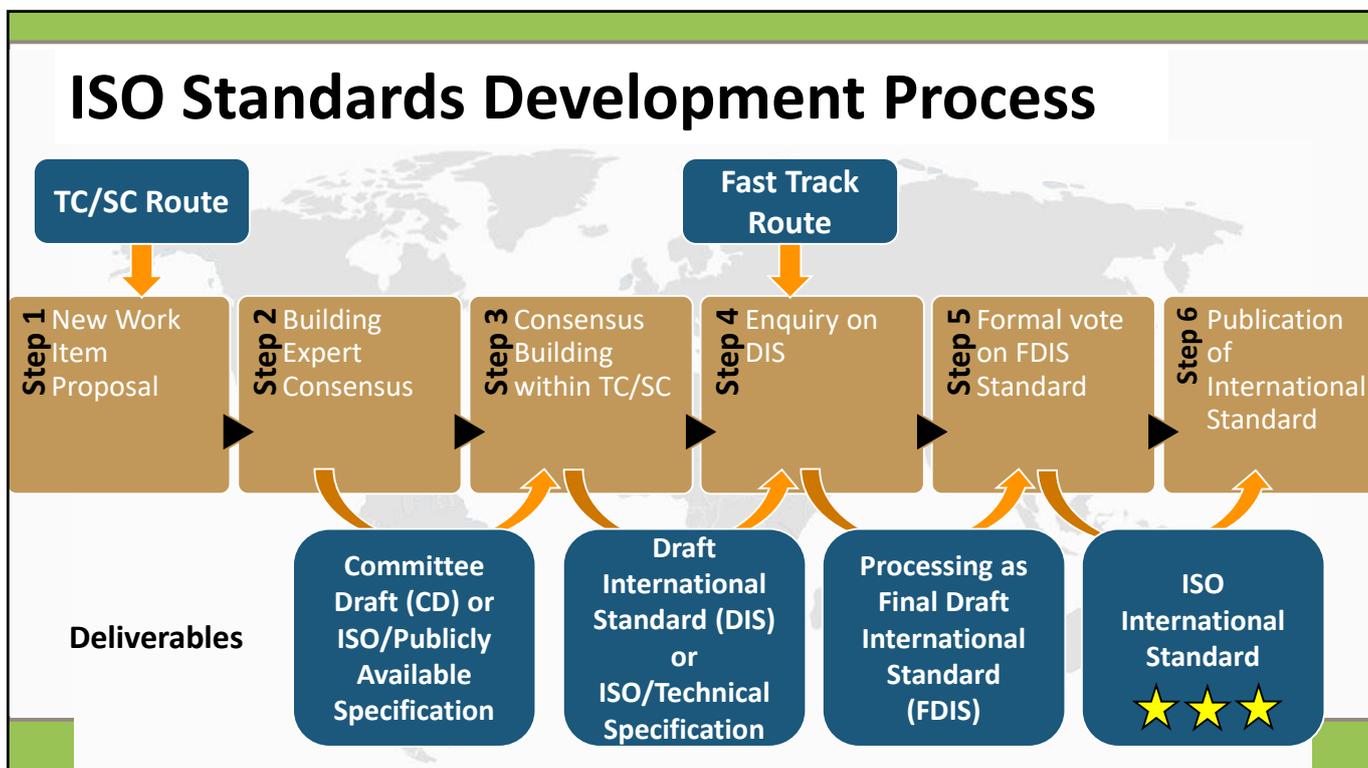
(International Organisation for Standardisation)



Mission

ISO develops high **quality voluntary International Standards** which facilitate international exchange of goods and services, support sustainable and equitable economic growth, promote innovation and protect health, safety and the environment.





