



# FINAL DRAFT International Standard

## ISO/FDIS 21001

### Educational organizations — Management systems for educational organizations — Requirements with guidance for use

*Organismes d'éducation/formation — Systèmes de management  
des organismes d'éducation/formation — Exigences et  
recommandations pour leur application*

ISO/TC 232

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# Contents

Page

<b>Foreword</b>	<b>v</b>
<b>Introduction</b>	<b>vi</b>
<b>1 Scope</b>	<b>1</b>
<b>2 Normative references</b>	<b>1</b>
<b>3 Terms and definitions</b>	<b>1</b>
<b>4 Context of the organization</b>	<b>7</b>
4.1 Understanding the organization and its context	7
4.2 Understanding the needs and expectations of interested parties	8
4.3 Determining the scope of the educational organization management system	8
4.4 Educational organization management system	9
<b>5 Leadership</b>	<b>9</b>
5.1 Leadership and commitment	9
5.1.1 General	9
5.1.2 Focus on learners and other beneficiaries	10
5.1.3 Additional requirements for special needs education	10
5.2 Educational organization policy	10
5.3 Roles, responsibilities and authorities	11
<b>6 Planning</b>	<b>11</b>
6.1 Actions to address risks and opportunities	11
6.2 Educational organization objectives and planning to achieve them	12
6.3 Planning of changes	12
<b>7 Support</b>	<b>13</b>
7.1 Resources	13
7.1.1 General	13
7.1.2 Human resources	13
7.1.3 Facilities	14
7.1.4 Environment for the operation of educational processes	14
7.1.5 Monitoring and measuring resources	14
7.1.6 Organizational knowledge	15
7.2 Competence	16
7.2.1 General	16
7.2.2 Additional requirements for special needs education	16
7.3 Awareness	16
7.4 Communication	17
7.4.1 General	17
7.4.2 Communication purposes	17
7.4.3 Communication arrangements	17
7.5 Documented information	18
7.5.1 General	18
7.5.2 Creating and updating documented information	18
7.5.3 Control of documented information	18
<b>8 Operation</b>	<b>19</b>
8.1 Operational planning and control	19
8.1.1 General	19
8.1.2 Specific operational planning and control of educational products and services	20
8.1.3 Additional requirements for learners with special needs	20
8.2 Requirements for the educational products and services	20
8.2.1 Determining the requirements for the educational products and services	20
8.2.2 Communicating the requirements for the educational products and services	21
8.2.3 Changes to requirements for the educational products and services	21
8.3 Design and development of the educational products and services	21
8.3.1 General	21

# ISO/FDIS 21001:2025(en)

8.3.2	Design and development planning.....	22
8.3.3	Design and development inputs.....	22
8.3.4	Design and development controls.....	22
8.3.5	Design and development outputs.....	24
8.3.6	Design and development changes.....	24
8.4	Control of externally provided processes, products and services.....	24
8.4.1	General.....	24
8.4.2	Type and extent of control.....	25
8.4.3	Information for external providers.....	25
8.5	Delivery of the educational products and services.....	26
8.5.1	Control of delivery of the educational products and services.....	26
8.5.2	Identification and traceability.....	28
8.5.3	Property belonging to interested parties.....	28
8.5.4	Preservation.....	29
8.5.5	Protection and transparency of learners' data.....	29
8.5.6	Control of changes in the educational products and services.....	29
8.6	Release of the educational products and services.....	29
8.7	Control of the educational nonconforming outputs.....	30
<b>9</b>	<b>Performance evaluation.....</b>	<b>30</b>
9.1	Monitoring, measurement, analysis and evaluation.....	30
9.1.1	General.....	30
9.1.2	Satisfaction of learners, other beneficiaries and staff.....	31
9.1.3	Other monitoring and measuring needs.....	31
9.1.4	Methods for monitoring, measurement, analysis and evaluation.....	32
9.1.5	Analysis and evaluation.....	32
9.2	Internal audit.....	33
9.2.1	General.....	33
9.2.2	Internal audit programme.....	33
9.3	Management review.....	33
9.3.1	General.....	33
9.3.2	Management review inputs.....	33
9.3.3	Management review results.....	34
<b>10</b>	<b>Improvement.....</b>	<b>34</b>
10.1	Continual improvement.....	34
10.2	Nonconformity and corrective action.....	34
10.3	Opportunities for improvement.....	35
	<b>Annex A (normative) Additional requirements for early childhood education.....</b>	<b>36</b>
	<b>Annex B (informative) Principles for an educational organization management system.....</b>	<b>39</b>
	<b>Annex C (informative) Classification of interested parties in educational organizations.....</b>	<b>49</b>
	<b>Annex D (informative) Guidelines for communication with interested parties.....</b>	<b>51</b>
	<b>Annex E (informative) Processes, measures and tools in educational organizations.....</b>	<b>55</b>
	<b>Annex F (informative) Example of mapping to regional standards.....</b>	<b>58</b>
	<b>Annex G (informative) Health and safety considerations for educational organizations.....</b>	<b>61</b>
	<b>Bibliography.....</b>	<b>62</b>

## Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO document should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see [www.iso.org/directives](http://www.iso.org/directives)).

ISO draws attention to the possibility that the implementation of this document may involve the use of (a) patent(s). ISO takes no position concerning the evidence, validity or applicability of any claimed patent rights in respect thereof. As of the date of publication of this document, ISO had not received notice of (a) patent(s) which may be required to implement this document. However, implementers are cautioned that this may not represent the latest information, which may be obtained from the patent database available at [www.iso.org/patents](http://www.iso.org/patents). ISO shall not be held responsible for identifying any or all such patent rights.

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For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see [www.iso.org/iso/foreword.html](http://www.iso.org/iso/foreword.html).

This document was prepared by Technical Committee ISO/TC 232, *Education and learning services*.

This second edition cancels and replaces the first edition (ISO 21001:2018), which has been technically revised.

The main changes are as follows: assessment related text has been revised to reflect current best practices in educational assessment.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at [www.iso.org/members.html](http://www.iso.org/members.html).

## Introduction

### 0.1 General

This document provides a common management tool for organizations providing educational products and services capable of meeting learners' and other beneficiaries' requirements.

### 0.2 Relevance

There is a critical and continuous need for educational organizations to evaluate the degree to which they meet the requirements of learners and other beneficiaries, as well as other relevant interested parties and to improve their ability to continue to do so.

NOTE 1 A classification of interested parties in educational organizations is provided in [Annex C](#).

Although educational organizations and learners worldwide are the main beneficiaries of this document, all interested parties will benefit from standardized management systems in educational organizations.

EXAMPLE Employers who sponsor and encourage staff to participate in educational services can also benefit from this document.

The potential benefits to an organization of implementing an educational organizations management system (EOMS) based on this document are:

- a) better alignment of objectives and activities with policy (including mission and vision);
- b) enhanced social responsibility by providing inclusive and equitable quality education for all;
- c) more personalized learning and effective response to all learners and particularly to learners with special education needs, distance learners and lifelong learning opportunities;
- d) consistent processes and evaluation tools to demonstrate and increase effectiveness and efficiency;
- e) increased credibility of the organization;
- f) a means that enables educational organizations to demonstrate their commitment to effective educational management practices;
- g) a culture for educational organization improvement;
- h) harmonization of regional, national, open, proprietary and other standards within an international framework;
- i) widened participation of interested parties;
- j) stimulation of excellence and innovation.
- k) continual improvement of the design and development of study programs to ensure the development of the competencies of learners to meet the needs of all interested parties

### 0.3 Relationship between this document and other International Standards

This document is a stand-alone management system standard, aligned with ISO 9001. It focuses on the management systems of educational organizations as well as the impact of these on learners and other relevant interested parties.

This document conforms to ISO's requirements for management system standards. These requirements include a high level structure, identical core text, and common terms with core definitions, designed to benefit users implementing multiple ISO management system standards.

This document can be implemented alongside regional, national, open, proprietary and other standards or related documents.

NOTE 2 [Annex F](#) provides an example of how to implement this document alongside the European Quality Assurance Framework for Vocational Education and Training (EQAVET).

## 0.4 Principles for an EOMS

The EOMS entails the following management principles:

- a) focus on learners and other beneficiaries;
- b) visionary leadership;
- c) engagement of people;
- d) process approach;
- e) improvement;
- f) evidence-based decisions;
- g) relationship management;
- h) social responsibility;
- i) accessibility and equity;
- j) ethical conduct in education;
- k) data security and protection.

