

# Annual Review 2021



# Our vision, mission and values

## Our vision

As the pioneering workplace and facilities management body, our vision is to drive change for the future. To be the trusted voice of a distinct profession recognised, beyond the built environment, for its ability to enable people to transform organisations and their performance.

## Our mission

We empower and enable workplace and facilities professionals to upskill and reach their full potential and have a rewarding, impactful career. Together we create the conditions for the profession to thrive through leading edge thinking, sharing best practice and upskilling our people.

## Our values

**Active and energetic**

We're full of energy and passion; ready to influence and inspire.

**Confident and bold**

We use self-assured language that is straightforward, accessible and inclusive.

**Knowledgeable and in sync**

We speak with calm authority; we are totally in tune with what's going on today.

**Human and inspiring**

We use expressive language; our words create a positive, productive world enriched with opportunity and potential.



## Our strategic aims

- 1 To be the recognised trusted voice of a distinct profession.
- 2 First choice destination for workplace and facilities management research, information, and debate.
- 3 To foster a vibrant, accessible, engaged community for peer to peer learning, sharing best practice and networking.
- 4 To be the first choice development partner for individuals and organisations.

# Contents

2	Outgoing Chair's message	40-45	<b>Aim 3:</b> to foster a vibrant, accessible, engaged community for peer to peer learning, sharing best practice and networking
3	Chair's message	46-51	<b>Aim 4:</b> to be the first choice development partner for individuals and organisations
4	CEO's summary	52	Board members
5	Driving EDI in our profession	53	Members' Council
6-7	2021 year in review	54	Financial summary
8-13	<b>Aim 1:</b> to be the recognised trusted voice of a distinct profession	56	Purpose, aspirations and priorities for 2022
14-39	<b>Aim 2:</b> the first choice destination for workplace and facilities management research, information, and debate		



# Outgoing Chair's message



'If we can fully harness the power of our volunteers, nothing can stop us.'



Leading our Institute during a global pandemic has been one of the biggest challenges of my professional career and was a truly humbling experience.

Reflecting on my tenure, I am confident and optimistic for the future of our Institute. I draw confidence from how we responded to immense challenges and embraced digital member-centric solutions. Optimism is borne from knowing that the CEO and I, with support of the Board, volunteers, and colleagues, laid strong foundations for growth and capitalising on post-pandemic workplace opportunities.

This sense of confidence and optimism increases knowing the baton of IWFM Chair has landed in the very capable hands of Mark Whittaker. I have worked closely with Mark during the transition and am convinced he will be an immense asset to IWFM and the profession and will continue to drive cohesion and success.

Throughout my time as Chair, one of my passions was focusing on meeting members' needs and I'm proud of the progress we've made in this area, together, through the Communities Review. This initiative, which began in 2019, has resulted in meaningful changes which place members at the heart of the Institute and provide them with a say in IWFM's strategy.

One of my final acts as Chair was to represent the Board at the 2021 AGM as members voted to have a Members' Council representative on the Board. Active members now have a voice in decision making and I am delighted by how we have strengthened governance and improved the cohesion between the Board, Executive team, and the Committee Chairs.

I want our members to feel like they belong, whatever their background, which is why I've been committed to driving equity, diversity and inclusion (EDI). The response from members wanting to be involved with the new focus group where we will form our EDI policy was hugely encouraging.

For my part, I was delighted to be voted to be retained on the Board for the next two years as a co-opted Non-Executive Director. The experience of serving our Institute has emphasised to me personally the importance of our profession and the impact each one of us can make.

As we look to the future in a world full of volatility, uncertainty, complexity and ambiguity, we can be confident and excited in what IWFM can achieve. If we can fully harness the power of our volunteer members, nothing can stop us. Please ask yourself, 'How can I get involved and support us on this journey?'

**Martin G Bell**  
Chair  
July 2019 – July 2021

# Chair's message



'The positive impact of IWFM's 'community' of professionals should never be underestimated.'



Since first contact with the Institute at a North Region event in 2009, it was humbling to become Chair last October and to follow the successful tenures of my predecessors. Just as they had to steer the Institute through challenging circumstances and considerable change - including prolonged Brexit uncertainty, COVID-19, and our transition to a modern professional body - I know that effective Chairship will be crucial in how IWFM navigates the next inevitable set of challenges.

I mention previous Chairs because I believe that providing a sense of continuity is critical to IWFM's future. 'Continuity' is one of 'five Cs' that I am using to guide my priorities throughout my tenure. The others are community, communication, chartership, and character.

The positive impact of IWFM's 'community' of professionals, who volunteer to support their peers in our regional, special interest, focus and working groups, should never be underestimated. It is therefore critical that their relationship with IWFM is as strong as possible, and I am 100% committed to seeing through the recommendations that have emerged from the Communities Review.

Communication is so important to me. I have worked hard over the years to develop a high profile within the profession, which I have used both to encourage (and sometimes challenge) my peers. I hope you'll have seen - in person, on social or via one of my monthly updates to community group Chairs - that I've been proactive, using the profile given to me as Chair to amplify my engagement with fellow workplace and facilities professionals, whether they are members of IWFM or not.

In terms of 'character', I am guided by my Christian faith. Honesty and integrity are personal values that are crucial in my role as Chair; treating others with openness, kindness and respect will be equally important.

Chartership remains an ambition for the Institute, as you all know. Progress towards it has been hindered by the pandemic, but the desire to be a Chartered body endures. I am very keen to support IWFM in making tangible progress, in terms of professional development, financial stability and continuing to demonstrate this profession's contribution to society.

I could almost add a sixth 'C' because a key focus of mine is Career of Choice. Just before the pandemic, I volunteered to run two workshops at a school near to where I live. I've been encouraging participation from others; not only to benefit from the rewarding experience but to plant a seed of a fulfilling career in workplace and facilities management with young people. This will also be a crucial means to improving diversity and inclusion in our profession.

**Mark Whittaker**  
Chair



# CEO's summary



'Due to your support, there has been plenty for the profession and your Institute to celebrate during challenging times.'



Just as it was for societies, economies and industries around the world, 2021 was another demanding year for the Institute with uncertainty and challenges continuing throughout; all the while, the vaccine rollout promised eventually to bring an end to the social distancing measures that kept so many safe, and finally bring us all together again.

With a widespread sense that the COVID-19 crisis had highlighted the value that workplace and facilities professionals add in organisations, 'emerging stronger' became a theme of the year, from World FM Day in May to our Conference in September.

After an unprecedentedly tough 2020, IWFM too began to recover as external factors changed and confidence crept back, reflected in a better financial outturn. After a year that spared no membership organisation<sup>1</sup>, a higher proportion of members stayed with us and professionalisation continued as more new members joined and more upgraded at assessed grades. CPD uptake continued at healthy rates as members took up training and came together again with physical events. Our role as business enabler and partner was further consolidated as more partners and sponsors worked with us, seeking the cachet of aligning with our brand and collaborating on important work to inform and advance the profession.

In recognition of the key role members and volunteers play in our Institute, the Communities Review, which you can learn more about in this document, put members centre stage of IWFM, giving you more say in how your Institute serves you, not least through stronger governance and devolved autonomy.

Members' views, through Members' Council Chair Jason Cousins, are represented on the Board and in setting our strategic direction. Connecting with that Review's recommendations, we began a deep dive into our customer value proposition.

Nothing we do would be possible without the continued support of our members, including the volunteers who support the Institute's work in crucial ways.

Due to your support, there has been plenty for the profession and your Institute to celebrate during challenging times, and I cannot express enough how grateful I am.

Thank you to our members and our partners for choosing to be with us. From focusing on ways to achieve net zero to the future of work, there are numerous opportunities for the workplace and facilities profession to make differences which will impact many; and IWFM will be your most stalwart advocate, supporter and friend throughout.

**Linda Hausmanis**  
Chief Executive

<sup>1</sup> PARN, 2022



## Driving EDI in our profession

In November, we made a Public Statement outlining IWFM's policy, ambition and commitment to improving EDI practices within the Institute, our membership, and across the workplace and facilities management profession.

Ensuring that we are a diverse and inclusive organisation will allow us to strengthen our ability to support our members and raise their voice, both individually and collectively, on a wide variety of matters. In future it will permit us to better respond to, and influence effectively on, key issues affecting our members' working lives.

Diversity expands the talent pool, adds perspective, and enriches thought, innovation and influence, allowing everyone to flourish and progress without needing to conform. Our profession, as an enabler of organisational performance, its workplace and its people, should have a particular interest in embedding EDI in its DNA, given its wide reach and impact and the diverse frontline workforce that helps to deliver its outcomes.

The Statement is the result of extensive research, planning and engagement on this important topic, including the establishment of a volunteer EDI Focus Group who helped to finalise the document.

Alongside the statement we launched a new EDI webpage detailing the rationale and motivation for this initiative and some of the core activity that is and will be undertaken over the coming months and years. It includes an explanation of how and why we will collect, analyse and use data to help us identify 'what good looks like' and to overcome the barriers to greater diversity and inclusion across the sector. There are also details about the members of the EDI Focus Group who are guiding and supporting our work in this area.

2021 further saw us laying some foundations for the future: weaving in EDI questions across our surveys; collaborating within the I&D of Professions Network, a group of professional bodies working together to improve our collective impact on inclusion and diversity; reviewing the Conference and Awards; and establishing some key priorities for moving forward in this area. The focus for 2021-2022 will be to understand the data and barriers better, understand where we will impact in a meaningful manner, and then how we move to break down those barriers.

# 2021 year in review

## JANUARY

- New look Facilitate magazine lands
- COVID-19 hub refreshed as pandemic endures
- Catering services 'checklist' launched in partnership with Fooditude
- Milestone uptake of IWFM Direct
- Sustainability Survey 2020 infographics on 'wellbeing' and 'social value'
- 'Compliance' guidance in partnership with Elogbooks
- Twenty-first IWFM Impact Awards with three new categories

## FEBRUARY

- IWFM marks National Apprenticeship Week with roundtable discussing opportunities
- IWFM Life Safety Working Group responds to White Paper on new Building Safety Regime for Wales
- IWFM joins BSI and BSRIA to launch revised Facilities Maintenance Management Standard
- 'Optimising workspaces' guidance note in partnership with Ricoh
- Communities Review receives initial volunteer feedback

## MARCH

- IWFM marks International Women's Day with personal FM stories
- Guidance on 'Harnessing the power of data' in partnership with Planon
- IWFM discusses Building Safety Manager role on Fire Protection Association podcast
- Impact and Experience 2020 Survey infographics
- Tickets release for IWFM Conference 2021

## APRIL

- Updates to Living Wage guidance in partnership with the Living Wage Foundation
- One-year anniversary of 'Navigating turbulent times' webinar series
- IWFM Market Outlook 2021 report
- IWFM's 'Returning to the workplace' research finds majority of UK employees expect a move to hybrid working

## MAY

- Chair Martin G Bell kicks off new collaborative process for the Communities Review
- IWFM Impact Awards 2021 entries reach five-year high
- CEO Linda Hausmanis keynote to Association of University Directors of Estates
- IWFM community celebrates World FM Day
- IWFM Impact Awards finalist ENGIE UK's Making Zero Carbon Happen project wins Gold at 2021 Global FM Awards

## JUNE

- 'Simplifying technology' guidance in partnership with Ricoh
- Life Safety Group responds to Home Office consultation on PEEPs in high-rise residential buildings
- Recognition programme helps longstanding MIWFM grade members access CIWFM
- NEC and IWFM launch NEC4 Facilities Management Contract (FMC)
- IWFM signs Construction Industry Council (CIC) 'Carbon Zero' Climate Action Plan
- CEO Linda Hausmanis shares IWFM 'Returning to the workplace' research at Memcom
- IWFM hosts future of work session at Security and Estate Management Conference

