

Annual Review 2020



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Welcome to the 2020 Annual Review from the IWFM Chair

Our world is unpredictable, that's a certainty. We live in turbulent times, as our conference this year explored, and we all need to be resilient and adaptable.

The words 'resilient' and 'adaptable' perfectly describe the incredible efforts of our profession, and the industry that supports it, during 2020. I want to add another word that describes our profession: relevant. Last year workplace and facilities professionals helped their organisations confront unprecedented challenges. Around the world they kept work moving and they kept work safe.

When we took the step, in 2018, to embrace workplace as a key differentiator for our members, the underpinning rationale was to re-frame the profession as a value creator. We were determined that FM should be regarded an occupation that can impact an organisation's overall performance, and not simply a cost centre to be minimised and marginalised.

That opportunity ripened fast in 2020. Without workplace and facilities managers, the impact on society and the economy from COVID-19 is unthinkable. Furthermore, we have been at the forefront of new opportunities in the rapid evolution of work, and the workplace itself, during and post-pandemic. The way people work is changing. We must recognise and capitalise on our relevance.

The tough climate pulled no punches for anybody. IWFM was no different and like millions of businesses its activities were impacted as a result of the COVID-19 outbreak and the Government's measures taken to contain it.

Among the greatest uncertainty any of us have ever experienced, we faced big strategic decisions. We moved swiftly to establish the Extraordinary Finance Committee to support the Board and the Executive. We aimed to strike a balance between exercising



prudence to keep costs low and sustaining the Institute, whilst supporting the profession to capitalise on the 'workplace opportunity' that was presented by the pandemic.

The team at IWFM has shown relevance, adaptability and resilience. It has been active in creating value for members; to meet their professional development needs, support them individually through difficult times and work with partners and our volunteer community to champion the wider workplace cause.

It focussed relentlessly on keeping costs down whilst using appropriate Government support. Although the overall financial result was a loss after depreciation due to an inevitable drop in turnover, our focus on creating member and societal value has created solid foundations for us to grow in 2021 so we can capitalise on the post-pandemic recovery.

It has been an extraordinary but exhilarating first full year as Chair. I'd have preferred to experience more of our great Institute and the people that make it so in person rather than virtually, but there will be more time for that as we open up again. I am proud of the work we have done behind the scenes to strengthen links between our communities and committees, and I know that we will be able to drive further inclusion that will help us flourish.

We have been bold and progressive in 2020, and I am confident we will reap the benefits of this in the future.

Martin G Bell
Chairman

CEO's summary

2020 is a year that nobody will forget. The COVID pandemic has been one of the biggest challenges of our time.

Yet as with other difficult periods in our history, living through a global crisis has also shown us the very best of humanity: innovation, problem solving, collaboration, courage and kindness.

Responding to it up-ended all our norms, including the way we work. With the flip to mass home-working almost overnight, the idea of work as an activity rather than a destination was suddenly every office worker's reality. IWFM was pleased to inform the national debate as we tracked their evolving experience.

If there was a year that brought workplace and facilities professionals to the fore, it was 2020. Helping to maintain support to those working remotely. Keeping buildings and assets safe, secure and operational during the lockdown. Preparing premises for COVID-safe re-opening. Supporting on the front-line and in local communities. In the autumn we saw the extent of this brilliance in sixty-nine outstanding entries to the COVID Response Award. It was an honour to announce the four eventual winners, chosen by public vote, at our virtual Impact Awards in October.

But with the economy all but shut down, schools closed and almost nine million UK workers furloughed at the height of Lockdown One, uncertainty ruled. IWFM's second operating year was anything but effortless. We might easily have hibernated in this period, lowered our pulse and mothballed Head Office. But we decided our priority was to support our members, who were doing so much to help the national effort.

We acted with prudence, availed ourselves of help and made savings where sensible, but instead of shutting down we doubled down and focused our energy on providing targeted assistance to those furloughed or in financial difficulty, and to our learners who we granted more time to complete qualifications.

In fact, we adapted our entire offering to the virtual world; from our AGM, Awards and Conference which appeared on screen for the first time, to a free weekly



webinars programme, 'Navigating turbulent times' featuring new research and insights, as well as our policy work, good practice guidance and even personal development. We further helped CPD and professional development to continue by switching face-to-face Academy training courses to 'virtual face-to-face' delivery with a new platform and bespoke offers.

2020 was one of our toughest years, but one of most stimulating I can recall; and as you read through this year's Review, you will see the full extent of our activities throughout the period where I hope our influencing, our insights, the learning opportunities we have provided and the small gestures we have made - including freezing membership fees for a second year - have helped to make a tough period more bearable.

I've been immensely proud to be associated with this profession this year; everything you have done to support the national effort and everything you have helped the Institute to achieve.

Linda Hausmanis
Chief Executive

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.

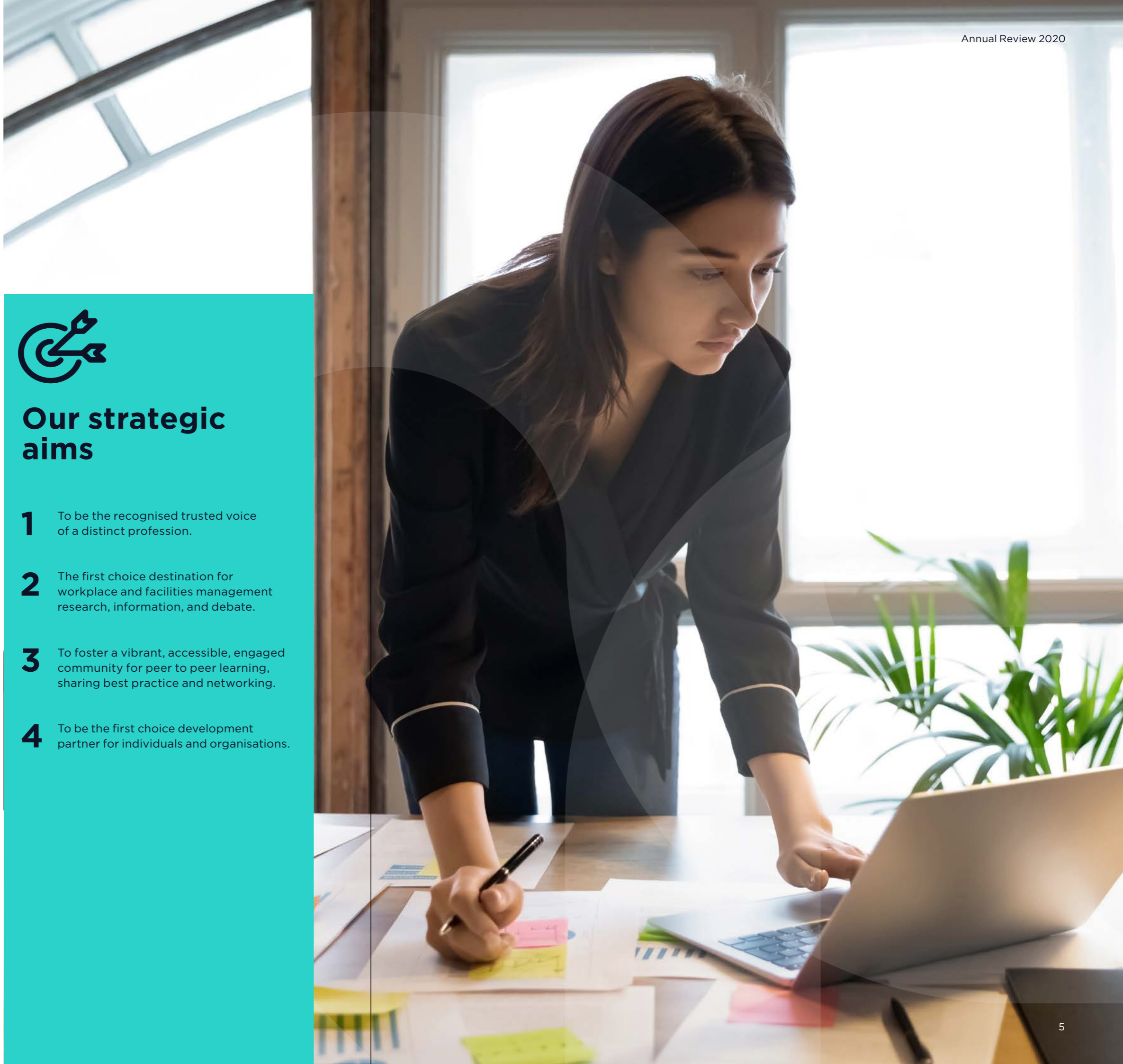
Human and inspiring

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 The 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.



