



International Organization for Standardization



ISO 41000: ready, set, FM!! International Standards

,AACEi - AZ Section, Phoenix – September 27, 2018

Stephen Ballesty

In-Touch Advisory

Standards Australia & ISO/TC-267

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Meet Our Presenter

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

- ✎ Stephen is an award winning international industry leader and is this year being recognized as an IFMA Fellow.
- ✎ 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 is currently 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). He is also the Oceania representative to the RICS's Global Cost Prediction working group.
- ✎ He is former member of the IFMA Board of Directors and Past Chairman of both the IFMA Foundation; and FMA Australia.



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Today's Presentation

ISO 41000: ready, set, FM!!

- 📄 Standards
- 📄 Facility Management
- 📄 ISO international FM standards initiative (ISO 41000)
- 📄 Other Standards, and asset management (ISO 55000)
- 📄 What next?



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Today's Presentation



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ISO International Organization for Standardization

aace International Arizona Section

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An FM viewpoint?

STANDARDS Australia

RLB Rider Levett Bucknall

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Context & Definitions

AACE International

- constructive exchange of ideas between members
- development of technical guidance and quality education
- recognition of subject matter experts
- working in a variety of disciplines and across all industries

Our Vision
To be the gathering place and source of thought leadership for professionals who drive successful project and program delivery.

WORLD FM DAY
advancing facilities management

RICS **IFMA**
International Facility Management Association
Empowering Facility Professionals Worldwide

def!ne.fm

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PERFORMANCE



Standards Matter

Standards are fundamental to operating in a truly sustainable global environment, and offer:

a common language across borders

increased transparency and professionalism

greater confidence and reduced risk

consistent and accurate reporting

ability to benchmark and forecast accurately

ability to predict cost and performance

"Our world is suffering from a bad case of Trust Deficit Disorder"
António Guterres, UN General Assembly Address - New York, September 25, 2018

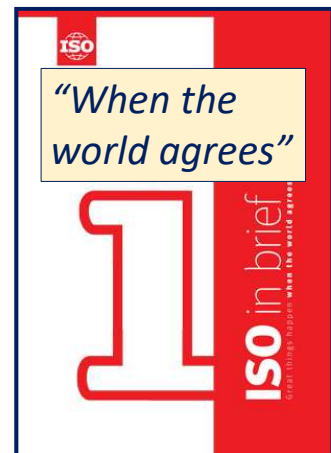


International Organization for Standardization

ISO/TC-267 Facility Management (FM)

International Standards Organization (ISO)

- Founded in **1947**.
- An independent, non-governmental international organization with membership of **163 national standards bodies**.
- Through its members, ISO brings together experts to share knowledge and develop voluntary, consensus-based, market relevant International Standards that support innovation and **provide solutions to global challenges**.
- www.iso.org/about-us.html



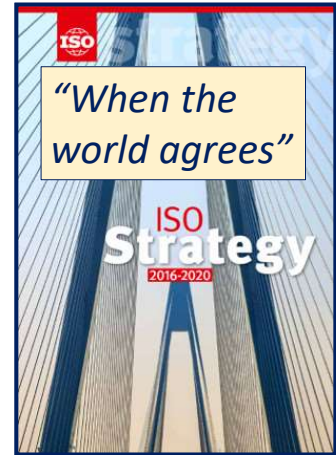


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What are standards?

- International Standards **make things work**.
- Standards provide world-class specifications for **products, services and systems**, to ensure quality, safety and efficiency. They are instrumental in facilitating international trade.
- ISO has published **International Standards** and related documents, covering almost every industry, from technology, to food safety, to agriculture and healthcare.
- ISO Standards **impact** everyone, everywhere.



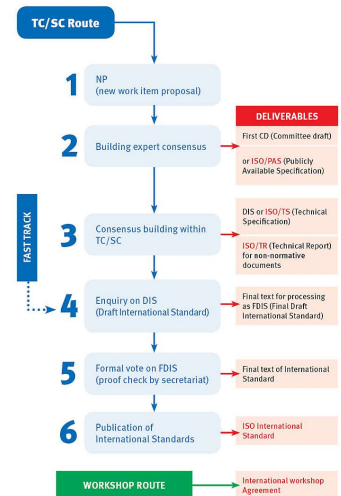
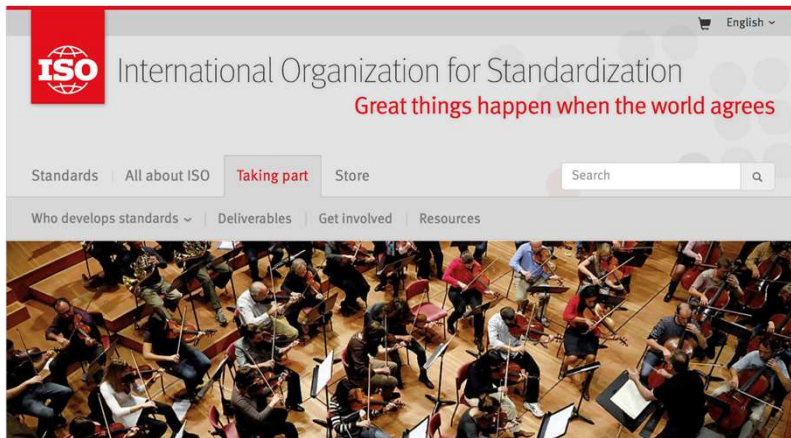
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ISO/TC-267 Facility Management (FM)