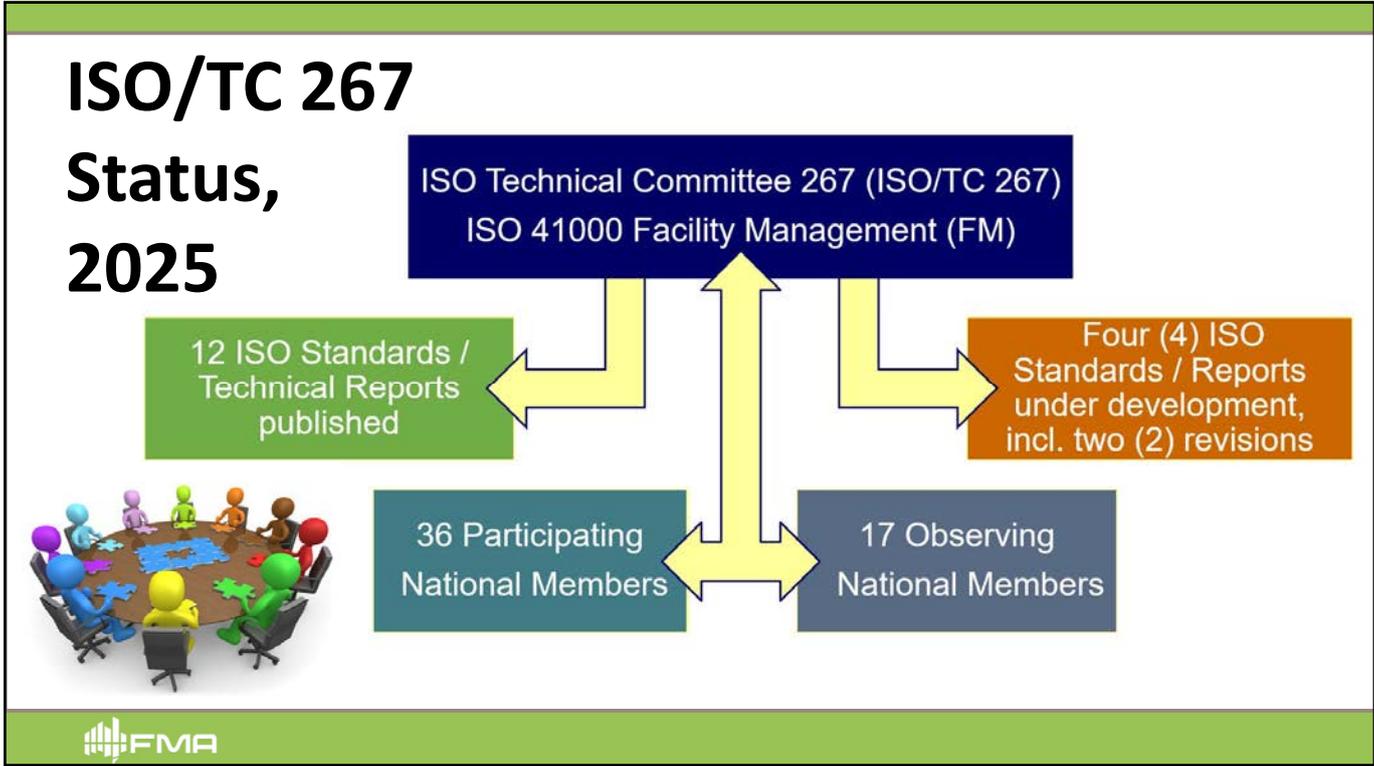
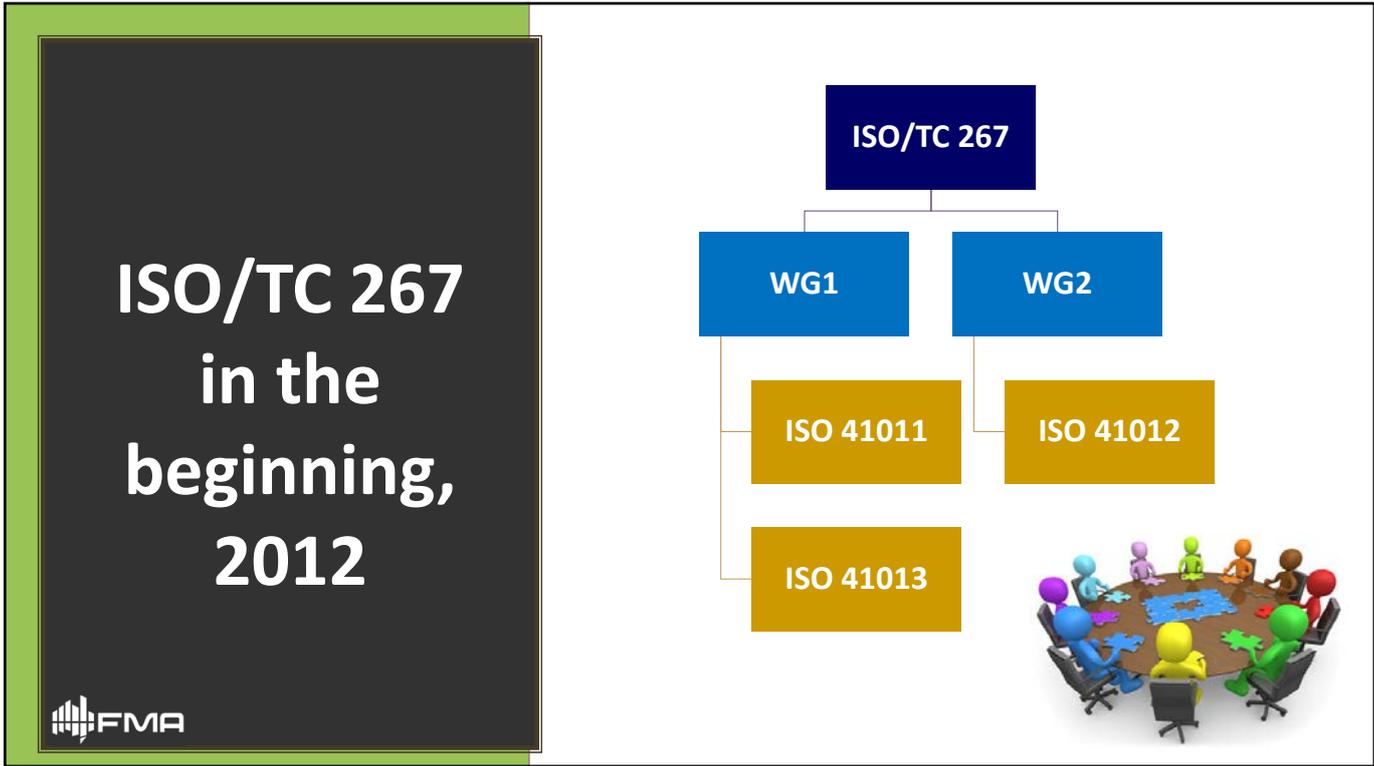


