The Institute of
Asset Management

STRATEGIC PLAN 2026-2028

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INTRODUCTION

Welcome to the Institute of Asset Management Strategic Plan 2026 to 2028. This plan has been developed through engagement with representatives from our IAM Chapters, our Patrons, our members (both individual and organizational), 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.

Twelve 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.

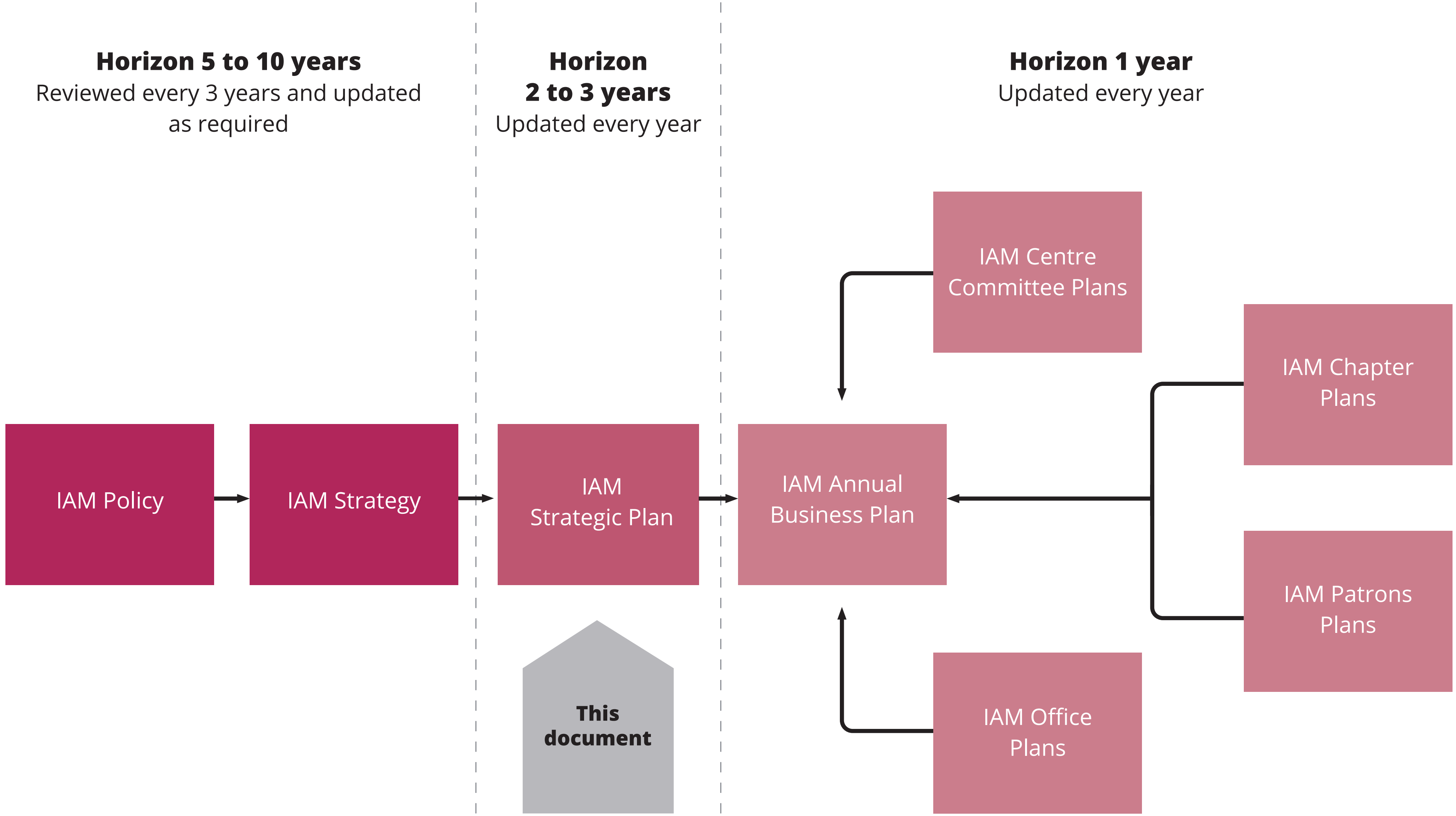
The format of the plan is designed to provide focus on the delivery of the plan actions and enable a quarterly in-year review of progress against the plan. The plan is updated annually to align with the business planning process.

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
- seeking convergence of the discipline
- recognizing good practice wherever it comes from
- 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 2026 TO 2028

As part of the strategic plan development for 2026 to 2028, the key objectives established through engagement with representatives from our IAM Chapters, our Patrons, our members (both individual and corporate), and our volunteers were reviewed. Two additional objectives were added and the other objectives were updated. These key objectives are organized into three themes.