ISO Process Overview



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www.iso.org





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ISO/TC-267 Facility Management (FM)

What is 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*”

Source: ISO 41011:2017

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What is FM?

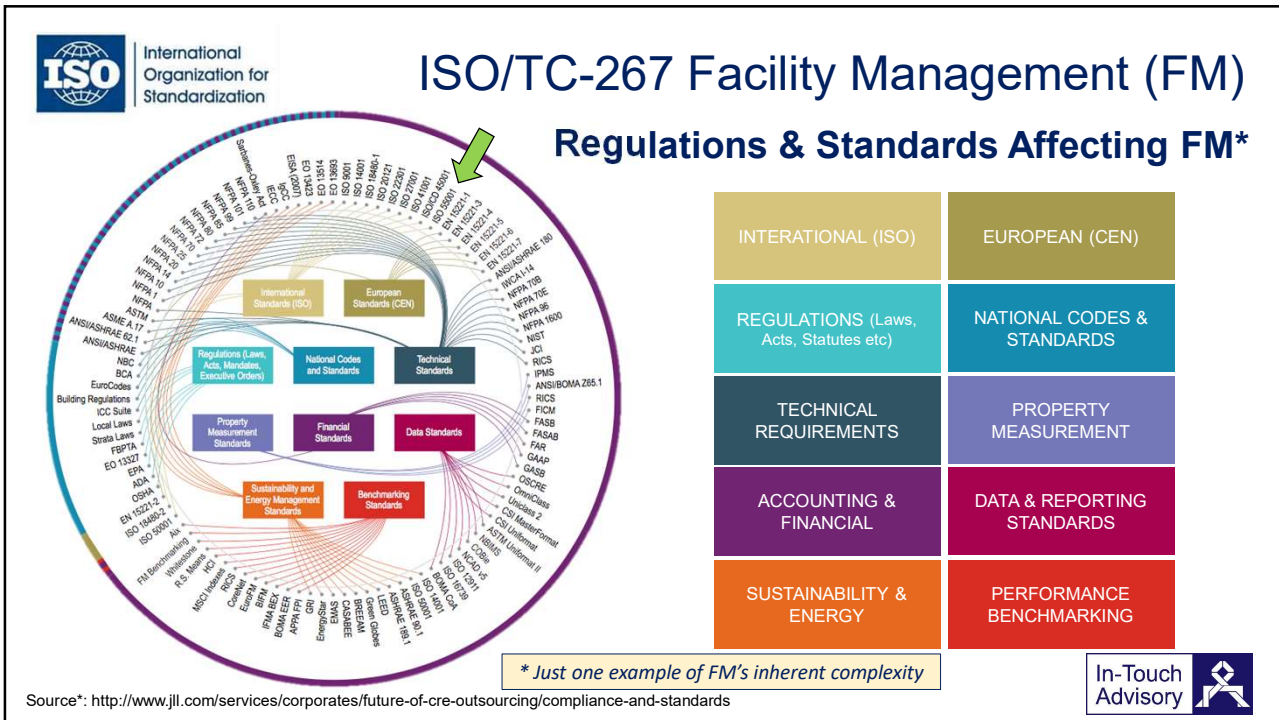
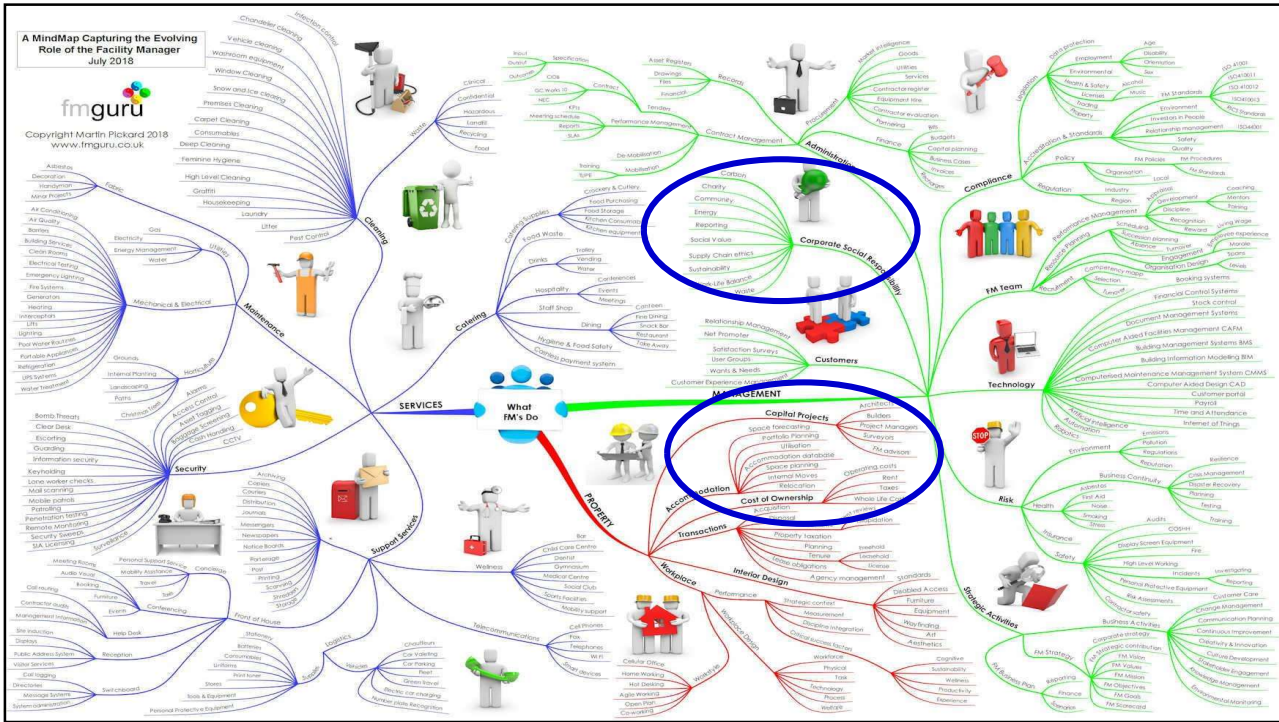