## JULY

- IWFM joins The Climate Group to discuss smart buildings for London Climate Action Week
- Pay and Prospects Survey 2021 report
- IWFM responds to government consultation on recycling
- IWFM gives evidence to the Low Pay Commission
- 'Customer Experience Team' puts members at heart of Institute and becomes 'Member and Customer Engagement Team'
- Guidance on creating 'Healthy buildings' in partnership with Trend Controls
- Building Safety Alliance launches
- Good Business Charter accredits IWFM for 'responsible business practices'

## AUGUST

- IWFM's Life Safety Working Group responds to BSM competence framework
- IWFM research on future of work receives national and regional coverage

## SEPTEMBER

- IWFM announces University of Bolton to deliver dedicated L6 FM Degree Apprenticeship
- Sustainability Survey 2021 Report
- Hybrid IWFM Conference helps profession to 'Emerge stronger'
- IWFM EDI Focus Group launches
- 'People management' good practice guide and toolkit by IWFM Customer Experience Working Group
- Hybrid AGM; Communities Review-generated resolution for permanent Members' Council seat on the Board approved

## OCTOBER

- Mark Whittaker becomes new IWFM Chair
- Members' Council Chair Jason Cousins inaugurated to Board
- Five collaborative workstreams start for Communities Review
- Twenty-first IWFM Impact Awards honours 15 winners
- 'An introduction to smart buildings' guidance in partnership with Elogbooks and IWFM Technology SIG
- Social value practice note for NEC4 FM Contract
- HMG guidance acknowledges Building Safety Alliance work on BSM competence framework

## NOVEMBER

- IWFM launches podcast series on wellbeing with Sodexo
- CEO Linda Hausmanis keynote at Workspace Design Show
- IWFM at COP26 with Build Better Now on building safety and sustainability
- EDI Public Statement outlines IWFM's policy, ambition and commitment
- 'Living Wage: why pay it and what does it mean for our profession' guidance updated
- NEC4 FMC Living Wage practice note
- Mark Griffiths becomes Chair of Judges for IWFM Impact Awards
- IWFM, Liverpool Business School and Workplace Unlimited launches the Return on Workplace Investment (ROWI) Tool

## DECEMBER

- IWFM supports government proposals to make flexible working the default
- IWFM argues for 'No more hot air' post-COP26



**Aim 1:** to be the recognised trusted voice of a distinct profession

# ‘Emerging stronger’ from IWFM Conference 2021

After almost two-and-a-half years, several lockdowns and one virtual Conference, IWFM returned to St Paul’s, London on Monday 13 September to help our profession with ‘Emerging stronger’ post-pandemic.

Aiding us were a curated blend of expert voices from inside and outside our profession to inform, guide and inspire delegates attending in person and online at the Institute’s first hybrid Conference.

Our three mega trends of climate action, technology and the future of work were served brilliantly by talks from Leo Johnson, Carl Benedikt Frey and the Rt Hon Camilla Cavendish; bookended by keynotes Deborah Frances-White and David Olusoga OBE. Breakout sessions enabled delegates to explore practical considerations with sessions from insight partners, collaborators and colleagues.



**Deborah Frances-White**

Opening keynote, comedian Deborah Frances-White, started us off by looking at diversity and inclusion (D&I) with a strong emphasis on belonging. Inclusion is only part of the battle, she argued, because a person can be included but won’t feel they belong without those who do belong making a concerted effort.



**Leo Johnson**

The first of our mega trend speakers was Leo Johnson, Head of Disruption Practice at PWC, who took on climate action in an engaging and very interactive session. Leo’s message was one of positivity as he highlighted that eco tech is booming and new solutions – from international legislation to IoT – are emerging all the time.

He closed with a story about a wine venture that almost went sour until a new acquaintance suggested using an Iranian sugar to salvage the unpalatable libation. The message: action between strangers drives innovation.



**Carl Benedikt Frey**

Technology mega trend speaker Carl Benedikt Frey, economic historian and Oxford Martin Citi Fellow at Oxford University, took us through history to look at the impacts of the second tech revolution we are currently living in. The rise of automation puts lower

skilled workers at greatest risk of their roles becoming obsolete, he said; they are also the roles that are less likely to be carried out remotely. However, uniquely human qualities that cannot be replicated by AI, like creativity and perception, will protect many roles. Similar to Leo Johnson, Carl argued that chance encounters bring innovation and mandatory office time was the best course to get the best out of workers.



**Rt Hon Camilla Cavendish**

Our third and final mega trend speaker was journalist Rt Hon Camilla Cavendish, who spoke about the future of work and the changing demographics of the UK workforce with people living longer and more people working later in life. Another proponent of people coming together for the best work to happen, Camilla said organisations should think about: when

people use offices to maximise time together; how to entice workers back to offices by capitalising on the fear of missing out; ensuring there is a divide between work and home; encouraging collaboration. Camilla also made the point that many people meet their partners at work – a path to love that would be lost without people coming together in the office.



**David Olusoga OBE**

Closing the day was historian David Olusoga OBE on diversity. Silence or inaction in the face of racism is complicity, he argued, while noting that ‘Something as random as skin colour impacts life chances’. Speaking to the mostly white audience, he urged them to ask themselves tough questions because only through reflection will we create the fair and equitable society people want.



**Aim 1:** to be the recognised trusted voice of a distinct profession

# Healthcare and sustainability dominate at IWFM Impact Awards 2021

It was the contribution of people and teams in health, wellbeing and sustainability that wowed the judges at the 2021 IWFM Impact Awards in October, as the industry's most prestigious event got physical again for the first time since 2019. Exemplars of the best in workplace and facilities management were celebrated at London's JW Marriott Grosvenor House where 15 amazing winners were honoured.



In a glittering ceremony hosted by comedian and TV regular Mark Watson, 63 finalists vied for the hotly competed categories with the winners reflecting the fundamental contribution that the workplace and facilities sector is making to contemporary challenges at every level, from front line care to smart innovation.

It was also an evening of change as new IWFM Chair Mark Whittaker paid tribute to outgoing Chair of Judges Julie Kortens, who stepped down after two years.

Julie is succeeded by longstanding lead judge Mark Griffiths.



‘The role of Chair of Judges is a crucial ambassadorial role for the Institute and its many demands require significant commitment. We are indebted to Julie for her outstanding service to our profession, in particular her role in safeguarding the robust standards of judging and ensuring that the IWFM Awards continues to be recognised as the gold standard within the industry.’

**IWFM Chair Mark Whittaker**



A selection of winners from 2021

## THE WINNERS

### Workplace Experience:

#### Office / Corporate Environment

Workplace Experience Programme, Sodexo and AstraZeneca Partnership

### Workplace Experience:

#### Non-office / Corporate Environment

Village, Sodexo

### Positive Climate Action

#### Sponsored by: NG Bailey

Plan Zero, Mitie

### Social Value

#### Sponsored by: 14forty

Jointforces, ISS Facility Services UK

### Wellbeing

#### Sponsored by: Thomson FM

Sodexo Counselling Service supports frontline wellbeing

### Diversity Initiative

#### Sponsored by: PRS Facilities

The Atalian Served Diversity Initiative

### Collaboration

#### Sponsored by: Kier Places

Permanent Joint Operating Bases, Infrastructure Service Provider (PJOB ISP) Cyprus, Gibraltar, Falkland Island and Ascension Islands, Mitie

### Product or Service Development

#### Sponsored by: Ascot Services

Paper Round partners with Vegware to launch a large-scale commercial compostables service

### Technology

#### Sponsored by: EMCOR UK

ISS ServicePoint - a technology solution for better patient care

### Team of the Year: Private Sector

#### Sponsored by: PTSG

Entertainment Team, Emaar Facilities Management

### Team of the Year: Non-private Sector

#### Sponsored by: PTSG

Royal Derby Hospital Portering Team, ISS Facility Services UK

### Newcomer of the Year

Alex Ballintine, Operations Manager, Mears Facilities Management

### Account Manager of the Year

Moses Ayoola, Business Director (Hard and Soft FM), Sodexo & Queen's Hospital, Romford

### Frontline Heroes (Organisation Award)

Merseyside team, VINCI Facilities

### Frontline Hero (Individual Award)

#### Sponsored by: ISS UK

Lucy MacNeill, a true community hero and inspiration within the FM industry



**Aim 1:** to be the recognised trusted voice of a distinct profession

# Raising our voice

## INFORMING NATIONAL DEBATES

We continued our work with PR agency Good Relations for a second year in 2021 to help raise the profile of workplace and facilities management as an influential and crucial profession, and position IWFM as a thought leader on some of the biggest topics affecting business and society.

The approach centred on four content-led tactics cross the year, with campaigns mainly focused on hybrid working and the future of work as employees and employers alike dealt with remote working under social distancing restrictions and gradual returns to shared spaces. This manifested as three further stages of our 'Returning to the workplace' time-series research and, ahead of COP26, a campaign based on the Sustainability Survey Report.

PR campaigns based on our time-series research secured 50 pieces of coverage in trade, regional and national outlets, including ITV, Evening Standard, the Mail and Metro, as well as live blogs in the Telegraph and The Guardian.

IWFM also carried out a smaller campaign, targeted at our sector, which secured wide trade coverage for our 2021 Sustainability Survey research and its finding of a worrying gap between action and intent on net zero commitments.

You will find further information on the research behind these campaigns on pages 20 and 22 respectively.

## Office life not up to the job

MOST workers now view the office as unnecessary and do not want to return, a study has found.

Since the first lockdown, the number who think workplace is pointless has risen from 51% to 63%.

The poll by the Institute of Workplace and Facilities Management found 44% plan to work in the office for three days a week.

Chris Moriarty, of the IWFM, made an appeal to employers to ensure "hybrid working" is an option for everyone.

## Workers will shun the office

By Rhiannon James

MORE workers think offices are now pointless and nearly half plan to spend just three days a week or less there, a study says.

Sixty-three per cent said the post-Covid workplace was no longer necessary.

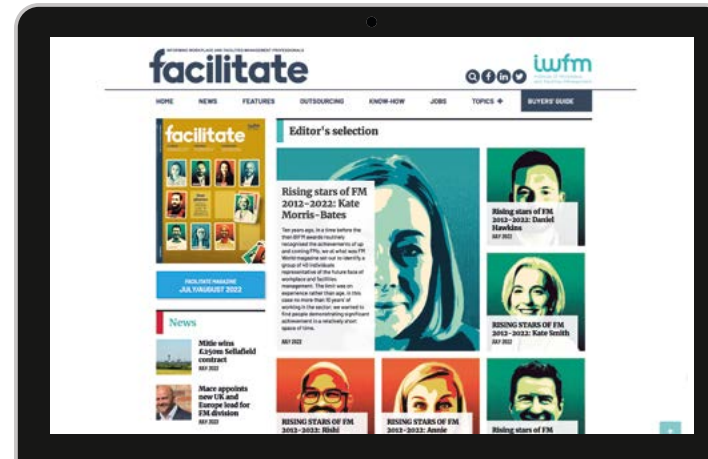
More than three quarters of 18 to 24 year olds said they were just as, if not more, productive working from home.

### Benefits

Chris Moriarty of the Institute of Workplace and Facilities Management, which carried out the study, said the young particularly preferred "hybrid working".

He added: "The benefits of the office have not been forgotten, yet we continue to become accustomed and comfortable with our home-working routines."

Meanwhile, two out of three said the jobs rollout made them happier about going back to offices, a survey by Aviva Found.



## FACILITATE MAGAZINE GOES DIGITAL

As the mass adoption of digital technology continued to spread, IWFM's award-winning title was rejuvenated in 2021 in a move designed to embrace these new opportunities and enable all members to access the magazine in full digital format, from wherever they are, via their IWFM account.

Meanwhile the Facilitate print edition, still available to members at assessed grades, evolved into a bi-monthly journal-style format geared towards higher quality content, including in-depth analysis and more thought-leadership.