2020 year in review

JANUARY

- IWFM Conference 2020 to focus on key megatrends to help the profession 'Navigate turbulent times'
- Entries open for twentieth IWFM Impact Awards as five new categories reflect profession's reach and diversity
- IWFM signs MoU with BSRIA to collaborate on technical building services insights
- We support Australian Red Cross fundraising for the bushfire emergency in New South Wales

FEBRUARY

- New 'BIM data for FM systems' good practice guide published

MARCH

- Head Office transitions to remote working
- COVID-19 'Managing the impacts' hub launched for updates, guidance and key resources, with help from IWFM Risk and Business Continuity SIG
- IWFM talks sustainability in The Times' Raconteur 'Future Workplace' supplement
- New 'Managing accessible and inclusive places' good practice guide published
- New Customer Experience Working Group rallies members passionate for customer-centric delivery

APRIL

- Outreach to understand members' pandemic-based concerns targets tailored responses to foster professional development and growth
- 'COVID-19: rising to the challenge' launches new 'Navigating turbulent times' webinar series for topical, engaging discussion

MAY

- New Sustainability content hub launch marks World FM Day 2020: 'Celebrating our environment'
- IWFM signs MoU with The Climate Group to promote sustainability in business
- New Leaders' Forum Report by the ISIG on Emerging skills in FM and international FM
- Impact and Experience members' survey response rate reaches highest level yet
- New 'Inside track' bi-monthly newsletter targets organisation members
- New insight partnership with Elogbooks for guidance on compliance and risk for smart buildings

JUNE

- IWFM meets Dame Judith Hackitt to discuss statutory Building Safety Manager role

JULY

- New guidance 'Leading successful workplace change' published with Ricoh as Creating Better Workplaces partnership extends to a second year
- Low pay: new guidance on 'the real Living Wage and the case for paying it' launched in partnership with the Living Wage Foundation whilst we put the profession's case to Government
- IWFM Impact Awards finalists announced
- New live virtual training with IWFM Academy launch boosts CPD options
- Brexit and immigration guidance updated with 'no deal' implications

AUGUST

- IWFM Virtual Conference revealed as week-long programme
- TWIN FM features IWFM review of Building Safety Bill implications for sector
- IWFM and Inenco hosted roundtable discusses Sustainability Survey 2020 findings
- 2019 Annual Review published

SEPTEMBER

- First virtual AGM
- First virtual IWFM Conference brings thought leadership and challenge on key megatrends
- IWFM Sustainability Survey 2020 provides insights on social value and wellbeing
- Resilience Alliance launched as IWFM joins forces with member organisations
- Facilitate magazine's Martin Read crowned 'Editor of the Year' at memcom awards
- IWFM and partner Trend Controls discuss data analytics at smart buildings panel

OCTOBER

- IWFM Impact Awards 2020 winners announced at the first virtual ceremony
- IWFM nominee wins Gold at the Global FM Excellence Awards
- Our webinar explains how the profession can prepare for first statutory role: Building Safety Manager
- IWFM responds to Government's net zero strategy
- We discuss post-pandemic sustainability opportunity in Government Business magazine feature
- We mark National Work Life Week with tips for FMs to support mental wellbeing at work

NOVEMBER

- New report 'Bridging FM's digital divide' with Microsoft aims to increase digital literacy
- Award-winning Facilitate magazine goes digital and bi-monthly
- IWFM supports Workplace Week International
- New guidance 'Empowering people' is sixth output with workplace partner Ricoh
- Housing Select Committee references IWFM in Draft Building Safety Bill scrutiny
- IWFM gives evidence to the Low Pay Commission as 2021 Minimum Wage rates announced

DECEMBER

- New social value framework enables profession to measure and demonstrate the SV advantage
- New Building Safety content hub provides one stop shop for insight and guidance
- Roundtable with Ricoh explores communication and collaboration in the future workplace
- 'Emerging stronger' announced as IWFM Conference 2021 theme

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

IWFM Conference 2020: Navigating turbulent times

Little did we know when we chose 2020's theme 'Navigating turbulent times' in autumn 2019 just how relevant it was to become.

We wanted to explore the four 'megatrends' that are reshaping the global economy today: climate change, wellbeing, technology, and the future of work. It seemed somehow prophetic when spring brought a worldwide lockdown.

We moved the date to September in the hope that it might remain a physical event, whilst also preparing an online version if not. By summer, with a physical event out of the question, we launched our first fully virtual IWFM Conference on Monday 21 September: a full week of activity in a creative format that allowed delegates to experience virtually all aspects of a physical event from their homes and workspaces. A bumper Friday of megatrend speakers was preceded by four days of content, interactive engagement, and networking.

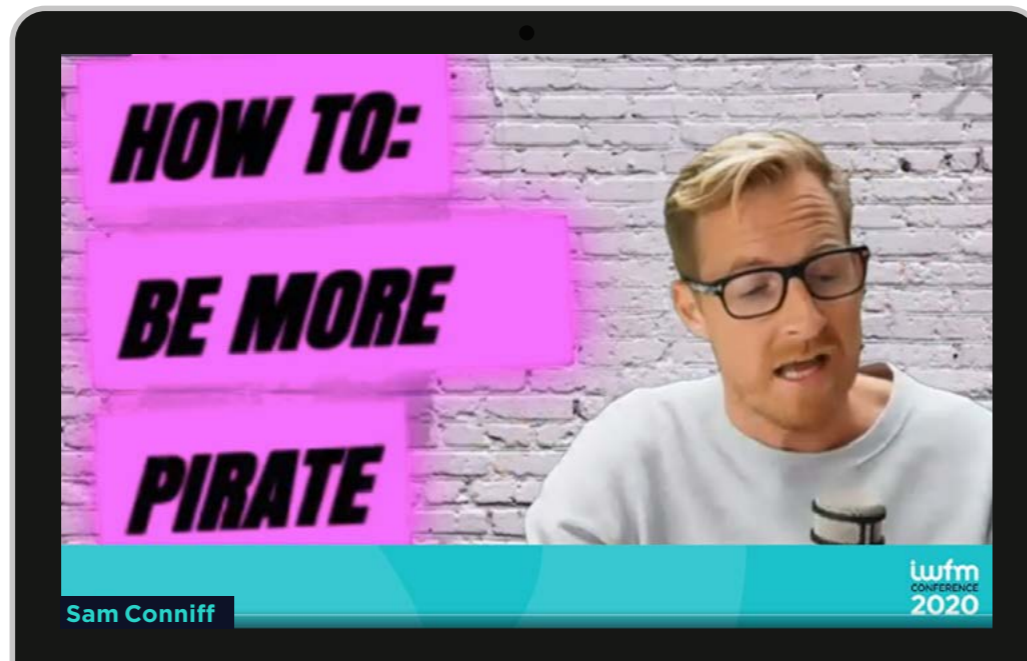
Monday 21 September: Welcome
Chair Martin G Bell video-welcomed delegates and discussed the importance and relevance of our theme. He was joined, virtually, by Chris Moriarty, then Director of Insight and Engagement, who guided delegates through the week's content.

Tuesday 22 September: The zookeeper rules
First up to spread positivity and provide useful tips on how we can make this our best year ever, keynote speaker Nigel Risner talked us through focusing on a positive mindset and provided the tools on how to look forward, not back, to create our own opportunities and success. Sharing insights from his book 'It's a zoo around here',

Nigel showed how we can learn from the animal kingdom to communicate successfully with our colleagues.

Wednesday 23 September: Be more pirate
Sam Conniff took to the virtual stage on Wednesday morning with his interactive session 'Rebellious acts of positive change' taking delegates on his unusual personal journey and encouraging us to join him in practicing a pirate's philosophy of professionally breaking the rules and rewriting them, encapsulated in 'Be more pirate: or how to take on the world and win'.

Thursday 24 September: Navigating turbulent times and a VUCA world
Science writer, broadcaster and comedian Timandra Harkness took us very aptly into a VUCA world, discussing protective gear, the importance of the office, and Brazil nuts in an engaging session. Also on Thursday, the Conference platform hosted a 'Navigating turbulent times' webinar by insight sponsor EMCOR UK, where a panel of experts focused on three of the megatrends requiring a workplace and facilities management response today: climate change, technology, and the future of work.



WELLBEING

Marjorie Wallace, founder of mental health charity SANE, gave a frank reflection on the nation's mental health during the pandemic and explained the role that organisations can play going forward. Already seeing success with the Black Dog campaign, which aims to provide environments and opportunities for colleagues to talk openly about their mental health, she highlighted that the pandemic is exacerbating an already difficult situation and urged organisations to take an active role in supporting their employees.



THE FUTURE OF WORK

Rounding off the week, public commentator Matthew Taylor, CEO of the RSA and author of the 2017 report 'Good Work', an independent review into modern employment, explored the complex scenarios and challenges in this evolving area. Matthew explored how huge changes to market conditions drive new business models. Work drives talent and talent drives workplace because, essentially, organisations will be wondering how to use 'human labour to generate value'.

If there was too much to digest on the day, we made sure all of the Conference content remained freely available to delegates until the end of the year.

Friday 25 September: The megatrends



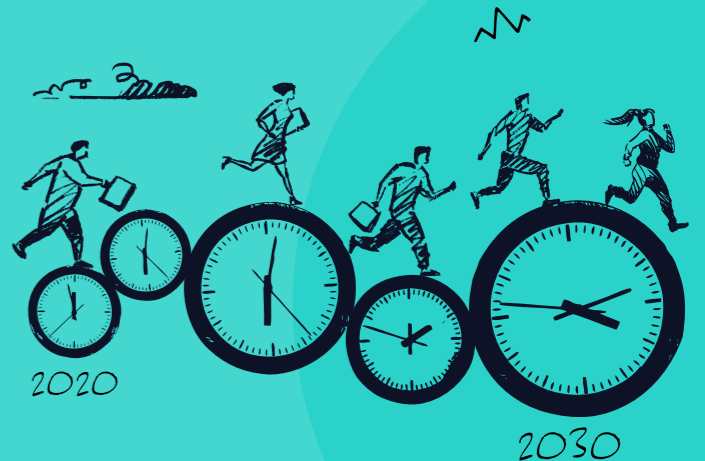
CLIMATE CHANGE

Explorer Pen Hadow started the day with his mind-blowing story of solo expeditions to the North Pole and his first-hand take on the climate change emergency. He discussed how the northern ice cap's fragility will be accelerated by commercial activity in the region, made possible only by ice melting due to climate change. He challenged everyone in a position to make changes in our organisations, including workplace and facilities managers, to take action before it is too late.



TECHNOLOGY

Tech guru Dave Coplin's message was one of human progress going hand-in-hand with advancement, rather than the 'loss of jobs' narrative that can dominate future of tech discussions. Bemoaning the tendency to use technology to make what we did yesterday a bit better today, he urged us instead to start from a fresh perspective: look at the work experience we want to create and how technology can get us there, adopting an experimental, rather than predictive, mindset.