FM is an “*organizational function which integrates people, place and process within the **Built Environment** with the purpose of improving the **quality of life** of people and the **productivity** of the core business*”

Source: ISO 41011:2017

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ISO/TC-267 Facility Management (FM)

Value of ISO Standards to FM?

*“FM practitioners require a **rare mix of specialist technical skills**, rounded business understanding, and general management expertise. We are now in a position to **provide consistency for the profession internationally** and to provide a framework for standards on a worldwide scale.”*



~ Stan Mitchell
Chairman, ISO/TC-267
Facility Management

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*“The ability of FM practitioners to speak the **same professional language** around the world is the foundation of a robust **global community** that will be better situated to tackle the challenges of the future.”*



~ Jim Whittaker
Past Chair, US Mirror
Committee for ISO/TC 267
Convenor, ISO/TC-267/WG3
FM Management System



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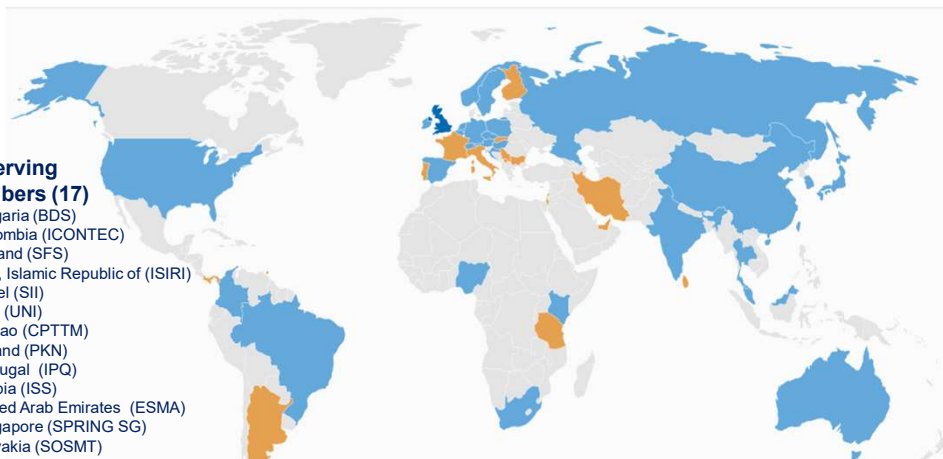
ISO/TC-267 Facility Management (FM)

Participating Members (26)

