ISO Standards for FM:

What has been achieved - what is still to come

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  – Facility Management

ISO Standards for FM:
What has been achieved - what is still to come

Topics:

1. FM Standard – Process Overview

2. **What has been achieved**

   - Adopted / Published FM Standards

3. **What is still to come**

   - FM Standards in the pipeline

ISO Standards for FM:
Why FM Standards?

- Standardised industry terminology
- FM International best practise
- Benchmarking
- Industry maturity, professionalism
- Industry Growth
- Enhanced user satisfaction
- Etc.

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Standards for FM:

❑   How it Works
❑   Where did it start?

Standards for FM:

❑ How it Works
- ▪ **Any country can join ISO**
  - ➢ Like joining the United Nations for standards

- ▪ **1 x Technical Committee is created per subject / field**
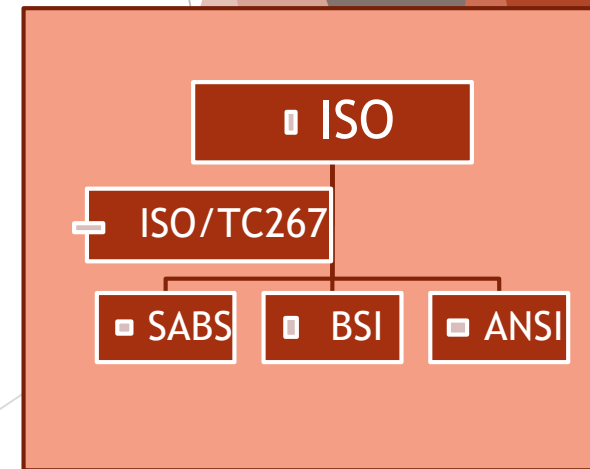 - ➢ ISO/TC 267 = Facility Management

Standards for FM:

❑ How it Works

- ▪ Any country can join ISO
  - ➤ Like joining the United Nations for standards

- ▪ 1 x Technical Committee is created per subject / field
  - ➤ ISO/TC 267 = Facility Management

- ▪ **Each country creates its own TC – mirror committee**
  - ➤ **SABS TC 267**
  - ➤ **TC nominates Subject Matter Expert/s – SME**

- ▪ **International group of SMEs write new standards**
  - ➤ **New standard take 2 -3 years to develop**
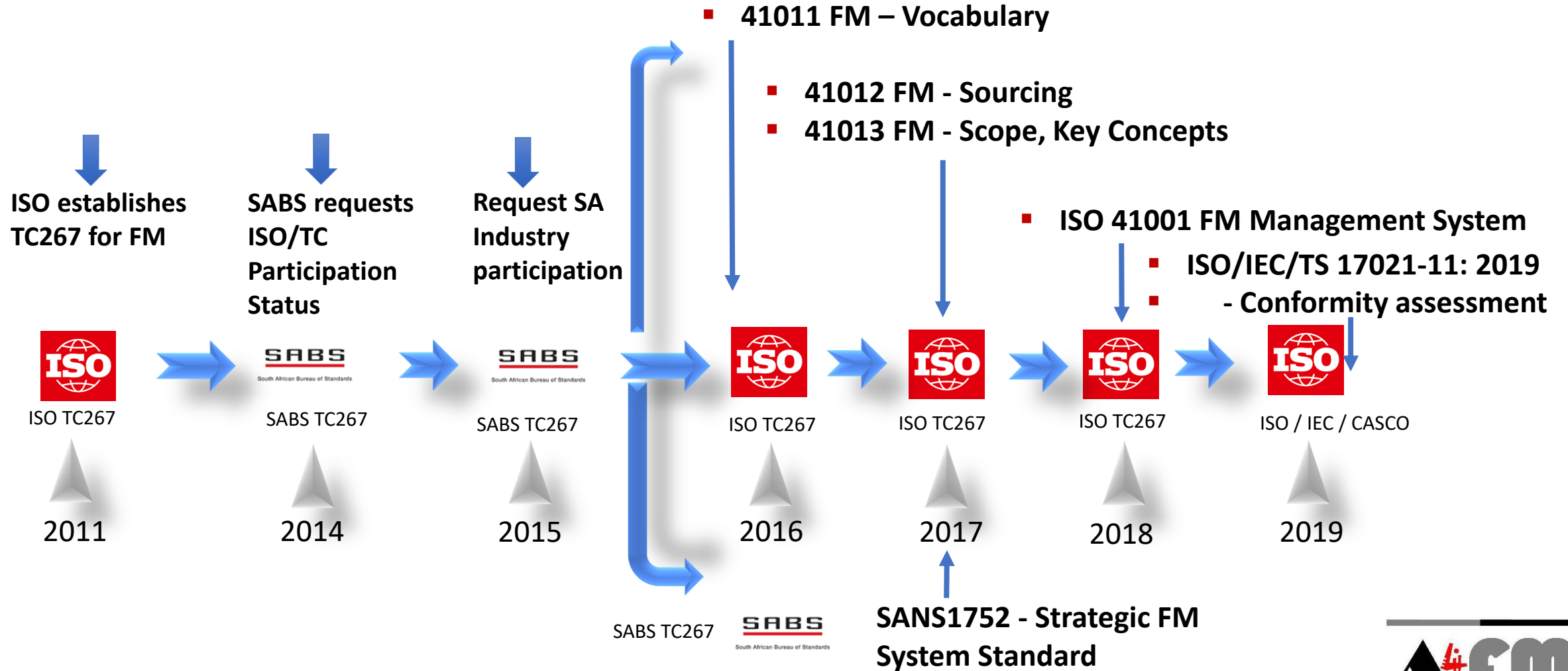 - ➤ **Key principle is rigorous peer review**

