

**BUSINESS PLAN**  
**ISO/TC 267**  
**Facility Management**

**EXECUTIVE SUMMARY**

**The Facility Management Discipline and Market**

Facility Management is a relatively young discipline that is emerging worldwide.

In those countries that have recognized its importance major initiatives have been developed which today influence emerging economies and make a significant impact across government, industry and commerce.

Research undertaken by Frost & Sullivan predicts that by 2025 the global outsourced market in FM services will be worth \$1 trillion.

**The Profession**

Facility Management is a maturing professional discipline that differs in various parts of the world which will make a direct and significant contribution to the overall effectiveness and efficiency where applied whether it be commerce, industry or government.

Facility Management is also a management discipline which influences the quality of life, productivity, safety and health of those utilising the workplace as is clearly stated in the definition contained in ISO 41011: 2017 as follows:

“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”

Facility management goes beyond this in extending beyond just workplace to impact many other facility types including residential, education to name a couple. As an enabling profession facilities management produces outcomes that extend across the entire economy.

It makes a significant contribution to the financial, operational, employment and environmental effectiveness and efficiencies of each and every built environment irrespective of the sector, purpose and level of maturity.

As Facility Management is responsible for the look and feel of the built environment/workplace as well as hospitality services provides, it is the most important conveyor of the organization brand and culture to the outside world. Through horizontal integration of business processes, it is the only discipline that can adequately represent and collectively support the built environment in a holistic and efficient manner.

**Committee Objectives**

1. To enable the widest participation of country experts in TC 267 as possible
2. 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

3. 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
4. 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
5. To ensure that all outputs from the TC are of value and benefit to commerce and industry as a whole

### **Priority of Committee**

Establish adequate international representation and proactive participation in the work of the TC and its working and advisory groups.

To develop relevant international standards that will align the discipline worldwide as well as enhance and develop the value that Facility Management as a strategic professional discipline can deliver in a consistent and effective manner.

### **Importance of Standards**

The Facility Management profession has a direct impact on the quality of life and productivity of every individual that works in and around buildings and infrastructure. It also plays a role in the security and wellbeing of people around the world.

In order to do so, there is a need to establish independent International Standards that will enable the sector to evolve in a coherent and coordinated manner. Therefore, the objective of ISO TC 267 is to make a valid contribution to this process, at a strategic level, in a manner that will be acceptable and relevant to all countries that are members of ISO and beyond.

## **1 INTRODUCTION**

### ***1.1 ISO technical committees and business planning***

The extension of formal business planning to ISO Technical Committees (ISO/TCs) is an important measure which forms part of a major review of business. The aim is to align the ISO work program with expressed business environment needs and trends and to allow ISO/TCs to prioritize among different projects, to identify the benefits expected from the availability of International Standards, and to ensure adequate resources for projects throughout their development.

### ***1.2 International standardization and the role of ISO***

The foremost aim of international standardization is to facilitate the exchange of goods and services through the elimination of technical barriers to trade.

Three bodies are responsible for the planning, development and adoption of International Standards: ISO (International Organization for Standardization) is responsible for all sectors excluding Electrotechnical, which is the responsibility of IEC (International Electrotechnical Committee), and most of the Telecommunications Technologies, which are largely the responsibility of ITU (International Telecommunication Union).

ISO is a legal association, the members of which are the National Standards Bodies (NSBs) of some 160 countries (organizations representing social and economic interests at the international level), supported by a Central Secretariat based in Geneva, Switzerland.

The principal deliverable of ISO is the International Standard.

An International Standard embodies the essential principles of global openness and transparency, consensus and technical coherence. These are safeguarded through its development in an ISO Technical Committee (ISO/TC), representative of all interested parties, supported by a public comment phase (the ISO Technical Enquiry). ISO and its Technical Committees are also able to offer the ISO Technical Specification (ISO/TS), the ISO Public Available Specification (ISO/PAS) and the ISO Technical Report (ISO/TR) as solutions to market needs. These ISO products represent lower levels of consensus and have therefore not the same status as an International Standard.

ISO offers also the International Workshop Agreement (IWA) as a deliverable which aims to bridge the gap between the activities of consortia and the formal process of standardization represented by ISO and its national members. An important distinction is that the IWA is developed by ISO workshops and fora, comprising only participants with direct interest, and so it is not accorded the status of an International Standard.