- Australia (SA)
- Austria (ASI)
- Belgium (NBN)
- China (SAC)
- Croatia (HZN)
- Czech Republic (UNMZ)
- France (AFNOR)
- Germany (DIN)
- Hungary (MSZT)
- India (BIS)
- Ireland (NSAI)
- Japan (JISC)
- Kenya (KEBS)
- Korea, Republic of (KATS)
- Malaysia (DSM)
- Netherlands, The (NEN)
- Nigeria (SON)
- Norway (SN)
- Panama (COPANIT)
- Russia (RSS)
- South Africa (SABS)
- Sweden (SIS)
- Switzerland (SNV)
- Thailand (TISI)
- United Kingdom (BSI)
- United States (ANSI)

Observing Members (17)


- Bulgaria (BDS)
- Colombia (ICONTEC)
- Finland (SFS)
- Iran, Islamic Republic of (ISIRI)
- Israel (SII)
- Italy (UNI)
- Macao (CPTTM)
- Poland (PKN)
- Portugal (IPQ)
- Serbia (ISS)
- United Arab Emirates (ESMA)
- Singapore (SPRING SG)
- Slovakia (SOSMT)
- Spain (UNE)
- Sri Lanka (SLSI)
- Tanzania, United Republic of (TBS)
- Trinidad and Tobago (TTBS)



43 countries

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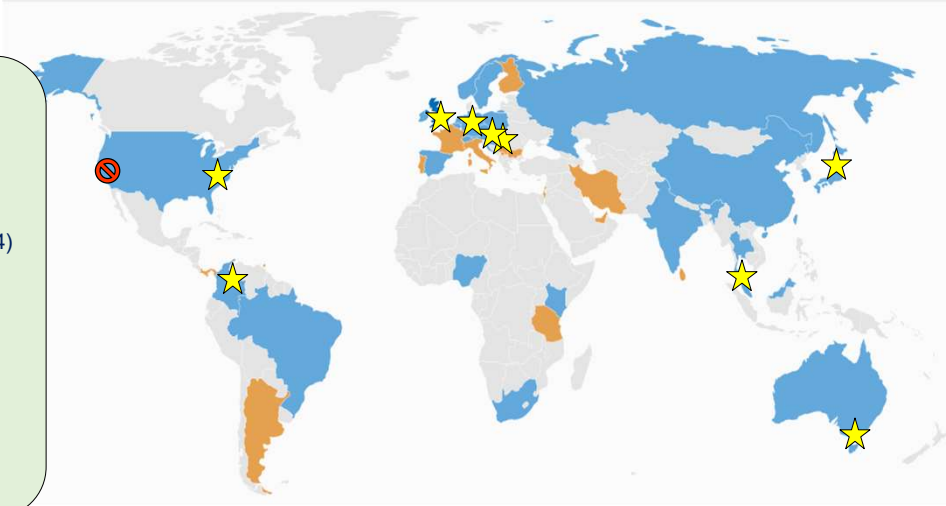


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ISO/TC-267 Facility Management (FM)


ISO/TC-267 Meetings

- ★ Berlin (2012)
- ★ Budapest (2013)
- ★ Tokyo (2013)
- ★ Washington DC (2014)
- ★ Glasgow (2015)
- ★ Melbourne (2016)
- ★ Budapest (2017)
- ★ Kuala Lumpur (2017)
- ★ Bogotá (2018)
- 🚫 Next stop: Las Vegas
7-9 November 2018