## REPRESENTING OUR PROFESSION'S INTERESTS

IWFM representatives were visible on a range of platforms in 2021. As an example, CEO Linda Hausmanis spoke at:

- the Association of University Directors of Estates' flagship event, the AUDE Annual Conference, to provide a compelling overview of the findings from IWFM's 'Returning to the workplace' time-series research (which garnered some of the media coverage referenced opposite)
- Memcom Conference, where she joined an expert panel to discuss the future of work and the hybrid office
- the Workspace Design Show to make the case for 'the lynchpin profession' whose super-connector potential can really help organisations to achieve higher goals, including on sustainability and equity, diversity and inclusion (EDI)
- the NEC's virtual conference to help launch the NEC4 Facilities Management Contract (FMC), and to explain why the standardisation of FM contracts is so important.



**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate

# IWFM's Insight programme: supporting development, driving change

IWFM's Insight programme exists to inform and empower members, support their professional development, strengthen our voice for the profession, and provide us with the evidence to drive meaningful change on key areas where workplace and facilities management can make a difference.

Driven by our Policy and Research and Insight teams, the programme is informed, shaped and kept relevant by a diversity of expert stakeholders, from insight partners to volunteer members, whose contribution via SIGs and Working Groups, as well as Regions, is vital to its success.

To help us enhance the offering, we continued our work with specialist agency b2b partnerships Ltd to nurture strategic relationships with leading innovative brands. The partnerships programme serves our strategically important topics and helps us to maintain up to date guidance and best practice in other areas important to members, such as safety and compliance.

Over the next several pages, we will cover Insight highlights from our main strategic themes – data and technology, the future of work, sustainability, wellbeing, and building safety; then, we will look at highlights from the broader programme.

## Insight highlights from: Data and technology

IWFM objective: to drive and update standards in this area; to centralise data as key to unlocking evidence-based decision making in driving organisational performance; and to build members' capability in this area.

### 'Harnessing the power of data' with Planon

Data plays a central role in modern life; we all use and rely on data in our jobs and daily lives, often without thinking about it. However, when compared with some other sectors, the workplace and facilities management sector is still relatively immature when it comes to understanding the value of data and implementing digital strategies for harnessing the power of data.

This guidance note, released in March, was created to provide members with a better understanding of the value data can bring to their work and the practical things they need to consider when trying to make better use of data. It draws on lessons and insights from organisations in other sectors and those who are at the forefront of harnessing data in our sector.

### 'Importance of data' survey and debate with IWFM International SIG

Building on the Planon-partnered guidance, IWFM and the International SIG followed up with the 'Importance of data' survey to gain sector insights into attitudes towards data, how organisations are benefiting from it and ongoing challenges.

The findings informed an ISIG Leaders' Forum debate framed around four topics: priorities for the facilities function, the links to the wider organisation, skills, and access to data points. A report resulting from the discussion was released in March 2022.

GUIDANCE NOTE  
Harnessing the power of data

PLANON  
WORKPLACE & FACILITIES MANAGEMENT

iwfm  
Institute of Workplace and Facilities Management

### Survey insights:

**43%**   
of respondents felt they had the data they needed at their fingertips.

**48%**   
of respondents felt the way they store and manage data means they have a single source of truth.

**48%**   
of respondents felt they can easily combine different sources of data when they need to.



**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate



#### **IWFM UAE Region talks data management**

The IWFM UAE Region hosted a webinar on 'Managing data, securely and effectively' in August, which discussed how data-centric activities differ across the sector: from innovation to risks, good practice guides to ISOs, plus changing methodologies in other countries. Host and IWFM UAE Region Chair David Carey was joined by an expert panel which included the Chairs of the IWFM Scotland Region and IWFM Technology SIG.

#### **IWFM Technology SIG informing the profession**

In May, the Technology SIG hosted a two-part webinar series on 'BIM data for FM systems'. Part one provided an introduction for FMs seeking to use BIM information to support an effective facilities and asset management strategy, hosted by the authors of the IWFM good practice guide of the same name. The second part, also featuring a panel of industry and technology experts, provided practical advice on the essential aspects of successfully planning and managing the transfer of BIM data into operational systems.

Then, in December, the SIG discussed 'The opportunities from a sustainable digital built environment' in a 'Navigating turbulent times' webinar. Panellists included technology giants, government digitisation leaders, FM leading practitioners, carbon experts and pioneering estate managers blending visionary insight and hands-on experience across an engaging session.

#### **'An introduction to smart buildings' with Elogbooks**

Developed with the IWFM Technology SIG, this guidance aims to help members understand what a smart building is, its purpose and value for workplace and facilities management, and how to create a smart buildings roadmap or strategy.



#### **Exploring smart ecosystems and digital transformation with Microsoft**

After IWFM and Microsoft worked together in 2020 on the report 'Bridging FM's Digital Divide' which highlighted the lack of digital skills in the industry, we teamed up again in 2021 to help individuals and organisations understand and navigate the world of workplace technology to create people-centred workplaces capable of driving better outcomes. Our work together, which will start to bear fruit in 2022, will see us host a roundtable on smart ecosystems, carry out 'living lab' case studies on digital transformation projects, and develop guidance to support facilities professionals in understanding and utilising data and technology in their roles.

#### **Integrated smart building technology with Verkada**

'Navigating turbulent times' welcomed content partner Verkada for a session that argued natively integrated video security, environmental sensors, intruder alarms, and access control is the next step to delivering on a vision of an operating system that powers modern buildings.

The webinar also included an introduction to all-in-one sensors for monitoring environmental changes across facilities and a live demonstration of how intruder alarms and access control integrates with a video security solution, providing users with real-time visibility into access-based events across their locations.



**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate

# Insight highlights from: Future of work

IWFM objective: to articulate the provenance of workplace and to highlight IWFM's authority and unique perspective on future of work matters; to shift the conversation from 'hybrid working' to workplace strategy; and to articulate where workplace and facilities management can make the biggest impact.

## 'Holy Grail' ROWI Tool could put value of profession beyond doubt

In November, five years since the Stoddart Review proved the existence of the workplace advantage and three years since the Institute added 'workplace' to its name as part of an initiative to reposition the facilities management profession, IWFM, Liverpool Business School and Workplace Unlimited released a prototype tool that could consign doubts about the return on workplace investment permanently to the past.

The Return on Workplace Investment, or ROWI Tool, is a calculator for determining the impact of workplace projects on organisational performance. It has been developed for use in high-level cost-benefit analysis assessments for new fit-out or refurbishment projects to factor in this additional value, so they no longer depend on cost alone.

After the launch, we invited organisations who are creating a new workplace or redesigning an existing one to come forward to beta test the Tool in 2022.



'Workplace and facilities professionals know their own worth, but until now the means of demonstrating their added value has been as elusive as the Holy Grail. The tool's publication is an important step to settle doubts about their strategic impact once and for all and to show organisations the true impact that this professional community contributes.'

**IWFM CEO Linda Hausmanis**



## 'Creating better workplaces' with Ricoh

Earlier in the year we published the seventh and eighth guidance notes of our 'Creating better workplaces' guidance suite developed in partnership with Ricoh.

'Optimising workspaces' explores what future changes in working practices could mean for the corporate workspaces most organisations inhabit – specifically offices. In short, it's about how organisations can make optimal use of their workspaces in service of individual and organisational performance.

Next was 'Simplifying technology' which aims to help organisations make the successful transition to hybrid and other forms of flexible working where some people work remotely. With many organisations indicating they intend to shift to hybrid working post-pandemic, 'Simplifying technology' looks at how technology can be used to enable this, so that working in a more hybrid way becomes a seamless experience.





**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate

## IWFM RESEARCHES THE FUTURE OF WORK

After investigating attitudes towards and experiences of remote working in time-series research in April and June 2020, we continued the project in 2021 with three further national surveys to thousands of UK-based office workers. IWFM's take on the findings was that as we move into new modes of working, businesses must adapt physical spaces, working culture and supporting technologies. We used the research to underline the need for businesses to use their workplace and facilities managers to review their entire workplace strategies, refreshing them in relation to the learnings of the pandemic.



### IWFM finds majority of UK employees expect a move to hybrid working...

The first survey, commissioned in March, found that the vast majority of employees expect a level of 'hybrid' working in the future – with nearly half (44%) of the workforce planning to work from the office for three days or fewer a week. The findings also revealed that 63% of employees now believe the office to be unnecessary – a rise of a fifth since the first lockdown (51%).

Demand for hybrid working was particularly prevalent in younger demographics. Two-thirds (66%) of 18-24-year-olds admitted that not being offered flexible work patterns would cause them to look for a new job. Yet worryingly, more than a third (38%) of this demographic feel their employer is pressuring them to return to the office – risking losing new talent.

On the back of these findings, IWFM issued a national PR campaign that called on employers to ensure that hybrid working is accessible for all; providing adequate choice and support for employees to perform their role from multiple locations, to avoid losing younger workers to competitors.



### ... returning workers are frustrated by office inadequacies

The second national survey, commissioned in June, found that a majority of those who worked from home during the pandemic had experienced at least one day back in the office and the return had left most frustrated, with many struggling to adjust to the new realities of office life, from background noise to inadequate video conferencing facilities.

There were intriguing regional differences in responses which attracted an abundance of regional media coverage, but in terms of the overall results (which achieved wide national and trade media coverage), we found that half (48%) of those returning to offices suffered from a lack of breakout spaces, and a similar proportion (50%) felt more needed to be done to support hybrid working.

We also found that half (48%) believed they're more productive working from home, with the majority (59%) of 18-34 year olds keen to work regularly from the office, in contrast to just 38% of those over 55. Younger workers were also more likely to feel pressure from their employers to work regularly from the office. 54% of those under 34 were expected to work from the office most of the time, in contrast to 48% of 35-54 year olds and 47% of over 55s.



### ... and a wellbeing timebomb

In December, IWFM commissioned a third survey which found most office workers (73%) who took a break over Christmas were content or excited to return to the office in January. Over a quarter (27%) were not looking forward to their first day back. Overall, just 16% of office workers expected to stick with majority home working after restrictions were lifted.

In national media coverage, IWFM warned employers they owe a legal duty of care to protect the health, safety and welfare of all their teams working at home as 20% reported that their health had suffered in 2021 as a result of working from home. The findings also showed 33% complained that their employers had failed to equip them to work effectively from home, while 15% saw their productivity decline in 2021.

### IWFM supports government's flexible working proposals

Following engagement with IWFM members, the Institute responded to a government consultation on reforming flexible working regulations.

The submission, developed by the Policy team on the basis of input by several SIGs, supported the Government's key proposal to make flexible working the default, giving employees the right to request flexible working arrangements from day one in a job.

Recognising that there is no 'one size fits all' solution, we pointed out that flexible working arrangements benefit both employees and employers by opening up job opportunities, fostering a more diverse and inclusive workforce, improving staff wellbeing, and increasing motivation and productivity.

We also advocated for employers to liaise with their workplace and facilities management teams on issues such as space management and security when considering flexible working requests, highlighting the role of data and technology in making and implementing decisions.

**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate

# Insight highlights from: Sustainability

Our objective: to give members the tools to close the intent-action gap in the areas of holistic sustainability strategy, data and skills; to enable IWFM to walk the talk; and to embed EDI in our membership and the wider profession.



**Sustainability Survey 2021 with Inenco exposes gap between action and intent**  
Human activity is changing our climate in unprecedented and possibly irreversible ways. This is what the 2021 IPCC report stated, with the UN Secretary General referencing it as ‘a code red for humanity’. Buildings and the way they are used can play a huge role in mitigating the climate emergency. Workplace and facilities managers are the lynchpin in organisations to drive the crucial outcomes.

Over 310 workplace and facilities management professionals responded to the 2021 Survey and a clear trend that emerged is a gap between intent and action. From the data we have, there appears to be lacking a holistic, long-term approach in organisations to determining and delivering the outcomes that meaningful sustainability action requires. Concerted action is needed to deliver in this area and for our members to be in a position to deliver on the role they are best placed to take.

