

The background of the slide is a photograph of a city skyline, likely New York City, during sunset. The sky is filled with vibrant orange and red clouds. A large flock of birds is seen flying in a V-formation across the sky. The city buildings are silhouetted against the bright sky, and a highway with traffic is visible in the foreground.

The Institute of Asset Management UK Chapter Aligned Purpose & Vision



The Institute of Asset Management UK Chapter Purpose & Vision



The Institute of Asset Management (the IAM) is a not-for-profit, professional body. We are 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 the general public.



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

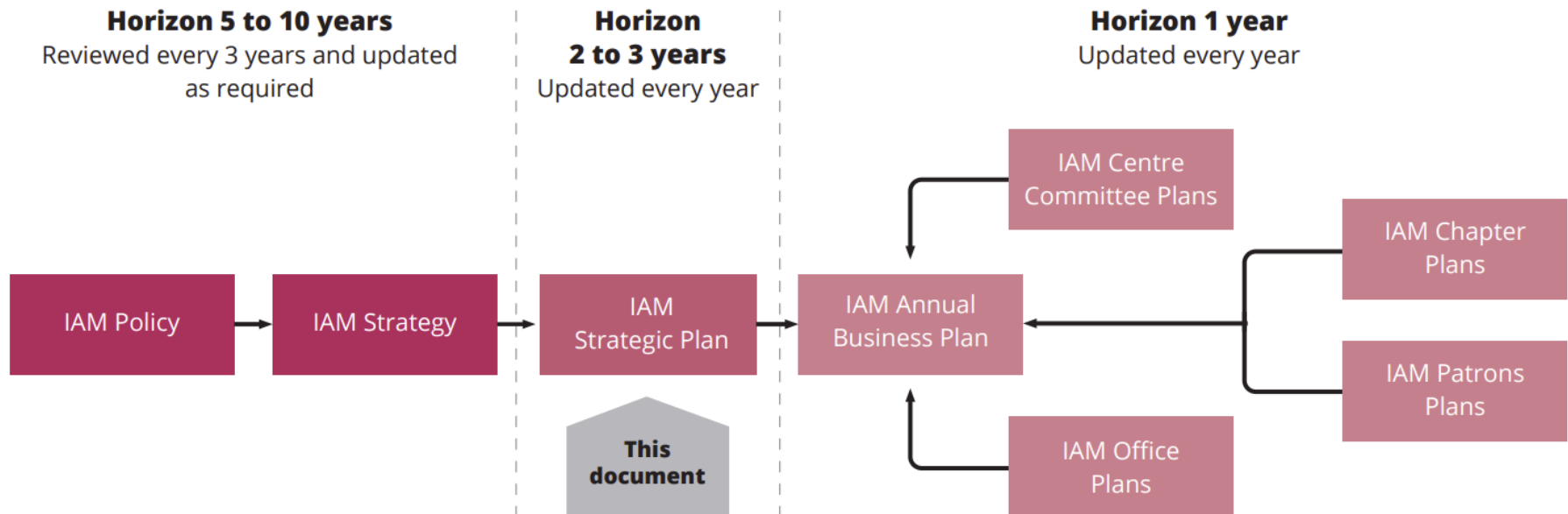
In pursuing our purpose and vision we are led by our key behaviours:

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

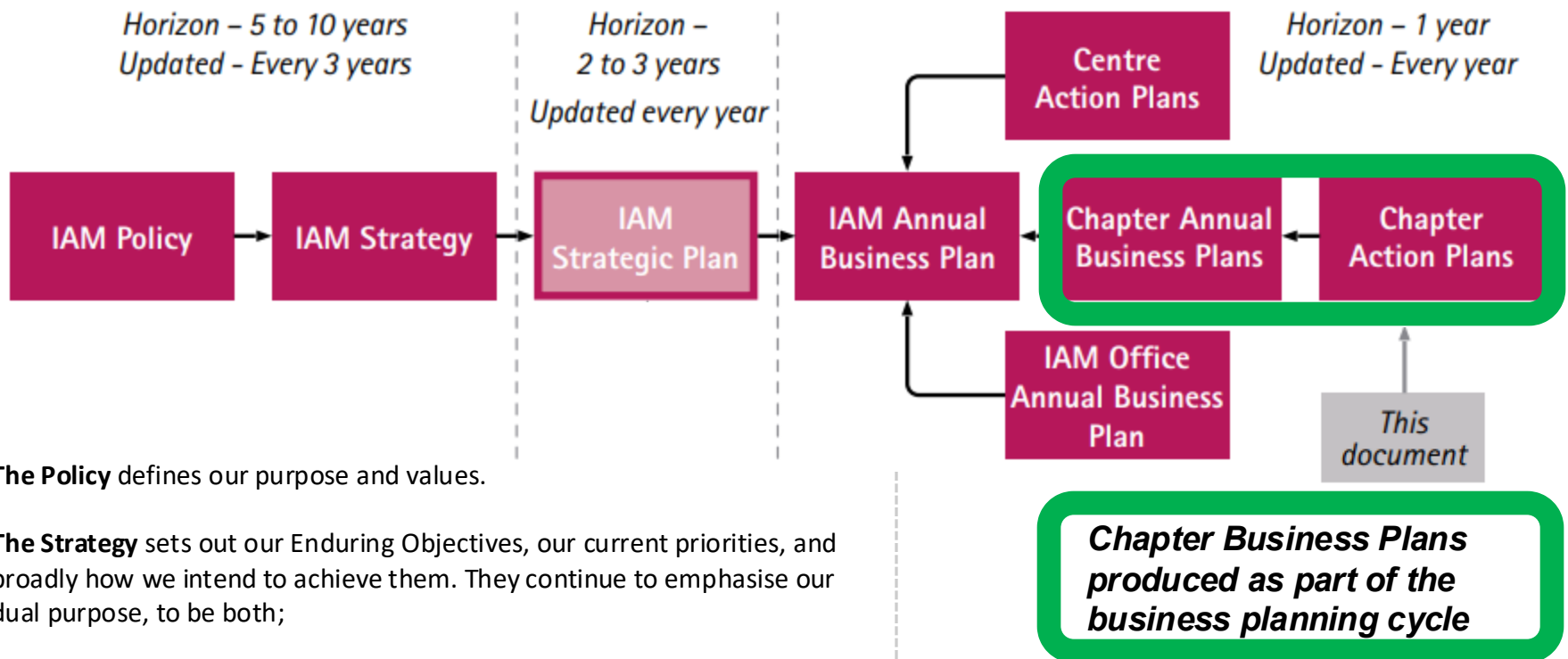
Global Institute Approach to IAM Strategic Plan 2026 to 2028

THE PLANNING PROCESS

The strategic plan is part of an integrated planning process:



IAM UK Chapter – Line of Sight to Global Strategy



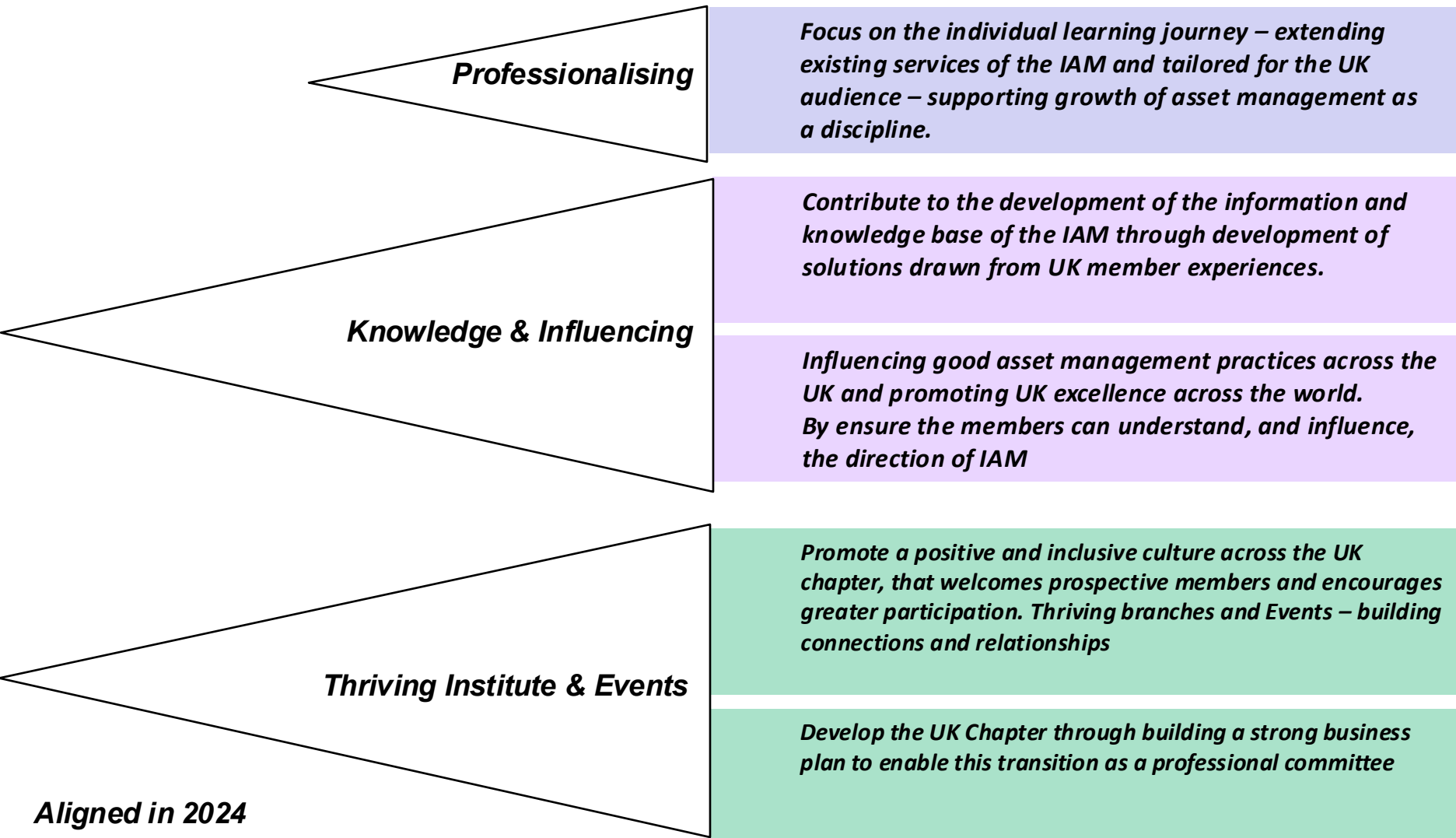
The Policy defines our purpose and values.

The Strategy sets out our Enduring Objectives, our current priorities, and broadly how we intend to achieve them. They continue to emphasise our dual purpose, to be both;

- a Learned Society that develops and extends the knowledge base, with wider societal objectives to spread good practice and awareness, and
- a Professional Association to support the development of, and recognize the competence of, our Individual and Corporate Members.

Source: The IAM Strategic Plan: 2020 - 2023

UK Chapter Objectives - Alignment



Aligned in 2024



The Institute of Asset Management UK Chapter Looking Back 2025



IAM UK Chapter – Planning 2025 (01.05.2025)



2025 Measures



Goal	Measures & Targets
1	4 Chapter events to promote the individual journey and membership proposition.
2	- Number of branch & NxtGen events (Target: >20) - GB, SM, CS - Conference attendance (Target: 350) - SJ - Publish NxtGen articles (Target: 4) - CS & SM
3	- Engage 3 Universities to promote IAM - JS to determine. - Engage 3 new companies on IAM 2 joint event with other professional bodies
4	- Number of LinkedIn posts including NxtGen (Target: 80) - JI - Establish a regular UK Chapter Comms videos (Target: Min 4) - Motivate active branches (Target: Min 6) - Increase UK membership (Target: 1200) = 2025:1170 - Outreach to 1 social enterprise
5	Establish a business plan for 2025, publish and track accordingly

IAM UK Strategic Plan 2025 Q1 and Q2

	January – March 2025	April – June 2025
Professionalizing	- Establish expense policy & governance – AW - Identify event membership lead - SW - Continue to contribute to working group Chartership plan (£10k) – SW	- Publish (to members) our UK business plan on website (£0.5k) – JI & AW - Purchase UK Chapter Canva License (£0.1k) - Establish NxtGen website landing page for UK – CS & SM.
Knowledge and Influencing	Join global knowledge leadership group - JS	- Establish an active directory of academia contacts teaching asset management content – JS - Develop process for responding to government consultations - JI
Thriving Institute and Events	- Establish North East branch - GB - Establish and cascade branch in a box - GB - First hybrid event – GB - Secure UK Chapter Event Venue – SJ	- Launch UK Chapter Conference - SJ - UK Chapter AGM – SW - Identify social enterprise outreach – SJ & JI - First North East branch event - GB - Expand UK Chapter LinkedIn for all branches to use – JI & GB - Establish UK Chapter own financial position – AWW - Share 2025 business plan with branches for feedback – GB

