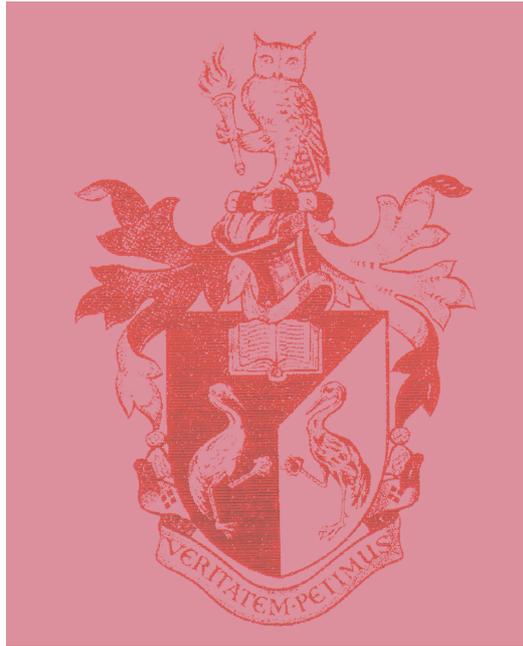


Institute of Management Services



MEMBERSHIP and EXAMINATION REGULATIONS

Edition 2006

IMS Certificate

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1. INSTITUTE OF MANAGEMENT SERVICES

The Institute was formed in 1941 and is one of the leading professional associations in the world dedicated to improving productivity. The main objective of the Institute is to make connections between:

the concept of all-sector productivity as a key determinant of wealth-generation and economic well-being;

the systematic measurement, analysis and improvement of systems, processes and procedures through management services approaches and techniques; and

the further development and deployment of those approaches and techniques via research and development, knowledge sharing and peer-based support processes.

To further this primary objective, we:

- act as a knowledge hub to support both decision-makers and practitioners
- create and maintain professional standards for the practice of management services and productivity improvement
- provide a system of qualifying examinations for those who aspire to the highest standards of practice, and who subscribe to the underpinning philosophy and ethics of the Institute.

2. ACTIVITIES

The Institute has a regional structure covering the United Kingdom which offers technical meetings, work visits, social events and opportunities to meet with others in the profession.

In addition there are specialist groups for members with particular interests.

The Institute publishes the quarterly magazine *Management Services*, which is sent free to members. It carries a host of news stories and features, enabling readers to keep abreast of developments in the profession, and, through its classified sections, leads the management services job market.

Furthermore, the Institute operates an information service, publishes handbooks, sponsors research, and produces videos and stages conferences and workshops.

3. MEMBERSHIP RULES AND GRADES

There are four grades of membership of the Institute. The grade appropriate to you depends upon your qualifications and practical experience in management services.

Corporate

All corporate members are entitled to vote at general meetings and are issued with a certificate of membership.

Fellow – designatory letters FMS

- A) age 30+ and
- B) MMS/MMS(Dip) for the previous five years and
- C) currently holding a position of responsibility in management services.

Or

Age 35+ and having held a position of responsibility in management services for at least 10 years and currently having a major responsibility for advising on areas within the Institute’s Body of Knowledge.

Or

In exceptional circumstances by invitation of the Council.

The Council may also award Honorary Fellowship – designatory letters FMS (Hon) - to an individual as a mark of recognition and respect, normally recognising long and valuable service to the Institute or to the profession of management services.

Member – designatory letter MMS/MMS(Dip)

- A) Holding the Management Services Diploma or
- B) Having 3 years experience in management services and

C) holding the Management Services Certificate or an equivalent qualification in management services acceptable to the Institute.	Or	D) satisfying the institute either by interview or by references to current or past employers of competence in management services.
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Those members who hold the Management Services Certificate and the Management Services Diploma may use the designatory letters MMS(Dip).

NON CORPORATE

Associate – designatory letter AMS

All associate members will receive a membership certificate.

- A) holding the Management Services Certificate and
- B) having one year's experience of management services.

Affiliate

Those who wish to be associated with the Institute whilst they study for Management Services qualifications or whilst they expand their knowledge around topics contained within the Institute's Body of Knowledge.