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

COVID responders celebrated as IWFM Impact Awards 2020 goes virtual

Face-to-face events may have been out of the question, but thanks to a digital platform – with a lively chatroom – and the National Lottery’s famous ‘Voice of the balls’, Alan Dedicoat, the IWFM Impact Awards 2020 remained a vibrant celebration of the profession’s outstanding work.

Eleven winners, representing teams and individuals sector-wide, were revealed via video-link by the lead judges whose independent teams had scrutinised and shortlisted scores of entries they whittled down to 37 finalists across the diverse categories. A Trailblazer Award was introduced for 2020, to recognise an individual who is a leading light and inspiration to others and for the positive and profound impact they have had on the workplace and facilities management profession.

A further four winners were also announced, chosen by public vote from a shortlist of 20 finalists in an additional ‘COVID-19 Response’ category, devised to recognise the contribution made by workplace and facilities managers in the wake of the pandemic. The new category, announced in June, proved so popular that it was divided into four discrete awards to recognise the scale and variety of initiatives.



‘It’s often said that with each challenge comes opportunity. This year, workplace and facilities professionals have been helping their organisations confront unprecedented challenges. Yet we have also been at the forefront of new opportunities around the evolution of work and workplace during and post-pandemic. It is more important than ever to celebrate the great work our profession does.’

IWFM Chairman Martin G Bell



‘It has been an absolute privilege to be involved in the COVID Response Award. It acts as a true reminder of how special workplace and facilities management really is. Whether it’s maintaining safe, productive and connected working environments, supporting the wider community, responding directly to the pandemic or adapting to new realities; every single one of you is a true FM hero.’

Julie Kortens, Chair of Judges



THE WINNERS

- Workplace Experience: Office/Corporate Environment**
Edinburgh Park Office, Diageo and Sodexo
- Workplace Experience: Non-Office/Corporate Environment**
12 Day Mobilisation of all FM Services at NHS Nightingale North-West, Interserve Group
- Positive Climate Action**
Barings
- Social Value**
Homeworks Garden and Home Improvement Service, PM Training
- Technology**
Matrix Booking, Hubs Network Collaboration
- Collaboration**
‘WeCo’ – at the leading edge of Vested partnership, Johnson & Johnson together with Sodexo
- Wellbeing**
Authentic Wellbeing, EMCOR UK
- Newcomer of the Year**
Jack Flanagan, Pareto Facilities Management
- Manager of the Year**
Stephanie Welch, Ove Arup & Partners
- Team of the Year (Private sector)**
Yorkshire Ambulance Service Interim FM Team, Sewell Facilities Management
- Trailblazer Award**
Steve Gladwin



THE COVID-19 RESPONSE WINNERS



COVID-19 Response Award: Keeping Good Work Going
Covid-19 Response, Lloyds Banking Group and Mitie



COVID-19 Response Award: Supporting the Community
Edmonton Green Shopping Centre – Supporting the Community throughout COVID-19, Ashdown Phillips & Partners



COVID-19 Response Award: On the COVID Frontline
Facilities Management Team, NHS Property Services



COVID-19 Response Award: Adapting to New Realities
University of Greenwich IFM Mobilisation, Sodexo, The University of Greenwich and Gardiner & Theobald LLP

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

Raising our voice

BUILDING GOOD RELATIONS

In December 2019, IWFM appointed Good Relations as its retained PR agency following a competitive pitch. Throughout 2020, we worked with them to raise the profile of the profession and establish IWFM as the trusted voice of a distinct profession, positioning the Institute at the frontier of thought leadership on topics where workplace and facilities management can have an impact.



In addition to helping IWFM to inform the national debate through a research-backed campaign to make the case for the workplace opportunity in the wake of the 'mass home working experiment' driven by COVID, Good Relations boosted the 'home team' effort by operating the press office and scanning the horizon for suitable comment opportunities where IWFM might have a point of view. In total, the agency helped us to secure 68 pieces of coverage, ranging from industry news websites and financial publications to mainstream media, including the Independent, The Sun and BBC Radios 4 and 5.

Two out of five office staff working in inappropriate home environment, study suggests

Only one in four of 2,200 adults surveyed by the Institute of Workplace and Facilities Management said they had a separate home office

IWFM research reveals many employees are anxious about returning to the office

Coronavirus: HR and facilities teams must work together to keep workplaces hygienic

Facilitate's Martin Read wins memcom's 'Editor of the Year' award

Hygiene Anxiety - 44 per cent of workers are worried about office cleanliness

ANOTHER WIN FOR FACILITATE MAGAZINE AS TITLE EMBRACES DIGITAL

Editor Martin Read added a second trophy to the Facilitate magazine cabinet in September after he was crowned 'Editor of the Year' at the memcom membership excellence awards 2020. The award was the magazine's second in as many years after winning 'Best Magazine' in its category in 2019's Association Excellence awards.

In November we announced that Facilitate was evolving to embrace new digital opportunities and to enable all members to access it online wherever they are, in line with modern appetites for content that can be consumed on the move. As part of the new strategy, Facilitate took on a new bi-monthly journal-style format to deliver higher quality content, including in-depth analysis and more thought-leadership. Members at professional grades continue to receive an additional print copy.

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

Policy: engaging and influencing for better standards and difference-making

Members tell us they want to see us influencing and advocating. In 2020 our policy work extended across a range of programmes and topics. Our primary focus fell on three issues dominating the workplace and facilities management profession and wider society: building safety, sustainability, and the impact of the coronavirus pandemic on workplaces, now and in the future.

Working across the Institute and with our wide expert and stakeholder community we have listened and leveraged expertise, analysis and insight to encourage better standards, achieve better outcomes, and better inform the profession. Our aim is to strengthen the knowledge, authority, influence and impact of facilities professionals, helping them to improve the performance and success of their organisations.

BETTER PRACTICE

Building a safer future

Providing the FM perspective to the work of the Government and industry on improving the safety of buildings and their residents.

The Building Safety Bill was finally published in July 2021 and its draft published a year earlier was no less keenly anticipated. Encouragingly, the Housing Select Committee backed many of the recommendations made to their inquiry by the expert members of our Life Safety Working Group in their pre-legislative scrutiny of the Bill during that summer. Our recommendations focused on the new statutory Building Safety Manager (BSM) to be introduced within the legislation.

As a member of a key post-Grenfell Working Group (WG8), we helped to develop the competence framework for the BSM. Head of Policy, Sofie Hooper, discussed WG8's work with industry audiences, including the Industry Safety Steering Group and Dame Judith Hackitt, whose report 'Building a Safer Future' shaped much of the Bill. Through WG8, we also contributed to 'Setting the Bar', the Competency Steering Group's final report, which set out a blueprint to drive culture change within the industry and build a new competence regime for a safer future.

Dame Judith Hackitt, whose report 'Building a Safer Future' shaped much of the Bill. Through WG8, we also contributed to 'Setting the Bar', the Competency Steering Group's final report, which set out a blueprint to drive culture change within the industry and build a new competence regime for a safer future.

In October, an IWFm webinar explaining to members the implications of the Bill and the BSM role was very popular. A new Building Safety web hub is keeping members engaged in this critical area by bringing together latest news, guidance, resources and legislative changes.

Procurement and social value

Advocating for a procurement approach that prioritises the delivery of quality, transparency and social value.

Collaborating with the Social Value Portal and the National Social Value Taskforce, we helped to develop a new measurement framework for social value, designed specifically for our profession. Published in December, the Themes Outcomes Measures (TOMs) FM 'Plug In' aims to unlock social value measurement and management, helping organisations to evaluate and maximise the value they create through the delivery of their services and to report value created as a financial contribution to society.

Our work to develop the first-ever, FM-specific suite of contracts in collaboration with the Institution of Civil Engineers and NEC gathered pace this year. Helped by a volunteer steering group of Ed Baldwin, Andy Candelent, Chris Jeffers, Patrick O'Farrell and Christine Vallis, the contracts, user guidance and a series of practice notes will soon be available.

MAKING A DIFFERENCE

Employment and low pay

Advocating the benefits of secure employment and paying a decent wage.

The coronavirus pandemic threw the spotlight on this issue as never before, with so many low-paid roles at the heart of our sector, not least keyworkers providing essential services in the crisis. As a member of the Living Wage Foundation's Recognised Service Providers Leadership Group and a Living Wage employer, we support the Foundation's work calling for minimum pay rates independently calculated and based on 'actual' living costs. In July we published new guidance for members outlining the tangible benefits and practicalities of paying the real Living Wage. It highlights research evidencing the link between higher rates of pay and improved service delivery and performance, reinforced by case studies and testimonies from organisations and individual workers who have benefitted.

Our longstanding relationship with the Low Pay Commission continued and once again via oral evidence we provided insight from the facilities sector as part of the annual consultation on the National Living Wage level.

Throughout the Brexit transition period, we kept members updated on the potential implications of deal/no deal scenarios, as well as the Government's post-Brexit, points-based immigration policy. With EU workers comprising up to 34% of the workforce in some areas of FM, we encouraged employers to ensure that their workers secured their future right to live and work in the UK by applying to the EU Settlement Scheme.



SKILLS

Apprenticeships

Advocating the opportunities that employment-based education can offer, arguing for Levy flexibility.

We remain concerned that failings in the Apprenticeship Levy are deterring businesses from investing in skills. The anticipated Levy review, made more critical by the pandemic, and the consequent drop in apprenticeship take up, will enable us to restate the case for two key reforms: ensuring that sufficient funding bands are available for the FM Apprenticeship Standards; and introducing flexibility to use Levy funds for a wider range of training options.

In July we made the case for the apprenticeships opportunity as the Government launched its 'Plan for Jobs' and in September at a roundtable with Employment Minister Mims Davies MP, we discussed initiatives including the Kickstart Scheme funding jobs for 16 to 24-year-olds on Universal Credit, and the wider impacts of COVID-19 on young people.