CEN Standards for FM: Published

Reference / Year	Title
EN ISO 41001:2018*	FM - Management systems - Requirements with guidance for use - (ISO 41001:2018)
EN ISO 41011:2018*	FM - Vocabulary- (ISO 41011:2017)
EN ISO 41012:2018*	FM Guidance on strategic sourcing and the development of agreements (ISO 41012:2017)
EN 15221-3:2011	Guidance on quality in Facility Management
EN 15221-4:2011	Taxonomy, Classification and Structures in FM
EN 15221-5:2011	Guidance on Facility Management processes
EN 15221-6:2011	Area and Space Measurement in FM
EN 15221-7:2012	Guidelines for Performance Benchmarking

* Replaced CEN Standard

ISO / SANS Standards for FM:
The process and timeframes – Published Standards

- 41011 FM – Vocabulary

- 41012 FM - Sourcing
- 41013 FM - Scope, Key Concepts

- ISO 41001 FM Management System
  - ISO/IEC/TS 17021-11: 2019
  - - Conformity assessment

ISO establishes TC267 for FM

SABS requests ISO/TC Participation Status

Request SA Industry participation

ISO TC267

SABS TC267

SABS TC267

SABS TC267

ISO TC267

ISO TC267

ISO TC267

ISO / IEC / CASCO

2011   2014   2015   2016   2017   2018   2019

SANS1752 - Strategic FM System Standard

ISO Standards for FM:

What has been achieved?

ISO / SANS Standards for FM:
What has been achieved – Published FM Standards

1. ISO 41011: 2016 - Terminology

2. SANS 1752: 2017 - Strategic Facilities Management System

3. ISO 41012: 2017 - Sourcing

4. ISO 41013 TR: 2017 - Scope, Key Concepts

5. ISO 41001: 2018 - Facility Management - Management System

6. ISO/IEC/TS 17021-11: 2019 - Conformity assessment

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ISO Standards for FM:
What has been achieved

ISO 41011- Terminology

- One global definition

- Standardised terminology for FM

"Facility Management 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 Standards for FM:
What has been achieved

ISO 41012 - Sourcing

Established international best practice re:

- SLA / sourcing terminology

- Due diligence in decision-making re sourcing

- Guidelines for developing Service Level Agreements
  – some 100 recommendations provided