Applications for Associate, Member and Fellow grades require supporting and information – see the reverse of the application form.

Application for Membership

Application for membership should be made on the appropriate form, which is available from:-

**Institute of Management Services
Brook House
24 Dam Street
Lichfield
Staffordshire
WS13 6AA**

**Tel: 01543 266909 Fax: 01543 257848
email: admin@ims-stowe.fsnet.co.uk
Website: www.ims-productivity.com**

Those who have previously held membership should not make a fresh application, but quote their old membership number and the year in which their previous membership expired.

Subscriptions

See website www.ims-productivity.com or contact Head Office for current subscription rates. Please note that students are only eligible for Life membership once they have obtained the IMS Certificate.

The Student of the Year Award

Each year the Institute awards the IMS Student of the Year Award to the student who in the opinion of the Council of Management is the most deserving.

Examination and Qualification Regulations

4 The Management Services Certificate Scheme

Introduction

Management Services is a generic term covering a wide range of activity. The Certificate scheme is designed to meet the needs of:

- new entrants into management services in industry, commerce or public services who will practise under the supervision of a team leader; or
- someone in mid-career well qualified in their work, who wishes to apply management services techniques to their own work.

The aim of the Certificate scheme is to produce a practitioner able to systematically quantify and examine activities in order to improve the effectiveness of working systems, processes and procedures, and the effective use of human and other resources.

To reflect the breadth of activity covered by the term *management services**, the Certificate scheme is made up of core content which addresses the underpinning principles of management services work, and a modular productivity toolkit from which students can select components according to their particular needs or interests. Learners build up credit points by completing modules of the Scheme and must reach the prescribed number of points to be awarded the Management Services Certificate.

Courses are provided by *Approved Providers* in partnership with the Institute of Management Services. These partners may submit to the Institute details of a particular customised scheme they wish to offer, perhaps to meet the specific needs of a particular local industry. Such schemes will be validated against the guide content below and will normally be accepted as long as they successfully address the core content and meet overall conditions for study time and assessment methods.

Anyone wishing to study for the Management Services Certificate must be an affiliate member of the Institute of Management Services. They will be directed to one of the Approved Providers who will advise on administrative arrangements for Registration as a Learner and for the registering of credit points on the successful completion of components of the scheme.

**Footnote – as defined in BS3138: Glossary of Terms used in Management Services*

The scheme outlined below should therefore be taken as a model for illustrative purposes. The specific scheme to be followed by an individual will vary depending on the course followed as it is designed and delivered by the specific Approved Provider. Indeed, it is possible for a learner to undertake different components of the scheme at different Approved Providers, using each set of credit points to build towards the eventual claim for award of the Management Services Certificate.

Productivity Services Core	=	45 credit points
Productivity Toolkit	=	15 credit points

Successful completion of the Core and of 15 credit points from the toolkit leads to award of the Management Services Certificate.

Note: All three topics in the Core must be included into an approved programme. Topics may be combined to provide cohesive and integrated learning. Elements of the Core and the toolkit may similarly be combined.

Note: The IMS moderator is responsible for ensuring that all subjects from the content guides (4.3, 4.4 and 4.5) are included in each programme.

Productivity Services Core

The core is made up of three areas that will normally be introduced in three modules. These core modules, with their associated credit point values, are:

Critical Review Methodology	15 points
Process Quantification	15 points
People and Implementation Skills	15 points

(Study time to achieve a particular credit point value will vary with the form of a course, the mix of tutor-led and independent activity and the form of assignments and assessments, but broadly 3 credit points is equivalent to a day's study activity.)

Note: People and Implementation skills may be incorporated throughout the Core and toolkit modules. Evidence of their inclusion must still be demonstrated.

Guide Content

Critical Review Methodology

The generic process of undertaking productivity/review/improvement

Note: Each subject must be included in the teaching programme: examples of content are indicative only.

This module outlines the importance of understanding the underlying business environment and business strategy and then introduces the components of a typical review/improvement project. Though the content is written in linear fashion, many of the steps and phases overlap and inter-relate.