## **2 BUSINESS ENVIRONMENT OF THE ISO/TC**

### ***2.1 Description of the Business Environment***

The following political, economic, technical, regulatory, legal and social dynamics describe the business environment of the industry sector, products, materials, disciplines or practices related to the scope of this ISO/TC, and they may significantly influence how the relevant standards development processes are conducted and the content of the resulting standards:

Facility Management is a wide ranging and dynamic business discipline and, in conjunction with other pursuits, is potentially the foremost contributor to a more productive, user friendly and sustainable built environment/workplace for all. The management of our built environment/workplace encompasses the communities' social, economic, environmental, legal, technological and functional requirements as they contribute to our quality of life

The business environment to which Facility Management applies is wide ranging and dynamic. It encompasses the built environment as a whole as well as the social, environmental, legal and technical requirements of the multiple stakeholder groups that utilize or are affected by the use of such an environment.

Therefore, the scope of this ISO TC has the potential to touch and influence almost every aspect of working, social and economic activities in almost every environment.

As a result, it is not only important that this ISO TC is aware of and fully understands the activities elsewhere within ISO relating to the built environment, but likewise that those TC's are aware of ISO TC 267.

It is also important that the TC itself carefully selects and prioritizes its activities commensurate with the support it receives from the registered P members to ensure that it makes best use of such resources.

Facility Management, as opposed to facility services, is a professional discipline which, whilst being the 'new kid on the block' in terms of the built environment and management professions, it has the potential to make a direct and significant contribution to commerce, industry, government and the community. It can make a significant contribution to the financial, operational, employment and environmental efficiencies and effectiveness of each and every organization irrespective of the sector and purpose. It is the only discipline that can adequately represent and collectively support the organization it serves in a holistic and efficient manner. Without FM the silos of specialisms (health & safety, security, maintenance, asset management, etc.) will develop in isolation and not necessarily in a

cohesive and consistent manner supporting the goals and objectives of the organization. It is the only discipline that can take 'total ownership' of the support services that every organization needs.

The Facility Management profession has a direct impact on the quality of life, health, safety, productivity and wellbeing of every individual that works and/ or lives in and around buildings and infrastructure. It also plays a role in the security and wellbeing of people around the world.

To do so there is a need to establish International Standards that will enable the sector to evolve in a coherent and coordinated manner. Therefore, the objective of ISO TC 267 is to make a valid contribution to this process, at a strategic level, in a manner that will be acceptable and relevant to all ISO member nations and beyond.

## ***2.2 Quantitative Indicators of the Business Environment***

The following list of quantitative indicators describes the business environment to provide adequate information to support actions of the ISO/TC:

The quantitative indicators, regarding the development of Facility Management as a professional discipline, include an understanding of the basis of acceptance within different countries and regions. This can be measured in a variety of ways including but not limited to the following:

- Government acknowledgement of the size and impact of the profession on securing health and wellbeing of people
- Government acknowledgement of the sector and data capture relevant to economic impact, benefits and influence
- Government, industry and commerce organizational structure relating to the planning, management and operation of its built environment assets
- Education recognition and availability of recognized qualifications
- Recognized sector employment scale and contribution
- Number of associations emerging worldwide to attempt to provide a platform for the discipline to emerge and become recognized
- Research into the sector and its growing influence in various markets worldwide
- Balance sheet value of activities and responsibilities under the control and stewardship of the Facility Management team
- Increased innovation in Facility Management service delivery to address relevant social, safety, health or environmental concerns such as the use of emerging technologies
- Growth of Facility Management research, education and training recognising the diverse global challenges
- Regulatory reform in terms harmonisation and greater consistency of compliance requirements across jurisdictions
- Greater emphasis on sustainability in services procurement and supply chain management
- Enhanced standardisation of terminology and performance benchmarking protocols for new and existing facilities
- Adoption or use of the guidance standards

### **3 BENEFITS EXPECTED FROM THE WORK OF THE ISO/TC**

As a maturing professional discipline - as well as the discipline that offers most potential to influence the economic, social and environmental agendas currently in vogue - there is a need for leadership to assist and enable those within the sector to have access to standards that are relevant and that will assist them in both understanding as well as delivering the value proposition that is offered.

Such standards will be a significant asset in developing awareness of governmental and business leaders to the potential that exists and the significant contribution that is available through a Facility Management approach to their organization's efficiency and cost-effective operation in the long term and to the stakeholder communities understanding of the importance of Facility Management to their everyday health and wellbeing.