Facilitate magazine's Policy Pipeline feature illustrates the range of topical issues we are engaged with such as Brexit, the Budget, fire safety - and their implications for the profession - as well as signposting members to further resources and providing the opportunity to feed into our ongoing work.

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

Research and Insight: informing and guiding our profession

Members value our expert insight and guidance. In addition to our regular research programme which changed course because of world events, our ambition to boost the Institute's insight programme and enhance our own brand by partnering with leading organisations and innovative brands continued apace throughout 2020.

With the help of specialist agency b2b partnerships Ltd, several new content partnerships have emerged, alongside a significant renewal. These arrangements help us to bring new insight and intelligence to the profession in strategic priority areas including the future of work; technology; sustainability; wellbeing so we can inform and support members in their work.

COMMUNITY-DRIVEN INSIGHTS

The expertise of our special interest groups (SIGs) and working groups continued to guide and inform our profession in 2020. In March, we launched our Technology SIG-developed good practice guide on 'BIM data for FM systems' which provides guidance on transferring data from BIM into CAFM.

This was followed in May by the latest International Special Interest Group (ISIG) Leaders' Forum report, 'Emerging skills in FM and International FM', which provided insights from academia, demand organisations, suppliers, and consultants who were invited to debate emerging skills to support the future of workplace and FM.

IWFM worked closely with our Customer Experience, Healthcare and Manufacturing Working Groups throughout the year; the outputs published in 2021.

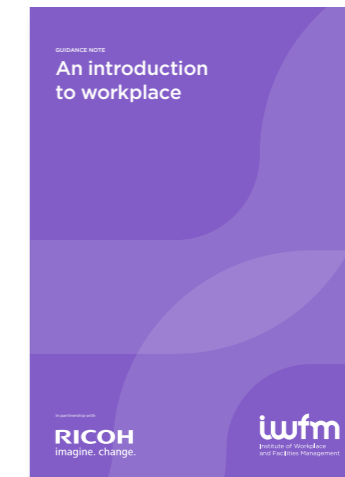
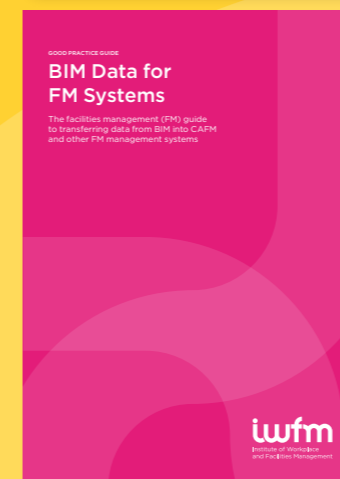
INSIGHT PARTNERSHIPS AND COLLABORATIONS: EXPANDING OUR OFFERING, ADDING VALUE

Understanding the value of data with Planon

In February a new partnership with software provider Planon aimed to provide workplace and facilities professionals with a better understanding of the value data can bring to their work and the practicalities to consider when trying to make better use of it. The guidance, for 2021, is supported by primary research by consultancy and authors 3edges including insight from senior leaders with extensive first-hand experience of leading or implementing major data and digital transformation initiatives.

Driving the sustainability agenda with Inenco

In the same month we began a two year partnership with energy management and environmental sustainability consultancy Inenco to support the long running IWFM Sustainability Survey in 2020 and 2021. Inenco said of the partnership: 'We're delighted to be working with IWFM to provide invaluable insight to help organisations better understand and plan their sustainability journey.' Read about the 2020 Survey results on page 19.

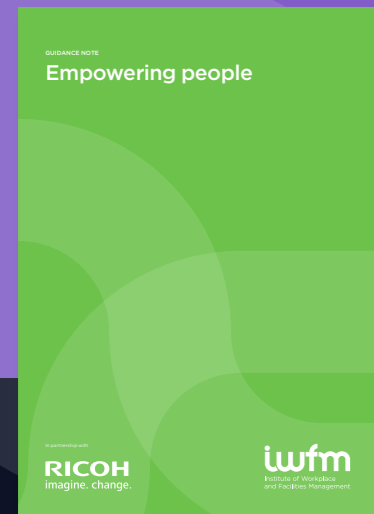


CREATING BETTER WORKPLACES WITH RICOH

In July we renewed our partnership with technology company Ricoh to continue developing our 'Creating better workplaces' knowledge hub as a one-stop source of workplace essentials. The first phase of the partnership, from March 2019 to June 2020 resulted in a series of five guidance notes above.



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

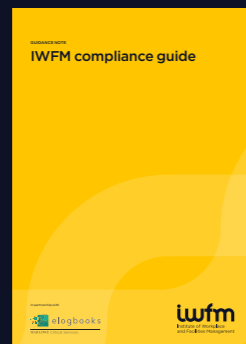


The second year of the partnership saw Ricoh sign up to add three new guidance notes to the growing series, one of which was published in 2020.

The last two, 'Optimising workspaces' and 'Simplifying technology', in 2021.

Exploring compliance and smart buildings with Elogbooks

In July we partnered with FM software company Elogbooks to create two guidance notes. The first, on compliance, was published in January 2021 and explains the concept and its importance in the profession. The second on smart buildings, to follow later, is being developed with support from the IWFM Technology SIG.



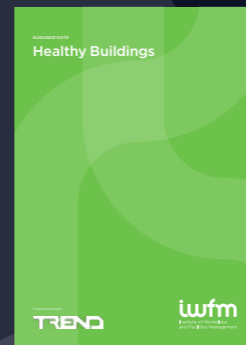
Mid-pandemic catering best practice with Fooditude

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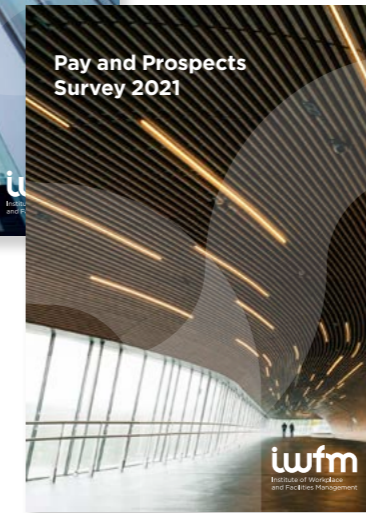
Maintaining healthy buildings with Trend Controls

In the same month Trend Controls, designers of Building Management Systems and HVAC Control solutions signed with us to collaborate on guidance around 'Healthy buildings' with an emphasis on ventilation – a very pertinent topic for those seeking to welcome employees and occupiers back to buildings during the pandemic. Published in summer 2021.



Bridging FM's digital divide with Microsoft

In November a new 'hands-on' report, *Bridging FM's Digital Divide*, was designed to help the profession overcome the tech barrier and realise its considerable potential to impact workplace performance. Aimed at increasing digital literacy in FM, rather than aiming to develop technology experts overnight, the practical report focuses on how to harness the digital knowledge and expertise of others through partnerships, using fictional and real examples to explore what a digitally transformed profession might look like. The work, which began in 2019, responds to IWFM research, Embracing Technology to Move FM Forward, which found a low level of knowledge of digital technologies in the profession and identified a need for it to be able to bridge it's 'digital divide'.



CORE RESEARCH

Market Outlook and Pay and Prospects

Under normal circumstances the annual IWFM Market Outlook and IWFM Pay and Prospects surveys would have been published in 2020. However, the year was far from routine. Mindful that the impacts of the pandemic, the resulting lockdown and subsequent furlough scheme were all placing our profession under extraordinary strain we decided to mothball the findings of the 2020 Market Outlook Survey which had already been undertaken before lockdown. We picked them up in 2021's survey and have used them to draw comparisons between pre and mid-pandemic conditions. We postponed Pay and Prospects entirely for a year in sensitivity to the national situation.



IWFM Sustainability Survey 2020 in partnership with Inenco

The fourteenth survey continued to benchmark perceptions on priorities, performance and governance around sustainability in our organisations and the barriers to, and influences on sustainable practice. With the rising importance of social value and wellbeing in recent years, the survey gave insights on both. The pandemic shaped responses, too, and the findings reflected its effect on this agenda.



As the sustainability agenda broadens across organisations, workplace and facilities management needs to establish its role and positive impact clearly. The nature of the post COVID-19 workplace with energy use, property, flexible working, transport and wellbeing, will offer many opportunities. Initiatives such as the Net Zero Carbon Buildings Commitment and UN Sustainable Development Goals (SDGs), amongst others, could take on increasing significance for businesses, organisations and so for the facilities profession.

Peter Brogan, IWFM Head of Research and Insight



Download the IWFM Sustainability Survey 2020 Report by clicking here or by visiting the Insight section of our website.