Knowledge and Influencing	• Expand our globally recognized Body of Knowledge, providing thought leadership and practical resources on evolving asset management topics
	• 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
	• Further develop relationships with academia to engage with research, influence curricula, and encourage NxtGen
Professionalizing	• Grow the network of asset management professionals and progress becoming a Chartered body

Professionalizing	• Strengthen the individual journey offering through the introduction of new professional development frameworks and programs (e.g. qualifications, continued professional development, career pathways) from NxtGen through to asset management professionals
	• Strengthen the organizational 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 lifeblood 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 organizational 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 twelve 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; support NxtGen

Professionalizing: grow AMPs and progress Chartership; strengthen individual journey; strengthen organizational journey

Thriving Institute: support volunteers; support chapters; support Patrons; support worldwide member growth

Enduring Objectives	**Values and Behaviours**
Purpose	**Vision**

The first year of the plan 2026 has been organized into actions to deliver in each quarter. The years 2027 and 2028 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 2026, the year 2027 will have more detailed actions added and will be organized in quarters, and an additional year 2029, 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 2025 to 2027 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.

2026 STRATEGIC PLAN

	January–March 2026	April–June 2026
Knowledge and Influencing	Mega trends 2026	Review and potentially revise pathway to excellence document based on SAM 2025 update
	Program of new knowledge	
	Case study library launch	Value and benefits work
	New SSGs based on revised IAM Anatomy	Innovative tools (e.g. AI) to support knowledge generation
		New SSGs based on revised IAM Anatomy
Professionalizing	Plan to progress becoming a chartered body	Career pathways
	Revise syllabi for IAM qualifications	Establish CPD framework and requirements
	Revise IAM Competences Framework	Refresh individual and organizational value propositions
		Progress approach for academia and organizations engagement and collaboration
Thriving Institute	2026 plan for Patrons Strategic Priorities	In-person IAM Global Patrons workshop and dinner
	Plan for 2026 geographical Patrons events	
	Celebrate volunteers in 2025	Enhanced onboarding for volunteers
Events	2026 webinars and professional development workshops	Physical Global Conference
		IAM UAE Event
		IAM KSA Event

2026 STRATEGIC PLAN

	July–September 2026	October–December 2026
Knowledge and Influencing	Value frameworks examples and insights	SAM 2025 follow-on work
	Cross Boundary Integration	New ways knowledge is accessed and provided (e.g. web pages, artificial intelligence)
	New SSGs based on revised IAM Anatomy	New SSGs based on revised IAM Anatomy
	Asset management terms translations glossary	
Professionalizing	Review MIAM and FIAM criteria	Review IAM Foundation award
	Review AMP criteria	Review IAM certificate and diploma
	Develop NxtGen value proposition	Revise Endorsed Assessor scheme
		Revise Endorsed Training scheme
		Recommendations for extension of Endorsed Assessor Scheme
Thriving Institute	Establish Rest of the World group	New website
	Develop new sponsorship opportunities	Establish Rest of the World NxtGen group
Events	IAM NA Conference	IAM Uganda Conference
	IAM Netherlands Conference	IAM India Conference
	IAM virtual Global Conference	IAM UK Chapter Conference
	Plan for 2027 events	IAM UAE Conference
		IAM Germany Conference

2027 STRATEGIC PLAN

Knowledge and Influencing	Program of new knowledge by quarter
	Establish a process to capture and curate knowledge from the IAM Discussion Forum
	Promote key asset management topic for 2027 (look at options to amplify promotion e.g. media models, video, interviews)
	Working with Patrons and chapters provide options for senior executive engagement
Professionalizing	New professional registration on journey to AMP
	Syllabus for academia
	Qualification Recognition (Ofqual)
	Explore interest in an enhanced assessor scheme
Thriving Institute	Explore potential benefits of an IAM app

2028 STRATEGIC PLAN

Knowledge and Influencing	Program of new knowledge by quarter
	Mega Trends 2028
	Promote key asset management topic for 2028 (look at options to amplify promotion e.g. media models, video, interviews)
	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)
Professionalizing	New 'top up' qualifications
	Explore interest in corporate recognition scheme
	Qualification Recognition (Ofqual)
	Investigate options for learning journeys
Thriving Institute	

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 2026.