The challenges are many: a lack of data; multiple methodologies; questionable carbon calculations; a shortage of the right skills; perhaps a lack of serious intent.

We need to collaborate with expert members and partners alike to empower facilities professionals to be the agents for change that they can and must become. The Institute, too, needs to reflect the importance of sustainability within our professional standards, so that we can better provide associated upskilling tools and guidance.

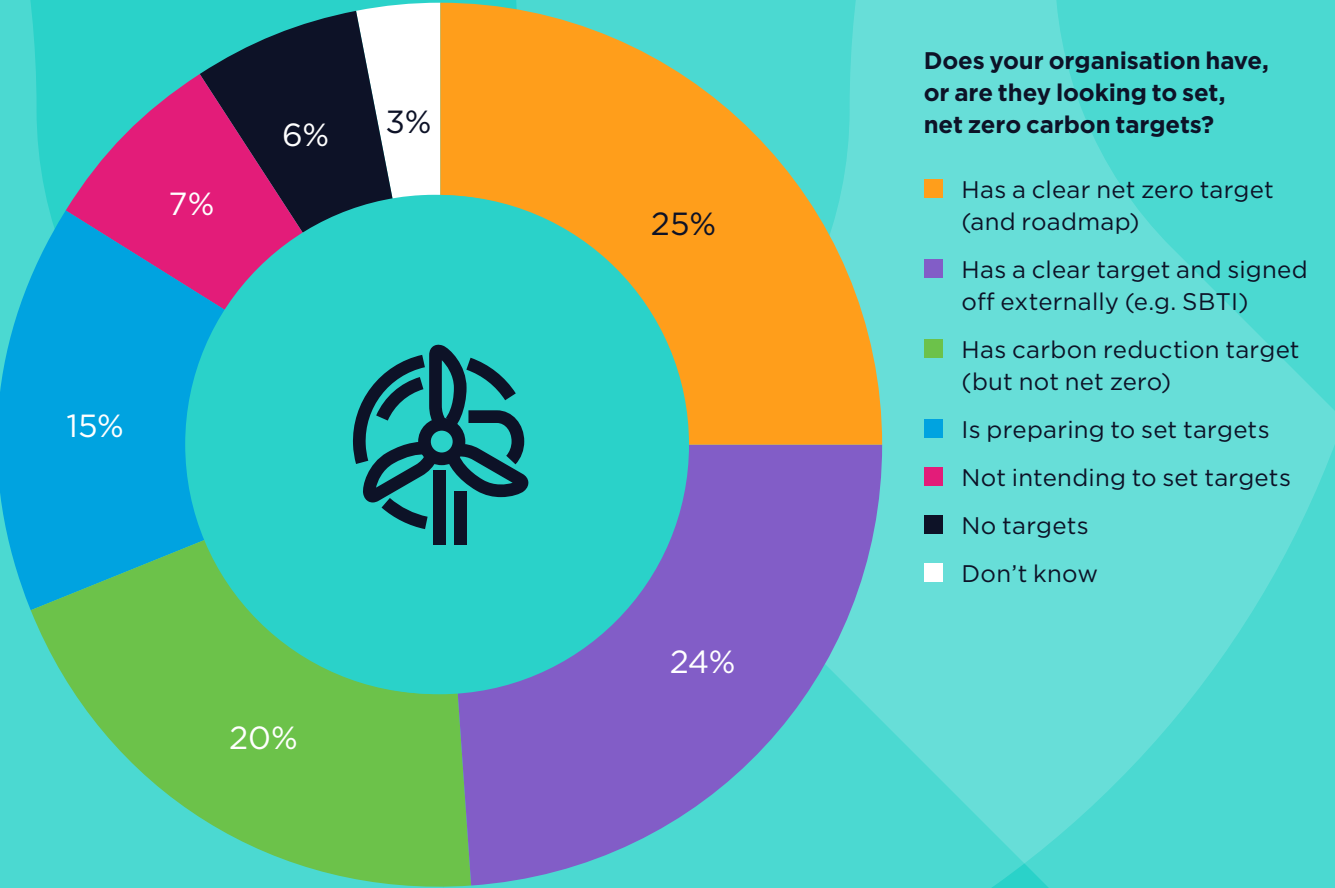
**CIC Climate Action plan**  
June saw IWFM sign the Construction Industry Council’s (CIC) ‘Carbon Zero’ Climate Action Plan.

The Carbon Zero Plan initiative, chaired by Stephen Hodder MBE, is a concerted effort by a diverse group of professional institutions and organisations in the construction and property industries, covering both the natural and built environments, convened by CIC.

The actions in the Carbon Zero plan will prepare natural and built environments, and the professionals who manage them, for making the long-discussed transition to becoming effective and digitally enabled, able to deliver on the challenges and obligations ahead.

**Scope 3 emissions**  
Through workshops, peer reviewing and steering advice, IWFM supported the Sustainable FM Index (SMFI) and BAM FM on the ongoing development of a framework for Scope 3 emissions in FM. Scope 3 includes indirect emissions that occur in a company’s value chain; and IWFM believes it is critical to gain a better understanding of carbon emissions in the industry, both from an in-house FM and an outsourced provider perspective, with a view of mitigating them.

IWFM contributed to a report titled ‘Scope 3 Emissions in FM – Setting the Foundations for Net Zero’, which was released by SFMI and BAM FM in Q4. A second report will follow in 2022 incorporating feedback from the first, which will deliver a methodology for measuring FM’s Scope 3 emissions.





**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate

#### **Energy efficiency: NABERS UK National Steering Committee**

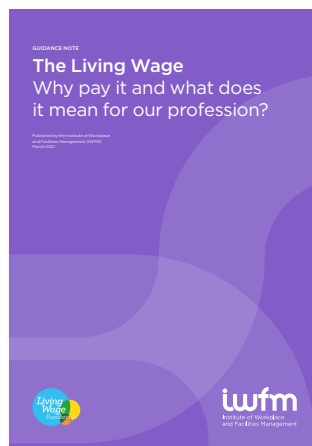
IWFM, represented by David Hemming, CEO at CETEC, joined the NABERS UK National Steering Committee in the summer, where we are responsible for providing feedback and advice to BRE Group, as Scheme Administrators, to ensure NABERS UK delivers against the needs of the commercial real estate industry. IWFM, along with other stakeholders represented within the Committee, will serve for three years and as one of the only bodies with a single focus on the occupation phase, our main ambition is to help provide the occupation use perspective, which is often omitted in favour of the real estate perspective.

#### **COP26**

Head of Policy Sofie Hooper joined a panel discussion, hosted by Build Better Now, called 'Safe, sustainable and healthy – the relationship between building safety reform, sustainability and wellbeing' to discuss how the building safety agenda should interact with the sustainability agenda.

#### **NEC practice notes on social value and the Living Wage**

In October, the first in a series of practice notes to support users of the new NEC4 Facilities Management Contract (FMC) was published by NEC in partnership with IWFM and the Social Value Portal.



This practice note focuses on including social value in the FMC, setting out the principles and purpose of social value using the National Themes, Outcome and Measurement (TOMs) methodology, for which IWFM and the Social Value Portal developed the dedicated FM Plug In. It also explains how the social value requirements would be incorporated into the Scope and Performance Table in an NEC FM contract.

In November, IWFM and NEC jointly published the second practice note on incorporating the Living Wage in the new NEC4 Facilities Management Contract.

The guidance highlights the importance of paying the Living Wage throughout the supply chain in FM contracts, explains how it would be implemented in the FMC, and outlines the differences between the Living Wage and the lower statutory wage rates. It is particularly appropriate for contracts which include the provision of 'soft services' such as cleaning and security. Improving pay not only supports individuals and their families; it has also been shown to benefit an organisation's bottom line, as well as local communities. Find out more about the NEC4 FMC on page 31.

#### **Giving evidence to the LPC**

In July, IWFM submitted evidence to the Low Pay Commission (LPC), the independent body which advises government on the levels of the National Living Wage (NLW) and the National Minimum Wage (NMW).

IWFM took part in an oral evidence session with LPC Commissioners to provide an overview of the workplace and facilities management profession, its contribution to the UK economy – notably in keeping people and workplaces healthy and safe during the pandemic – and the practices and policies which impact on its members. We also spoke about how the FM sector responds to the NMW/NLW rates and some of the challenges it faces in the wider environment.

IWFM also submitted a detailed written response to the consultation, looking at the impacts of the pandemic on business conditions in the sector, in particular on employment and hours, pay and benefits, and the prospects for economic recovery.

This was the fifth year that IWFM took part in this annual consultation which will shape the LPC's recommendations (invariably accepted by the Government) on the minimum wage rates to apply from the following April.





**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate

# Insight highlights from: Wellbeing

Our objective: to position workplace and facilities management as having a clear impact on the wellbeing levers of employment, health and the environment/ space of people and building.

## IWFM Podcasts: Wellbeing with Sodexo

Between improving awareness around physical and mental health and the impacts of the mass home-working experiment brought on by the pandemic, workplace wellbeing has never been higher on the workplace and facilities management agenda. It is, however, a broad and dense topic which takes time to explore in depth.

It was no surprise, then, that it became the focus of IWFM's first-ever mini-series of podcasts – a digital channel that affords us the time and space to take a deep dive into the subject with multiple leading minds per episode.

Across four fortnightly episodes of expert views, challenging thinking and practical experiences, we introduced workplace wellbeing with a wide lens view of the topic before unpicking the cultural, spatial and technological considerations of this important contemporary issue.

### Episode one: The wellbeing prerogative

Wellbeing's emergence as a core consideration of organisations.

### Episode two: Space to thrive

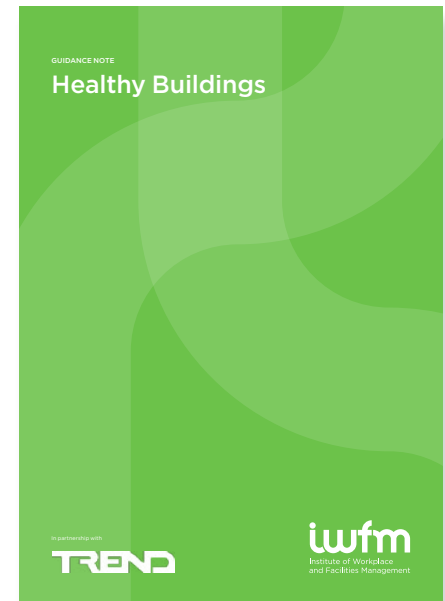
Wellbeing and the physical environment.

### Episode three: The cultural connection

Adapting workplace culture to remove negative factors and ensure work supports good mental health.

### Episode four: Digitising our wellbeing

The role of data and tech in supporting wellbeing, and the ethical implications.



## Creating 'Healthy buildings' with Trend Controls

Improved air quality and ventilation strategies in the built environment has become a high in recent times. This guidance note, developed in partnership with Trend Controls, was created to help workplace and facilities professionals understand systems and processes to minimise the impact of the spread of pathogens and contaminants, thereby enhancing the health of the buildings they oversee. The guidance is straightforward on the use of techniques and technology, irrespective of budgetary or operational requirements, by optimising the premises and associated building services to maintain as healthy and safe environment as possible for occupants.

## Extinguishing burnout

Vicky O'Farrell, Managing Director of Motivational Voice Ltd, appeared on 'Navigating turbulent times' in April to take us through how to spot the warning signs of burnout in different DiSC personality profiles, and the steps to take to stop burnout in its tracks.



**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate

## Insight highlights from: Building safety

IWFM objective: to raise awareness of regulatory changes impacting the profession in the areas of fire safety and structural safety, both in residential and commercial buildings and to build members' capability in this area.