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

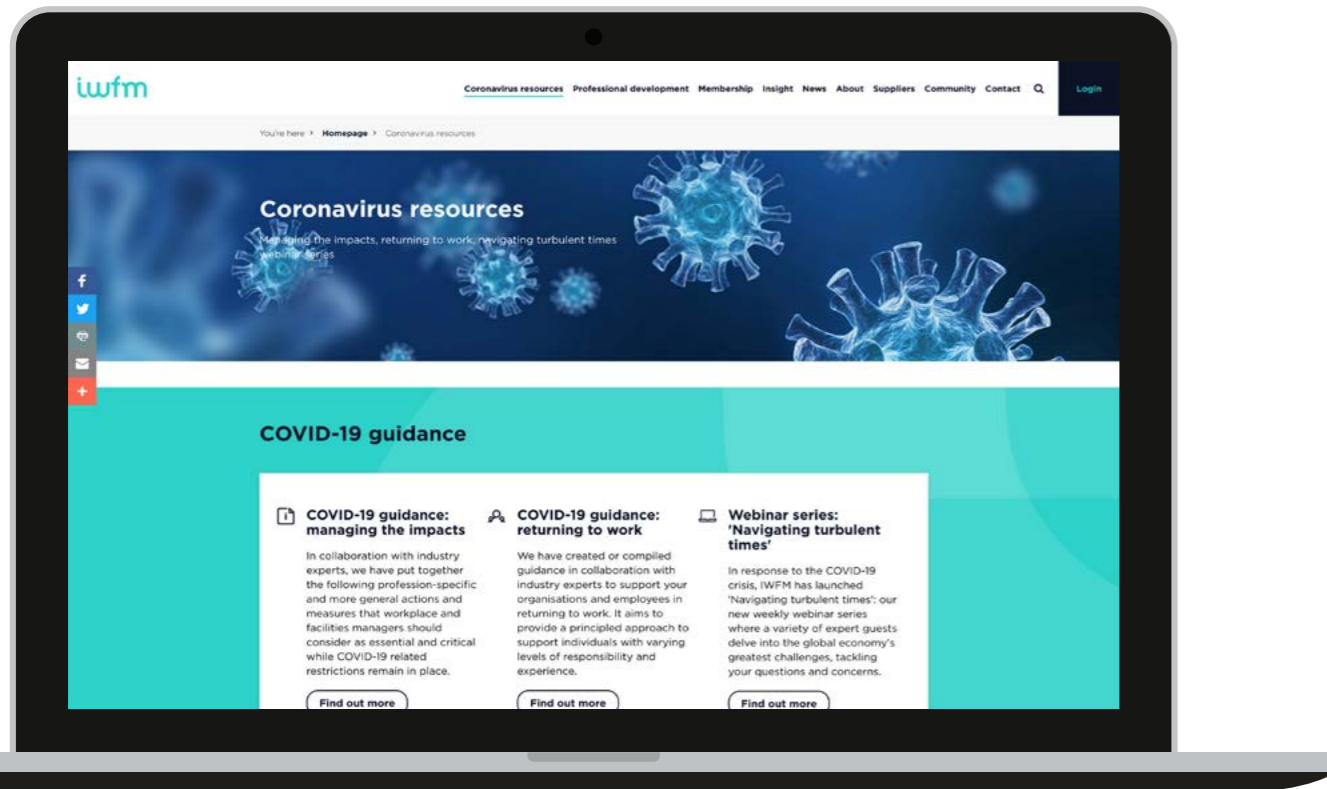
Content, connectivity and communicating on the issues that matter

The circumstances of 2020 sped up many trends across the world. None more than virtual digital communications. This was equally true of our internal working with the result that our content programme, driven by our policy and research engines evolved like never before to deliver improved guidance and resources for facilities professionals.

COVID response pushed us to accelerate a long term ambition to improve our on-line resources started in 2019 with the Creating better workplaces and Sustainability hubs.

COVID-19 HUB

Policy colleagues collaborated with industry experts, including volunteers from the Risk and Business Continuity SIG, to assemble detailed online resources with actions and measures that workplace and facilities managers should consider to protect their people and sustain their businesses. Guidance on managing the initial and ongoing impacts of the pandemic was followed by support for organisations and employees on returning to the workplace. These resources were updated as the pandemic and lockdown developed and informed by IWFM research on the impact of mass homeworking. We also drove a campaign in collaboration with industry stakeholders for the UK Government to recognise the essential role of FM key workers in the national effort to tackle the pandemic.



'Navigating turbulent times' webinar series in numbers

31 episodes

9,095 registrations

5,217 attendees

85% average approval rating*

*an 'approval rating' is the percentage of attendees who rated the quality of an episode as 4 or 5 out of 5

'NAVIGATING TURBULENT TIMES' WEBINAR SERIES

Staying connected, socially distanced

With millions working from home, face-to-face engagement prohibited yet members and other facilities professionals seeking insight, engagement and connection we devised a programme of webinars, building on a format that we had successfully but sporadically used before.

In early April, a fortnight into the first lockdown, we launched 'Navigating turbulent times' (NTT), a regular webinar series covering key strategic themes, initially viewed through the lens of COVID. Echoing the theme of the conference, expert guests would discuss the profession's greatest challenges, tackle questions and concerns, and help to inform, enlighten and engage.

The fortnightly series received excellent feedback and 1,720 registrations from the first four episodes led us to double to a weekly programme. By the end of the year this cross-departmental project had delivered 31 unique episodes covering a range of topics including the pandemic response, resilience, remote working, the future of work, diversity and inclusion, building safety, sustainability, data and technology, social value, leadership, and wellbeing. It had also brought new audiences to the Institute.

SIGs and Regions inspired a number of episodes and made significant contributions to the series providing topic ideas, appearing as panellists and hosting, in addition to hosting a number of community dedicated webinars (see pages 26-27). We also worked with insight partners on a number of episodes and secured renowned thought leaders as guests, including IWFM Conference speakers Marcus Child, Dave Coplin and Matthew Taylor.

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

That was the (global pandemic) year that was...



'2020 is a year that nobody will forget. The COVID pandemic has been one of the biggest challenges of our time. Responding to it up-ended all our norms, including the way we work. Living through it showed the very best of humanity and our profession. Here's a snapshot of how we responded.'

Linda Hausmanis, CEO

FEBRUARY

- IWFM mini-poll gauges confidence levels on organisational preparedness to manage a public health emergency following COVID-19 outbreak

MARCH

- Head Office transitions to remote working in anticipation of national lockdown
- Conference 2020 postponed by six months to September
- COVID-19 'Managing the impacts' hub launched for updates, guidance and key resources, with help from the Risk and Business Continuity SIG
- IWFM argues for facilities professionals to be recognised as key workers during the crisis via letters to ministers and jointly with built environment bodies

APRIL

- Outreach to understand members' pandemic-based concerns targets tailored responses to foster professional development and growth
- We grant six months extension to IWFM learners to complete qualifications and foster CPD with discount on selected online courses with IWFM Academy
- 'COVID-19: rising to the challenge' launches new 'Navigating turbulent times' (NTT) webinar series for topical, engaging discussion
- FMJ opinion FMs, your country needs you by CEO Linda Hausmanis dubbed "a real call to arms"
- AGM 2020 postponed to September

MAY

- New 'Returning to the workplace' guidance boosts COVID-19 resources hub and helps profession preparing for re-occupation
- 'Top five things for businesses to consider ahead of reopening' feature in HR Director and London Loves Business
- 'Thoughts from Leaders' feature in FMJ spread 'Testing Times' on sector reaction and response to COVID-19
- IWFM YouGov poll seeks initial experiences of remote working and return to work guidance
- YouGov remote working research covered by The Independent online
- 'Tales from the front line' NTT webinar with the Manufacturing Working Group
- 'Planning the return to work - the practicalities' NTT webinar with London and Workspace SIGs

JUNE

- New COVID-19 Response Award announced as main categories close for entries
- 'Remote yet connected - wellbeing in the time of COVID-19' NTT webinar with Women in FM SIG and Midlands Region
- 'Loosening lockdown: spotlight on catering' NTT webinar with the Catering SIG
- 'COVID-19: the international perspective' NTT webinar with International SIG and Nigeria and UAE Regions

JULY

- IWFM YouGov second poll findings on remote working attitudes covered in national and trade media
- New live virtual training with IWFM Academy launch boosts CPD options
- IWFM urges caution as PM encourages more workers to return to offices
- 'Skills in the post-COVID world: evolution or revolution?' NTT webinar with International SIG

AUGUST

- IWFM Virtual Conference revealed as week-long programme
- IWFM guidance on the safe return to work features in Maintenance & Engineering magazine
- IWFM COVID-19 Response Award inspires sixty nine entries
- We poll members to gauge sector sentiment on role of face covering in COVID-19 safety at work
- 'Lockdown lessons to empower workplace change' NTT webinar with Workspace SIG

SEPTEMBER

- 6,000 votes cast in COVID-19 Response Award public vote in four categories
- First virtual IWFM Conference brings thought leadership and challenge on four megatrends
- IWFM tells BBC Radio 4: 'Remote workers as or more productive; flexibility is key.'
- CEO speaks at roundtable with Minister for Employment on youth COVID-19 employment impacts and initiatives
- Manufacturing Matters interview 'No more 9-5? Features IWFM on the future of the workplace

OCTOBER

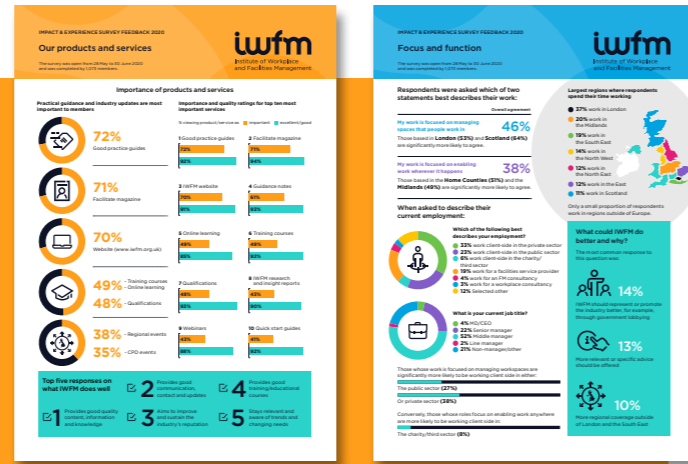
- We discuss post-pandemic sustainability opportunity in Government Business magazine feature
- 'Managing flexible and remote teams' NTT webinar with Workspace SIG

NOVEMBER

- 'COVID-19 international perspective part 2' NTT webinar with International SIG and UAE Region
- 'Emerging Stronger' announced as IWFM Conference 2021 theme

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

Impact and Experience Survey 2020



The IWFM Impact and Experience Survey (previously the Membership Survey) is a key tool to help us understand what members think of our products and services, where we do well and, most importantly, where we can improve. We also supplement this insight with snap surveys to ensure we stay in tune with what matters to members.