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 predominately open to 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 2025 TO 2027

A review of the previous strategic plan 2025 to 2027 is shown below focusing on 2025:

KNOWLEDGE AND INFLUENCING	
Activity	**Review**
Mega trends 2025	Delayed. Included in 2026 plan
Program of new knowledge by quarter	Complete. Published on website knowledge page
Case study library launch	Complete. The development was delayed but has since been launched in Apr 2026
Establish sector specific guidance groups	Complete. Launched Apr 2025
Working with Patrons and chapters provide options for senior executive engagement	Removed from 2025 plan. Further consideration is required in how this can be best delivered working with Chapters, Patrons and volunteers
Promote key asset management topic for 2025 (look at options to amplify promotion e.g. media models, video, interviews)	Complete. Decisions that Deliver launched at IAM Global Conference June 2025
Review self assessment methodology +	Complete. The review of the self assessment methodology + was undertaken and produced recommendations based on a MoSCoW model to review the methodology
New SSGs based on revised IAM Anatomy	In progress. One new SSG was launched in 2025 based on the new 10 box model. More work is continuing in 2026 and 2027 to deliver the whole program
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)	Removed from 2025 plan. Further consideration is required in how this can be best delivered working with Chapters, Patrons and volunteers

KNOWLEDGE AND INFLUENCING (CONTINUED)

Activity	Review
Investigate options for changing the way knowledge is accessed and provided (e.g. web pages, artificial intelligence)	In progress. Work was undertaken in 2025 and has continued into 2026
Development way forward on asset management value and benefits	In progress. Work was undertaken in 2025 and has continued into 2026
Establish a process to capture and curate knowledge from the IAM Discussion Forum	Removed from 2025 plan. This will be considered for a future plan once more thought is given on how best to deliver and sustain this activity
Revise self assessment methodology+	Complete. The self assessment methodology SAM2025 was launched at the IAM UK Chapter Conference Nov 2025
Collate and consolidate 6 capitals reporting examples	Delayed. This will be progressed with the value frameworks work in 2026

PROFESSIONALIZING

Activity	Review
Take forward Chartership plan actions	In progress. A letter of intent was submitted to the Privy Council in June 2025 and a response was received late Dec 2025 to say the Institute could progress to the next stage
Agree way forward on becoming Ofqual recognized based on gap analysis	Complete. A paper was written outlining the work required to become Ofqual recognized. A decision was made to defer further work to a future year of the plan
Refresh individual and corporate journeys	Complete. The individual and organizational journey diagram was updated and published in Nov 2025
Refresh individual and corporate value propositions	Delayed. Included in 2026 plan

PROFESSIONALIZING (CONTINUED)

Activity	Review
Review syllabus for IAM qualifications	In progress. Work was undertaken in 2025 and has continued into 2026
Develop NxtGen value proposition	Delayed. Included in 2026 plan
Career pathways	In progress. Work was undertaken in 2025 and has continued into 2026
Plan for reviewing IAM certificate and diploma	Delayed. Included in 2026 plan
Plan for reviewing Endorsed Training scheme	Delayed. Included in 2026 plan
Plan for syllabus for academia	Removed from 2025 plan. This will be considered for a future plan once more planning is undertaken with academia
Revised IAM competences framework	In progress. Work was undertaken in 2025 and has continued into 2026
Plan for new professional registration on journey to AMP	Removed from 2025 plan. This will be considered for a future plan once work to update the existing AMP requirements is undertaken and other actions are progressed related to the current registration process
Establish CPD framework and requirements	In progress. Work was undertaken in 2025 and has continued into 2026
Review IAM Foundation award	Delayed. Included in 2026 plan
Plan for reviewing MIAM, FIAM and AMP criteria	Delayed. Included in 2026 plan
Plan for reviewing Endorsed Assessor scheme	Delayed. Included in 2026 plan

THRIVING INSTITUTE

Activity	Review
2025 plan for Patrons Strategic Priorities	Complete. The 2025 priority areas were progressed
Plan for 2025 geographical Patrons meetings	Complete. An in person Patrons event was held the night before the North America Conference
Inclusion plan for 2025	Removed from 2025 plan. Based on chapter feedback through IAM Council and different approach is being adopted
Celebrate volunteers in 2024	Complete. The 2024 volunteers were celebrated
In-person IAM Global Patrons meeting and dinner	Complete. The in person global Patrons dinner was held the night before the IAM Global Conference
Develop model for academia and organizations engagement and collaboration	Delayed. Included in 2026 plan
Review pilots of transform model	In progress. The chapter IAM agreement has been developed and the chapter handbook has also been drafted and comments provided by chapters. Both these documents need to be finalized
Reviewed and if necessary revised code of conduct	Removed from 2025 plan. Not required
Establish Rest of the World NxtGen group	Delayed. Included in 2026 plan
Plan for improved website	In progress. This work will continue for the rest of 2026 and into 2027
Investigate options for learning journeys	Removed from 2025 plan. This will be considered for a future plan once the functionality of the new planned website is assessed
Establish Rest of the World chapter	Delayed. Included in 2026 plan

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