Over the past few years, IWFM has engaged significantly with the building safety agenda, through both our Policy team and Life Safety Working Group. We've engaged in parliamentary and governmental consultations on policy and regulatory matters, pushed cross-sectoral collaboration, driven the development of the Building Safety Manager (BSM) competency framework, and fed into a variety of wider guidance and standards, such as British Standards (BS) and Publicly Available Specifications (PAS).

Although the legislative duty to appoint a BSM was removed in 2022, the work we undertook in 2021 will continue to stand.

### **Alliance submission to Building Safety Bill Committee**

Over the year, IWFM continued to feed in and liaise heavily with the building safety team in the Department for Levelling Up, Housing and Communities, and have continued to watch the fire safety policy developments and publication of the fire safety act.

As the bill went through parliament, IWFM submitted a submission to the Building Safety Bill Committee on behalf of the wider Building Safety Alliance (more info below), highlighting what concerns and recommendations from the occupation phase needed to be addressed. We continued to feed into and monitor the Bill's progression throughout parliament in 2021.

### **IWFM co-founds Building Safety Alliance**

The Building Safety Alliance, an independent, industry-led, not for profit organisation, was launched in July to implement both the certification of competent individuals wishing to deliver the role of BSM, and a publicly accessible register of those certified by the scheme.

The Alliance, of which IWFM is a founding and leading member, will play an essential role in helping to improve the competence of those responsible for managing buildings so that they can deliver safe homes for people.

In guidance published in October on the Building Safety Bill, the Government confirmed it does not intend to set up or maintain a state-run register of BSMs. Instead, the decision on which individuals or organisations will be registered as competent to perform the role will be taken by the Alliance.

Recognising the Alliance's efforts to develop the competence framework for BSMs and to establish a register of competent practitioners, the government guidance acknowledges a role for public registers in helping to assure Principal Accountable Persons when appointing a BSM and in promoting transparency to residents.

Note: in 2022, with the duty to appoint a BSM being removed from the Building Safety Act, the Alliance is pivoting its purpose to speak with a uniform voice for issues relating to building safety in the occupation and driving best practice and excellence in the occupation phase.

### **Wales' new Building Safety Regime**

IWFM's Life Safety Working Group submitted a response to the Welsh Government's White Paper proposing a new Building Safety Regime for Wales which it calls 'the most extensive building safety reforms in the UK'.

Buildings in scope include high-rise residences, as well as those converted into multiple flats, with the new regime recommending a proportionate approach according to risk level and building type.

Mirroring the government's draft Building Safety Bill, proposals include a number of new dutyholder roles during the design, construction and occupation stages. The BSM role is also included in the Welsh proposals for buildings over 18m. The Welsh proposals on the BSM are very similar to the English proposals but introduce an explicit licence to practice for the role.

Note: following the publication of the Building Safety Act, the Welsh Government is still considering whether to maintain the duty to appoint a BSM.



**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate

### **BSI PAS 8673**

The government commissioned the British Standards Institute to develop PAS 8673 – Built environment – Framework for competence of individual Building Safety Managers and nominated individual Building Safety Managers – Specification. This PAS will clarify what exactly is expected in terms of skills, knowledge, experience and behaviours (SKEB) for those fulfilling BSM duties. IWFM is part of the PAS 8673 Steering Group, helping to shape the BSM policies, SKEB and role since the Grenfell Tower fire in June 2017. Our objective being to improve building safety and enable safer homes for people. Our work in this area is supported by our expert Life Safety Working Group.

### **Home Office Personal Emergency Evacuation Plans (PEEPs) consultation**

In a busy year for the expert collective, IWFM's Life Safety Group responded to the Home Office's public consultation on proposals for PEEPs in high-rise residential buildings based on recommendations made by the Grenfell Tower Inquiry Phase 1.

The proposals will require law changes to place new requirements on owners or managers of multi-occupied high-rise residential buildings. The key proposals are:

- to require the Responsible Person to prepare a PEEP for every resident in a high-rise residential building who self-identifies to them as unable to self-evacuate (subject to the resident's voluntary self-identification) and to do so in consultation with them
- to require the Responsible Person to complete and keep up to date information about residents in their building who would have difficulty self-evacuating in the event of a fire (and who have voluntarily self-identified as such), and to place it in an information box on the premises to assist effective evacuation during a rescue by the Fire and Rescue Service.

Note: the government response to this publication was published in May 2022. Government recognised that significant issues were raised covering three broad areas – practicality, proportionality and safety, which let them to conclude they are currently unable to mandate PEEPs in high-rise residential buildings, contrary to recommendation from the Grenfell Tower Inquiry. A new Emergency Evacuation Information Sharing consultation was therefore published at the same time.

### **IWFM feeds into BS 8644-1 consultation**

IWFM's Life Safety Working Group provided consultation on Part 1 of BS 8644-1, the new British Standard for the digital management of fire safety information. This part of BS 8644 (Design, construction, handover, asset management and emergency response – code of practice) gives recommendations for the management, presentation and exchange of fire safety information using digital information management processes.

The standard covers the following stages in the lifecycle of assets in all parts of the built environment (including infrastructure): briefing, design, construction (including on-site fire safety information), handover, operation, and fire and rescue service intervention. While the standard is applicable primarily to new built assets, its principles can also be applied to existing assets.

The Life Safety Working Group looked in particular at the challenges of providing and maintaining adequate levels of fire safety information for existing buildings and consulted with other relevant groups and stakeholders before submitting a consolidated response to the consultation in August. The standard is due to be released in 2022.

# Insight highlights from: the broader programme

From customer experience to procurement, workplace and facilities management touches a variety of areas beyond the scope of – but no less important than – our strategic objectives. Here are some highlights:

### **New NEC4 Facilities Management Contract (FMC)**

In June, following three years of consultations with members and substantial expert input from volunteer members of IWFM's NEC Steering Group, the NEC4 FMC was launched with exclusive discounts for IWFM members.

For some time, the profession has called for an FM-specific procurement tool that meets our sector's diverse needs as an alternative to standard contracts based on construction practices or bespoke, one-off arrangements.

In 2016, IWFM's Special Interest Groups began work on developing best practice in this area and articulating the rationale and benefits of an FM-standard contract. The collapse of Carillion in 2018 highlighted problems embedded in procurement and contract management processes and intensified the appetite for such a contract: one which emphasises collaborative working and provides the tools to achieve better outcomes.

Building on our existing relationship, IWFM (then BIFM) and NEC agreed in 2018 to develop contracting and procurement products and services to support the facilities management sector, using the NEC4 contract suite.

The key benefits of the FMC are:

- it is specifically developed for the FM sector, so there is better alignment with FM priorities including market recognised phrases and definitions
- it will help streamline processes, reduce the potential for problems and promote best practice in the procurement of FM services
- it offers flexibility to support a variety of FM approaches in procurement and delivery strategies
- it supports the building of trust and collaboration which is vital to a well-functioning FM industry.

Alongside the launch of the NEC4 FMC, NEC and IWFM's NEC Steering Group have continued aiding its implementation by publishing topic-specific practice notes to help users consider specific issues and topics that may be of importance in certain regions or across regions. Find out more about the first two practice notes on social value and the Living Wage on page 24.



**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate



**IWFM Women in FM conference: ‘Empowering women’**

The Women in FM SIG held their annual conference virtually on 8 June, entitled ‘Empowering Women’.

The interactive, engaging, and impactful event was hosted by Women in FM Chair Nicola Lathbury and topics covered diversity and inclusion in leadership, the benefits of having strong mentors in your support network and dealing with your inner critic. There were opportunities to network in designated breakout sessions and ask questions to the following speakers:

- ‘Benefits of having a mentor, and the Plan B scheme’ - Liz Kentish, Managing Director at Kentish & Co Ltd, and Jackie Cupper, FM Consultant
- ‘Diversity and Inclusion in Leadership’ - Ijeoma Samuel, Director/Leadership Game Changer at Turner and Townsend
- ‘Inner critic’ - Helen Courtney, Founder of Soulful Woman Rising.

**People management good practice with IWFM Customer Experience Working Group**

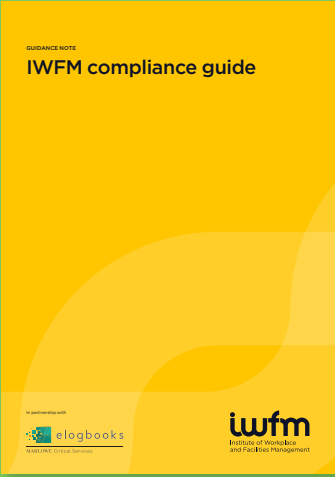
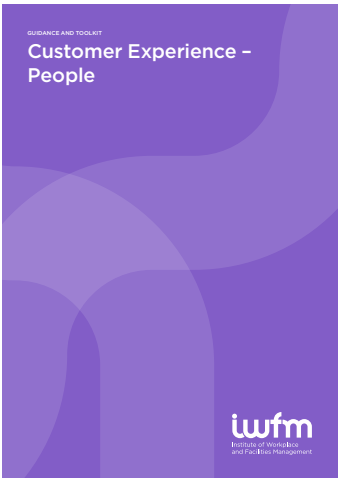
September saw the IWFM Customer Experience Working Group publish a new guide and toolkit to help members implement people management good practice to deliver great customer experience in their organisations.

The practical and insightful resource comes in three parts:

- guidance on how to nurture your teams from recruitment through to advancement
- a toolkit with helpful templates designed to assist managers in putting customer experience at the heart of their thinking
- a presentation to support leaders in sharing and cascading the detail within the guidance.

Used together, they equip facilities professionals to identify, attract, recruit, induct, train, develop, lead, reward and retain people, all in the service of delivering outstanding customer experience.

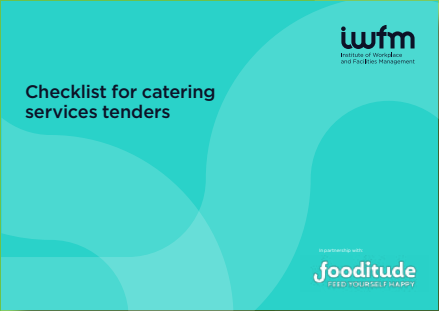
The Group’s role is to bring together members with a passion for customer-centric delivery, the ideas and best practice that have made a difference, and the drive to create a nucleus of ideas and innovation to enrich our members and the industry.



**Compliance guidance with Elogbooks**

Authored by IWFM Life Safety Working Group member Robert Greenfield DipOSH MIWFM and developed in partnership with Elogbooks, this guidance note explains the concept of compliance and its importance in the profession.

It also highlights the need for effective change to enable organisations to achieve the highest possible level of compliance within the working environment, to reduce accidents, reduce the costs of achieving compliance through the optimisation of asset maintenance, and above all to protect the organisation’s brand.



**Checklist for catering services tenders with Fooditude**

Created in partnership with contract caterers Fooditude and with support from our Catering SIG, this simple checklist outlines the information and data to collate and issue to bidders when tendering for catering services.

The purpose of the checklist is to help members to avoid multiple and timely clarifications from bidders requesting the same information; allow enough time to gather the data as it will lead to a fully considered, correctly costed proposal from all bidders; enable fair and easy evaluation of bidders’ responses by providing accurate data to all bidders upfront; and select a bidder that meets business needs and expectations.

**The changing face of FM delivery in the NHS with IWFM Healthcare Working Group**

The IWFM Healthcare Working Group’s aim is to raise the profile of workplace and facilities management within the healthcare environment and to advise, collaborate and share expertise amongst a wide range of sector experts.

Working closely with representatives from NHS Estates and Facilities teams, FM providers and the extended supply chain, they also look to support the development, application and implementation of workplace and facilities requirements in the healthcare sector, as well as keeping abreast of NHS and Public Health England guidance and initiatives.

The group conducted two webinars in 2021, the first of which focused on the changing face of FM delivery in the NHS, while the latter was an open virtual meeting to move the group forward in terms of themes and encouraging further members to the group.

**IWFM responds to Green Paper consultation**

At the start of the year, the Cabinet Office published a Green Paper with proposals for the most significant and radical changes to the public procurement regime in many years.