- User-friendly and useful standard

ISO Standards for FM:
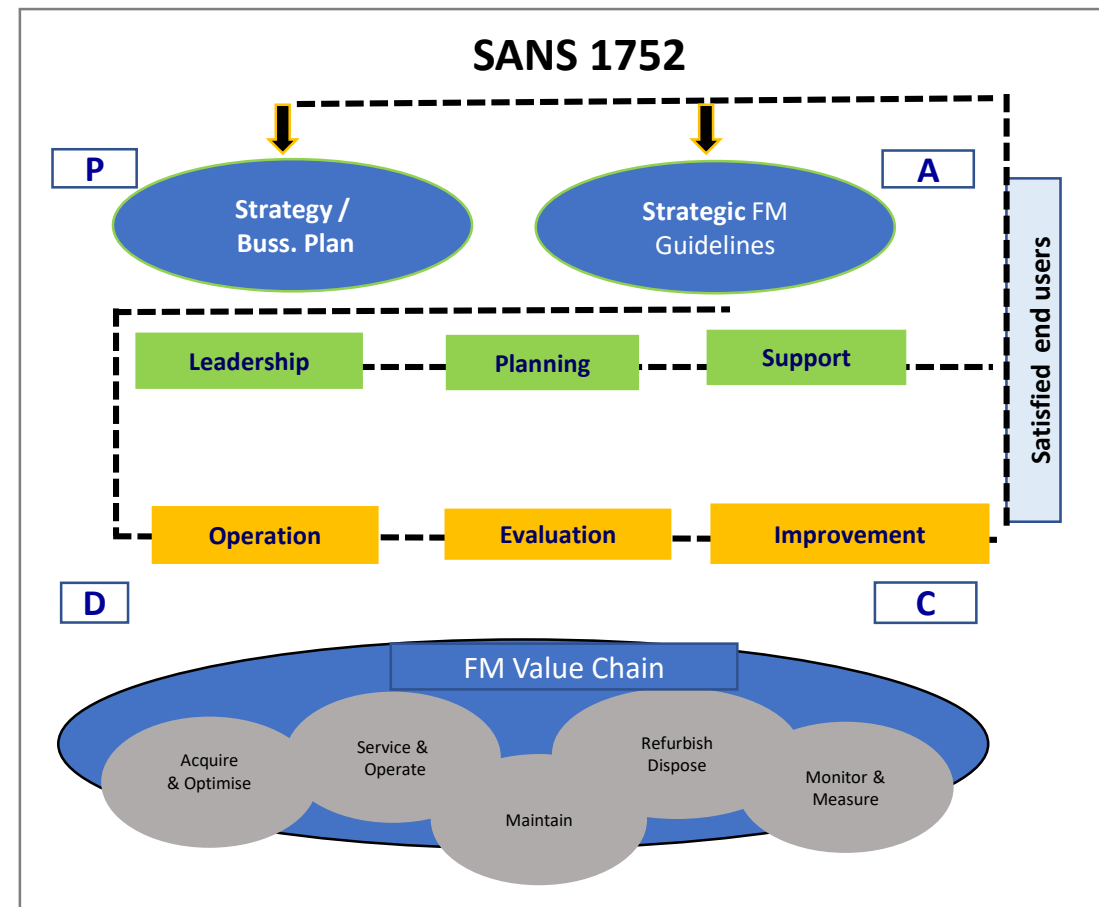# What has been achieved

ISO 41012 - Sourcing

ISO 41012 covers:

- Terms and definitions
- Sourcing strategy and understanding the core business context
- Sourcing process in FM
- Facility service provision
- Main characteristics of FM agreements
- Common considerations in agreements
- **Preparation and development of an agreement**
- Metrics for performance of service provision

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SANS Standard for FM:
What has been achieved

SANS 1752 – Strategic FM Management System (SFMS)

- Understanding the organisation and its SFMS / its context
- Determining the scope of the SFMS / FM
  - Leadership
  - Planning
  - Support
  - Operation
  - Performance evaluation
  - Performance improvement

ISO Standards for FM:
What has been achieved

ISO 17021-11 : Conformity

ISO 17021-11 covers:

- Generic competence requirements for FM management systems auditors

- Competence requirements for persons reviewing audit reports and making certification decisions

- Competence requirements for persons conducting the application review to determine audit team competence required, to select the audit team members and to determine the audit time.

ISO Standards for FM:

What is still to come?