NOTE 3 The details of these principles are analysed in [Annex B](#).

## 0.5 Process approach

### 0.5.1 General

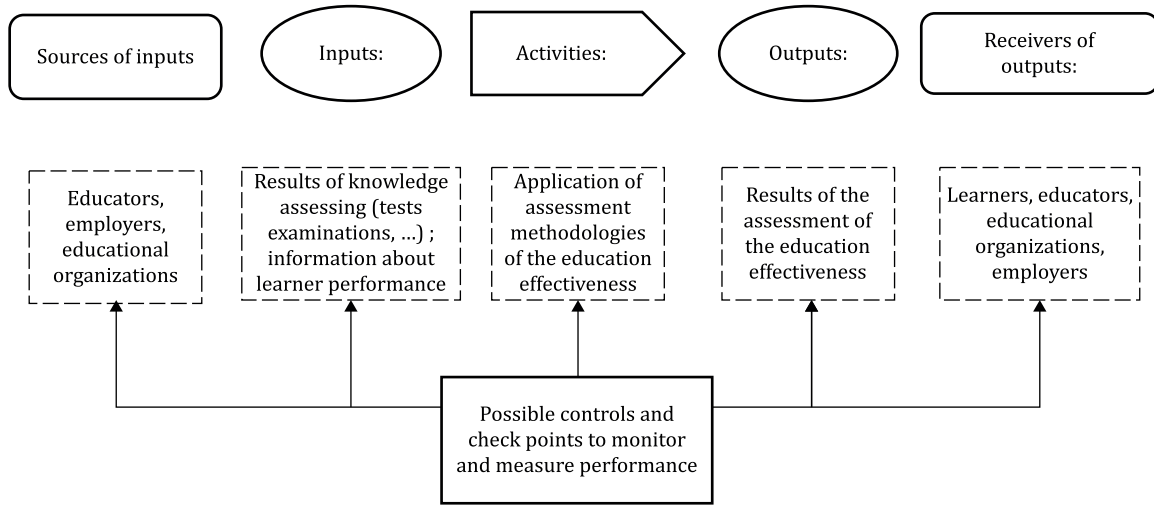
This document promotes the adoption of a process approach when developing, implementing and improving the effectiveness of an EOMS, to enhance learner and other beneficiary satisfaction by meeting learner and other beneficiary requirements. Specific requirements considered essential to the adoption of a process approach are included in [4.4](#).

Understanding and managing interrelated processes as a system contributes to the educational organization's effectiveness and efficiency in achieving its intended results. This approach enables the educational organization to control the interrelationships and interdependencies among the processes of the system, so that the overall performance of the educational organization can be enhanced.

The process approach involves the systematic definition and management of processes, and their interactions, so as to achieve the intended results in accordance with the policy, objectives and strategic plan of the educational organization. Management of the processes and the system as a whole can be achieved using the Plan-Do-Check-Act (PDCA) cycle (see 0.5.2) with an overall focus on risk-based thinking (see 0.5.3) aimed at taking advantage of opportunities and preventing undesirable results. The application of the process approach in an EOMS enables:

- understanding and consistency in meeting requirements;
- the consideration of processes in terms of added value;
- achievement of effective process performance;
- improvement of processes based on continuous evaluation of data and information.