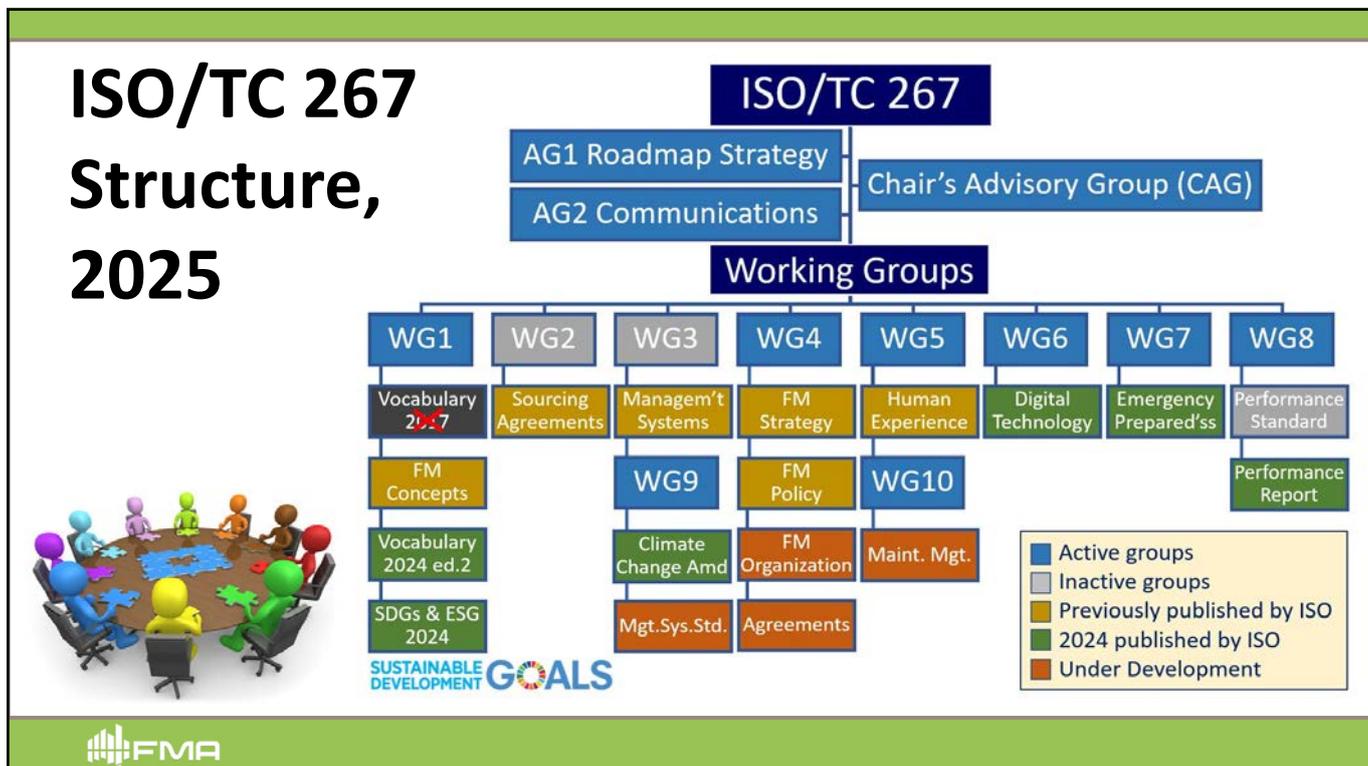
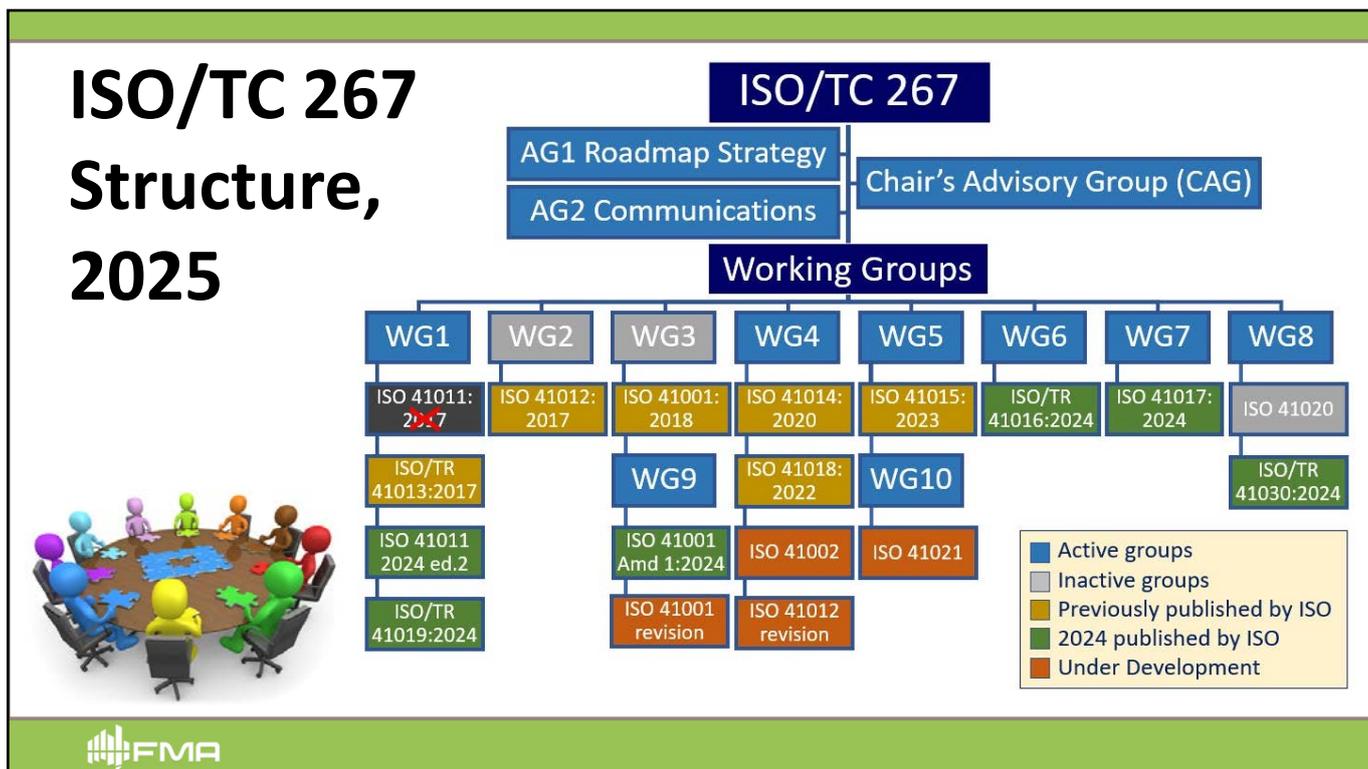
Australian involvement



