BOUNDLESS

CQI Integrated Management Special Interest Group (IMSIG)

Newsletter – February 2016

MSS 1000 Shortlisted Award Winner – are you using it?

Will ISO Annex SL help or hinder integrated management?

Welcome to our February 2016 Newsletter. We have many new members so we carry some content forward from previous newsletters where deemed to be valuable.

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What is IMSIG's Role?

The role of IMSIG is to act as a focal point for the mutual exchange and dissemination of best practice within the area of integrated management that is becoming mainstream thinking within organisations. If you want to find out more, our longstanding objectives are defined on the web site http://www.thecqi.org/Community/Special-Interest-Groups-SIGs/Integrated-Management-Group/ .

A range of useful resources are available via http://www.thecqi.org/Community/Special-Interest-Groups-SIGs/Integrated-Management-Group/Research-and-reports/ as well as a free universal management system standard facilitating fully integrated management systems without boundaries.

The IMSIG UK and international membership has grown steadily since 2012 but has tended to plateau in 2015. The current membership on the CQI database is 1,599 and within the LinkedIn group is 638.

How do we meet?

Looking at ways to make it easy for members to participate in IMSIG meetings, technology has been embraced, and all meetings since 2013 are teleconferences. Recent meetings have been via 'GoToMeeting', which is a web based communication tool that facilitates sharing of presentations and other documents as well as voice and visual images of attendees. This has enabled more interactive discussions and the visual sharing of media such as PowerPoint presentations. Discussions have included:

- Vision of the future quality professional (later published in Quality world).
- Implications of ISO "risk & opportunity" ISO9001, ISO14001, ISO45001 etc.
- Serving small organisations.
- Social responsibility.
- ISO Annex SL and integrated management.
- Data management.

IMSIG LinkedIn Group

Our LinkedIn group provides an opportunity to network with others. Here are some of topics that have previously been discussed: -

- UK risk register.
- What is a balanced stakeholder view and how should it inform what is measured?
- Does an IMS necessarily need an integrated Manual & Procedures?
- MSS 1000:2014 – a free one-stop universal management system standard.
- Future integration of 'Governance, Risk Management, and Compliance'.
- Disadvantages of an IMS.
- Should management software be integrated?
- Integrated reporting?
- Link between Corporate Social Responsibility and business performance.

Join in or start a discussion in the group, and connect with our virtual community.
To access the networking group, you will need to register as a LinkedIn member before requesting access to the CQI Integrated Management SIG group.

General News and Progress

Management integration has become main stream management for many organisations unlike a decade ago when integrated management was much more of a pioneering exercise for IMSIG. However, the following news items demonstrate that the integration path can be tortuous with a mixture of technical and political issues. Items covered include:

- ➢ MSS 1000:2014 Universal Management System Standard
- ➢ New ISO Standards and Annex SL
- ➢ IMSIG and External Interactions
- ➢ Integrated Reporting

MSS 1000:2014 Universal Management System Standard

MSS 1000 was originally conceived as a project in 2011 with approval from the CQI Executive. It proved to be a challenging project in terms of not only the technical issues but obstacles that were placed in its way. However, it was subjected to multiple expert peer reviews and now stands as a robust universal management system standard that can be freely downloaded from the web. There is no better source to guide the structuring of a fully integrated management system.

"It must be remembered that there is nothing more difficult to plan, more doubtful of success, nor more dangerous to manage than a new system. For the initiator has the enmity of all who would profit by the preservation of the old institution and merely lukewarm defenders in those who gain by the new ones." — Niccolò Machiavelli

The following is a brief timeline of key events:

- ❖ Apr 2014 - CQI placed restrictions on standard
- ❖ Jul 2014 - Standard rebranded as a specification
- ❖ Oct 2014 - Presented at the Iran Quality Society Conference in Istanbul
- ❖ Jan 2015 - Published on web – total project costs £0.00
- ❖ Aug 2015 – Shortlisted in CIR Risk Management Awards: "Risk Management Product of the Year" – (unfortunately did not win)
- ❖ 2015 Being used in IIRSM/Zurich data management research