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- 2012 ++

ISO/TC 267

WG1

WG2


ISO 41011
published

ISO 41012
published


ISO 41013
published

TC 267 Liaisons

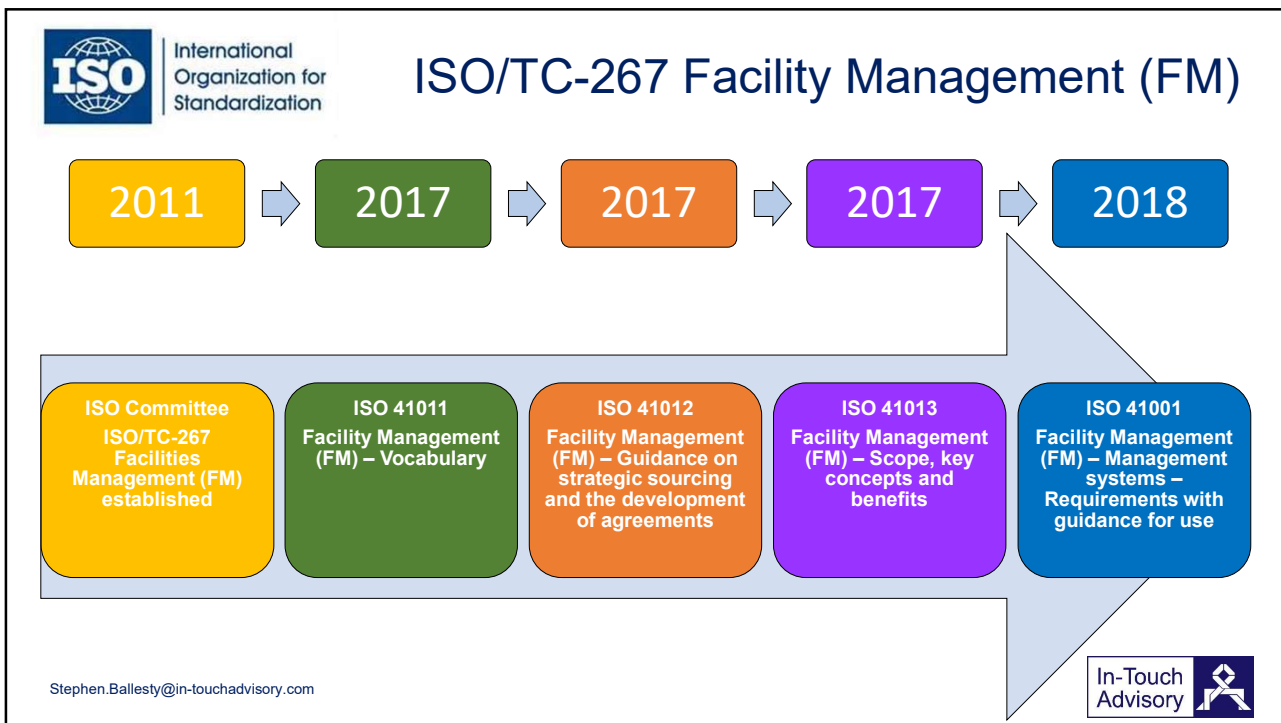
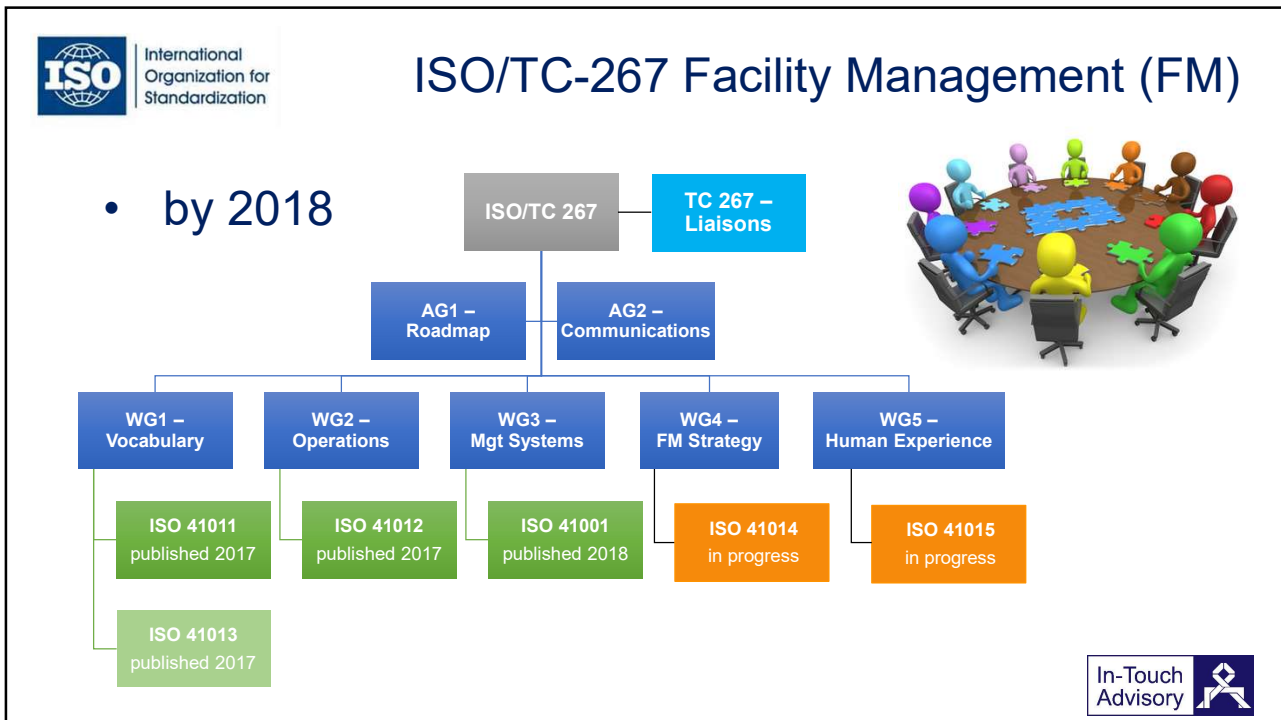
- ISO/TC-59
- ISO/TC-176
- ISO/TC-301
- ISO/TC-251
- ISO/TC-286
- ISO/TC-292
- CEN/TC-348
- Euro FM
- ETUC
- Global FM



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ISO/TC-267 Facility Management (FM)

<https://committee.iso.org/home/tc267>

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ISO/TC 267
Facility management

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What is Facility Management (FM)?