- **Standards Australia is the ISO member**
- **FMA Australia** proposed in 2010 that Standards Australia be involved in the development **FM standards**.
- **Standards Australia** set up a local cross industry mirror committee is designated MB-022.
- **MB-022** ensures Australian representation on ISO working groups and meetings.
- MB-022 meets regularly to review drafts, provide feedback on ISO outputs and to progress Standards Australia **adoption of ISO publications**.





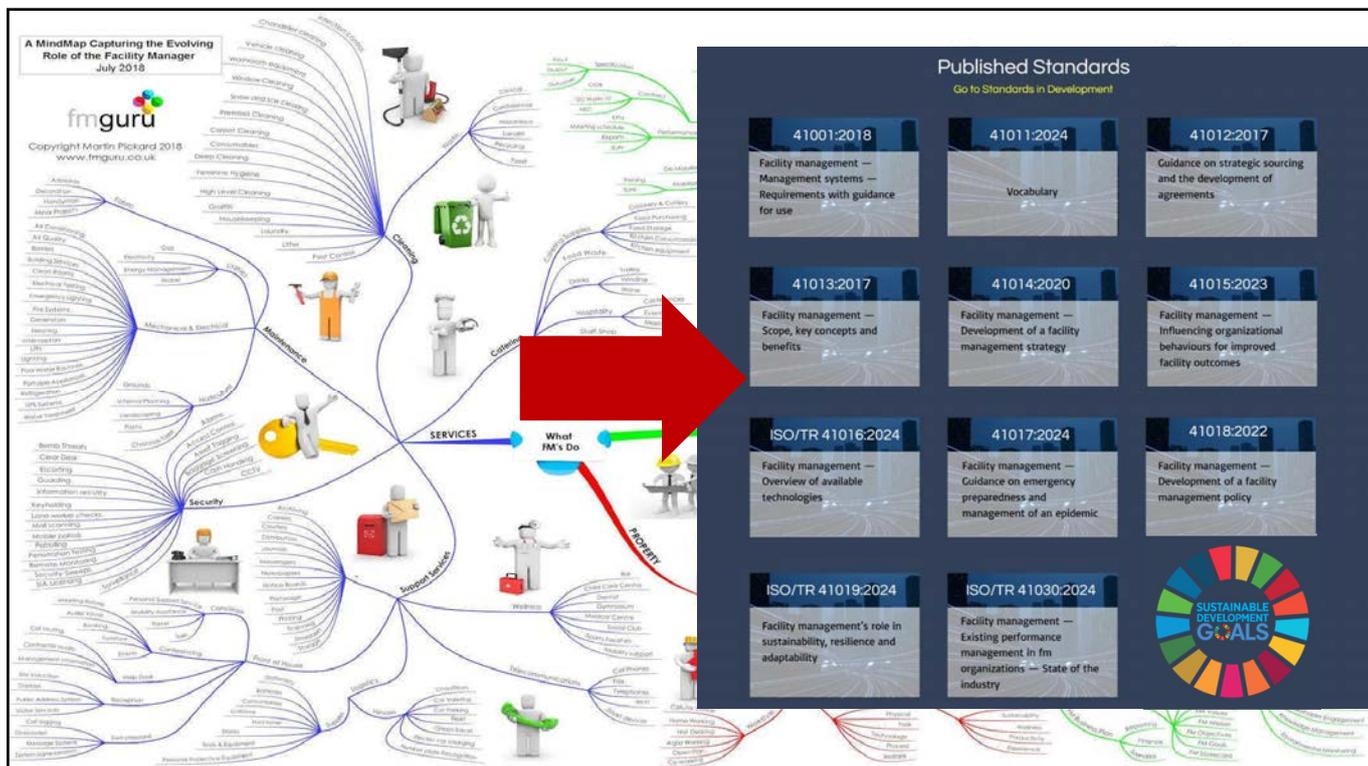


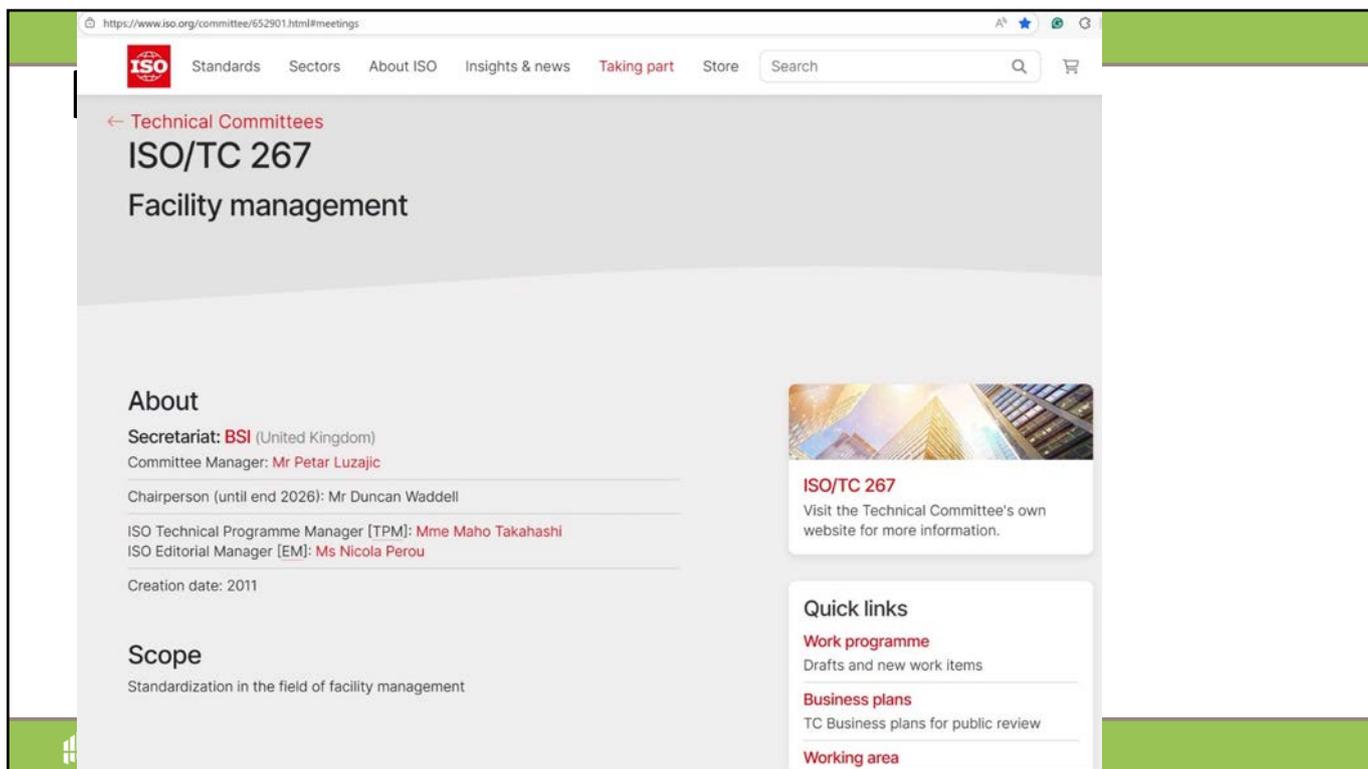
ISO/TC 267 Facility Management

What is FM? / Facility Management? / Facilities Management?