Identifying and selecting areas for review

- Prioritising areas for review on the basis of current strategic, tactical or operational plans
- Scanning the external business, legal and regulatory environment
- Using measurement, analysis and diagnosis as the basis of identification.
- Identifying areas and levels of dissatisfaction with current performance
- Assessing potential benefits of a review process

Identifying stakeholders and understanding their position

- Identifying those affected by, or with an interest in, the situation/activity under review
- Understanding shared histories and interactions
- Identifying and respecting different value sets and priorities

Establishing the scale, scope and success criteria

- Understanding and clarifying what is in, and out of, scope
- Understanding stakeholder aspirations
- Working on initial schedules and resource inputs for a review/improvement project
- Negotiating and agreeing terms of reference

Gathering and recording relevant foreground and background information

- Establishing the level of detail required in data collection and analysis
- Recording the present situation – via structured interviews and the use of appropriate charts, diagrams and mapping techniques
- Collecting quantitative data – including benchmark data from external sources if available
- Establishing relevant baseline measures against which improvement can be determined

Critically analysing the situation ‘as is’ and developing alternative scenarios

- Undertaking structured analysis
- Addressing target criteria
- Brainstorming

Simulating proposed scenarios

Evaluating alternatives as a basis for recommendation and decision

- Undertaking a 'reality check' – against agreed success criteria
- Understanding probabilities of success
- Building quantitative models e.g. Cost- benefit analysis, Break-even analysis, Risk analysis
- Assessing qualitative factors
- Presenting results to stakeholders

Establishing the parameters of the desired change situation

- Revisiting scale and scope
- Identifying external factors affecting the situation to be changed
- Identifying and mitigating key risks
- Identifying and addressing health and safety factors
- Establishing potential timescales, schedules and milestones
- Planning, preparing for and resource change

Making the change

- Establishing and issuing appropriate documents, instructions, standards, etc.
- Understanding the importance of regular communication with stakeholders
- Establishing monitoring processes to identify variance from plan or budget
- Training, change management, people issues

Managing results and assessing outcomes

- Using agreed criteria and agreed measures to identify degree of success
- Reporting to stakeholders
- Post-implementation review

Process Quantification

Note: Each subject must be included in the teaching programme: examples of content are indicative only.

This module outlines the importance of measurement in aiding the diagnosis, analysis and review of working systems, processes and activities; in assessing performance and productivity; and in evaluating results.

Understanding the need for appropriate quantification

- Understanding the role of measurement:
 - in supporting planning
 - in supporting costing and financial analysis
 - as the basis of benchmarking and evaluation
 - as the basis of comparing alternative systems, processes and procedures
 - in establishing time standards
 - in underpinning performance-related pay systems

Understanding the importance in some scenarios of measuring the 'total system' rather than just the 'work' contained within it

Basic principles of measurement

Understanding the need for analysis, measurement and synthesis as part of an overall approach to measurement
Concepts of discrimination, accuracy and reliability
Principles underlying measurement by sampling and estimating
Understanding the use of 'proxy' measures

Time Standards

Defining the context of a time standard
Assessing and rating performance
Normalising to a defined performance level
Identifying the frequency of occurrence for irregular elements of a system or process
Adjusting for environmental and other factors
Adding recovery allowances
Understanding appropriate work-rest regimes
Understanding the role of 'synthetics' and data banks

Measurement Techniques

Understanding the characteristics of the most commonly used techniques including:
Self-recording
Time Study
Simple Estimating
Analytical Estimating
Comparative Estimating
Activity Sampling
Pre-determined motion time systems

Selecting a measurement technique

Understanding the factors involved in selecting a technique for a particular measurement task
Understanding the 'trade-offs' between these factors

People and Implementation Skills

Note: Each subject must be included in the teaching programme: examples of content are indicative only.

This module outlines the importance of the 'soft skills' that underpin successful productivity improvement projects.

