



STRATEGIC PLAN

2025 – 2027

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INTRODUCTION

Welcome to the Institute of Asset Management Strategic Plan 2025 to 2027. This plan has been developed through engagement with representatives from our IAM Chapters, our Patrons, our members (both individual and organizations), and our volunteers. The plan sets out the key objectives and actions we would like to achieve over a three-year period to advance the asset management discipline for the benefit of our members and wider society, as well as continue to develop the Institute and its global reach.

The IAM is a not-for-profit, professional body, owned and controlled by our members and committed to remaining independent from commercial and trade associations. We exist to advance the discipline of asset management, not only for people and organizations involved in the acquisition, operation, and care of physical assets, but also for the benefit of society and the general public.

Ten strategic plan key objectives support the development of the plan. These key objectives support the delivery of the IAM's purpose and vision and the IAM's enduring objectives. The IAM values underpin everything we do as an Institute and provide the foundation for the strategic plan key objectives and strategic plan actions. In pursuing our strategic plan key objectives and strategic plan actions we are also led by our key behaviours.

The format of the plan is designed to provide focus on the delivery of the plan actions and enable a quarterly in-year review of progress against the plan. The plan is updated annually to align with the business planning process.

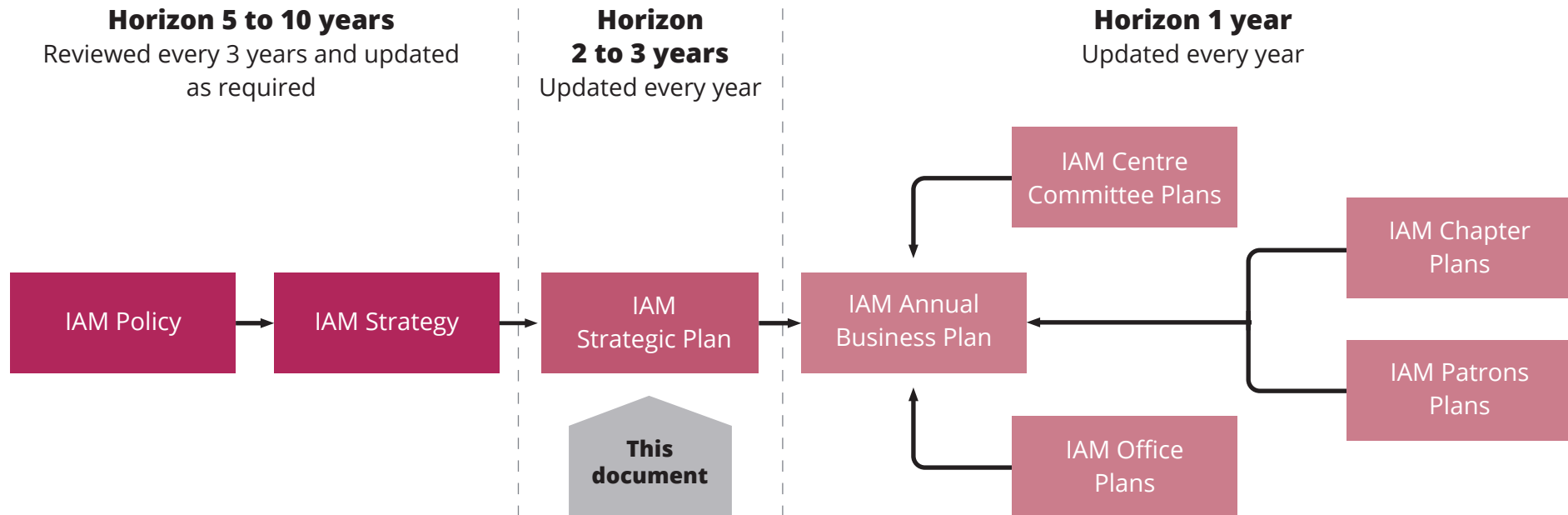
The plan sets out an ambitious but pragmatic set of actions. These have been developed to enable the IAM to increase its reach and influence across the world, support our members with their professional journeys and deliver on our commitment to developing asset management knowledge and best practices for the benefit of our members and wider society.

