CQI Integrated Management Special Interest Group Newsletter – May 2012

Prepared by IMSIG chair – Ian Dalling.

This newsletter contains the following sections. For those short on time please read the summary.

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SUMMARY

Following a period of slumber prior to 2011 IMSIG has been reinventing itself including a new steering committee conducting meetings via telephone conference call with one member as far away as New Zealand. IMSIG continues to grow with CQI registered members increasing by 8% in 2011 and by a projected annual rate of 16% so far in 2012. As well as the UK, members are resident in many countries around the world demonstrating a global interest in integrated management.

The April 2011 edition of Quality World was dedicated to integrated management and included a report on an integrated management roundtable held at the CQI and an article on a management topic taxonomy supporting fully integrated management systems. IMSIG maintains support resources on the CQI IMSIG web site and has recently produced a set of universal management assessment and review questions to assist organisations to review their arrangements. An online integrated management system survey has been operating for a couple of months supporting a master’s research project and this will be reported later in the year. A joint integrated management paper with the International Institute of Risk and Safety Management was published in March 2012. Some preliminary work has taken place on the development of a universal management system standard intended to be made freely available on the web.

Please email the chair via iandalling@live.com if:

- You wish to be part of the universal management system standard development group;
- You wish to suggest anything that you would like IMSIG to focus on;
• You have any suggestions or comments regarding the management and functioning of IMSIG and in particular the holding of an AGM;
• 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.

INTRODUCTION
Hello to all IMSIG members and a very warm welcome to new members. This is a longish newsletter because one has not been sent out in recent times – future newsletters will be sent out necessarily periodically based on need.

I would like to attempt to bring you all up to date on the current state of play of IMSIG which has awakened from a period of slumber between 2008 and 2010 and is the process of reinventing itself to meet changing times.

The role if IMSIG is to act as a focal point for the mutual exchange and dissemination of best practice within the area of integrated management. Its longstanding objectives are defined on the web site http://www.thecqi.org/Community/Special-Interest-Groups-SIGs/Integrated-Management-Group/.

I have included a section on the background of IMSIG below, ‘IMSIG History’, but some LinkedIn members may wish to skip this as the material has been communicated already on LinkedIn.

The last section covers ‘Member Needs and Aspirations’ and the IMSIG steering group invites your feedback to help in deciding what IMSIG should focus on in the future. It would be great if we could get more active participation by IMSIG members that have the time to do so and feel motivated.

IMSIG HISTORY
I will review where IMSIG has come from and where we currently are or at least my personal guess.

I was not involved with IMSIG at its birth which must now be of the order of ten years or more ago? Someone may be able to enlighten us? It is my understanding that it was initially formed within the IQA to give advice on managing ISO14001 as an addition to ISO9001. I recall that a computer based training package was developed and sold by the IQA for about £50? However this time was not the birth of integrated management systems, if indeed they were ever born – I personally had the good fortune to become involved in quality management in the UK Central Electricity Generating Board in the 1980’s when it implemented a fully integrated management system at all of its nuclear power plants.

When I worked at AEA Technology Consulting we developed a course on integrated management in the late 1990’s but very few organisations showed any interest in attending apart from the UK Ministry of Defense naval section and we ran only one course such was the lack of interest. It seems that later the need to comply with multiple management standards would become the prime motivator for integrated management systems and would come from individual organizations each discovering that it was a sensible and logical objective with many advantages over fragmented approaches. Academic institutions, learned bodies, certification bodies, consultants, training bodies
etc. all seemed to be caught napping and had to work hard to meet the demands of organizations for an integrated approach to management. I hope that the Management Systems Survey being conducted by Aggi Katniak will provide objective data on this issue.

Between 2002 and 2007 IMSIG systematically developed a number of documents between and at quarterly IMSIG meetings at the CQI in London. Some of these are available on the IMSIG section of the CQI web site [http://www.thecqi.org/Community/Special-Interest-Groups-SIGs/Integrated-Management-Group/Research-and-reports/](http://www.thecqi.org/Community/Special-Interest-Groups-SIGs/Integrated-Management-Group/Research-and-reports/). Initially IMSIG put attention on developing the concept of Integrated Management and only later put attention on Integrated Management Systems. The integrated management definition document went through 7 drafts and discussion via the IMSIG Yahoo group before the IMSIG committee finally unanimously approved it. Presentations were made to the IQA Professional Policy Board and the CQI Council making the case for the IQA to take a lead on integrated management and fill the growing integrated management vacuum not being served by any of the professional bodies. Coincidentally a team of quality professionals from China interested in integrated management visited the CQI having found IMSIG on the IQA web site.