Cultures and behaviours

Understanding the relationship between shared value sets, motivations and behaviours
Understanding basic group dynamics and leadership

Identifying prevailing cultures and attitudes

Communication and presentation skills

Undertaking data collection interviews
Structuring and managing meetings
Writing reports and preparing presentations
'Selling' recommendations and getting 'buy-in'

Managing Change

Understanding resistance to change
Understanding the importance of an executive sponsor
Understanding the importance of regular communication
Preparing for a change project: setting targets and agreeing outcomes
Negotiating and facilitating change
Training, coaching and supporting the people undergoing the change
Managing a change project and achieving 'closure'
Reinforcing changed behaviours

Productivity Toolkit

Components of the productivity toolkit will provide learners with:

- practical competencies (including accreditation to meet the specific needs of a particular work measurement technique); or
- areas of specialist management services activity.

Examples of such specialising might include:

Lean manufacturing – value stream mapping, flow, Pull, 5S, SMED, TPM etc
Six Sigma – DMAIC process, basics of statistics, process capability
Strategy Development and Deployment - Balanced Scorecard , KPI's

Each component of the toolkit offered by an Approved Provider will have an associated credit point score. For example, a course leading to competence to practise Time Study would normally have a credit point value of 15 points.

To be eligible for the Management Services Certificate, learners must complete the full 45 points of the Productivity Services core and gain a further 15 points from the Productivity Toolkit.

Learners may offer previous, relevant courses as exemption (i.e. PADS & MOSTs) against credit points of the Toolkit. This includes certificates of competence to practise a recognised work measurement technique. Any such claims for exemption must be submitted to the Institute Head Office with full documentation of the certification achieved or the course(s) studied.

5. MANAGEMENT SERVICES CERTIFICATE

Additional notes for Scheme Providers

The titles of modules that make up the Productivity Services core of the Certificate scheme reflect the broad areas of the core. Alternative titles for these modules are quite acceptable as long as the content broadly matches the guide syllabus. Similarly, the breakdown of the core into three modules is illustrative only. The Institute is happy to approve schemes that 'package' the appropriate content in other ways - perhaps, for example, by addressing core content in the context of a particular methodology or technique.

The current IMS practical examinations are a valid component of the Productivity Toolkit.

Assessment for all modules may be via a mix of multiple choice questions, continuous assignments, examination papers, etc. Approved providers will set and mark their own examinations to a format and marking scheme approved as part of the scheme approval process. Pass marks for examinations will normally be 50%; though pass marks for other forms of assessment may differ (e.g. pass marks for multiple choice question tests may be higher). The Institute will review assessment processes as part of the scheme audit process (see below) and reserves the right to ask to see any or all examination papers and other forms of assessment on demand.

In all cases, Approved Providers will clarify issues of scheme structure, mandatory and optional components and assessment processes as part of the process of submitting a scheme for approval. It is the aim of the Institute to allow providers to be innovative and flexible in creating schemes to meet market needs.

Becoming an Approved Provider – Eligibility Assessment

All providers will first be validated and registered as Approved Providers.

A registration approval will be for a period of two years and a registration fee of £200 will be charged to cover that two year period. This fee is reviewable bi-annually.

A certificate of Approved Provider status will be issued by the Institute.

Approval of Certificate Scheme – Course Assessment

Approved Providers will then be required to submit details of their particular scheme intending to lead to award of the Management Services Certificate. Details of the scheme must be submitted to the Institute Head Office (two copies) who will organise the process of moderation by one or more Institute-approved moderators. The fee for Scheme approval is £300 per application to cover Institute administrative costs. Approval of the scheme lasts for the current period of Registration of the provider as an Approved Provider though there is no charge for re-approval unless there are amendments to the scheme.

Subsequent substantial amendments to the scheme, including the addition of further, optional components must be submitted to the Institute for approval. The fee for such amendment is £100 for each new component.

Scheme audit process

An IMS-approved moderator will be responsible for conducting annual audit reviews of all Certificate schemes. This audit will involve a visit to the provider's delivery centre. The audit process will be charged at £200 annually.

This audit process is confidential to the Institute and the Provider being audited. Only two copies of audit documentation will be produced; one to be retained by the Provider, and the other to be kept in secure storage at the Institute Head Office.

The internal IMS administrative processes are detailed in the flow process chart.