A key challenge is still to broaden the awareness of the existence and great value of the standard particularly because the normal communication channels of the CQI are currently being denied to IMSIG.
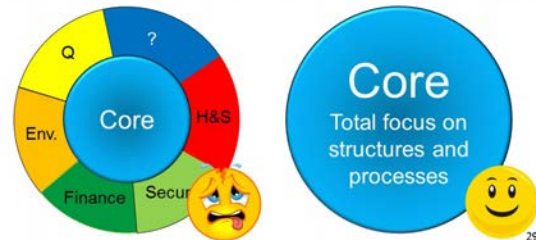
Read more about MSS 1000 in section MSS 1000:2014 Management System Standard of this newsletter below.
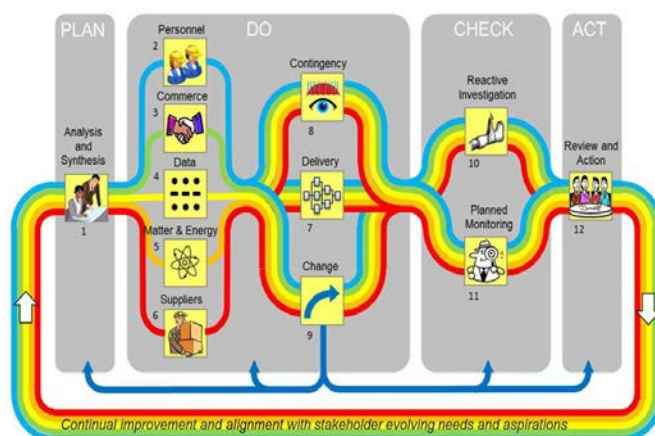
New ISO Standards and Annex SL

Since before the turn of the millennium ISO had resisted suggestions to recognise and support organisations adopting integrated management systems. These suggestions included having a core management system standard with specialist supplements. It continued with an ever expanding plethora of management system standards in different styles and with no common

uniform set of management concepts and definitions. However, ISO finally concluded that it ought to be seen to be recognising integrated management systems that were being widely adopted by enlightened organisations seeking greater effectiveness and to avoid wasteful duplication and poor use of valuable management resource. However, ISO did not adopt the classic suggestion of a core management system standard but instead implemented something more hybrid that became commonly known as Annex SL. This approach places a strict obligation on ISO management system standards writers (Technical Committees) to place content under a standard set of headings plus some mandatory content. All content that does not logically fit under the standard headings has to be placed in one or more appendices. Anyone wishing to create an IMS can now see two principal types of non-integrated content in the new style standards together with some standard text automatically inserted in the standard template. Some non-integrated

content occurs within the standard headings and other non-integrated content occurs in appendices. Annex SL makes up 30% of ISO9001, 50% of ISO14001 and 70% of ISO27001 with the rest of the content in the Appendices or other documents. In contrast MSS 1000:2014 has no leftovers.

While ISO Annex SL enables the reader to see some commonality of structure across the management system standards which was more difficult for the uninitiated to see in the past, it has the disadvantage of potentially setting back the progress of effective integrated management by:

a) Giving a totally false impression of what an integrated management system is and that only partial integration is possible i.e. a core plus leftovers.
b) Permitting each discipline to continue to operate in a relative silo and to use a non-unified terminology rather than a comprehensive common set of ISO management concepts and terms.
c) Limit the degree that integrated audits can be conducted by certification bodies because so much of the standards is in appendices rather than a fully unified structure.
d) Creating a standardised structure across multiple standards that will be extremely cumbersome to correct in the future.

Annex SL was a good idea that was poorly implemented and should have received a lot more input and review from experts experienced in the theory and practice of fully integrated management systems and working across disciplines. 'Order from Chaos' was published in Quality World in April 2011 demonstrating that the totality of a management system or management system standard could be placed within a universal hierarchical management topic structure (taxonomy) with

nothing leftover. This was the basis for the creation of '[MSS 1000-2014](#)' which addresses all aspects of the management of any type of organisation.

The ISO situation is far from ideal and far from what is needed considering the fragile state of the world economy. However, intelligent organisations are still able to freely access '[MSS 1000-2014](#)' and use it to structure an elegant and effective IMS while still being able to interact with certification bodies operating non-optimal surveillance processes. Considerable progress has been made in the advancement of the theory and practice of integrated management since the turn of the millennium and it can only be hoped that this progress will be sustained despite the recent ill-conceived ISO initiatives.