In IWFM’s response to the consultation, we supported the Government’s broad aims: to speed up and simplify procurement processes; introduce greater fairness, flexibility, innovation, transparency and competition; place value for money at the heart of the system; and generate greater social value in public service delivery. We also called for greater embedding of social value and prompt payment within the core of any new regulatory framework.

The Government’s response to the consultation echoed our views on the actions needed to bring about a long overdue change in procurement culture. We anticipate the changes will not be implemented before 2023 at the earliest.



**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate



**Pay and Prospects  
Survey 2021 insights:**

# A picture of changes and fresh insights in Pay and Prospects 2021

Back for its fifteenth year, the IWFM Pay and Prospects Survey 2021 findings - drawn from nearly 900 responses - provided a rich and comprehensive snapshot of salaries, benefits, and training and qualifications throughout the profession, while also highlighting evolving trends in sentiments and experiences.

By any measure, 2020 was an outlier year and its impact was seen in a range of areas. Salary - usually the most important consideration for our profession by far - saw its importance shift significantly, while other factors, such as job security and interesting work, gained ground.

The demographics of our profession also changed, meanwhile there is an evident shift in the balance of those working in-house versus working for large providers.

Professional development has seen progress, which is notable given a link between career prospects, pay, and professional qualifications, also shown in the report.

Like Market Outlook, the 2021 Survey also looked at diversity and inclusion for the first time, revealing a promising yet mixed picture.



Respondents were asked what they like about working in workplace and facilities management



**66%**

Variety/diverse range of work



**27%**

Like the results of their work



**18%**

Enjoy the challenge



Reasons respondents plan on staying with their current employer for six months or more



**37%**

Enjoy their job



**27%**

Job security



**11%**

Their work is valued

## Salary

**48%**

Salary remains the most important factor, but fewer respondents selected this than in previous years (48%, cf. 67% in 2019, 58% in 2017 and 59% in 2016).

Challenging/  
interesting work



Job  
security



**38%** **36%**

Challenging/interesting work was the next most frequently selected factor (38%), followed by job security, which is of greater importance now than previously it would appear (36%, cf. 31% in 2019, 29% in 2017 and 34% in 2016).

## Last pay review

2021

**38%**



In 2021, nearly two-fifths of respondents (38%) reported no change in their pay at their last pay review.

2019

**16%**

2017

**22%**



This is a significant increase compared with 2019 (16%) and 2017 (22%). It is undoubtedly a reflection of the challenging times resulting from the COVID-19 pandemic.

**33%**

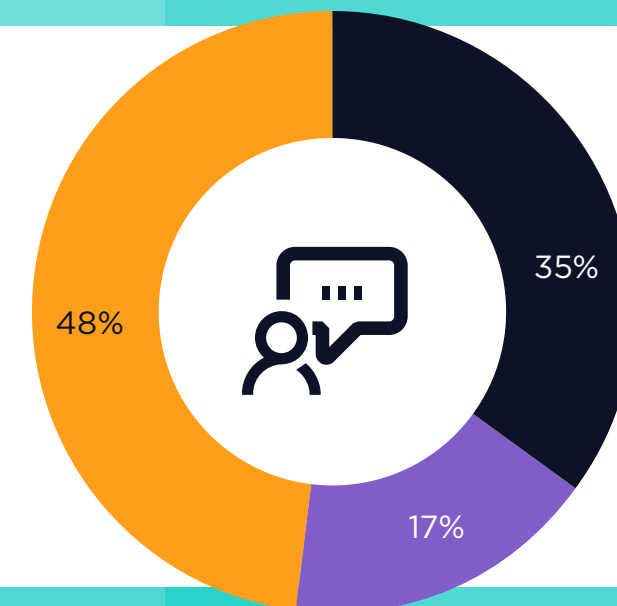
A third of the highest earners (33% of those earning £61k+ pa) have responsibility for a budget of more than £10 million



One in six of those have worked in FM for 9+ years

**41%**

Around two-fifths of respondents in 2021 (41%) reported that their last pay review resulted in an increase of 1-2%.



**How respondents working within an FM provider/outsourcing organisation describe their work**

- My work is focused on enabling work wherever it happens
- Neither of these resonate
- My work is focused on managing spaces which people work in



**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate



**Market Outlook Report  
2021 insights:**

# Portfolio concerns and hybrid working dominate Market Outlook 2021

IWFM's Market Outlook 2021 report - a snapshot of the market's experiences, how its state has altered since COVID-19, and our profession's expectations for the future - encompassed two years' data for the first time, weaving in 2020's unpublished findings to compare and contrast against.

Unsurprisingly, the challenges arising from COVID-19 and Brexit featured prominently. Highlights from the report included:

- how the pandemic spot lit the importance of the facilities role in services such as cleaning and security, whilst emphasising these professionals' status not only for safety and infection control, but as agents of change in a changing work-scape
- concerns for the future as post-pandemic scenarios signal a reduction in property portfolios, raising questions about what this will mean for the profession long-term
- the opportunities for the profession and the supply chain in facilitating further workplace change
- the growing influence of technology in the market
- the market's readiness and appetite for tackling climate change
- for the first time, the current levels of diversity and inclusion across the market and its employers.



## FM MARKET SENTIMENT

Improved **33%**  Got worse **39%** 

There were mixed views on the UK FM market over the last 12 months, with 33% of respondents believing that it had improved but 39% feeling that it had got worse.

This mixed picture reflects the fact that different parts of the FM market and different organisations have been affected in different ways by COVID-19 and associated lockdowns.

For example, some FM services (such as cleaning and security) have been in greater demand, whereas others (such as catering) have seen a drastic fall in demand.

In some ways, the events of the last year have helped to raise FM's profile, because it's shone a light on an industry that's usually overlooked. FM has stepped up and helped to keep people safe.

## Decrease in FM budget

**30%** 

The negative impact of COVID-19 was reflected in organisational-level indicators for the last year, with 30% of client-side respondents reporting a decrease in FM budget and headcount.

## FM MARKET OPTIMISM

Will improve **58%** | Will get worse **19%**

Respondents were generally more optimistic about the prospects for the FM market in the next 12 months, with 58% saying that it will improve and only 19% thinking it will get worse.

## Increase in turnover

**45%** 

This was reflected in organisational-level indicators, with 45% of service providers projecting that their turnover will increase over the next 12 months.

People cited a number of different reasons why things would improve, including ongoing demand for COVID-safe workplaces but also the release of pent-up demand for FM services as the UK economy re-opens.

Nevertheless, there were concerns that the economic damage of COVID-19 and the possibility of widespread changes in working practices may have a negative impact on the FM market in the longer-term.

For instance, if more people in more organisations work in a more distributed way after the pandemic, then organisations may start reducing the size of their property portfolios, which will in turn reduce demand for FM services.

## Changed flexible working strategy

**84%** 

## Reduction of space occupancy

**58%** 

Such concerns are well founded, with 84% of client-side respondents reporting that their organisation had changed its flexible working strategy and 58% reporting that it would be reducing the amount of space it occupies.




**Aim 2:** the first choice destination for workplace and facilities management research, information, and debate

### FM MARKET FORCES

Unsurprisingly, COVID-19 and the state of the UK economy were the two forces that were seen by most people to have had a negative impact on the FM market over the last 12 months.

#### Positive influence

# 69%



#### changes in technology


Changes in technology continue to be seen as a positive influence on the FM market, with 69% of respondents saying that it has had a positive impact over the last 12 months.

Concern over climate change also continued to be seen as a positive factor, with 40% of respondents viewing it as such in the 2021 survey.

Looking back over the last 12 months, Brexit attracted far more negative responses (50%) than positive ones (7%), with only 18% thinking that it would have a positive impact on the FM market over the next year.

#### Increase in positivity

# 19%



#### state of the UK economy

Looking forward over the next 12 months, there is an increase in the proportion of positive responses about the state of the UK economy: 19%, compared with 6% over the last 12 months.


This suggests there's an emerging optimism about the broader economic outlook and its subsequent impact on the FM market.

### DIVERSITY AND INCLUSION

For the first time this year we asked respondents about their views on and experiences of diversity and inclusion in their organisations and the FM market.


#### Increased awareness in FM market

# 55%



#### in own organisation

# 74%




The results indicate a generally positive picture, with a majority of respondents reporting an increased level of awareness of diversity and inclusion within the FM market (55%) and their own organisations (74%).

In terms of barriers to progress in the diversity and inclusion agenda, unconscious bias was the most frequently selected (25%), followed by lack of support (19%) and lack of diversity and inclusion policy and drive (13%).

### ORGANISATION'S FOCUS OVER THE NEXT 12 MONTHS


#### Will increase

# 58%



#### Remain the same

# 33%



When it comes to the next 12 months, a slight majority (58%) of respondents felt that their organisation's focus on diversity and inclusion would increase, with a third of respondents believing that it would stay the same.

# Still 'Navigating turbulent times'...

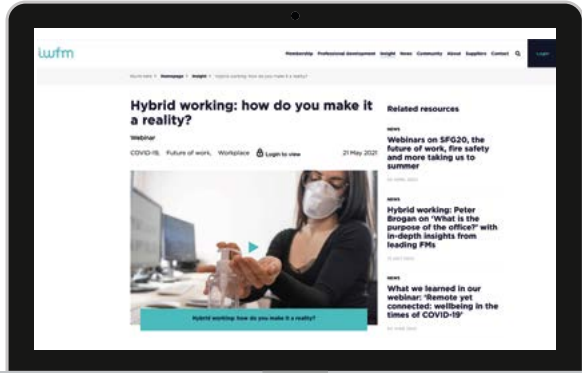
Following its launch in April 2020, IWFM's flagship webinar series continued to provide guidance, insight and thought-provoking discussions in 2021 with 33 new episodes which attracted excellent feedback and, despite changes in social distancing measures, strong registration numbers.

The year's topics were a blend of our profession's mainstays and current talking points, such as building safety, hybrid working, doing business beyond Brexit, sustainability, listening skills, wellbeing, data and technology, leadership, careers and recruitment, people management, and more.

Many episodes were delivered with support from IWFM members and volunteers, whether it was creating and presenting their own content or lending their time as expert panellists.


Given the topicality of the future of the workplace, it will come as no surprise that two of the top five best attended episodes were about hybrid working and future workplace strategy. The other three episodes covered changes in building safety, listening skills with former hostage negotiator Richard Mullender, and the NEC4 Facilities Management Contract.

IWFM also kept the workplace and facilities management conversation moving in 2021 with a brand new podcast series exploring workplace wellbeing, produced in partnership with Sodexo. Launched in November, the short series was IWFM's first foray into podcasts, amassing hundreds of listens from the UK, continental Europe, the USA and beyond.




### 'Navigating turbulent times' in numbers

# 33




episodes

# 5,922




registrations

# 3,588



attendees

# 85%



average approval rating

... and creating new content channels

Each episode featured renowned thinkers in the wellbeing space and its related topics, as well as voices from the IWFM community with their own practical viewpoints of how wellbeing is being delivered in their organisations.

Find out more on page 26.



**Aim 3:** to foster a vibrant, accessible, engaged community for peer to peer learning, sharing best practice and networking

# Keeping members at the heart of IWFM

We are committed to operating in a way which fosters a culture of co-operation and trust, which in turn helps IWFM to be a thriving and relevant body delivering outstanding value to our members.

The IWFM Communities Review, which aims to ensure volunteers are included in and contributing towards the Institute’s strategy, decision-making and future direction, is a key tool for achieving this.

It began in 2019 as a review of how IWFM’s Regions and SIGs could better support IWFM’s overall aims. It was galvanised in spring 2021 after feedback from volunteers and the Board’s desire for ‘leading practice’ governance as IWFM looks towards Chartered Body status. Guided by independent expertise from the Modern Professional Body, we established a number of working groups comprising volunteers, staff and the experts to take forward the work required. Throughout the process, we have kept volunteer committee chairs and Communities Review Working Group members abreast of the developments they have helped to shape.