Facility management has been defined 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." [Source ISO 41011]

FM is a strategic, professional discipline that provides optimum performance of support services to any and all types and sizes of organizations that it serves. The impact of a properly implemented strategic FM program goes beyond operations and maintenance. It can influence employee engagement and retention, support the demand organization's mission-critical assets, and minimize organizational risks.

FM standards provide specific guidance for individual teams and organizations to demonstrate a commitment to quality and continuous improvement through a robust, systems approach to managing the support services needs and working environment of the demand organization. It is incumbent on facility managers worldwide to utilize the ISO

Upcoming FM events:
Find upcoming FM events near you at [Global FM](#).

Published Standards:

- [ISO 41011:2017](#) Facility management – Vocabulary
- [ISO 41012:2017](#) Facility Management – Guidance on strategic sourcing and the development of agreements
- [ISO/TR 41013:2017](#) Facility management – Scope, key concepts and benefits

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ISO/TC-267 Facility Management (FM)

WG1

ISO 41011 Facility Management - Vocabulary

EUROPEAN STANDARD **EN 15221-1**

NORME EUROPÉENNE

EUROPÄISCHE NORM

October 2006

ICS 01.040.03; 91.040.01; 01.040.91; 03.080.99

English Version

Facility Management - Part 1: Terms and definitions

Stephen.Ballesty@in-touchadvisory.com

Introduction	Scope, Normative references, Terms and definitions
Clause 1, 2 & 3	
“ 3.1	Terms related to facility management
“ 3.2	Terms related to assets
“ 3.3	Terms related to people
“ 3.4	Terms related to sourcing
“ 3.5	Terms related to process
“ 3.6	Terms related to finance
“ 3.7	Terms related to general business
“ 3.8	Terms related to measurement

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WG2

ISO 41012 Guidance on strategic sourcing and the development of agreements

Introduction	
Clause 1, 2, 3	Scope, Normative references, Terms and definitions
“ 4	Sourcing strategy and understanding the core business context
“ 5	Sourcing process in FM
“ 6	Facility services provision
“ 7	Main characteristics of FM agreements
“ 8	Common considerations in agreements
“ 9	Preparation and development of an agreement
“ 10	Measure service provision performance
Annex	
A	(informative) Example of requirements for a service
B	(informative) Example of a business case content
C	(informative) Structure of an agreement – General clauses
D	(informative) Service level agreements – Benefits, preparation and structure of an agreement (SLA clauses)

EUROPEAN STANDARD
NORME EUROPÉENNE
EUROPÄISCHE NORM

ICS 03.080.99; 91.040.01


English Version


Facility Management - Part 2: Guidance on how to prepare Facility Management agreements

Stephen.Ballesty@in-touchadvisory.com

FINAL DRAFT
prEN 15221-2


June 2006





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WG1

ISO 41013 Facility management scope, key concepts and developments

Foreword	
Introduction	
Clause 1, 2 & 3	Scope, Normative references, Terms and definitions
“ 4	Scope of facility management
“ 5	Business process background of FM
“ 6	Key concepts in FM
“ 7	Benefits of FM (purpose)
Annex	
A	Evolution of terms & definitions from EN 15221 to ISO 41011

EUROPEAN STANDARD
NORME EUROPÉENNE
EUROPÄISCHE NORM

ICS 01.040.03; 91.040.01; 01.040.91; 03.080.99


English Version

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October 2006





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Management Systems Standard (MSS)

1. Scope
2. Normative References
3. Terms & Definitions
4. Context of the Organization
6. Leadership
7. Planning
8. Support
9. Operation*
10. Performance evaluation
11. Improvement

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

* contains bulk of the requirements

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Value of a Management Systems Standard (MSS)