'Professional', 'informative' and 'knowledgeable' were the top three words our members used to describe us in 2020, but, as with any organisation, we can and will always do better.

You said:

- 1 you trust us and are proud to belong to IWFM
- 2 you love our insight and knowledge, and you like the comms that keep you informed
- 3 belonging to IWFM enhances your professional credibility
- 4 lobbying in Government and representing the 'industry' is important to you and we could do more
- 5 you want us to focus on more 'sector specific' guidance and information.

Member outreach in challenging times

Mindful that some members would be facing personal and professional difficulties during the first lockdown, we personalised our engagement communications and emphasised our availability to help. Where it was needed, we offered tailored payment plans and concessionary rates to enable members to remain with IWFM and continue their professional development. The same was offered to those who reached out to us.

We also wanted to help our members support their organisations through the pandemic impacts. Our 'Help us to help you' campaign involved reaching out to find out how we could best help members based on their circumstances and concerns.

A survey to understand areas of concern began the campaign; then, based on their response, we followed up with tailored weekly messages to offer advice and support by highlighting helpful and relevant resources, training, news and insights.

We ended the year by freezing membership fees for second time.



Active communities; thriving networks

In the first quarter of 2020, communities were gearing up to hold a series of events across the year.

Lockdown meant the cancellation of all face-to-face activity and a move to the virtual world. Each group approached the challenges differently. Some stepped back from events to focus on recruitment of new members and content creation to support the wider insights programme, whilst others developed webinars across a range of topics, including procurement, drone technologies, Brexit, evolving trends in workspace, wellbeing and best practice. Several community inspired and led webinars featured as part of the 'Navigating turbulent times' programme.

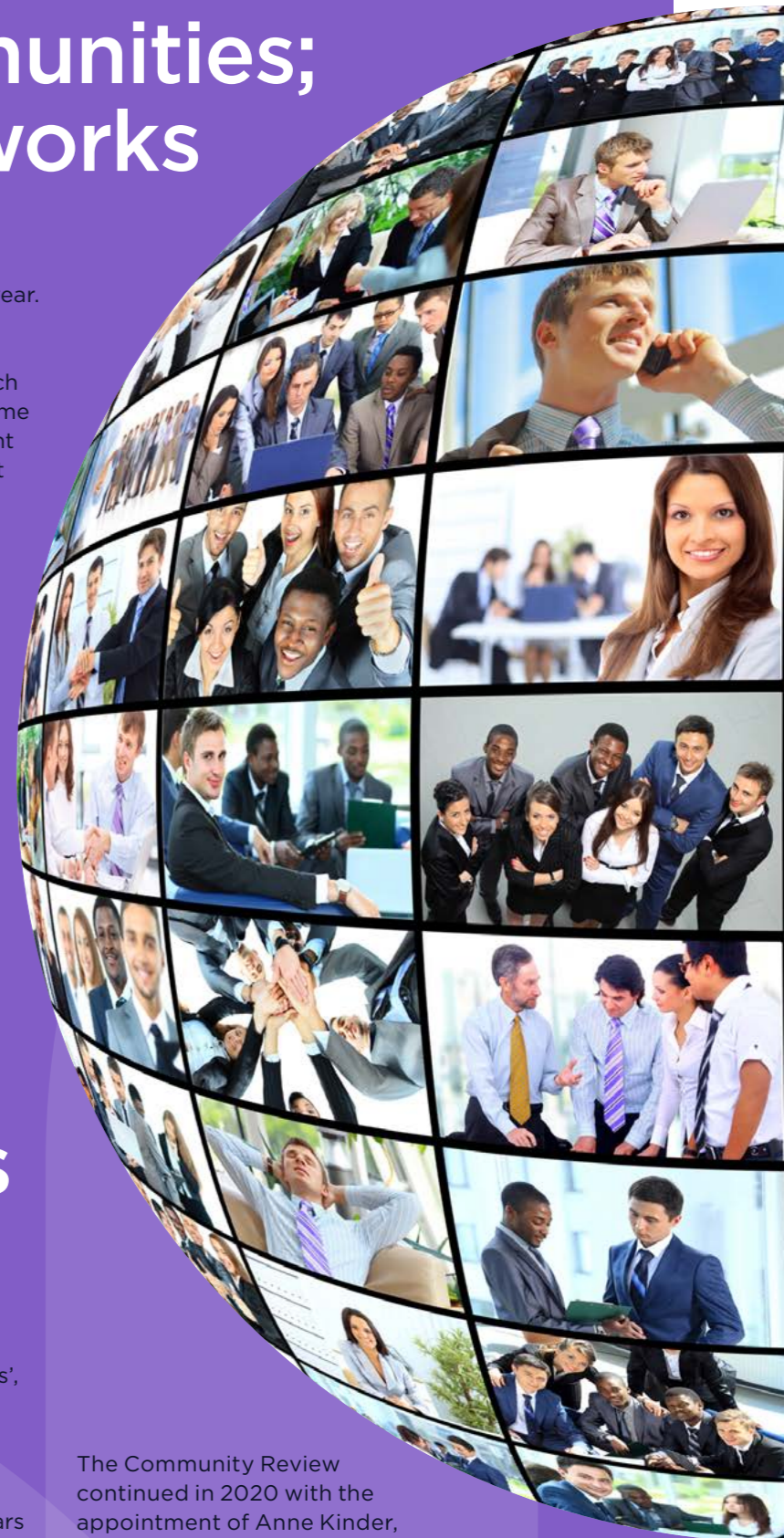
The introduction of Microsoft Teams in 2019, whose use rapidly accelerated in 2020 as Members' Council and Committee Meetings became virtual, brought unexpected opportunities. Benefits included allowing international committees 'real time' participation at Members' Council and to increase collaboration generally between committees.

International communities

We continued to support the profession across the world through a range of on-line and virtual resources. Digital formats for insights and to support CPD such as 'Navigating Turbulent Times', virtual IWFM Conference as well as Academy virtual training courses all enabled access across geographies.

The UAE Committee produced a range of webinars addressing challenges faced locally during the pandemic and like others they collaborated across community groups to produce webinars focusing on globally-relevant topics such as technology, procurement and people. For the first time workplace and facilities management professionals across the UAE region were able to access events previously unavailable.

The Community Review continued in 2020 with the appointment of Anne Kinder, as the Chair of the Governance and Structure workstream. Anne oversaw a volunteer-led feedback exercise on community structure and governance intended to feed into recommendations from the workstream to the Board. The outcomes of recommendations from this and other groups will be taken forward into 2021.



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

Community events

Before and then during restrictions, a number of regional, international and special interest groups held face-to-face and then online events, joining together to learn, debate and connect.

Here is a selection:

JANUARY

UAE - 'Cost Reduction Methods in Vertical Transportation'

London - 'Question Time and AGM'

Home Counties - 'The role facilities management plays in the modern business park'

Women in FM - 'Annual Conference: How Customer Excellence Impacts Bottom Line'

South - 'Indoor Air Quality and AGM'

FEBRUARY

People Management - 'AGM'

UAE - 'Defects Liability Management in FM'

North - 'FM in a dual purpose facility'

International - 'Changing how we think about the world: managing inclusive environments'

Channel Islands - 'Rubbish, Recycling & Reporting Breakfast Seminar'

South West - 'Compliance in FM'

MARCH
(national lockdown)



APRIL

Risk and Business Continuity - Navigating turbulent times webinar: 'COVID-19: rising to the challenge'

Workspace - Navigating turbulent times webinar: 'Coronavirus Question Time'

UAE - Webinar: 'Sharing confidence and best practices in uncertain times'

MAY

Manufacturing - Navigating turbulent times webinar: 'Tales from the frontline'

International x Sustainability - Navigating turbulent times webinar: 'Net zero and sustainability'

London x Workspace - Navigating turbulent times webinar: 'Planning the return to work - what are the practicalities?'

Women in FM x Midlands - Navigating turbulent times webinar: 'Remote yet connected - wellbeing in the time of COVID-19'

JUNE

Catering - Navigating turbulent times webinar 'Loosening lockdown: spotlight on catering'

UAE - Webinar: 'New realities in FM in the Middle East'

International x Nigeria x UAE - Navigating turbulent times webinar: 'COVID-19: the international perspective'

London - Webinar: The lockdown: one-to-one with an FM professional

JULY

International - Navigating turbulent times webinar: 'Skills in the post-COVID world: evolution or revolution?'

UAE - Webinar: 'Human Capital in FM: how to preserve value, post-COVID?'

AUGUST

Workspace - Navigating turbulent times webinar: 'Lockdown lessons to empower workplace change'

UAE - Webinar: 'Practical Post-COVID Priorities in Sustainability'

SEPTEMBER

International - Navigating turbulent times webinar: 'Brexit: where are we and what awaits?'

OCTOBER

Sustainability - Navigating turbulent times webinar: 'Sustainability: today's landscape and how to create change'

Workspace - Webinar: 'One step beyond COVID-19'

Workspace - Navigating turbulent times webinar: 'Managing flexible and remote teams'

UAE - People of Determination in modern society: how can the FM Sector best respond to such needs?

London - Navigating turbulent times webinar: 'One-to-one with Brian Reeves'

North - Webinar: 'Drone Technology & the 2D/3D Digital Data for the Surveying and Inspection of Assets'

NOVEMBER

International - Webinar: 'Creating a collaborative procurement model for supply and demand side organisations'

International x UAE - Navigating turbulent times webinar: 'COVID-19 international perspective part 2'

UAE - Webinar: Do AI, IoT and Digitalisation really have serious potential value in FM, or are we just dreaming?

DECEMBER

People Management: Webinar: 'Employee Wellbeing and Mental Health - Whose role is it anyway?'

UAE - Webinar: 'Relationship Management in FM'



World FM Day - Celebrating our environment

On 12 May we took part in World FM Day, celebrating through a week-long campaign. The theme 'Celebrating our environment', acknowledged our sector's respect for the environment in its widest sense and positive impact on sustainability.