IMSIG and External Interactions

IMSIG is the oldest of the CQI SIGs and has been operating for about 20 years. Its basic integrated management definition and concepts were defined well over a decade ago and have remained unchanged. They have influenced the theory and practice of integrated management and have been extensively referenced by researchers e.g. refer to https://en.wikipedia.org/wiki/Integrated_management.

About a year ago the CQI underwent a reorganisation merging the CQI and IRCA into a single entity. The CQI has decided to focus on training standards and cease to be a training body. The CQI has aligned itself very closely with ISO and is strongly promoting ISO 9001 and ISO 14001 in particular and also ISO Annex SL as an integrated management systems methodology despite it only being intended as a structure for standards writers. IMSIG has been permitted zero column inches in Quality World while there have been extensive articles and advertising promoting ISO products. IMSIG believes that there should be open channels of healthy debate on the development and future of quality management in general as you would expect to see in any professional body that has a Royal Charter defining duties towards society in general. If ISO products as are good as they are being claimed, they should have no difficulty in holding their own in an intellectually free environment and a competitive marketplace free of restrictive practices and censorship. Restrictive practices are incompatible with quality principles.

IMSIG is committed to the highest levels of professionalism and living the true spirit of the CQI's Royal Charter. This includes promoting harmonious and mutually beneficial interfaces with the CQI Executive and external bodies promoting all forms of management excellence.

Integrated Reporting

Integrated management is not just about integrated management systems, it is about taking a complete, non-fragmented approach to any and all aspects of management. A typical example is the way the value of an organisation is viewed and how performance should be reported in a holistic way rather than the standard financial accounts. This necessitates considering all of the capitals and not just financial and enables stakeholders to get a much better handle on true worth of an organisation and its current performance. In the last few years this has been the objective of the '[The International Integrated Reporting Council (IIRC)](#)' that has created a '[standard reporting framework](#)'.

The International Integrated Reporting Council (IIRC) is a global coalition of regulators, investors, companies, standard setters, the accounting profession and NGOs. The coalition is promoting

communication about value creation as the next step in the evolution of corporate reporting. The IIRC's mission is to establish integrated reporting and thinking within mainstream business practice as the norm in the public and private sectors. Their vision is to align capital allocation and corporate behavior to wider goals of financial stability and sustainable development through the cycle of integrated reporting and thinking.

Web Site

Progress on developing the IMSIG web pages has been held up for a couple of years because of delay in the CQI refurbishing the overall CQI web site. Following the advice of the CQI, the plan now is to develop a separate IMSIG web site under IMSIG control following the lead set by other SIGs.

Existing reference documents can still be accessed via the CQI IMSIG web site to assist members on the integrated management path and IMSIG are happy to add further documents submitted by members.
http://www.thecqi.org/Community/Special-Interest-Groups-SIGs/Integrated-Management-Group/Research-and-reports/

Key IMSIG Documents - Summary

Top management brief

This is a long existing IMSIG document that has recently been reviewed and amended.   Top management invariably has the aspiration for joined up thinking and recognises that it would be valuable but never gets any further, perhaps because they don't know it is possible or are not aware of other organisations that are beginning to do it more systematically.

The principal content of the brief is a sales pitch related to improvements in effectiveness and efficiency which is something all top managers can relate to. As the marketing people tell us we should sell on benefits and not features. The PowerPoint presentation is intended to be customised to suit the audience and the organisation in its current circumstances.

How IMSIG members have used the presentation in practice over the last decade is generally not known but IMSIG have received some good feedback and nothing negative. It has been observed that slides from the presentation have been included in conference presentations demonstrating that the intended purpose is being fulfilled at least to some degree.

A Survey Analysis of Integrated Management Systems in the UK

This master's dissertation by Agneszkai Katniak analysed the integration of management systems in UK organisations operating to multiple management system standards and had staff who were members of the Chartered Quality Institute or the International Institute of Risk and Safety Management.