We hope you find the strategic plan useful, and if you have any feedback, please email our CEO, [Ursula Bryan](#).



THE PLANNING PROCESS

The strategic plan is part of an integrated planning process:



IAM PURPOSE AND VISION

Our purpose and vision reflect the significant positive impact asset management can have in benefiting society and the role we as an Institute can have through furthering the asset management discipline.



OUR PURPOSE

We promote and develop the asset management discipline and profession to positively impact the world's biggest challenges, now and into the future.



OUR VISION

To create value by engaging with our members and wider society, through generating and sharing asset management knowledge and innovative solutions, whilst inspiring and supporting individuals and organizations to build their asset management capability.

OUR KEY BEHAVIOURS

In pursuing our purpose and vision we are led by our key behaviours:

- inclusive and collaborative
- recognizing good practice wherever it comes from
- seeking convergence of the discipline
- inspiring adoption of asset management

IAM ENDURING OBJECTIVES

The IAM nine enduring objectives have been reviewed but remain unchanged as they continue to emphasize our dual purpose, to be both;

- a Learned Society that develops the discipline and knowledge base, with wider societal objectives to spread good practice and awareness, and
- a Professional Association providing services that both support the development of and recognize the competence of our members.

Enduring Objectives

1. Collect / Collate / Disseminate existing knowledge and good practice
2. Generate and extend knowledge and good practices
3. Influence public policy and stakeholder expectations
4. Promote capability and excellence in asset-owning organizations or their suppliers and structured schemes for recognizing these achievements
5. Promote knowledge and competence of individuals and objective schemes for recognizing these achievements
6. Deliver Member publications, engagement and networking opportunities, and other valuable Member Services
7. Raise profile and respect for IAM and the profession
8. Collaborate and support other bodies having similar objectives
9. Develop and maintain an appropriate and sustainable organization



IAM VALUES

The six IAM values have also been reviewed and remain the same:

Independence

We shall remain not-for-profit and controlled by our Voting Members. We shall remain evidently free from vested interests, hidden influences, or paymasters, particularly our knowledge and technical products or services.

Inclusiveness

We shall remain open to all individuals without regard to race, religion, politics, sexual orientation, or other discrimination. We welcome the involvement of organizations in all sectors whether large or small, public or private or not-for-profit, including government.



Collaboration

We shall recognize and support expertise and useful activity wherever it is found. We shall avoid unnecessary competition, and share knowledge rather than reinventing it. We shall work with similar bodies having the same objectives, leveraging our influence by creating structured partnering opportunities.

Transparency

We shall continue to ensure that knowledge work and technical material are actively challenged and peer-reviewed openly. We shall strive for good governance of both member activities and the Institute itself.

Integrity

We are committed to ensuring both the Institute and our Members promote high standards of ethics and behavior. We require members to abide by the IAM's Code of Conduct and we shall deal with any lapses or complaints fairly and transparently.

Respect

We promote courtesy and professionalism in all our activities. We accept that good practices are not universal and that they may need adjusting for different cultures and contexts.



THE IAM STRATEGIC PLAN 2025 TO 2027

As part of the strategic plan development for 2023 to 2025, ten key objectives were established through engagement with representatives from our IAM Chapters, our Patrons, our members (both individual and corporate), and our volunteers. In developing the strategic plan for 2025 to 2027 these ten key objectives were reviewed and it was agreed to keep them broadly the same with just editorial updates. These key objectives are organized into three themes.