The document includes information flows between the IMS, Approved Providers and students for:-

- Student registration
- Student membership and upgrades
- Course attendance
- Exemptions
- Appeals
- Certification of modules
- Certification upon completion

6. GENERAL INFORMATION

NOTES FOR GUIDANCE OF STUDENTS

Students should bear in mind that their academic studies should be supplemented by practical experience and private reading. Other than in exceptional circumstances a course of study with an IMS approved course provider should be undertaken in order to prepare for the examinations.

Homework, private reading and study required outside the lecture room are an integral part of the studies, and reliance should not be placed on being able to pass the examinations solely by attendance at a course of lectures.

Additionally, students should keep abreast of developments in the profession, particularly by taking part in any local activities of the Institute and by reading the Institute's journal *Management Services*.

Throughout their studies, students should pay particular attention to their written work. One of the tasks of a practitioner is to present reports to management, and the examiners will pay particular attention to the layout and presentation of examination answers.

Failure in this respect may lead to a student's failure in the examination.

COURSES, COURSE-WORK AND HOMEWORK.

Colleges, course providers and training organisations wishing to run courses for the Certificate and Diploma must be approved by the Institute and will be expected to demonstrate that they are adequately staffed and equipped to offer the necessary tuition, especially in preparation for the practical tests.

Students should check whether the Institute approves the course they intend to take. If in doubt they should contact the Institute's education department immediately.

To meet the aims and objectives of the course and the individual modules, providers may choose to take a variety of approaches to the teaching of the various subjects. However, it may be that students will undertake some assignments at their place of work; prepare materials at home; study, with the help of open learning materials, some of the theoretical background at home; and/or prepare short talks on aspects of their own as well as the policies and practices of their own company. By encouraging students to use their working knowledge, study time will be released for practical work and practice. This approach will better prepare the candidates for their examinations, which will draw heavily on their ability to apply knowledge and understanding in practical situations. Students should, therefore, not expect extensive course time to be occupied by formal lecturing or note dictation. Some Approved Providers may also include short residential periods as part of their requirements and as an essential component of the course.

EXAMINATION PRE-ENTRY REQUIREMENTS

The Institute does not set formal pre-entry requirements for candidates. However, as a general rule, candidates undertaking a scheme leading to the Management Services Certificate would be expected to have appropriate employment experience, business knowledge and academic skills to cope with the programme.

Special note – Examinations will be conducted in English only and the moderators' decision is final.

Examination Centres

Candidates will normally sit the examinations at the establishment where they are studying. See our website for Approved Providers details.

Results and Certificates

Once results have been logged and noted by the IMS Moderators, students will be notified by their respective Approved Course Provider. The Management Services Certificate will be forwarded automatically, after the official issue of the results, to those who have successfully completed the appropriate approved scheme