IAM UK Strategic Plan 2025 Q3 and Q4



	July – September 2025	October – December 2025
Professionalizing	- Develop process map and guidance for key member activities (e.g. events how to) – JI, SM,MN - Review mentoring pilot - MN - Develop branch kit - (£10k) - Review how chapter are working towards articles – JA, SW	- Deliver actions based on mentoring pilot review. - Automate KPI report – SW & GB
Knowledge and Influencing	- Outreach to academic contacts – JS - Identify publications for chapter response – JS	
Thriving Institute and Events	NxtGen In person event (£1k).	- NxtGen outreach event to patrons – CS, SM - Establish Eastern branch - GB - UK Conference - Conduct a UK membership survey



The Institute of Asset Management UK Chapter Business Planning 2026 Review



IAM UK Chapter – Planning 2026 (29.01.2026)



2026 Measures



	Measures & Targets
1	4 virtual member only chapter events (mega trends, individual journey etc) *non member fee.
2	- Number of branch & NxtGen events (Target: >25) - GB, GS, CS - Conference attendance (Target: 400) - SJ - Assets Publication articles (Target: 3) - CS & GS & SJ & JI
3	- Engage 5 Universities to promote IAM - All - Promote UK Chapter to 3 new companies 2 joint event with other professional bodies 1 response to industry consultation
4	- Number of LinkedIn posts including NxtGen (Target: 150)- JI, SC, GS - Total LinkedIn Followers (Nxtgen:466 & UK Chapter:974) - Establish a regular UK Chapter Comms videos (Target: Min 3) - Motivate active branches (Target: Min 7) - Increase UK membership (Target: 1250) 1 Corporate Social Responsibility initiative
5	Establish a business plan for 2026, publish and track accordingly

IAM UK Draft Strategic Plan 2026 Q1 and Q2



	January – March 2026	April – June 2026
Professionalizing	- Create 1 membership value statement (to support outreach pack) - Review how chapter are working towards articles & develop governance – JA, SW - Continue to contribute to working group Chartership plan (£10k) – SW - Recruitment of admin support in center (£25k) - AW - Develop branch material kit - (£10k) - GB	- Publish (to members) our UK business plan on website (£0.5k) – JI & AW - Purchase UK Chapter Canva License (£0.1k) - Establish NxtGen website landing page for UK – CS & SM. - NxtGen Written Article Published - Capture branch & Nxtgen kit feedback – GB
Knowledge and Influencing		- Establish an active directory of academia contacts teaching asset management content – JS - Analysis of target new companies, target markets review. (IAM Center support) - Develop process for responding to government consultations – JI - Influence Patrons – develop stronger links to share UK Chapter Business Plan /
Thriving Institute and Events	- Launch UK Chapter Event – SJ - NxtGen Community Event Q1 – CS & GS - UK Chapter Event Q1 (Virtual) - Share 2025 business plan with branches for feedback – GB	- Establish Eastern branch – GB - NxtGen Community Event Q2 - CS & GS - UK Chapter Event Q2 (Virtual) - NxtGen InPerson Event (£500) - CS & GS 1 Corporate Social Responsibility initiative (£5k) - UK Chapter AGM (including guest speaker)– SW

IAM UK Draft Strategic Plan 2026 Q3 and Q4

	July – September 2026	October – December 2026
Professionalizing	- Develop process map and guidance for key member activities (e.g. events how to) – JI, SM,MN - Investigate requirements for mentoring offer - MN	- Deliver actions based on mentoring pilot review. - Automate KPI report – SW & GB - NxtGen Website – Global Refresh
Knowledge and Influencing	- Outreach to academic contacts – JS - Identify publications for chapter response – JS - UK Branch Strategy (Ireland, Scotland etc.)	Determine 2027 conference theme, date & venue announced as 2026 conference.
Thriving Institute and Events	- NxtGen Community Event Q3 – CS & GS - UK Chapter Event Q3 (virtual) - Virtual Global Conference – NxtGen Leads Collaboration – CS, GS, SM	- NxtGen outreach event to patrons – CS, GS - UK Conference (£100k risk pot) - Conduct a UK membership survey - NxtGen In Person Event (£1k) (at UK Conference)