Knowledge and Influencing	• Further develop existing and introduce new methods for production and dissemination of relevant and timely knowledge enabling significant expansion of the IAM knowledge base
	• Develop and strengthen collaborative relationships with organizations with shared common goals to amplify our joint influence and messages
	• Strengthen the IAM's position as an international voice and a trusted advisor on topics relevant to asset management
Professionalizing	• Grow the network of asset management professionals and progress becoming a Chartered body
	• Strengthen the individual journey offering through the introduction of new professional development frameworks and programs (e.g. qualifications, continued professional development, career pathways)
	• Strengthen the corporate journey offering through the introduction of new frameworks and programs (e.g. sector specific groups, benchmarking)
Thriving Institute	• Enhance our attraction, support mechanisms, retention and our recognition of volunteers/key contributors who are the life blood of the IAM
	• Create added value for our membership, enhancing local networks and services, through our IAM chapters
	• Create added value for our Patrons, globally and locally
	• Support the organic growth of individual and corporate membership across the world and support members in the Rest of the World to establish new chapters where there is critical mass and activity

Bringing all these elements together provides the following overview of the IAM strategic plan, where the ten strategic plan key objectives have been summarized against the themes.

THE IAM STRATEGIC PLAN: OVERVIEW

Knowledge and Influencing: expand knowledge; strengthen relationships; international voice and trusted advisor	
Professionalizing: grow AMPs and progress Chartership; strengthen individual journey; strengthen corporate journey	
Thriving Institute: volunteers; transform chapters; transform Patrons; support worldwide member growth	
Enduring Objectives	Behaviours and Values
Purpose	Vision

The first year of the plan 2025 has been organized into actions to deliver in each quarter. The years 2026 and 2027 are not broken down into the same level of detail recognizing that priorities will change over a three-year plan horizon, particularly in the latter years of the plan. The intention is that when the annual update of the strategic plan is undertaken later in 2025, the year 2026 will have more detailed actions added and organized in quarters, and an additional year 2028, will be added to the plan.

Resources for delivering the strategic plan actions are drawn from volunteer members, our sponsors and supporters, and, where required, appointed contractors. We thank them all for their time, effort, and commitment to delivering the plan and to supporting moving the asset management discipline and the Institute forward.

We recognize that actions wholly or substantially dependent on volunteers can be subject to challenges in meeting specified timescales, and the representatives of the IAM who have been involved in developing the plan felt the approach adopted balanced the focus on delivering actions with the adaptability of being able to flex the plan as required particularly in the latter years.

In developing this strategic plan actions, a review of the previous plan 2024 to 2026 was undertaken, and a summary of this progress is included in the appendix to this plan.

As this is a strategic plan, it does not contain all the day-to-day activities undertaken by the IAM. It focuses on actions designed to make an advancement in the asset management discipline or the Institute.

2025 STRATEGIC PLAN

	January – March 2025	April – June 2025
Knowledge and Influencing	Mega trends 2025	Promote key asset management topic for 2025 (look at options to amplify promotion e.g. media models, video, interviews)
	Program of new knowledge	
	Case study library launch	Review self assessment methodology +
	Establish sector specific guidance groups	New SSGs based on revised IAM Anatomy
	Working with Patrons and chapters provide options for senior executive engagement	Collate and consolidate value framework examples
Professionalizing	Take forward Chartership plan actions	Refresh individual and corporate journeys
	Agree way forward on becoming Ofqual recognized based on gap analysis	Refresh individual and corporate value propositions
Thriving Institute	2025 plan for Patrons Strategic Priorities	In-person IAM Global Patrons meeting and dinner
	Plan for 2025 geographical Patrons meetings	
	Inclusion plan for 2025	Develop model for academia and organizations engagement and collaboration
	Celebrate volunteers in 2024	
Events	2025 webinars and professional development workshops	Physical Global Conference
	Plan for 2026 events	IAM UAE Event