The key issues included: which management systems were being integrated and to what extent, what were the barriers and benefits of integration, and the level of competence of the integrated management system practitioners.

It was found that most of the businesses that were surveyed planned to integrate their management systems or have already integrated them and that the integration is mostly internally driven.

Although there is a widely held view that management systems should be integrated, several interpretations of what an integrated management system is were revealed and the survey reports that this lack of consensus is perceived as the number one barrier to integration. Most companies achieved partial integration.

The research also showed that the large number and wide range of management system standards used by companies is not reflected in the integrated management system literature. However, the survey did indicate that the number of management system standards adopted does not determine the integration policy, the achieved degrees of integration or the number of difficulties in the integration process.

We hope you find these documents of interest and value. Please email the chair via secretaryimsig@thecqi.org if you wish to submit an already published article or paper relating to integrated management that you would be willing to have posted on the CQI IMSIG web site either directly or via a web link.

MSS 1000:2014 Management System Standard

The universal management system standard (MSS 1000:2014) has been added to the web site and is a powerful and valuable resource to help organisations create fully integrated management systems without boundaries and avoid unnecessary time on compliance with multiple management system standards each focusing on a different dimension of an organisation's performance. It is intended to provide a one-stop solution for organisations seeking to implement a fully integrated management system.

It provides organisations with more choice in selecting management system standards, which will help stimulate the continual improvement of standards in the marketplace. It is also a valuable resource that can be used within any organisation e.g. getting to grips with a universal approach to prospect and risk management.

The current principal objective of MSS 1000 is to provide instruction and guidance on designing and implementing fully integrated management systems that attempt to optimise the functionality of the whole organisation employing joined up thinking. This is achieved by organising the collective thought and action of the organisation to equitably satisfy the needs and expectations of its stakeholders while making the best use of resources. Integrated Management Systems do not recognise artificial and restricting management boundaries and transcend the organisation and management discipline silos. However, MSS 1000 can also be used for existing or planned partial management systems and can assist in aligning their structures for future integration.

The application of existing management system standards has meant that many organisations have only had experience of formal management systems covering only part of their organisation's performance. MSS 1000 incorporates quality, risk and other management principles and provides the opportunity for organisations to create fully integrated management

systems that address the whole of an organisation in a truly joined up and coherent way and avoid the need to comply with multiple diverse management system standards enabling it to economise on valuable management resources. This empowers an organisation to improve its effectiveness, efficiency, innovation, robustness, agility and resilience and also experience the synergistic benefits of coherent management processes. Independent surveillance and certification processes will also have the potential to be more effective and efficient.

As this MSS has the potential to universally benefit every type of organisation of whatever size it was decided that it should be freely published on the World Wide Web without charge inspired by its inventor Tim Berners-Lee.

This single universal MSS achieves the principal objectives of many separate management system standards in common use such as ISO 9001, ISO 14,001 and OHSAS 18,001 but it does not achieve this by simply merging the requirements of the various standards in the marketplace. It was done by returning to first principles required to be applied to an organisation's structures and processes in order to equitably satisfy the needs and expectations of its stakeholders while making the best use of resources. This has the effect of shifting the principal attention of management from its multiple facets of performance such as goods and services quality, people protection and nurture, environmental protection, security etc. to the organisation's structures and processes that affect the multiple facets of stakeholder satisfaction.

Plan-Do-Check-Act is something that humankind naturally does to varying degrees of competence but it does not happen naturally in an organisation and needs to be orchestrated via a management system. A fully effective, efficient, agile and resilient integrated management system has the capability of promoting and facilitating the optimal functioning of Plan-Do-Check-Act throughout an organisation at every level. Its establishment is an indicator of high performance functionality that provides confidence to stakeholders. Compliance can be demonstrated to three levels – bronze demonstrating effective and efficient processes, silver demonstrating commercial responsibility and gold social responsibility.

It should be noted that all modelling of the real world to aid its understanding, prediction and management is approximate to some degree and good judgement must be exercised by competent managers to get the most out of the MSS and an integrated management system. The MSS provides the flexibility to deviate from a requirement where it is justified.

As this MSS is innovative, empowering organisations to gain new management experiences, it is hoped that it will stimulate creative thinking and research and help drive continual improvement in the understanding and application of management systems.