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 41011:2024





ISO/TC 267 Facility Management (Jan. 2024)

PUBLISHED ISO STANDARDS

- ISO 41011:2017 FM - Vocabulary
- ISO 41012:2017 FM - Guidance on strategic sourcing and the development of agreements
- ISO/TR 41013:2017 FM - Scope, key concepts and benefits
- ISO 41001:2018 FM - Management systems - Requirements with guidance for use
- ISO 41014:2020 FM - Development of FM strategy
- ISO 41015:2023 FM - Influencing behaviors for improved facility outcomes
- ISO 41018:2022 FM - Development of a FM policy

UNDER DEVELOPMENT (titles may be subject to revision)

- ISO/AWI 41001 FM - Management systems - Requirements with guidance for use (2nd edition, revision) [← plus ISO's 2024 climate change amendment](#)
- ISO/FDIS 41011 FM - Vocabulary (2nd edition, revision)
- ISO/AWI 41012:2017 FM - Guidance on strategic sourcing and the development of agreements
- ISO/DTR 41016 FM - Overview of available technologies
- ISO/FDIS 41017 FM - Guidance on emergency preparedness and management of an epidemic
- ISO/DTR 41019 FM - Role in sustainability, resilience and adaptability
- ISO/CD TR 41030 FM - Existing performance management in facility management organizations



ISO/TC 267 Facility Management (Aug. 2025)

12 Published ISO standards *
4 ISO standards under development *
37 Participating members
16 Observing members

* number includes updates

Structure Liaisons

ISO/TC 267 Facility Management (Aug. 2025)

ISO 41001:2018	Facility management — Management systems — Requirements with guidance for use	90.92	03.080.10 03.100.70
ISO 41001:2018/Amd 1:2024	Facility management — Management systems — Requirements with guidance for use — Amendment 1: Climate action changes	60.60	03.080.10 03.100.70
ISO 41011:2024	Facility management — Vocabulary	60.60	01.040.03 03.080.10
ISO 41012:2017	Facility management — Guidance on strategic sourcing and the development of agreements	90.92	03.080.10
ISO/TR 41013:2017	Facility management — Scope, key concepts and benefits	60.60	03.080.10
ISO 41014:2020	Facility management — Development of a facility management strategy	90.20	03.080.10
ISO 41015:2023	Facility management — Influencing organizational behaviours for improved facility outcomes	60.60	03.080.10
ISO/TR 41016:2024	Facility management — Overview of available technologies	60.60	03.080.10
ISO 41017:2024	Facility management — Guidance on emergency preparedness and management of an epidemic	60.60	03.080.10

FMA

ISO/TC 267 Facility Management (Aug. 2025)

https://www.iso.org/committee/552901/x/catalogue/p/1/u/0/w/0/d/0

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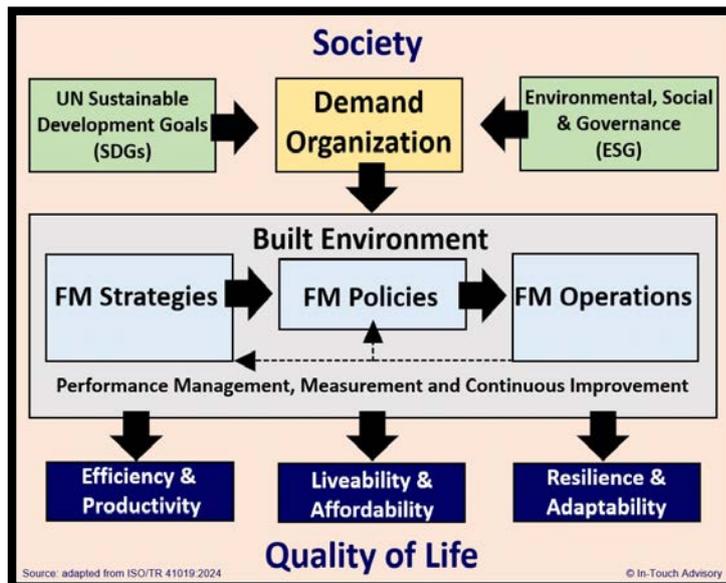
- ISO 41018:2022 Facility management — Development of a facility management policy 60.60 03.080.10
- ISO/TR 41019:2024 Facility management's role in sustainability, resilience and adaptability 60.60 03.080.10 13.020.20
- ISO/TR 41030:2024 Facility management — Existing performance management in facility management organizations — State of the industry 60.60 03.080.10

Filter [4]: Published Under development Withdrawn Deleted Search in the list

Standard and/or project under the direct responsibility of ISO/TC 267 Secretariat ↑

Standard	Stage	ICS
ISO/AWI 41001 Facility management — Management systems — Requirements with guidance for use	20.00	
ISO/DIS 41002 Facility management — Development of the facility management organization	40.00	03.080.10
ISO/CD 41012 Facility management — Guidance on strategic sourcing and the development of agreements	30.60	
ISO/AWI 41021 Facility Management — Guidance on maintenance management	10.99	

ISO/TR 41019:2024 SA ISO/TR 41019:2025



Technical Report

SA ISO/TR 41019:2025

ISO/TR 41019

Facility management's role in sustainability, resilience and adaptability

First edition 2024-06

- “FM’s role in Sustainability, Resilience and Adaptability”
- Style: ISO Technical Report providing ‘concise and practical guidance for FM and Built Environment professionals’.
- Size: 44 pages including nine (9) sections and three (3) Annexures.
- Supplementary: Bibliography with 96 relevant references.