The Facility Management discipline, more than any other, has the potential to manage and implement environmentally sustainable strategies ensuring that a valid contribution is made to the local, regional, national and global environmental challenges currently facing us. It is the discipline that touches and affects every part of every organization from the infrastructure, working environment, aesthetics, environment and ultimately effectiveness and efficiency of the demand organization and all those who work within it.

Facility Management is the strategic and tactical basis which will rely upon, direct and coordinate the many specialisms associated with the built environment, as well as psychological aspects of performance and wellbeing.

It is the foundation on which all sound organizational goals are achieved.

It is the catalyst, and facilitator that brings together all the support functions and disciplines to ensure that the quality and quantity of what is delivered is doing so in support of organizational and stakeholder needs.

It is the management discipline that proactively supports the forward planning and resourcing of the stakeholders that it serves. When adopted in a practical sense, it will directly affect safety, reliability, productivity, sustainability, ecology and maintainability of the environment and society in general.

Many other ISO standards are expected to be cited within any standards associated with ISO TC 267 as they will represent the specialisms mentioned above. Together they will form part of the requirements under a Facility Management umbrella and have a direct impact on the ability of a Facility Management regime to succeed.

### **4 REPRESENTATIONS AND PARTICIPATION IN THE ISO/TC**

**4.1** Currently 45 countries/ISO members bodies are P and O members of the ISO committee.

#### ***4.2 Analysis of the participation***

We recognize that Europe, to a degree, has done much to lead the development of standards in Facility Management as demonstrated by the output of the initial seven standards via CEN TC 348. However, the discipline itself has been evolving on parallel paths in the Americas and Asia for an equal period of time and much has been done to influence and develop standards albeit not in the formal sense as per CEN or ISO.

Educational offerings and university degree programs are also on parallel paths of development across the globe. Encompassing the needs of industry to be consistently addressed by academia will be important in the discussions through participation in ISO TC 267 meetings.

It is therefore essential that ISO TC 267 has a key objective to develop international standards that encompass the thinking and development work done elsewhere worldwide to create a genuinely internationally applicable suite of Standards.

It is considered equally important that emerging countries fully participate to bring a fresh perspective to the work done over the past 30 years by the countries mentioned above. Whilst the registered P Members on the committee provide an ideal mix, their full participation is the main challenge in order to influence the work and ensure the ultimate outcome is relevant to their countries, economies and professionals who are striving to deliver value to the organizations they serve.

The committee will therefore ensure that geographical distance is not the barrier to participation and that all P Member countries will be proactively encouraged to participate in the plenary TC as well as the working group meetings. Named individuals will be sought to enable us to do so.

## **5 OBJECTIVES OF THE ISO/TC AND STRATEGIES FOR THEIR ACHIEVEMENT**

### ***5.1 Defined objectives of the ISO/TC***

The overall objectives, as discussed and agreed in principle, is to complement the work being done at the NSB level to create strategic standards that can be recognized and contribute to the role that Facility Management has at the highest levels in government, industry, commerce and the community.

Initial interpretation under the guise of the SMART headings is considered as follows:

#### **Specific**

Develop standards that are strategic in nature and that communicate in a language and with data that is relevant to strategic decision makers within the numerous stakeholder environments that Facility Management has the potential to influence.

That every effort is made to ensure that the language and data used effectively communicates across borders and cultures with the variety of economically mature markets.

#### **Measureable**

Proactively communicate awareness and the activities of the TC driven by the Communications Advisory Group now established as an active group within the TC.

Create documents that fill the gap in understanding or awareness of the strategic importance of Facility Management as a professional discipline.

Highlight and position Facility Management as the strategic discipline responsible for the efficient and effective management and operation of significant aspects of the economic wellbeing to the economies and organizations served.

Achieve executive endorsement that the outcome produced aids in the understanding and significance of Facility Management as a specific professional discipline within the built environment and management sectors.

#### **Achievable**

The specific objectives articulated above will only be achieved if we secure the support and participation of countries on every continent in the world. Enact a communications strategy that will ensure that we proactively reach out to those NSB's who have declared an interest.

That we welcome and build upon all standards work that has been done across the Globe; for example, the Australian Facility Management Action Agenda initiative.