ISO Standards for FM:
What is still to come

 A **FM Strategy - ISO 41014**

B **FM User Experience* – ISO 41015**

ISO Standards Formulation Phases			
NWIP (New Work Item) **1**	Working Group Draft (WG) **2**	Committee Draft / Draft Standard (CD/DIS) **3**	Publication **4**
ISO TC267	ISO TC267	ISO TC267	ISO TC267
2018	2019	2019	2020
A	A	A	A
B	B	B	B

FM Standards Roadmap – Pipeline 1

*Influencing behaviours for improved facility outcomes and user experience

ISO Standards for FM:
What is still to come

ISO 41014 – FM Strategy (1)

- Understanding the demand organisation

- Organisation

- Governance

- Context

  - Risk management

  - Strategic definition

  - Strategic dialogue

ISO Standards for FM:
What is still to come

ISO 41014 – FM Strategy (2 Continued)

- Developing FM requirements
  - Current and future interest in facilities
  - Maturity of FM
  - Briefing - refurbished or new facilities
  - Stakeholders
  - Accessibility, inclusiveness and equality
  - Prioritisation
  - Functional requirements
  - Scope of services

ISO Standards for FM:
What is still to come

ISO 41014 – FM Strategy (3 Continued)

- Formulating the FM strategy

- Managing performance

- Improving outcomes

ISO Standards for FM:
What is still to come

ISO 41015 – Influencing behaviours for improved facility outcomes and user experience

- FM role within the Context of the Demand Organisation
  - Strategic Intent of the Demand Organisation
  - Culture
  - Behavioural change
  - Roles and responsibilities
- Understanding the context of the demand organisation
  - Levels of Maturity
  - Levels of Influence

ISO Standards for FM:
What is still to come

ISO 41015 – Influencing behaviours for improved facility outcomes and user experience (Continued)

- Influencing behaviours within the full building life cycle
  - Planning and programming
  - Design and construction
  - Operation and maintenance
  - Occupation / Occupancy
  - Capital Renewal
  - End of life

ISO Standards for FM:
What is still to come

A Procurement of FM Services by the Public Sector

B FM Technical Task Group (FMTTG - ICT)

ISO Standards Formulation Phases

Task Team ①	NWIP (New Work Item) ②	Working Group Draft (WG) ③	Committee Draft / Draft Standard (CD/DIS) ④	Publication ⑤
ISO TC267	**ISO** TC267	**ISO** TC267	**ISO** TC267	**ISO** TC267
2019	2019	2019 / 20	2020 / 2021	2021 / 2022
----------------------	A	A	A	A
B	?			

FM Standards Roadmap – Pipeline 2

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ISO Standards for FM: What is still to come

Procurement of FM Services by the Public Sector - Scope

- Good practice guide for the procurement of FM by government

- Provide ISO 41000-series alignment & guidance re use of series for procuring services by government sector

- Additional guidance to address peculiarities unique to government business practices

- See government practices from a system horizon & demonstrate positive impact of 41000-series

- Directed at decision maker within government sector – Treasury

- Provide key guidance and understanding on contemporary models of FM

- Demystify areas which drive efficiency vs. areas that create a significant cost impact

ISO Standards for FM:
What is still to come

FM Technology Task Group – FMTTG Remit:

- Explore the issue of FM and technology

- Define the many aspects of tech(nology) in relation to FMi

- Develop a paper referencing technology implications for FM in a connected world/smart cities

- Developed a road map and a recommendation for a way forward to navigate this domain

- White paper, road map and, if applicable, New Work Item Proposal (Nov. 2019)
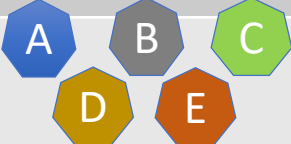
ISO Standards for FM: What is still to come

A FM Policy
B FM Plans (Operational)
C FM Benchmarking

D Integrated Management and service delivery
E Workplace

ISO Standards Formulation Phases				
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ISO TC267	ISO TC267	ISO TC267	ISO TC267	ISO TC267
2019/20	2019/20	2020/21	2020/2021	2021/2022
A B C D E	? →			

FM Standards Roadmap – Pipeline 3

ISO Standards for FM:
What is still to come

Current short list:

- Guidance on integrated management and **delivery of services** including organisation structure

- Development and Implementation of **FM Policy**

- Development of **FM Plans**

- Work environment / **workplace**

- (FM) **Benchmarking**

ISO/TC 304 Healthcare Organisation Management: Background

Standardisation in healthcare organisation management including: classification, terminology, nomenclature, management practices and metrics that comprise the non-clinical operations in healthcare entities.

Objectives

- Develop standards that are relevant to the intended users;
- Achieve the highest quality of standards that can reasonably be developed;
- Focus on the global harmonisation of healthcare organisation management practices that have the promise of reducing the growth of costs, improving overall organisational effectiveness, and optimising organisational efficiency

ISO Standards for FM

Questions

Thank You