ISO/TC 267 ... what next?

AG1

Current Work Items

- FM supply chain
- Building safety
- Transitioning assets
- Integrated risk and incident management
- Sustainability

	FM Functional Areas/Work streams								
Published	FM - General	Finance & Management	Human Factors & Experience	Digital Data & Technology	Resilience & Business Continuity	Performance Measurement & Improvement	Leadership & Innovation	The Built Environment & Life Cycle	Sustainability & Stewardship
In progress									
Proposed		[WG 4]	[WG 5]	[WG 6]	[WG 7]	[WG 8]	[WG 9]	[WG X]	[WG X]
Concepts & Context [WG 1]	ISO 41011 - Vocabulary			ISO/TR 41018 FM Technology					
	ISO/TR 41013 - Scope & benefits								
Leadership & Strategy	ISO/TR 41019 - Resilience and sustainability		ISO/PW chg mgmt						
			ISO 41015 Influencing behaviors				ISO 41001 FM Management system		
Planning & Support		ISO 41012 - Sourcing & agreements							
		ISO 41014 - Strategy							
Operations		ISO 41018 - Policy							
		ISO 41013 revision							
Performance and Improvement		ISO 41002 FM Organization							
					ISO/FDIS 41017 Em Mgmt - epidemic				
						ISO/TR 41030 Performance Mgmt			
							ISO 41021 Maintenance mgmt		
							New Work Item - Transitioning Assets		New Work Item - Sustainability in FM Ops



What FM standards would you like to see developed?



What is Important to Your Organisation?

- Meet customer demands
- Protect our assets and safeguard our employees
- Reduce risk of business interruption
- Assurance of continuity of our business
- Achieve a recognised global benchmark
- Protect reputation and brand
- Provide full service to our stakeholders
- Increase competitiveness



The Value of Management Systems



Flexibility



Discipline



Consistency

“Management systems are those activities used to anticipate, prevent, and resolve known problems.”



Harvard Business School, 2008

Business Case for Management Systems (ISO 9001)

- **Management:** Certified companies outperformed the market by < 100%
- **Finance:** 55% achieved cost savings
- **Operations:** 75% boosted their performance
- **Services:** 75% improved their customer service and loyalty
- **Sales & Marketing:** 71% acquired new customers and retained existing clients



Harmonised Management System Standards (Annex L)

Introduction

- Clause 1: Scope
- Clause 2: Normative References
- Clause 3: Terms and Definitions

Requirements

- Clause 4: Context of the Organisation
- Clause 5: Leadership
- Clause 6: Planning
- Clause 7: Support
- Clause 8: Operation
- Clause 9: Performance Evaluation.....
- Clause 10: Improvement



AS ISO 41001

Objective:

Within the ISO framework create a series of standards that:

1. Introduce the general requirements for an FM organisational strategy.
2. Articulate the requirements for an effective and efficient management regime.
3. Provide guidance to achieving benefit from an FM MSS.



PRODUCTIVITY

- Streamline processes
- Minimize waste
- Accelerate delivery of services
- Enhance quality of services
- Lower cost of compliance
- Optimize use of resources

INNOVATION

- Encourage process innovation
- Optimize staff potential
- Promote exchange of knowledge
- Accelerate spread of innovation
- Create a framework for creativity
- Enable continual improvement

GLOBALIZATION

- Optimize global supply chains
- Overcome barriers to trade
- Enhance ability to compete globally
- Improve transparency
- Foster confidence in service delivery
- Improve transparency/confidence

AS ISO 41001



DEMAND ORGANIZATION



Source: Adapted from ISO 41001: 2018



AS ISO 41001, Facility management – Requirements with guidance for use

ANNEX A

This annex presents examples, proven practices and strategic options for use. It is not intended to prescribe detailed elements, as the implementation will vary based on the demand organisation’s mission, market and goals.

Guidance

Requirements

FMA

AS ISO 41001

- 4. Context of the Organisation
- 5. Leadership
- 6. Planning
- 7. Support



Context of the Organisation

- External & Internal Issues
- Interested Party Requirements
 - Establish Scope
 - Document Scope
- FM Management System

Leadership

- Leadership & Commitment
 - Establish FM Policy
- Communicate FM Policy
 - Relevant Roles
- Responsibility & Authority

Planning

- Risks & Opportunities
 - Plan/Address Risks
- Requirements of Stakeholders
 - FM Objectives
- Implementation Plan

Support

- ID & Secure Resources
 - Source & Monitor
 - Competencies
 - Awareness
 - Communications
 - Information Required
- Knowledge management






Why is ISO 41001 and Certification so important to the future of our FM profession?