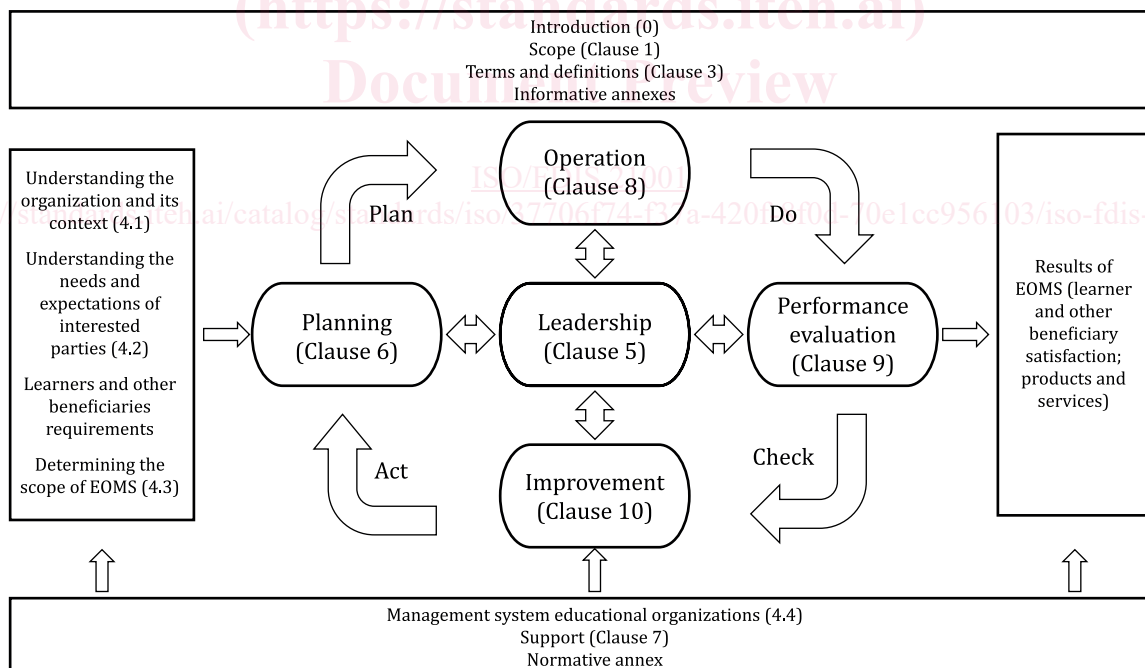
Figure 1 gives a schematic representation of any process (such as assessment of the educational effectiveness process) and shows the interaction of its elements. The monitoring and measuring check points, which are necessary for control, are specific to each process and will vary depending on the related risks.



**Figure 1 — Schematic representation of the elements of a single process (assessment of the educational effectiveness process)**

### 0.5.2 Plan-Do-Check-Act cycle

The Plan-Do-Check-Act (PDCA) cycle can be applied to all processes and to the EOMS as a whole. Figure 2 illustrates how Clauses 4 to 10 can be grouped in relation to the PDCA cycle.



NOTE Numbers in brackets refer to clauses in this document.

**Figure 2 — Representation of the structure of this document in the PDCA cycle**



The PDCA cycle can be briefly described as follows:

- **Plan:** establish the objectives of the system and its processes, and the resources needed to deliver results in accordance with learners' and other beneficiaries' requirements and the educational organization's policies, and identify and address risks and opportunities;
- **Do:** implement what was planned;
- **Check:** monitor and (where applicable) measure processes and the resulting products and services against policies, objectives, requirements and planned activities, and report the results;
- **Act:** take actions to improve performance, as necessary.

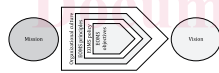
### 0.5.3 Risk-based thinking

Risk-based thinking is essential for achieving an effective EOMS. To conform to the requirements of this document, an educational organization needs to plan and implement actions to address risks and opportunities. Addressing both risks and opportunities establishes a basis for increasing the effectiveness of the quality management system, achieving improved results and preventing negative effects.

Opportunities can arise as a result of a situation favourable to achieving an intended result, e.g. a set of circumstances that allow the educational organization to attract learners and other beneficiaries, develop new products and services, reduce waste or improve productivity. Actions to address opportunities can also include consideration of associated risks. Risk is the effect of uncertainty and any such uncertainty can have positive or negative effects. A positive deviation arising from a risk can provide an opportunity, but not all positive effects of risk result in opportunities.

### 0.6 Educational organization mission, vision and strategy

[Figure 3](#) illustrates EOMS strategy as related to mission and vision.



**Figure 3 — EOMS strategy as related to mission and vision**

The EOMS policy statements are framed by the educational organization's culture (the complete set of beliefs and values that condition its behaviour) and by the EOMS principles. In turn, the EOMS policy statements provide the framework for the establishment of the EOMS objectives, which are periodically revised to ensure the educational organization's mission is effectively and efficiently accomplished while walking the continuous path towards the achievement of the educational organization's vision.

### 0.7 Additional requirements and guidance

[Annex A](#) specifies additional requirements for early childhood education for educational organizations that provide this service.