Following this period of intense IMSIG activity attendance at IMSIG meeting attendance fell off for a number of different reasons and was no longer viable there being only two at the last meeting. Key IMSIG players were unable to attend for many different reasons including being made redundant, retirement, funding disappearing and the chair returning to Belgium when her secondment ended. Rather than see IMSIG cease to exist I took over the chair but was not able to give IMSIG the attention it ideally needed due to pressure of professional work and giving support to family going through a very difficult situation. Ironically during the subsequent period of slumber people have steadily continued to join IMSIG and integrated management appears to have changed from being pioneering to main stream – in the 2009 CQI membership survey showed that 70% of its members were taking an integrated approach with their management systems. Also a major certification body made 5% of their staff redundant because they would not undertake training so that they could assess additional management system standards to ISO9001!

In 2011 IMSIG has received more attention from the chair in an attempt to revive it with a new steering committee with members old and new and it is hoped that the progress will continue.

**MEMBERSHIP**

Despite the period of slumber IMSIG has continued to grow with new registrations to the CQI membership database and to LinkedIn from the UK and many countries around the world.

On 08/03/2012 there were 512 IMSIG members on the CQI member database of which 507 were active CQI members. There were 41 new joiners between 01/01/2011 and 31/12/2011: an increase of 8% and 14 new joiners in 2012 up to 08/03/2012 representing a projected annual increase rate of 80 joiners (16%). The CQI membership as a whole fell by 3% in 2011.

The LinkedIn database was created in November 2010 replacing the existing Yahoo group and has grown steadily to 278 on 19/05/2012. Members join the LinkedIn IMSIG either via the CQI or directly via the web. The exact total IMSIG membership is therefore unknown.
It is requested that any member that is not registered on the CQI membership database or the LinkedIn web site that they do so by respectively:

- emailing CQI business support smelis@thecqi.org or
- creating a LinkedIn account, if you do not already have one, and registering via http://www.linkedin.com/groupsDirectory searching for CQI Integrated Management SIG under the group section.

If you have not received this newsletter via email it means that you are not on the CQI IMSIG database.

**ORGANISATION AND MEETINGS**

Quarterly teleconference meetings of the steering group have taken place since March 2011. People were not able to attend face to face meetings at CQI HQ in London as have taken place in the past.

Priority has been given to formalizing the management of IMSIG and the arrangements have been defined in a new document titled ‘IMSIG Management’. It contains sections covering: IMSIG Organisation, Meetings, Policy Approval, Policy Communication, Project Management, Conflict Resolution, Reporting and finally CQI SIG Rules to insure that IMSIG complies with the CQI charter. The arrangements cover the establishment of project groups as required. The IMSIG Management document will be posted on the IMSIG web site.

Meeting the needs of over 500 IMSIG members spread around the world and continually growing is a major challenge in terms of understanding member needs and also how to efficiently and effectively communicate and maintain the right organisation structure which is functional and member focused. The ‘IMSIG Management’ document has attempted to address this - see ‘Organisation and Meetings’. However it may be possible to be more creative in the future – see ‘Member Needs and Aspirations’.

At the March 2012 steering group meeting it was agreed that the IMSIG AGM should take place in September 2012 which will include elections where necessary in line with our newly agreed ‘IMSIG Management’ document. Personally, I believe that IMSIG should be democratic within the practical limitations of most members not wishing to be actively involved and the challenge of having over 500 IMSIG members on the CQI database and over 200 on IMSIG LinkedIn. The steering group thought that it would be good to consult members on their views and I request that you submit them via email regarding how this can be practically achieved without undue administration that does not add value – refer to ‘Summary’. There is a technical limitation of telephone conferences being limited to 20 people and also the limitation of being able to conduct meetings effectively with many participants. Currently I am acting as chair and secretary and would welcome a volunteer to act as secretary. An invitation for IMSIG members to stand for posts will be sent out prior to the AGM.

**COMMUNICATION AND LINKEDIN**

Since around 2002 IMSIG has used Yahoo as the means for IMSIG communication and Derek Deighton and Susan Kavanagh did a sterling job managing its administration. We had great debates
with hundreds of emails passing between the IMSIG community often touching on very emotive issues and challenging cherished values and beliefs. Since 2007 however it received very little traffic, but with the assistance of CQI staff, a CQI IMSIG LinkedIn group was established in November 2010 and subsequent discussions have taken place on several interesting topics. Integration of security has been covered and may well be one of the greatest integration challenges. Other topics have covered: training, integration risks, whether integration will become the norm, the HSE HSG65 standard being converted to a plan-do-check-act structure, relationship between quality and sustainability, is there such a thing as an integrated management system, and system and process approach. If you are currently not on LinkedIn please register – see 'Membership'.

Several discussions and fierce and passionate debate have also been initiated by non IMSIG members on the CQI LinkedIn group taking different angles on what exactly integrated management is and how it relates to other things such as process management and systems approaches. Many still argue that integrated management does not exist despite it having been clearly defined by IMSIG years ago as being a stakeholder focused approach to management which attempts to be equitable and minimize use of resources. It is by definition a totally inclusive management approach.

It has also been challenged as to whether the IMSIG definition of integrated management is unique which IMSIG has not asserted. Some have asserted that the definition of management existed historically but nobody has yet to provide a reference. Can anyone provide one?