2025 STRATEGIC PLAN

	July – September 2025	October – December 2025
Knowledge and Influencing	Establish and implement a process to generate and keep up-to-date material on topical areas chapters can use to engage on and respond quickly to topics in their geography (e.g. responding to government consultations, responding to press releases)	Development a way forward on asset management value and benefits
		Establish a process to capture and curate knowledge from the IAM Discussion Forum
	Investigate options for changing the way knowledge is accessed and provided (e.g. web pages, artificial intelligence)	Revise self assessment methodology +
		New SSGs based on revised IAM Anatomy
Professionalizing		Collate and consolidate 6 capitals reporting examples
	Review syllabus for IAM qualifications	Revised IAM competences framework
	Develop NxtGen value proposition	New professional registration on journey to AMP
	Career pathways	Establish CPD framework and requirements
	Plan for reviewing IAM certificate and diploma	Review IAM Foundation award
	Plan for reviewing Endorsed Training Scheme	Plan for reviewing MIAM, FIAM and AMP criteria
Thriving Institute	Plan for Syllabus for academia	Plan for reviewing Endorsed Assessor Scheme
	Review pilots of transform model	Plan for improved website
	Review and if necessary revise code of conduct	Investigate options for learning journeys
Events	Establish Rest of the World NxtGen group	Establish Rest of the World Chapter
	IAM NA Conference	IAM India Conference
		IAM UK Chapter Conference
	IAM Netherlands Conference	IAM Germany Conference
		Virtual IAM Global Conference

2026 STRATEGIC PLAN

Knowledge and Influencing	Program of new knowledge by quarter
	New ways for knowledge to be provided and accessed
	Innovative tools (e.g. AI) to support knowledge generation
	Revised pathway to excellence document
Professionalizing	Review MIAM and FIAM criteria
	Review AMP criteria
	Review IAM certificate and diploma
	Revise Endorsed Assessor and Endorsed Training schemes
	Enhanced assessor scheme launched
	Toolkit for other organizations to award AMP
	Syllabus for academia
	New 'top up' qualifications
Thriving Institute	New website

2027 STRATEGIC PLAN

Knowledge and Influencing	Program of new knowledge by quarter
	Mega trends 2027
Professionalizing	Corporate recognition program launched depending on survey
Thriving Institute	IAM app



DELIVERING THE STRATEGIC PLAN

As shown in the planning process, the strategic plan feeds into an IAM annual business plan, including an approved budget. The strategic plan actions have fed into this business plan for 2025.

To provide more focus on the delivery of the strategic plan actions and greater transparency on progress being made, the in-year strategic plan actions will be monitored and reported quarterly to IAM Board and IAM Council.

We are extremely grateful to our sponsors and supporters for your monetary and in-kind contributions to delivering our strategic plan.

Our volunteers are the lifeblood of the IAM. Without their dedication and commitment, in conjunction with their knowledge, skills, and capabilities, we could not deliver our strategic plan. We are grateful for all our volunteers across the world.

Volunteer opportunities are open to individuals and employees of corporate members of the IAM, and we are particularly grateful to our Chapters and our Patrons who promote and support the calls for volunteers.

We welcome the support of individuals and organizations who want to join us in developing this exciting discipline and delivering our plan. By becoming a member, you can demonstrate your support and show colleagues, clients, and suppliers your commitment to the principles and practice of asset management for the benefit of business and society, so why not join now? theIAM.org/Join



APPENDIX: REVIEW OF PREVIOUS STRATEGIC PLAN 2024

A review of the previous strategic plan for 2024 is shown below:

KNOWLEDGE AND INFLUENCING	
Activity	Review
Mega trends 2024	Delayed. Included in 2025 plan
Program of new knowledge by quarter	Complete. Published on website knowledge page
New professional development workshops launched	Complete. We have added three new workshops in 2024 and there are still two to be launched
Establish plan to review and revise knowledge resources to take into account new ISO550xx and new GFMAM Landscape documents when launched	Complete. Prioritized plan established
Investigate media models to promote key asset management topics	Removed from 2024 plan. Decision to progress in 2025. Focus for 2024 celebrating 30 years of the IAM and revision of core knowledge resources
Working with chapters provide options for senior executive engagement	In progress. Patrons are progressing actions to support senior engagement
New IAM Anatomy	Complete. Launched 5 July 2024
Establish and implement a process to generate and keep up to date a bank of material on topical areas chapters can use as a resource to engage on and respond quickly to topics in their geography (e.g. responding to government consultations, responding to press releases)	Delayed. To be included in a future plan
Establish sector specific guidance groups	Delayed. Included in 2025 plan
Development way forward on asset management value and benefits	Delayed. Included in 2025 plan

KNOWLEDGE AND INFLUENCING (CONTINUED)

Activity	Review
Develop way forward on further 'big picture' type material	In progress. Options to implement big picture style material link to IAM knowledge resources being investigated
Establish a process to capture and curate knowledge from the IAM Discussion Forum	In progress. Discussion Forum posts used to support some knowledge groups activities and IAM Patrons workshops but more structure required. Included in 2025 plan

PROFESSIONALIZING

Activity	Review
Take forward Chartership plan	In progress. Discussions with Privy Council advised resubmitting our original letter of intent so the plan has been revised to achieve this. The letter of intent has been submitted in 2025.
Establish plan to review and revise professional development resources to take into account new ISO550xx and new GFAM Landscape documents when launched	Complete. Prioritized plan established
Establish a directory of academia contacts with an interest in asset management	In progress. This has been progressed but more work is required to keep information updated
Survey on corporate asset management schemes/academies	Removed from 2024 plan. This will be included in a future plan to support interest in the development of a corporate recognition scheme
Recommendations from review of IAM competences framework	Complete. The recommendations were approved with the next step being to hire a contract project manager, who was hired early in 2025.
Review of Endorsed Assessor and Endorsed Training schemes	Removed from 2024 plan. Based on prioritized plan, requires delivery of the revised self assessment methodology + and revised syllabus before these scheme can be updated.

PROFESSIONALIZING (CONTINUED)

Activity	Review
Plan for becoming Ofqual recognized	In progress. Further activities included in 2025 plan.
Plan for syllabus for academia	In progress. Further activities included in future plan.
Campaign to support better understanding and differentiation of membership grades and professional registration	In progress. Further work being undertaken in 2025.
Establish CPD framework and requirements	In progress. Further activities included in 2025 plan.
Establish model for new 'top up' qualifications	Removed from 2024 plan. Based on prioritized plan, this will be included in a future plan as focus will be reviewing and revising IAM certificate and IAM diploma
Plan for new professional registration on journey to AMP	In progress. Included in 2025 plan.
Develop asset management career paths	In progress. Included in 2025 plan.

THRIVING INSTITUTE

Activity	Review
Establish IAM Netherlands pilot transform model	Complete. IAM Netherlands is piloting the revised model
Action plan for Patrons Strategic Priorities	Complete. Action plan established
DEI plan for 2024	Removed from 2024 plan. Based on chapter feedback through IAM Council and different approach is being adopted
Action plan to establish geographical Patrons meetings	Delayed. Included in 2025 plan.

THRIVING INSTITUTE (CONTINUED)

Activity	Review
Establish Rest of the World NxtGen group	Delayed. Included in 2025 plan.
Review pilots of transform model	In progress. Further activities included in 2025 plan.
Reviewed and if necessary revised code of conduct to support transform model	In progress. Further activities included in 2025 plan.
Understand changes required to articles and byelaws to enable transform model and chartership	Complete. We understand what will be required. The transform model will not require changes to the articles and byelaws. Becoming a chartered body will require changes.
Establish IAM systems and website requirements for transform model to include learning journeys	Removed from 2024 plan. It was too soon to undertake this activity in 2024 because the chapter transform pilots were still ongoing. This will be included in the future plan once the review of the pilots is completed.





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