[Annex B](#) outlines the principles for an EOMS.

[Annex C](#) provides a classification of interested parties.

[Annex D](#) provides guidelines for communication with interested parties.

[Annex E](#) provides guidance on processes, measures and tools in educational organizations.

[Annex F](#) gives an example of mapping to regional standards.

[Annex G](#) outlines health and safety considerations for educational organizations.



# Educational organizations — Management systems for educational organizations — Requirements with guidance for use

## 1 Scope

This document specifies requirements and provides guidance for a management system for educational organizations (EOMS) when such an organization:

- a) needs to demonstrate its ability to support the acquisition and development of competence through teaching, learning or research;
- b) aims to enhance satisfaction of learners, other beneficiaries and staff through the effective application of its EOMS, including processes for improvement of the system and assurance of conformity to the requirements of learners and other beneficiaries.

All requirements of this document are generic and intended to be applicable to any educational organization that uses a curriculum to support the development of competence through teaching, learning, training or research, regardless of the type, size or method of delivery.

This document can be applied to educational organizations within larger organizations whose core business is not education, such as professional training departments.

This document also provides guidance for the use of a EOMS.

This document does not apply to organizations that only produce or manufacture educational products.

## 2 Normative references

ISO/FDIS 21001  
<https://standards.iteh.ai/catalog/standards/iso/37706f74-f37a-420f-8f0d-70e1cc956103/iso-fdis-21001>  
There are no normative references in this document.

## 3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <https://www.electropedia.org/>

### 3.1 organization

person or group of people that has its own functions with responsibilities, authorities and relationships to achieve its *objectives* (3.6)

Note 1 to entry: The concept of organization includes, but is not limited to, sole-trader, company, corporation, firm, enterprise, authority, partnership, charity or institution, or part or combination thereof, whether incorporated or not, public or private.

Note 2 to entry: If the organization is part of a larger entity, the term “organization” refers only to the part of the larger entity that is within the scope of the educational organization *management system* (3.4).

### 3.2

#### **interested party**

stakeholder

person or *organization* (3.1) that can affect, be affected by, or perceive itself to be affected by a decision or activity

### 3.3

#### **top management**

person or group of people who directs and controls an *organization* (3.1) at the highest level

Note 1 to entry: Top management has the power to delegate authority and provide resources within the organization.

Note 2 to entry: If the scope of the *management system* (3.4) covers only part of an organization, then top management refers to those who direct and control that part of the organization.

### 3.4

#### **management system**

set of interrelated or interacting elements of an *organization* (3.1) to establish *policies* (3.5) and *objectives* (3.6), as well as *processes* (3.8) to achieve those objectives

Note 1 to entry: A management system can address a single discipline or several disciplines.

Note 2 to entry: The management system elements include the organization's structure, roles and responsibilities, planning and operation.

Note 3 to entry: The scope of a management system may include the whole of the organization, specific and identified functions of the organization, specific and identified sections of the organization, or one or more functions across a group of organizations.

### 3.5

#### **policy**

intentions and direction of an *organization* (3.1) as formally expressed by its *top management* (3.3)

### 3.6

#### **objective**

result to be achieved

Note 1 to entry: An objective can be strategic, tactical, or operational.

Note 2 to entry: Objectives can relate to different disciplines (such as finance, health and safety, and environment). They can be, for example, organization-wide or specific to a project, product or *process* (3.8).

Note 3 to entry: An objective can be expressed in other ways, e.g. as an intended result, as a purpose, as an operational criterion, as an educational organization objective or by the use of other words with similar meaning (e.g. aim, goal, or target).

Note 4 to entry: In the context of educational organization *management systems* (3.4), educational organization objectives are set by the *organization* (3.1), consistent with the *policy* (3.5) of the *educational organization* (3.22) management system, to achieve specific results.

### 3.7

#### **risk**

effect of uncertainty

Note 1 to entry: An effect is a deviation from the expected — positive or negative.

Note 2 to entry: Uncertainty is the state, even partial, of deficiency of information related to, understanding or knowledge of, an event, its consequence, or likelihood.

Note 3 to entry: Risk is often characterized by reference to potential events (as defined in ISO Guide 73) and consequences (as defined in ISO Guide 73), or a combination of these.