Flexibility



Discipline



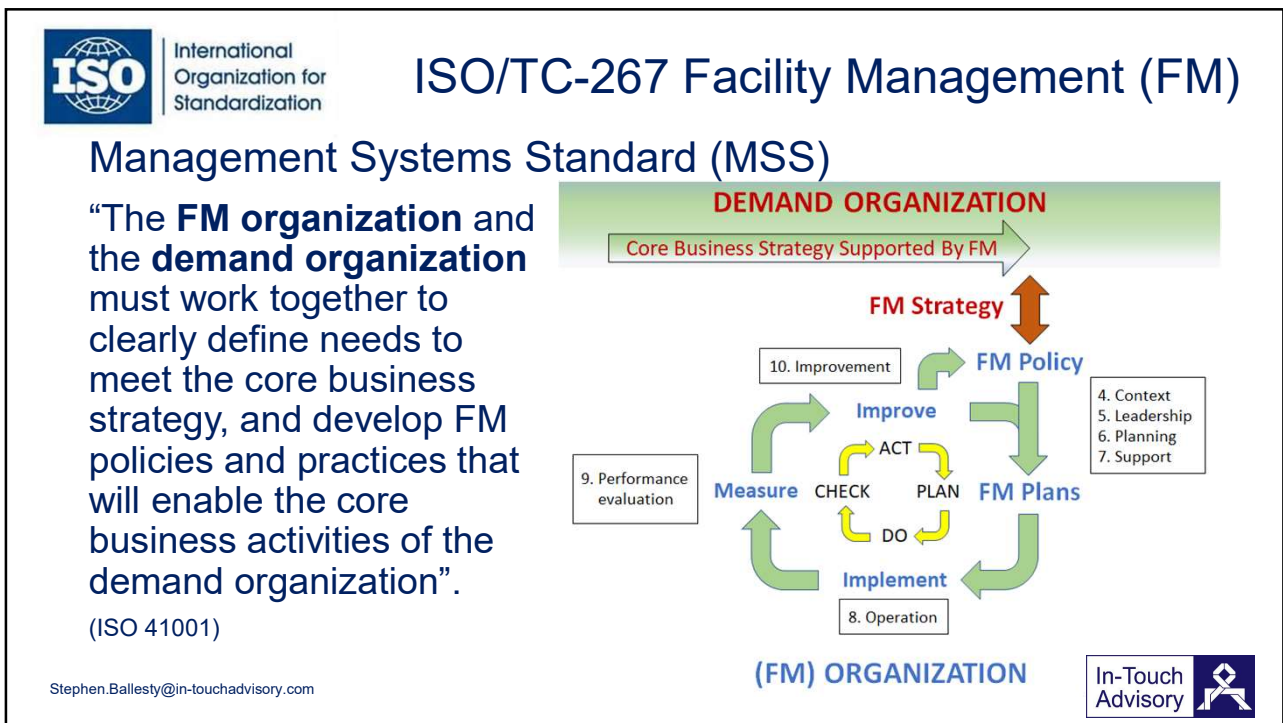
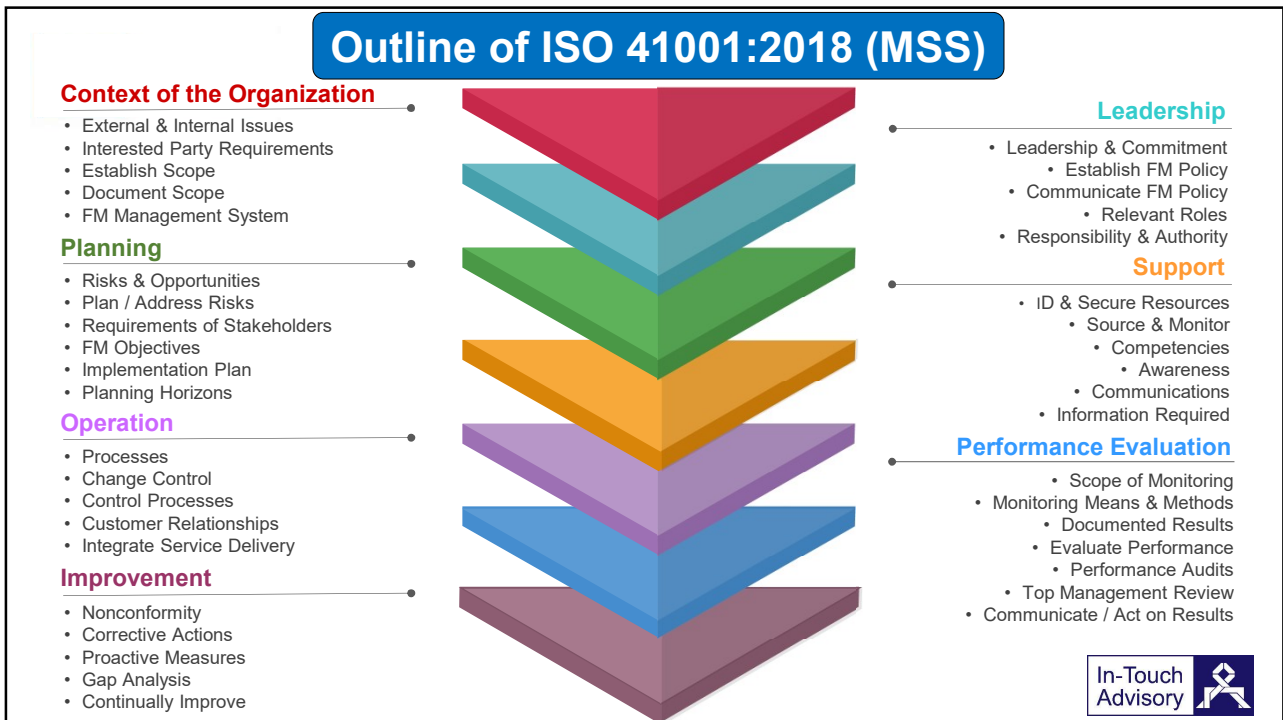
Consistency