WEB SITE

Although resident outside of the UK, Daniel Steyne has undergone training by the CQI IT section and is managing the IMSIG section of the CQI web site: http://www.thecqi.org/Community/Special-Interest-Groups-SIGs/Integrated-Management-Group/.

The site contains reference documents developed by IMSIG: http://www.thecqi.org/Community/Special-Interest-Groups-SIGs/Integrated-Management-Group/Research-and-reports/ that helps organizations on the integrated management path. It is also intended to create an area for presentations and other documents that IMSIG members are happy to have posted on the web site – see ‘Summary’.

NEW IMSIG DOCUMENTS

Two new IMSIG documents have been produced and will be placed on the CQI IMSIG web site in due course.

The first document defines the management of IMSIG and how it interacts with the CQI and complies with its charter. Refer to IMSIG Organisation and Meetings.

The second is a resource document titled “Universal Assessment and Review Questions”. These questions may be used to review or assess existing management arrangements to determine deficiencies in existing integrated or non-integrated arrangements. The questions are structured according to a twelve element management topic hierarchical taxonomy. These twelve principal
elements are clustered into the four components of the ‘plan do check act’ (PDCA) management cycle that ideally operates effectively and efficiently throughout all levels of an organisation.

These documents when posted will be accessible via http://www.thecqi.org/Community/Special-Interest-Groups-SIGs/Integrated-Management-Group/Research-and-reports/.

Work on this document has acted as preparatory work for the Universal Management System standard discussed below.

COOPERATION WITH THE IIRS

I am pleased that the CQI and IMSIG have made links with the International Institute of Risk and Safety Management via their director of policy and research Barry Holt who has a particular interest in integrated management and attended the CQI integrated management roundtable hosted by the Quality World Editor in April 2011. At the end of last year I was invited by Barry to co-author a paper on integrated management and this was published in March and may be downloaded via http://www.iirsm.org/Resources/IIRSM/Documents/Management%20Integration%20Whitepaper%20final%201.pdf.

MANAGEMENT SYSTEMS SURVEY

I have for a while been keen that a survey should be conducted to see exactly what organisations are doing with respect to their management systems to provide reliable data and also help disseminate good practice and practical experience. I prepared a draft questionnaire with the assistance of Paul Hayes kind assistance. However, last year I was delighted that Aggi Katniak took it over as part of a master’s research project into integrated management. This means that it will be conducted with appropriate scientific rigour and give it a much higher credibility and status. The on-line survey is I believe still live and takes about 5 to 10 minutes at https://www.surveymonkey.com/s/375B66Y.

Aggi advises me that we have managed to achieve a survey size which is statistically meaningful and she will report results later in the year. Thanks to all of you who have already completed it and particularly to Aggi for her diligent and professional approach.

UNIVERSAL MANAGEMENT SYSTEM STANDARD

Detailed work on the standard has been delayed because of attention being placed on the ‘Universal Assessment and Review Questions’ document – refer to New IMSIG Documents. This work has contributed to the creation of a universal management system standard.

One of the objectives of IMSIG is the creation of a universal management system standard to be freely available on the web for stakeholders to use as they wish which may include guidance, self-certification, third party certification, education, research, etc. This will greatly assist organisations wishing to implement a fully (or partial) integrated management system either immediately or in a staged programme. It will cover not just issues associated with health, safety, environment and product/service quality but also the full management of people and commerce – fully integrating quality management and risk management approaches. The standard will not just merge the multiple diverse existing requirements in existing standards but will link to first principles of the
IMSIG definition of integrated management. The standard will attempt to overcome known problems with existing standards and attempt to equitably meet the needs and aspirations of stakeholders. I hope that we may also be able to include some features not normally seen in management system standards.

I will be emailing everyone who has expressed an interest in this project in the past and also request anyone else interested to email me – see ‘Summary’. I do apologise for not communicating on the issue for a while.

MEMBER NEEDS AND ASPIRATIONS?
IMSIG has survived and come off the back burner in 2011 and is becoming more active again reinventing itself into something appropriate for the times we live in. My personal wish would be for it to be global, virtual and act as a bridge between people wishing to promote and practice an integrated/ holistic/joined up approach to management and to give the maximum freedom for participation, cooperation and mutual support. I hope that there is sufficient desire for this to happen and more members will feel motivated to get involved to achieve it or indeed anything else that IMSIG members may perceive as a priority.

Each member will have a unique circumstance e.g. where they are on the knowledge and experience curve and the need and potential for implementing integrated management within their organisation or industry sector. Future career development and development of management professionals in general will be of interest to many. The IMSIG steering group will use the Management Systems Survey Report to help in understanding IMSIGs needs and aspirations in order to formulate a long-term plan but your suggestions would be also be invaluable – refer to Summary.

Thanks to everyone who has supported IMSIG in whatever way and I look forward to interacting with you in the future. I would also like to thank Vince Desmond Executive, CQI Director Business Development, for his support and good advice.