- 1 Auditable Standards
- 2 Global Best Practices
- 3 Enhance Effectiveness

Strategies to Meet Requirements

- Define certification parameters and boundaries
- Communicate the value proposition of a MSS
- Understand and document the impacts of nonconformity
- Identify continuous improvement opportunities
- Establish criteria for policies and procedures
- Evaluate methodology for document control
- Justify exclusion of any shall statements



Importance of stakeholder engagement

Defining stakeholders, setting expectations and understanding their requirements are important components for analysing the organisational context of the facility management system.



Assessing readiness of the FM organisation

- Identified internal and external issues **relevant to its purpose**?
- Confirmed that its FM objectives are **fully aligned** to, and consistent with the demand organisation?
- Identified **stakeholders that are relevant** to the delivery of FM services and captured their requirements and expectations?
- Determined **criteria for decision making** including relevant stakeholder engagement?
- Developed an **FM strategy** that considers people, process, information, technology, and relationships to other organisational systems?
- Determined processes and measures to **assure the desired outcomes** are achieved and undesired effects are mitigated?
- Established processes to identify, assess, manage, and **monitor FM related risks and opportunities** that will change over time?
- Created processes to identify and assess **competency** requirements for internal and external resources?
- Provided processes and requirements for **information collection, control, protection, and use**?



Assessing readiness...

Of the Demand Organisation:

- Are processes and resources available to **react appropriately to non-conformities**?
- Is there a means for **monitoring and identifying potential failures** in performance?
- Is **continual improvement supported** through a process of monitoring, evaluation, top management reviews, and FM objectives and actions aimed at improving the system?



Commitment of Top Management:

- Demonstrate** a systematic approach to management reviews, including timing?
- Ensure** that information relevant to management review is identified and made available?



Preparing for certification

Audit objectives:

- To verify conformity with the organisation’s MSS policy and objectives
- To evaluate conformity with the requirements of AS ISO 41001
- To determine if suppliers can adequately meet contractual requirements

Key components of management systems:

- People with defined responsibilities
- Management processes relating to policy, planning, implementation & operation, performance assessment, management review and improvement
- Set of documentation providing auditable evidence



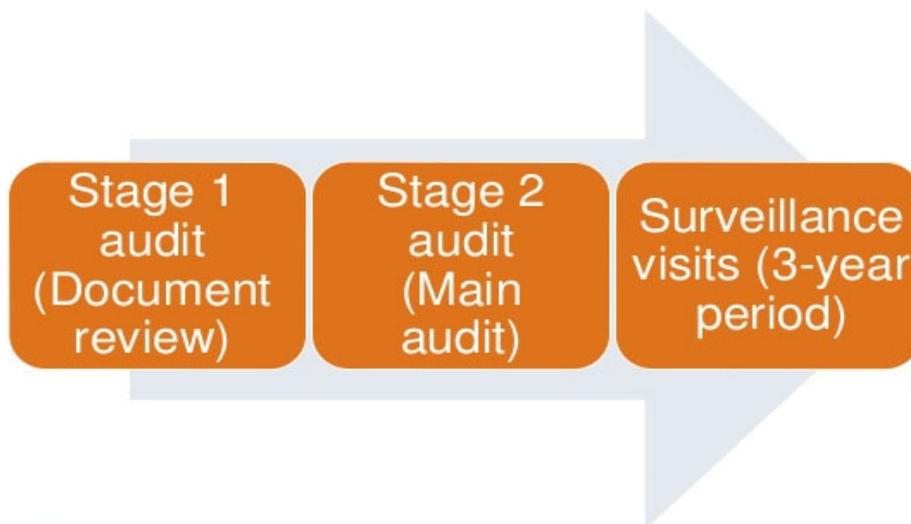
Preparing for certification

To evaluate conformity to the requirements of AS ISO 41001, consider:

ACTION WORDS



Preparing for certification



Preparing for certification

ISO/IEC TS 17021:2006 Conformity assessment -- Requirements for bodies providing audit and certification of management systems.

ISO/IEC 17021:2006 was designed for all management systems, along with this standard, several other versions of 17021 have been published to meet the needs of specific management systems, including parts:

2. environmental management systems
3. quality management systems
4. event sustainability management systems
5. asset management systems
6. business continuity management systems
7. road traffic safety management systems
8. for sustainable development in communities management systems (*under development*)
9. anti-bribery management systems
10. occupational health and safety management systems
11. facility management systems



17021-11

Filter
 All results

7 results found (4 ms)

© ISO/IEC TS 17021-11 Conformity assessment -- Requirements for bodies providing audit and certification of management systems -- Part 11: Competence requirements for auditing and certification of facility management (FM) management systems [Under development]



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Questions