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

Source: Harvard Business School, 2008

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ISO/TC-267 Facility Management (FM)


ISO 41001

- 1. Scope**
- 2. Normative references**
- 3. Terms and definitions**
- 4. Context of the Organization**
 - External & Internal Issues
 - Interested Party Requirements
 - Establish Scope
 - Document Scope
 - FM Management System
- 5. Leadership**
 - Leadership & Commitment
 - Establish FM Policy
 - Communicate FM Policy
 - Relevant Roles
 - Responsibility & Authority



- 6. Planning**
 - Risks & Opportunities
 - Plan / Address Risks
 - Requirements of Stakeholders
 - FM Objectives
 - Implementation Plan
- 7. Support**
 - ID & Secure Resources
 - Source & Monitor
 - Competencies
 - Awareness
 - Communications
 - Information Required
 - Knowledge management






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ISO/TC-267 Facility Management (FM)

ISO 41001


- 10. Improvement**
 - Nonconformity
 - Corrective Actions
 - Preventive Measures
 - Gap Analysis
 - Continually Improve
- 9. Performance Evaluation**
 - Scope of Monitoring
 - Monitoring Means & Methods
 - Documented Results
 - Evaluate Performance
 - Audits
 - Top Management Review
 - Communicate / Act on Results



8. Operation

- Processes
- Change Control
- Control Processes
- Stakeholder Relationships
- Integrate Service Delivery

Required: ISO 41001 alignment to ISO/IEC 17021 part 11 Conformity Assessment - requirements for bodies providing audit and certification of management systems.





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ISO/TC-267 Facility Management (FM)

ISO 41001 Certification *with alignment to ISO/IEC 17021 part 11 Conformity Assessment*

- Define Internal and / or External Audit processes
- Define certification parameters and boundaries
- Communicate the value proposition of a MSS
- Understand the impacts of nonconformity
- Identify continuous improvement opportunities
- Establish criteria for policies and procedures
- Evaluate methodology for document control
- Justify inclusion of any 'should' statements
- Justify exclusion of any 'shall' statements



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ISO/TC-267 Facility Management (FM)

Value of a Management Systems Standard (MSS)

Business Case for Management Systems - ISO 9001

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



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ISO/TC-251 & ISO/TC-267 collaboration

TC251 / TC267 Joint article #1 initiative 26 June 2018

- **ISO 55001:2014** helps organizations derive greater value from their assets.
- **ISO 41001:2018** helps organizations manage, operate and maintain facilities, assets and services in order to meet ever-changing operational requirements in an efficient and effective manner.
- ...basis and a framework for organizations to ensure facilities, assets and services are effectively and efficiently managed to improve operational activities and risks, achieve **organizational performance** objectives and contribute to our **quality of life**.
- <https://committee.iso.org/home/tc267> in 6 languages



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ISO/TC-267 Facility Management (FM)

What next from FM?

- Building on the Joint TC251 / TC267 article, provide for greater collaboration between AM & FM.
- Identify additional TC267 joint initiatives with other ISO management system standards.
- Identify the "Champions of FM" and build website content – *please ask how your organization can participate*.
- Work towards ISO 41001 alignment to ISO/IEC 17021 part 11 Conformity Assessment - requirements for bodies providing audit and certification of management systems.
- Establish WG4 – ISO 41014*, Facility Management - development of FM strategy.*
- Establish WG5 – ISO 41015*, Facility Management - influencing behaviors for improved facility outcomes and user experience.*



* proposed WG, and working titles

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ISO/TC-267 Facility Management (FM)

Value of ISO Standards to FM

- Improved procedures, productivity and performance
- Maintain regulatory compliance and provide safe workplaces
- Develop functional and motivating built environments
- Optimize life cycle performance and cost controls
- Improve resilience and relevance
- Better organizational identity and reputation
- Focus on **quality of life** for all



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

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ISO/TC-267 Facility Management (FM)

Closing Thoughts #1

- 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”* ISO 41011:2017.
- 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.



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ISO/TC-267 Facility Management (FM)

Closing Thoughts #2

- ❑ **ISO 41001:2018** FM Management Systems Standard is here and holistic.
- ❑ ISO/TC-267 answers the challenge of promoting FM, defining and coordinating the **focus, scope and practice for the FM** profession and others.
- ❑ **Cost Engineering** is primarily focused on the management of project costs, program and risk analysis. ISO 41000 Facility Management is primarily focused upon the operational performance. Inevitably there will be some **crossover, integration and complementary points** relative to organizational culture and project life cycles.



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ISO/TC-267 Facility Management (FM)

Thank you



Questions & Opportunities



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