We used the moment to highlight our work on this critical topic beginning by launching our sustainability hub, which brings together the Institute's work on sustainability in recent years, including research, good practice guidance and case studies.

Also during the week:

- We announced a new collaboration with The Climate Group which promotes the benefits of building sustainability and climate actions, including energy efficiency. Collaborative peer-to-peer events on how to accelerate the de-carbonisation of the built environment, showcase best practice and address common barriers will form the programme.
- The International SIG hosted a 'Navigating turbulent times' webinar with an expert panel to discuss 'Net zero and sustainability in a post-COVID world';
- We shared our good practice guides (GPGs) on Recycling, Waste and Resource Management as well as our other resources and guides, to help support our members in their day-to-day sustainability agendas;
- We encouraged those home schooling children during lockdown to get them involved by producing a worksheet to help them understand sustainability and the impacts at home and their surrounding areas.
- Finally, we took part in Digital Week with webinars on 20 and 22 May, hosted by the organisers of Facilities Show, bringing together industry leaders virtually to discuss how our sector is tackling COVID-19 and sustainability related topics, including the net zero challenge.

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

Professional Development:

promoting learning, advancing careers, upholding standards

Keeping professional development and career support at the heart of our work was key in 2020. Our focus in this unprecedented year was to make our learning offer as accessible as possible and to help and encourage all members, including those already studying with us, to keep up their learning and CPD and take every opportunity to focus on professional growth, through formal programmes of study toward qualifications, apprenticeships, short courses and broader opportunities.

Keeping professional development in focus

With virtual economic shutdown for much of the year we resolved to make it easy for members and others to choose a professional development path despite the effects of the pandemic, whether that was furlough, redundancy, budget constraints or overwhelming workloads.

In addition to offering tailored individual support to members and learner members to help them continue professional growth, we:

- extended by six months the completion time for qualifications as a buffer to those with pressures elsewhere
- shifted Academy short courses offering to 'Live Virtual Training' using the latest Zoom Education software
- offered discounts on selected IWFM Academy courses.

Qualified success

The barriers facing workplace and facilities professionals wanting to upskill in 2020 were not trivial as a number of Recognised Centres paused delivery. Despite this, people were motivated to study and it was encouraging to see more awarded completers this year, almost 700, against 652 last year, and to know that the number of learners registering for IWFM qualifications dropped by only a small margin in the year from 1,741 in 2019. We expect that the six month extension granted to learners will be reflected in next year's completer numbers as those who would have completed in 2020 do so in 2021.



IWFM qualifications in 2020

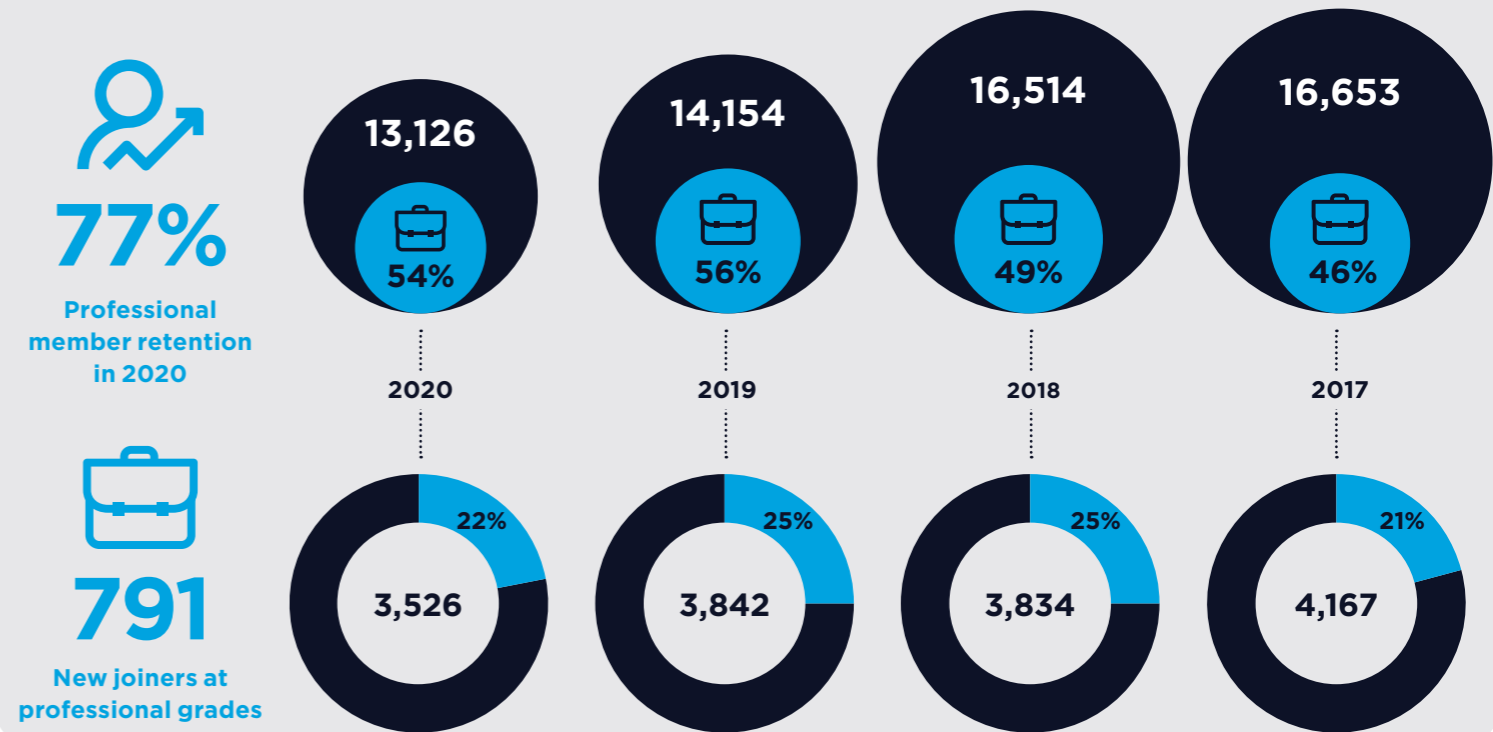
1,650 registered

697 awarded

The numbers accessing our qualifications from across the world continued to grow, with more organisations based overseas choosing to develop their people with IWFM. IWFM Direct remained an important study option during the year with just over one third of all registrations for qualifications choosing this route.

Membership in transition

- average membership
- at professional grades



Membership

Despite an unprecedented economic shutdown, we redoubled efforts to retain members with encouraging results in difficult circumstances, increasing the percentage of professional members renewing their memberships from 76% to 77%. The global number of member upgrades dropped in the year but net of those in non-assessed grades, the number was more stable. Other positive indicators, whilst not reflected in overall figures, included a record number of responses to our Insight and Engagement member survey, suggesting higher levels of engagement from the wider membership.

Despite the improvement in retention rates, professional membership dipped slightly as a proportion of the overall figure, and while the decline in overall member numbers will take time to reverse; retention, progression of existing members and outreach for growth in this area remains a crucial area of focus.



Growing our professional community

As well as attracting 3,526 new members in 2020 (300 fewer than in 2019) we also grew our non-member audience by 3,785 new professional contacts into our combined community pool of over 38,000. Nearly half of these came directly through our Insights programme, including the Navigating turbulent times webinar series introduced in April and was helped by our partnership work which has super-charged our research and content offering.

We maintained in regular conversation with the widest professional community on our activities, news, research, guidance, and professional development opportunities. We hope to encourage even more into membership in 2021.

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

IWFM Academy

We ensured the IWFM Academy remained an attractive learning solution by adapting the offering to a state of the art on-line platform and in July, we introduced a 'live virtual training' offer in place of face-to-face learning, maintaining the collegiate learning experience with a trainer delivering the course live via the Zoom Education platform streamed in real time to delegates' on-line devices.

Added benefits of the 'distance learning' delivery model included additional subject matter learning materials enabled by the digital format, which also led to an increase in international delegates, no longer facing practical or financial barriers of attending in person; and it proved popular with attendees generally.

As the new model was breaking new ground for all concerned, the Academy team trained the trainers via workshops and developed best practice guides to support delivery and to ensure the customer experience and Academy brand values were maintained across the new platform. The best practice guidance has since been adopted across the business as it switched to the Zoom platform for all virtual delivery.



AN INTRODUCTION TO FACILITIES MANAGEMENT

'Given the pandemic, I think IWFM have done well in transferring classroom training to a virtual course. I thoroughly enjoyed the interactive sections.'

Zule, Facilities Lead



SELLING YOUR WORKPLACE VISION

'Ian was very knowledgeable and brimming with information. I thought the course was pitched just right. We are in the middle of a smart working project so the information/techniques will be invaluable as part of the roll out.'

Allison, Facilities Manager

Digital formats enabled the Institute to add value in the shape of additional learning resources for delegates, except IOSH and Operational Space Planning (OSP) courses which had specific paper-based requirements, all of which were fulfilled in time.

As a result of shifting needs within the sector due to the pandemic, the 'leader board' of popular course subjects has changed quite dramatically, with large increases in demand for Operational Space Planning and IOSH courses. These trends informed the 2020 schedule as the year progressed and will feed into its 2021 review of course subjects.

Live virtual training feedback

4.7/5 average rating for live virtual courses

91% scored their experience as 'excellent'

Apprenticeships in 2020

End Point Assessment

IWFM has been an end-point assessor organisation (EPAO) since 2017 and we are currently approved to deliver End Point Assessment (EPA) for three Apprenticeship standards at Levels 2, 3 and 4.