Note 4 to entry: Risk is often expressed in terms of a combination of the consequences of an event (including changes in circumstances) and the associated likelihood (as defined in ISO Guide 73) of occurrence.

### 3.8

#### **process**

set of interrelated or interacting activities that uses or transforms inputs to deliver a result

Note 1 to entry: Whether the result of a process is called an output, a product or a service depends on the context of the reference.

### 3.9

#### **competence**

ability to apply knowledge and skills to achieve intended results

Note 1 to entry: The ability to apply knowledge and skills means that the *learner* (3.25) demonstrates appropriate attitudes and behaviour in different contexts or situations with responsibility and autonomy.

### 3.10

#### **documented information**

information required to be controlled and maintained by an *organization* (3.1) and the medium on which it is contained

Note 1 to entry: Documented information can be in any format and media and from any source.

Note 2 to entry: Documented information can refer to: the *management system* (3.4), including related *processes* (3.8); information created in order for the organization to operate (documentation); evidence of results achieved (records).

### 3.11

#### **performance**

measurable result

Note 1 to entry: Performance can relate either to quantitative or qualitative findings.

Note 2 to entry: Performance can relate to managing activities, *processes* (3.8), products, services, systems or *organizations* (3.1).

### 3.12

#### **continual improvement**

recurring activity to enhance *performance* (3.11)

### 3.13

#### **effectiveness**

extent to which planned activities are realized and planned results are achieved

### 3.14

#### **requirement**

need or expectation that is stated, generally implied or obligatory

Note 1 to entry: “Generally implied” means that it is custom or common practice for the *organization* (3.1) and *interested parties* (3.2) that the need or expectation under consideration is implied.

Note 2 to entry: A specified requirement is one that is stated, e.g. in *documented information* (3.10).

### 3.15

#### **conformity**

fulfilment of a *requirement* (3.14)

### 3.16

#### **nonconformity**

non-fulfilment of a *requirement* (3.14)

### 3.17

#### **corrective action**

action to eliminate the cause(s) of a *nonconformity* (3.16) and to prevent recurrence

### 3.18

#### **audit**

systematic and independent *process* (3.8) for obtaining evidence and evaluating it objectively to determine the extent to which the audit criteria are fulfilled

Note 1 to entry: An audit can be an internal audit (first party) or an external audit (second party or third party), and it can be a combined audit (combining two or more disciplines).

Note 2 to entry: An internal audit is conducted by the *organization* (3.1) itself, or by an external party on its behalf.

Note 3 to entry: "Audit evidence" and "audit criteria" are defined in ISO 19011.

### 3.19

#### **measurement**

*process* (3.8) to determine a value

### 3.20

#### **monitoring**

determining the status of a system, a *process* (3.8) or an activity

Note 1 to entry: To determine the status, there can be a need to check, supervise or critically observe.

### 3.21

#### **outsourcing**

make an arrangement where an external *organization* (3.1) performs part of an organization's function or *process* (3.12)

Note 1 to entry: An external organization is outside the scope of the *management system* (3.4).

### 3.22

#### **educational organization**

*organization* (3.1) whose core business is the provision of *educational products* (3.24) and *educational services* (3.23)

Note 1 to entry: An educational organization can be included within a larger organization whose core business is not education, such as a professional training department.

### 3.23

#### **educational service**

*process* (3.12) that supports acquisition and development of *learners'* (3.25) *competence* (3.10) through *teaching* (3.38), learning or research

### 3.24

#### **educational product**

learning resource

tangible or intangible goods used in pedagogical support of an *educational service* (3.23)

Note 1 to entry: Educational products can be either physical or digital and can include textbooks, workbooks, worksheets, manipulatives (e.g. blocks, beads), flashcards, *educator* (3.27) workshops, non-fiction, books, posters, educational games, applications, websites, software, online *courses* (3.33), activity books, graphic novels, reference books, magazines and periodicals, study guides, educator guides, laboratories, models, movies, television shows, webcasts, podcasts, maps and atlases, standards, technical specifications, and case studies.

Note 2 to entry: Educational products can be produced by any parties, including *learners* (3.25).

### 3.25

#### **learner**

*beneficiary* (3.26) acquiring and developing *competence* (3.9) using an *educational service* (3.23)