The continued growth in TC membership from all continents is to be encouraged to ensure that we achieve a mix of experience from mature markets alongside more less mature markets. It is also essential that the committee reflect the new generation of facilities professionals who are emerging alongside those more experienced to ensure that the output from the committee represents today's experience and fresh thinking.

### **Results Oriented**

New strategic standards work items collated for discussion and debate at plenary meetings.

### **Timely**

The Roadmap Advisory Group will continuously propose new work items for consideration by the TC. It is considered business critical for the TC that this work is both continuous as well as proactive through engaging with the markets to better understand where our work can achieve greatest impact to the wellbeing of people, communities, as well as industry, commerce and governments.

Develop a full complement of representation across all P member bodies ensuring a collective and thorough representation of the profession worldwide to develop new work items.

### ***5.2 Identified strategies to achieve the ISO/TC's defined objectives***

Prioritization of our work will be driven from two key perspectives:

1. In relation to the identified needs of the participating countries, to develop standards that support the ongoing awareness and development of Facility Management as a strategic professional discipline.
2. Through the identification of the potential value we can offer at an executive and strategic level. Ensuring as we progress, that any planned output is relevant across the continents represented and ideas are articulated and communicated in an appropriate manner.

It is essential that plenary meetings take place annually as a minimum in order to build the expertise and develop relationships across the delegate community. It is equally important that we develop the capability of connecting via virtual technologies to enable all participating countries to engage irrespective of whatever part of the world physical meetings are held. Working group conveners must be carefully chosen to ensure that facilitator skills are the driver as opposed to Facility Management expertise in order to maximize the contribution of all delegates.

Initial working groups should meet face to face where possible until such times as there is stability and working relationships have been established. However, the ability to attend in person will not preclude representative involvement.

Ensure that plenary and working group meeting take place across all continents to encourage and enable maximum participation of all P Member Organizations.

When mature, working groups should utilize video/ conference calling mediums to maintain momentum and timely progress of the work items.

Ensure that we have appropriate liaisons with organizations within ISO that are active in relevant activities that sit within or alongside the potential Facility Management scope of activities regarding the built environment and professional management sectors.

Ensure that we establish external liaisons with organizations that can effectively contribute to the work of the TC from as wide a community as possible; to communicate out the work of the TC to those communities that we can potentially influence.

Research and input is required to inform the TC of the relevant measures and communications strategy that will best connect with the communities that we seek to influence. We need to ensure that we focus upon the needs and desires of the communities we serve as opposed to the Facility Management community per se.

**6 FACTORS AFFECTING COMPLETION AND IMPLEMENTATION OF THE ISO/TC WORK PROGRAMME**

We currently enjoy a positive indication of participation which includes a healthy mix of countries that represent mature Facility Management markets and those that are emerging. It is essential, however, that we ensure proactive participation.

Reach out to the business and public-sector communities to better understand the drivers that will enable us to make a valid contribution through the development of relevant International Standards.

Reach out to organizations that may be able to support our research requirements in a timely fashion.

Reach out to ISO as an organization or other relevant committees to inform and develop awareness of the various trade and regulatory restraints that we should take cognizance of during the development of International Standards.

**7 STRUCTURE, CURRENT PROJECTS AND PUBLICATIONS OF THE ISO/TC**

This section gives an overview of the ISO/TC’s current structure, scope of the ISO/TCs and our existing advisory groups and information on existing and planned standardization projects.

**7.1 Structure of the ISO committee**



The current working groups reflect the current NWIP's that have been approved. It is anticipated that further NWIP's will be proposed as an output from the permanent AG1 Roadmap Group.

### ***7.2 Projects of the ISO technical committee and its subcommittees***

**AG1 – ISO TC 267 Roadmap Advisory Group**

**AG2 – Communications Advisory Group**

**WG1 – ISO 41011: 2017** Facility Management – Vocabulary ***Published***

**WG1 – ISO 41013: 2017** Facility Management - Scope, key concepts and benefits ***Published***

**WG2 – ISO 41012: 2017** Facility Management - Guidance on strategic sourcing and the development of agreements ***Published***

**WG3 – ISO 41001: 2018** Facility Management - Management systems -- Requirements with guidance for use ***Published***

**WG4 – ISO 41014** Facility Management -- Development of Facility Management Strategy

**WG5 – ISO 41015** Facility management -- Influencing behaviours for improved facility outcomes and user experience