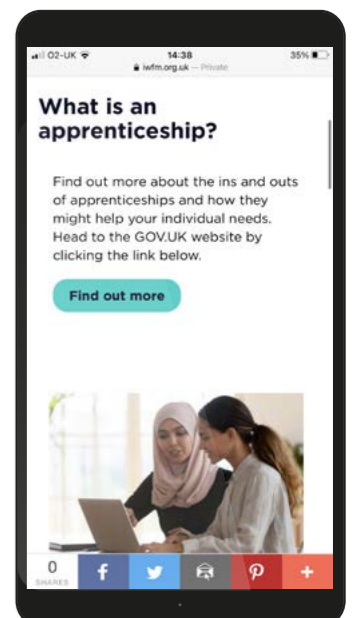
End Point Assessment (EPA) is the final summary assessment for apprentices and is designed to be an objective and impartial assessment of their knowledge, skills and behaviours. An EPAO must be involved in the EPA of each apprentice, so that all are assessed consistently.

Being an EPAO ensures competency within a given Apprenticeship Standard, contributes to the reputation, rigour, robustness and integrity of the Standards, and helps sustain and raise the competences and behaviours of those within the facilities management sector.

The EPAO must be chosen by the employer and sit on the government Register of End Point Assessment Organisations.

To ensure rigor of the end point assessment process, Ofqual externally quality assure and constantly monitor the activities of the EPAO function.

We plan to extend our reach to other training providers in the facilities management arena from August 2021.



Board members



Chair
Martin G Bell



Deputy Chair and Board representative on the Constitution & Ethics Committee
Sue Hills



Deputy Chair and Non-Executive Director
Andrew Hulbert



Co-opted Non-Executive Director
Paul Ash



Non-Executive Director
Michael Kenny



Non-Executive Director
Marilyn Standley



Non-Executive Director and Board representative on the Audit & Risk Committee
Mark Whittaker



CEO
Linda Hausmanis

IWFM Board and Members Council

Please note: this information was correct as of August 2021.

IWFM BOARD MEMBERS

(as from 30 Sept 2020)

Chair
Martin G Bell

Deputy Chair and Board representative on the Constitution & Ethics Committee
Sue Hills

Deputy Chair and Non-Executive Director
Andrew Hulbert

Co-opted Non-Executive Director
Paul Ash

Non-Executive Director
Michael Kenny

Non-Executive Director
Marilyn Standley

Non-Executive Director and Board representative on the Audit & Risk Committee
Mark Whittaker

CEO
Linda Hausmanis

IWFM Board Members who also served in 2020

Lucy Black
Lisa Hofen
Keith Waterman

IWFM BOARD COMMITTEE

Audit & Risk Committee 2020
Dale Gilbert – Chair
Ed Baldwin
Brian Court
Robert Grant
Mark Walker
Mark Whittaker – Board Representative

Nominations & Remuneration Committee 2020

Rod Lennox – Chair
Martin G Bell – IWFM Chair
Ashleigh Brown
Leila Osbourne
Marilyn Standley – Board Representative

Constitution & Ethics Committee 2020

Sue Hills – Chair & Board Representative
Paul Eslinger
Richard Farmery
Nick Fox
Stephen Roots

Extra Ordinary Finance Committee 2020

Paul Ash – Chair
Martin G Bell – IWFM Chair
Keith Waterman
Linda Hausmanis – CEO

Members who also served on Board Committees in 2020

Andrew Neal - Constitution & Ethics

MEMBERS' COUNCIL

(as from July 2021)

Chair (from May 2020)
Jason Cousins

Deputy Chair
Cathy Hayward

Catering and Hospitality
Julian Fris

Channel Islands
Katherine Torode

East
Natalie Allerton

Home Counties
Adam Phillips

International
Steve Gladwin

Ireland
Conor Cooney

London
Gary Binder

Midlands
Nicola Lathbury

Nigeria
Tunde Obileye

North
Mark Muncaster

People Management

Alison Verdin

Procurement
Anne Kinder

Rising FMs
Michelle Brightly

Risk & Business Continuity Management
Dave Cooke

Scotland
Sandy McNaughton

South
Ian Fielder

South West
Pauline Simpkins

Sustainability
Greg Davies

Technology
Gordon Mitchell

United Arab Emirates
David Carey

Women in FM (WIFM)
Nicola Lathbury

Workspace
Simone Fenton-Jarvis

COUNCIL MEMBERS WHO ALSO SERVED IN 2020-2021 AGM (Correct as of July 2021).

Wale Odufalu
Marie Katherine Mayers
Chris Jeffers
Bernard Crouch
Paul Thomas
Peter Fancy

WORKING GROUP CHAIRS

Customer Experience
Jamie McDonald

Healthcare
Peter Galley

Manufacturing
Andy Candalent

2020 financial summary

In a year of unprecedented economic challenge, we have been steadfastly focused on staying relevant to and creating value for members whilst reaching out to new audiences with insight, learning and professional development offerings. We kept costs down and used Government support where appropriate.

Overall income dropped by 18% on the prior year, an outturn that was tempered by encouraging retention levels at professional grades (77% renewed) and, as the year wore on, returns on our efforts to adapt our offering to on-line platforms. Operating costs fell by 18% across the period.

Although the overall result was a loss after depreciation due to a drop in turnover, the focus on creating member and societal value has laid solid foundations for 2021 so we can capitalise on the post-pandemic recovery.

Limited economic activity and furloughed staff across the piece made doing business difficult everywhere. We saw our strategy to double down on member engagement begin to pay off in improved retention figures; and while a decline in membership income of 7% is by no means a success, that the rate of decline has not accelerated further in such a devastating year is a positive.

Income from sources other than membership, an area we have sought to grow in recent years, took the biggest hit with the major gaps being revenue from the Awards, this year a pared down on-line ceremony; and to a lesser extent the Conference which moved on-line and extended from a day to a week and which in the end provided a reasonable contribution through deferred venue costs. Magazine revenue also suffered as recruitment and advertising income dried up. The decision to move Facilitate on-line, make the title bi-monthly and reposition it as a benefit of professional membership will help reduce costs in 2021. IWFM Direct suffered a 15% reduction in sales across the year, taking its contribution back to 2018 levels, though the product did recover in the latter part of the period. The Academy held up well as the offering went on-line, where in addition to the benefits of reaching new overseas audiences, savings were made on venue and travel costs. Income from Apprenticeships End Point Assessment was the year's beacon of hope, rising by 38% in the year, with the promise of further growth.

Operating costs were in general kept to a minimum, with savings on travel and accommodation adding to lower office costs, including a saving on rent. Cross business efforts to call in invoices, re-negotiate terms and win new business made the difference.

The Board and the Executive, supported by an Extraordinary Finance Committee (EFC) monitored the business closely after the start of the pandemic. With a role both to support and scrutinise the Institute as it responded to the year's challenges and took up Government-provided opportunities to help sustain small businesses throughout the crisis, the EFC met regularly from the beginning of the pandemic and reported to the Board throughout. The Institute used Government help where appropriate, including the furlough scheme, PAYE and VAT deferral and a CBIL (Coronavirus Business Interruption Loan) facility, which helped the Institute end the year with a healthy cash position.

These measures were considered when the auditors provided a going concern statement, available in the published accounts. The statement confirms that the directors have considered the company's financial performance since the balance sheet date, the likely impact on revenues as a result of COVID-19 and have prepared forecasts and cash flow projections taking into account the potential impact on the company as a result of COVID-19.

	2020 £000s	2019 £000s	Movement
Membership income	2,361	2,534	(173)
Other income	1,180	1,687	(507)
Total income	3,541	4,221	(680)
Operating costs	3,312	3,975	663
Profit before depreciation	229	246	(17)
Depreciation	355	292	(63)
Profit (Loss)	(126)	(46)	(80)
Net assets (Liabilities)	80	206	(126)
Cash	234	153	81

Purpose, aspirations and priorities for 2021

If 2019 was the year of consolidation after our re-brand and systems upgrade, 2020 was the year of reaching out, collaborating and engaging with a wide range of stakeholders, virtually as it turned out. In the post-GDPR environment we got better at understanding who our key audiences were and using data to guide our activities.

Pandemic proofing our workspace

The tech investment made in 2018 came into its own this year, enabling the entire workforce to switch - overnight - to remote working at the first lockdown. Modest in-year investment in integrated Zoom technology enabled us both to deliver a quality virtual face to face Academy experience and expand our channel capacity for webinars - our primary engagement tool in the year - so that we could host and support more virtual events, automate data processes and improve our customer insight. As well as keeping us fully enabled out of the office, the workplace team ensured the right protocols were in place and observed to keep us Covid safe when we were able to return.

Using data, listening to members, understanding our customers

Our first survey of members since becoming IWFM produced more responses than ever before and, together with qualitative customer experience data, including from members who had decided not to renew with us, they provided powerful insights about priorities.



Priority projects

With our long term ambition to become a chartered body front of mind and anticipating the recruitment of a Director of Professional Development as a top resourcing priority for 2021 we identified a number of cross-cutting projects that deserved our focus for the coming year. They include:

A 'customers' project to help define the market, segment our customers (members and non-member; individuals and organisations) and shape our customer value proposition.

Continued focus on member acquisition and retention bringing the Member and Customer Experience and Marketing teams closer to work on integrated campaigns both to attract new members and retain existing ones with a parallel strand to target key organisations, including corporate members, with membership and/or learning-based propositions where appropriate.

A first phase of a competency-based route to Certified status, recognising the "glass ceiling" to many long standing members previously assessed at the Member grade but unable to progress on their professional pathway for lack of a Level 6 qualification.

Other projects included **progressing the Communities Review** and freeing up resource through a **partnership based delivery model for the IWFM Impact Awards.**



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

We exist to promote excellence among a worldwide membership community of around 14,000 and to demonstrate the value and contribution of workplace and facilities management more widely.

Our Mission: We empower and enable professionals to 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 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.

The IWFM was established in 2018. It builds on the proud heritage of 25 years as the British Institute of Facilities Management.

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