Future Quality Professionals

The 'future of Quality professionals' has been a hot topic amongst CQI members and was discussed at our December 2013 AGM – Following that discussion this is our Vision: -

The quality professional of the future will have evolved further by standing on the shoulders of those who have gone before. They will emerge from a fully structured career plan and careful selection (rather than the happenstance of the past) which is sharply focused on the evolving needs and aspirations of organisations committed to applying fully joined up thinking in fulfilling their purpose and objectives. They will be experts in making the best use of resources to equitably

and ethically satisfy the needs and aspirations of stakeholders. Their thinking will employ unified management concepts and it will not be bounded by any predefined boundary.

Quality professionals of the future will:
- Be just as likely to be women as men,
- Be highly ethical and trustworthy and act as the conscience of the organisation,
- Understand and address the total functionality of an organisation without favour including all aspects of performance of interest to customers and other stakeholders (typically product/service quality, commercial, financial, health, safety, environmental, security, ethical and social),
- Be fully stakeholder focused rather than the historical narrower customer focus,
- Have a deep understanding of how value is effectively and efficiently created and delivered through the intelligent and creative integration of people, commerce, data, energy, matter and supplier structures and processes,
- Have a good understanding of the psychology of human motivation and the protection and nurturing of consciousness to facilitate creativity, fulfillment and well-being,
- Have a deep understanding of the anatomy of a fully integrated management system and all that is required to ensure it effectively and efficiently achieves the organisation's purpose and objectives,
- Be as comfortable with quality as with risk concepts and methodologies,
- Have an in-depth knowledge of management tools and techniques and able to select the most appropriate for the situation,
- Be able to lead management system audits or investigations or analysis on any aspect of the organisation irrespective of what it relates to,
- Be natural and passionate problem solvers working individually or within a group and able to take the lead and motivate and coordinate others,
- Be able to view and understand any element of an organisation with respect to the whole,
- Be competent to act as an internal or external consultant,
- Be visionaries and constant seekers of improvement,
- Be able to interact effectively and efficiently with all personnel at any level of the organisation and with any sized external organisation or individual,
- Have the capability to manage and coordinate management professional specialists,
- Be empathetic and excellent communicators enabling them to advise, persuade, negotiate, train, mentor and coach,
- Be selected according to essential personal skills and given a structured education and training suitable for an industry sector or sectors.

Does our Vision match yours?

Next Generation Network

The **CQI Next Generation Network (NGN)** aims to encourage young people working in quality to stay within the field and to create resources to foster an interest in quality for future generations. The Next Generation Network now has its own website, stay up to date with what they are up to *here*

Read the latest newsletter of the The Next Generation Network at Connexion - Connecting the Next Generation Network - January 2016

Need for New Steering Group Members

Following extensive work to develop and release the Integrated Management Standard (MSS 1000:2014), the project is moving in to a new phase where promotion and exploitation of the standard and support for organisations adopting it are to receive more focus.

With this fresh challenge a need for new skills and abilities comes forth and the IMSIG steering committee is seeking new members to come forward to help support this phase. We are looking for people who have, or want to learn, the right skills to step forward and join the steering committee.

There are three areas that require new blood to help move MSS 1000:2014 forward, these are: -

Promotion of the standard: -
- Marketing to promote awareness and adoption of the standard
- Documentation development to make the standard more accessible to organisations
- Development of training courses to support deployment of the standard

Organisational support: -
- Training in the application of the standard
- Training of internal auditors
- 3rd party auditing of organisations

Review of the standard: -
- Identify trends that may affect the standard
- Review organisational feedback to identify required improvements to the standard
- Set the future route for the standard

If you can contribute in these areas and would like to make a positive impact on the future of organisational management systems please get in touch so that we can discuss how you can get involved in the future of Integrated Management.

Contact Us

Please email the chair or secretary via secretaryimsig@thecqi.org if you wish to suggest anything that you would like IMSIG to focus on. For further information about the integrated management group, to become a member or to join the steering group please contact:

Chairperson: Ian Dalling   or Secretary: Bob Blackwell

Email: secretaryimsig@thecqi.org