## Developments in 2021

Building on outputs from the initial exercise, further work, including interviews and focus groups, culminated in recommendations to the Board and a strategy session with the Board and volunteers in July. Five key recommendations were agreed:

- to reinvigorate Members’ Council as a strategic sounding board for the Board and Executive
- to review the current structure of the Executive to a renewed focus on members
- to provide Regions, Networks and SIGs with greater local autonomy within an overall framework
- to ensure strategy development is a collaborative exercise
- to make the case for Chartership as a steppingstone towards professional body status.

Phase two of the work started in the autumn with staff and volunteers working together on five workstreams:

- Member Value Proposition – to create a proposition which motivates
- Strategy – agreement on direction with clear objectives
- Relationships – effective ways of working together
- Culture – positive behaviours and driving commitment
- Governance – a fit for purpose structure that involves members

There has been genuine collaboration throughout the process and significant commitment from participating volunteers. What was clear was the inter-connectedness of the workstreams; for example,

the need to have clarity of purpose and strategy to deliver on this, underpinned by a governance and behavioural framework, understood, and supported by staff and active members.

The Chair of Members’ Council is now on the Board and IWFM’s strategy is now a feature of Members’ Council agendas. The CEO has recently appointed a new Director of Membership and Partnerships to her Executive team as part of a broader set of moves to ensure that team is member and commercially focused. Proposals to give Regions, Networks and SIGs greater local autonomy have been presented to Members’ Council and are being implemented.



**Aim 3:** to foster a vibrant, accessible, engaged community for peer to peer learning, sharing best practice and networking

# Communities: bringing the profession together

As uncertainty over the legality and safety of face-to-face events continued throughout 2021, creating tremendous difficulties in event planning, IWFM's community groups helped keep the profession engaged via a variety of online events. Later in the year, with the UK government's social distancing measures and vaccine rollout having the desired effect on infections until a Christmastime spike, face-to-face events finally returned, enabling people once again to join together in person to learn, debate, connect and network

## Community events

Here is a selection of events hosted by our communities:

## JANUARY

**Customer Experience Working Group -** Measuring customer experience in FM (online)

**UAE Region (in collaboration with Nigeria, London and Procurement SIG) -** Procurement: hot issues and supply chain management in 2021 (online)

**People Management SIG -** New Year, new job: recruitment top tips and guidance (online)

## FEBRUARY

**UAE Region -** Property services: market-related challenges during COVID-19 (online)

## MARCH

**London Region -** Question Time: RIP 9 to 5, now what? (online)

**Women in FM SIG -** Interview with Kellie Lord-Thomas from Amnesty International on facing and overcoming career challenges (online); Interview with Mindfulness Coach Karen Farrell MIWFM on facing and overcoming career challenges (online)

**Channel Islands Region -** Coping during COVID: your physical and mental wellbeing check-in (online)

## APRIL

**Midlands Region/Risk and Compliance SIG -** Understanding building compliance (online)

**Rising FMs SIG -** Risings spotlight: our FM journey with Jack Flanagan and Andrew Hulbert from Pareto FM (online)

## MAY

**Technology SIG -** BIM data for FM systems - parts 1 and 2 (online)

**South West Region -** Celebrating FM in our region (online)

**Women in FM SIG -** Interview with Bellrock COO Dave Richards: how Bellrock teams have been 'Standing tall through the pandemic' (online)

**Ireland Region with IBEC -** Celebrating FM: standing tall beyond the pandemic (online)

**International SIG -** Standing tall: strategic FM leading beyond the pandemic (online)

**Rising FMs SIG -** Rising spotlights: FMs from around the world (online)

## JUNE

**UAE Region -** INDEX Work Design Summit talk (face-to-face)

**Ireland Region -** ISO 41000 - Facilities Management Standards (online)

**Women in FM SIG -** WIFM Conference: empowering women (online)

**People Management SIG -** Succeeding in a tough job market: networking for opportunities (online)

**Procurement SIG -** Introducing the NEC4 Facilities Management Contract (FMC) suite (online)

## JULY

**Rising FMs SIG -** Apprenticeships and their value in the workplace with Heathrow Airport (online)

**Home Counties Region -** Returning to the workplace: a tour of Winnersh Triangle (online)

**Catering SIG -** Catering in a post-COVID-19 world (online)

## AUGUST

**UAE Region with Scotland Region and Tech SIG -** Managing data, securely and effectively (online)

## SEPTEMBER

**Healthcare Working Group -** The changing face of FM delivery across the NHS (online)

IWFM Healthcare working group open virtual meeting (online)

**North Region -** Charity golf day (face-to-face)

**The Facilities Event -** Volunteers Ann Beavis (IWFM Sustainability SIG), Chris Jeffers (IWFM Procurement SIG), and Mark Whittaker (Non-Executive Director on the IWFM Board) spoke about sustainability, social value, and Career of Choice respectively (face-to-face)

## OCTOBER

**UAE Region -** UAE Region Annual General Meeting (face-to-face)

**ISIG -** ISIG Roundtable (face-to-face)

**Home Counties Region and Rising FMs SIG -** FM delivery at Whipsnade Zoo (face-to-face)

## NOVEMBER

**Rising FMs SIG -** Christmas networking (face-to-face)

**Midlands Region -** Meet the Committee and Christmas Quiz 2021 (face-to-face)

## DECEMBER

**Technology SIG -** The opportunities from a sustainable digital built environment (online)

**North Region -** Cathedral tour and Christmas networking (face-to-face)

**Ireland Region -** Sustainability, COP26 and its impact on the workplace in Ireland (online)

**South West Region -** Climate action carbon literacy (online)

**Aim 3:** to foster a vibrant, accessible, engaged community for peer to peer learning, sharing best practice and networking

## World FM Day: 'Celebrating FM: Standing tall beyond the pandemic'

On 12 May, we took part in World FM Day, celebrating through a week-long campaign. The 2021 theme of 'Celebrating FM: Standing tall beyond the pandemic' acknowledged the outstanding service and crucial support workplace and facilities managers provided to communities, colleagues, organisations, infrastructure and the economy during the pandemic.

We used the moment to encourage our profession to celebrate their successes and remind our members that we continue to stand with them as we all take steps towards a better future. Also during the week...

We held the following webinars:

- IWFM International SIG hosted our 'Navigating turbulent times' webinar to discuss the strategic direction of FM post-pandemic
- IWFM Ireland Region collaborated with Ibec to discuss the agile, flexible response to COVID-19 and the key role of FM, which also featured a video message from Leo Varadkar
- IWFM Rising FMs SIG had insightful conversations with FMs across the globe.

We shone a light on our profession:

- we gave a shout out to our 2020 COVID-19 Response Award winners on our Awards Twitter channel @IWFM\_Awards throughout the day and we talked about our new 2021 category 'Frontline Heroes'

- we congratulated an IWFM Impact Awards 2020 finalist ENGIE UK and Ireland, whose 'Making Zero Carbon Happen' project won Gold at the 2021 Global FM Awards
- Facilitate ran daily spotlight 'behind the job' articles on members of the profession
- IWFM's Sustainability SIG provided five articles and fact sheets, which we published on our Sustainability hub
- the London Region shared an article called FM and chocolate in the pandemic with Ferrero Rocher
- the UAE, Midlands, and South West Regions, and the Catering and Women in FM SIGs all created videos for LinkedIn.

There was a lot of buzz among our Regions and SIGs on social media, all celebrating the incredible profession to which we are all so proud to belong.





**Aim 4:** to be the first choice development partner for individuals and organisations

# Professionalising the membership

Ensuring that IWFM remains the first-choice development partner for individuals and organisations is a fundamental aim. As well as providing value to members, it means keeping professional development and career support at the heart of our work.



## MEMBERSHIP

Despite the pandemic still having an impact, 2021 saw more members join at professional grades as we welcomed 1,118 last year compared to 791 in 2020. Existing professional members showed their loyalty in the same period as the retention rate in that key group increased from 77% to 83%. Professional level upgrades increased significantly in the year to 1,832, having dipped in 2020, boosted by a one-time professional upgrade recognition programme.

Professionalising our membership will improve retention numbers as we continue to attract more senior and influential professionals into the higher membership grades. We intend to build on this as we develop plans for an experience-based route to the CIWFM grade as an equivalent alternative to a qualification-based pathway.



‘From my regular conversations with both employers and recruitment professionals, the IWFM membership grade is becoming increasingly important when assessing the suitability of candidates. Memberships grades are also closely aligned to candidates being able to show advancement and development in their career. For those starting their career in FM, they also provide very useful career progression signposting, in conjunction with training/professional development.’

**IWFM Chair Mark Whittaker**

## GROWING OUR PROFESSIONAL COMMUNITY

Despite very encouraging retention rates among members in professional grades, overall acquisition remained a challenge during a second turbulent year which saw government restrictions in place across large parts of the economy.

We attracted 2,610 new members in 2021 which was 916 lower than 2020 due to the ongoing repercussions of the pandemic, such as professionals being furloughed. Encouragingly, we continued to grow our non-member audience, adding 3,618 new professional contacts into our combined community pool of around 37,000. The reason we had more people to talk to in 2021 is largely due to our partnerships and insights programme bringing in new audiences through our ‘Navigating turbulent times’ webinar series.

**Membership in transition**  
● average membership  
● at professional grades



## Professional membership as a proportion of whole

1,118

New joiners at professional grades, 41% higher than 2020

83%

Professional member retention in 2021

1,832

Upgrades within professional member grades

## CUSTOMER EXPERIENCE BECOMES MEMBER AND CUSTOMER ENGAGEMENT

During the year, the Customer Experience Team continued its evolution to a ‘one stop shop’ for the Institute’s customers, handling all enquiries across all product lines. Putting ‘Members’ in its name underlined its role as a focus point for member enquiries and outreach and served as a reminder that it starts with members.

On the name change to the Member and Customer Engagement team, the team’s manager, Danielle Scott, commented:



‘We needed to change the narrative to meet this expectation from our members. While the real changes happened behind the scenes in how we work, changing the name as a first step meant we are now identified by what we do: engaging with members and customers at every important step to create a great member and customer journey.’

**Aim 4:** to be the first choice development partner for individuals and organisations

# Professional development

## CPD UPTAKE CONTINUES DURING PANDEMIC

Pandemic pressures notwithstanding, we were encouraged to see many individuals continuing to work on their professional development through our qualifications, online courses, and live virtual training in 2021. This apparent self-development was especially encouraging given how our Pay and Prospects research (see pages 34 to 35) evidenced that qualifications increase the likelihood of advancement in organisations.

The ongoing global health emergency reinvigorated appetites for change. Mindful of widespread financial challenges and eager to help our profession capitalise on the opportunities and lessons the pandemic has taught us, IWFM ran discount campaigns on online courses and qualifications to help members and others rise to the challenge for change by upskilling and future-proofing their careers.

Some of the barriers facing workplace and facilities professionals wanting to upskill during the pandemic continued into 2021, but with many of our Recognised Centres successfully delivering the IWFM qualifications online, people were motivated to study and learner registrations bounced back a little to 1,709. As predicted, a six-month COVID-19 extension granted to learners in 2020 resulted in an increase in the number of qualifications awarded in 2021, up 15% on the previous year, to 798. The number of people accessing IWFM qualifications from around the world continues to grow, with more organisations realising the value of developing their people, and more individuals realising the value that achieving a regulated qualification adds to their confidence and their career.

### IWFM QUALIFICATIONS IN 2020

**1,709**  
registered

**798 +15%**  
awarded increase from 2020

## IWFM ACADEMY

IWFM Academy resumed face-to-face courses after online and virtual learning had become the only available delivery methods during social distancing restrictions.

Live virtual training (LVT), however, remained in demand throughout 2021; and feedback suggested that certain courses work better in this format, particularly IOSH courses and Operational space planning.

While IWFM has used the Zoom platform to deliver LVT courses since 2020, our team also trained some trainers on using Microsoft Teams for educational delivery in 2021 so that we could accommodate clients without access to Zoom.

### IWFM ACADEMY: WHAT OUR CLIENTS SAY



‘This course has given me proper insights into what my job entails and where I need to be to succeed. It’s given me an understanding of what I thought I knew.’

**Amey, Facilities Management Coordinator**



‘The Academy trainer was very professional and engaging, easy to approach, kept the course interesting and fun, and provided good ROI.’

**Lina, Senior Facilities Coordinator**



‘The Academy trainer provided great real life and practical examples that supported learning and was able to take the decision to detailed areas as required – a great industry and thought leader. This learning experience supports me with continuous development to be the best version of me as an FM leader.’

**Kate, Head of Strategy Deployment**



**Aim 4:** to be the first choice development partner for individuals and organisations



## IWFM ACADEMY TURNS FIVE

On 3 October, we marked five years since IWFM brought its short courses offering back in-house. Here is what the Academy has achieved in that time:

**2,330**

- over 2,330 individual unique bookings for face-to-face and LVT

**55**

- trained people in 55 unique countries whether by Zoom, at a venue or through an online short course

**889**

- self-directed-study online short courses purchases, including extensions and hard copy certificate requests

**133%**

- increase in the number of delivery methods we offer

**20%**

- increase in number of trainers in the Academy portfolio

**23%**

- increase in the number of in-house course subjects available

**1,700%**

- percent increase in in-house sessions
- made continual user experience improvements, such as upgrading booking systems and enhancing functionality
- boosted our eco-friendliness through on-line delivery and by using recycled materials where possible.

## END POINT ASSESSMENT

IWFM's End-Point Assessment organisation (EPAO) is approved to provide end-point assessment for three apprenticeship standards: Facilities Service Operative Level 2, Facilities Management Supervisor Level 3, and Facilities Manager Level 4.

Here is the IWFM EPAO's activity in 2021:

- confirmed achievement of end-point assessment for almost 180 apprentices
- enhanced customer engagement and feedback mechanisms
- improved visibility and enhanced customer experience via a new EPAO section on the website
- invested in the team to ensure continued efficient and professional service
- revised assessment guidance documents and improved assessment tools and resources for each apprenticeship standard, forming part of an annual quality review
- responded quickly and efficiently to changes in assessment required due to COVID-19
- collaborated and participated in EPAO forums and Special Interest Groups with the Institute of Apprenticeships and the Association of Employment and Learning Providers, ensuring we remain aligned with Ofqual regulations, compliant, visible, and fully knowledgeable.

We aim to consolidate and increase our customer base in 2022 and beyond, improve our service, and become better every day. We will also look to identify our areas for growth within other industry apprenticeship standards and apply to become an approved end-point assessment organisation where appropriate.



'My End-point Assessor was perfect.'

'Probably the best EPAO we have experienced when it comes to booking assessments, getting results and dealing with general enquiries.'

'IWFM makes the whole EPA process very clear and straightforward though regular communication and their assessors are always on hand to answer any queries.'

## FM DEGREE APPRENTICESHIP WELCOMES FIRST COHORT

In May, nearly three years after the Level 6 apprenticeship standard was first developed, the University of Bolton become an IWFM Recognised Centre, approved to deliver the IWFM Level 6 Extended Diploma as part of the Senior/Head of Facilities management Degree apprenticeship.

The University of Bolton is the first to offer this apprenticeship, which is targeted at those who are responsible for the strategic management of an FM service or portfolio. Those who complete this apprenticeship will be offered IWFM Certified status.

The first cohort of seventeen apprentices started their programme of learning with the University in the autumn.



'We want to see a greater uptake of apprentices across the board and Bolton's course is an important and very welcome step in the right direction. This Levy-funded apprenticeship opens up another excellent avenue into senior workplace and facilities management at a pivotal moment for our profession.'

**IWFM CEO Linda Hausmanis**

# Board members



**Chair and Non-Executive Director**  
Mark Whittaker



**Deputy Chair and Non-Executive Director**  
Andrew Hulbert



**Non-Executive Director**  
Sue Hills



**Non-Executive Director**  
Marilyn Standley



**Non-Executive Director**  
David Carey



**Members' Council Chair**  
Jason Cousins



**Co-opted Non-Executive Director**  
Paul Ash



**Co-opted Non-Executive Director**  
Martin G Bell



**CEO**  
Linda Hausmanis

# IWFM Board and Members' Council

**IWFM BOARD MEMBERS**  
(as from 1 Oct 2021)

**Chair and Board Representative on Audit & Risk and Nominations & Remuneration Committees**  
Mark Whittaker

**Deputy Chair and Non-Executive Director**  
Andrew Hulbert

**Non-Executive Director and Board representative on Constitution & Ethics Committee**  
Sue Hills

**Non-Executive Director and Board representative on Nominations & Remuneration Committee**  
Marilyn Standley

**Non-Executive Director**  
David Carey

**Members' Council Chair**  
Jason Cousins

**Co-opted Non-Executive Director**  
Paul Ash

**Co-opted Non-Executive Director**  
Martin G Bell

**CEO**  
Linda Hausmanis

**IWFM Board Members who also served in 2021**  
Michael Kenny

**IWFM BOARD COMMITTEE**

**Audit & Risk Committee 2021**  
Dale Gilbert – Chair  
Brian Court  
Robert Grant  
Mark Walker  
Alistair Scott  
Mark Whittaker – IWFM Chair

**Nominations & Remuneration Committee 2021**  
Rod Lennox – Chair  
Mark Whittaker – IWFM Chair  
Ashleigh Brown  
Leila Osbourne  
Marilyn Standley – Board Representative

**Constitution & Ethics Committee 2021**  
Sue Hills – Chair and Board Representative  
Paul Eslinger  
Richard Farmery  
Nick Fox  
Stephen Roots

**Extra Ordinary Finance Committee 2020**  
Paul Ash – Chair and Co-Opted Non-Executive Director  
Mark Whittaker – IWFM Chair  
Keith Waterman  
Linda Hausmanis – CEO

**Members who also served on Board Committees in 2021**  
Ed Baldwin - Audit & Risk

**MEMBERS' COUNCIL**  
(as from end June 2022)

**Chair**  
Jason Cousins

**Catering and Hospitality**  
Tim Axe

**Channel Islands and Deputy Chair of Members' Council**  
Katherine Torode

**Customer Experience**  
Jamie MacDonald

**East**  
Natalie Allerton

**Home Counties**  
Adam Fahn

**International**  
Steve Gladwin

**Ireland**  
Conor Cooney  
Cormac O'Loughlin

**London**  
Gary Binder

**Midlands**  
Nicola Lathbury

**Nigeria**  
Tunde Obileye

**North**  
Mark Muncaster

**People Management**  
Alison Verdin

**Procurement & Contract Management**  
Anne Kinder

**Rising FMs**  
Michelle Brightly

**Risk & Business Continuity Management**  
Dave Cooke

**Scotland**  
Sandy McNaughton

**South**  
Jo Bell

**South West**  
Pauline Simpkins

**Sustainability**  
Greg Davies

**Technology**  
Gordon Mitchell

**United Arab Emirates**  
Eng. Ansari Wahid

**Women in FM (WIFM)**  
Nicola Lathbury

**Workspace**  
Simone Fenton-Jarvis

**COUNCIL MEMBERS WHO ALSO SERVED IN 2021-2022**  
(Correct as of end June 2022)

David Carey  
Ian Fielder  
Julian Fris  
Cathy Hayward  
Adam Phillips

**WORKING GROUP CHAIRS**

**Healthcare**  
Peter Galley

**Manufacturing**  
Andy Candelent



# 2021 financial summary

The Institute ended the year with a healthy cash position of £293k as income increased overall by 9% from 2020. This increase in income is mainly due to the combination of membership income increasing by £50k and other income increasing by £273k, resulting in an operating profit of £329k - a £100k increase on the prior year.

Major highlights from the 'other income' category include the following increases: £109k in sales for IWFM Direct; £66k for End-Point Assessment; £47k in events, which is attributable to the IWFM Impact Awards returning as a face-to-face event, as opposed to the pandemic-induced virtual event of 2020; and £29k in IWFM Academy courses.

The aforementioned £50k increase in membership income is attributed to the significant growth in professional grades, as highlighted earlier in this document.

Meanwhile, operating costs increased by 7% overall, some of which is in line with revenue increases, while the tentative and gradual return to 'normality' saw increases in areas such as IT and office costs.

Two other notable cost increases relate to the IWFM Conference and the Communities Review. Regarding the prior, the 2020 Conference took place online, which led to the deferral of venue costs from 2020 to 2021 when the event took place face-to-face once again; regarding the latter, there were costs associated with appointment of the Modern Professional Body to advise on and oversee the project.

Depreciation costs remained high, which affected profit; however, these are forecast to reduce by circa £20k in 2023 and £110k in 2024.

Furlough support ended in Q1 2021, reducing by £57k in 2021, and PAYE deferral payments of £193k were paid in full by 3 October.

	2021 £000s	2020 £000s	Movement
Membership Income	2,411	2,361	50
Other Income	1,453	1,180	273
<b>Total Income</b>	<b>3,864</b>	<b>3,541</b>	<b>323</b>
Operating Costs	3,535	3,312	223
<b>Profit before Depreciation</b>	<b>329</b>	<b>229</b>	<b>100</b>
Depreciation	356	355	1
<b>Profit   (Loss)</b>	<b>(27)</b>	<b>(126)</b>	<b>99</b>
Net assets   (Liabilities)	53	80	(27)
<b>Cash</b>	<b>293</b>	<b>234</b>	<b>59</b>



# Purpose, aspirations and priorities for 2022

After a year of pandemic-proofing, 2021 was all about putting members at the heart of the Institute.

We'd outlined four priority projects for the year that saw the Institute, like the wider economy, very much in recovery mode after the unprecedented events of 2020. The focus on creating member and societal value during that period had positioned us to build on the anticipated post-pandemic recovery.

We made strides in all four areas, and we aligned across teams like never before to do that. With fresh insights from a major member survey, we did the groundwork for a new customer value proposition; we re-focused on member acquisition and retention with tangible results; we completed the first phase of a competency-based route to Certified status; and perhaps most significantly of all, we took steps to change the culture and the conversation with our most engaged members: our volunteers.

In 2022 that work continues.

The Communities Review framework will provide a model to develop a new, meaningful and trusted relationship with active volunteers.

A revisited Vision and Mission, spurred by the Review, will form the platform for IWFM's next strategy as we enter a new cycle.

A new member value proposition will ensure we remain focused on members.

Further enhancing a supportive and productive culture will help us stay true to our values and help ensure that we walk the talk.

We will also remain focused on our commercial obligations.





The Institute of Workplace and Facilities Management (IWFM) is the body for workplace and facilities professionals.

We exist to promote excellence among a worldwide community of thousands and to demonstrate the value and contribution of workplace and facilities management more widely. We empower professionals to upskill and reach their potential for a rewarding, impactful career. We do this by advancing professional standards, offering guidance and training, developing new insights and sharing best practice.

It is our vision to see workplace and facilities management as a distinct profession – recognised beyond the built environment for its ability to enable people to transform organisations and their performance. The IWFM was established in 2018. It builds on the proud heritage of 25 years of the British Institute of Facilities Management.

To find out more, please visit:  
[iwfm.org.uk](http://iwfm.org.uk)

Or contact us at  
[engagement@iwfm.org.uk](mailto:engagement@iwfm.org.uk)  
+44 (0) 1279 712 620

**IWFM**  
Charringtons House  
1st Floor South  
The Causeway  
Bishop's Stortford  
Hertfordshire CM23 2ER

**iwfm**  
Institute of Workplace  
and Facilities Management