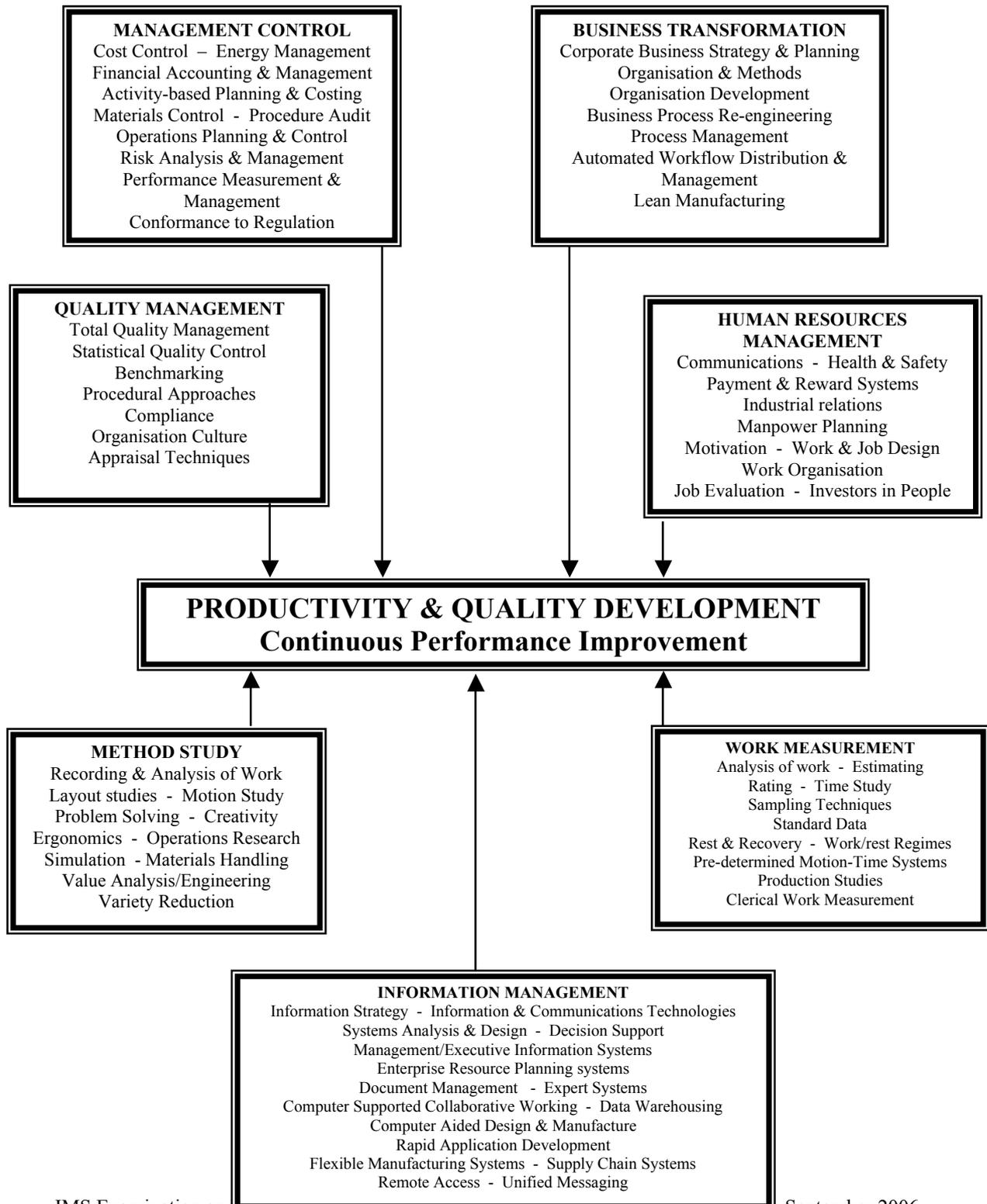
A duplicate certificate may be issued on payment of £27.50 so long as Institute membership is current. None members replacement certificate £50.00



THE MANAGEMENT SERVICES BODY OF KNOWLEDGE



The practice of Management Services involves the use of a range of skills, methodologies and techniques. It also involves a particular attitude and approach to problems, opportunities and potential for change. The diagram below summarises the current body of knowledge of the profession of Management Services and identifies the main technique and application areas.





CODE of PROFESSIONAL ETHICS

The Council of Management of the Institute has formulated the following code of professional ethics which all members of the Institute, of whatever grade, are expected abide by.

Members of the Institute of Management Services of all grades shall:

1. Conduct themselves in a manner which will merit the respect of the community for persons engaged in the profession
2. Uphold the reputation of the Institute and the dignity of the profession.
3. Carry out their professional duties responsibly and with integrity.
4. Collect and marshal facts without bias, and not allow their personal views or the views of others to influence their professional judgement, interpretation, analysis and presentation of those facts.
5. Not discuss with, or disclose to, any persons not authorised to receive such information by their employer or their employer's delegated representative, whether within or outside their employer's organisation, the data, results, reports or proposals arising from their work; nor shall they cause such confidential information to be misused or to be published without permission.
6. Not use information acquired during a previous employment in any way which could be detrimental to their former employer.
7. Not receive any undisclosed material benefits other than their normal emoluments consequent upon any recommendation they may make in the course of their duties.

GUIDE TO GOOD PRACTICE IN MANAGEMENT SERVICES

The following is intended to provide professional guidance to those practicing management services, particularly members of the Institute of Management Services.

1. While management services practitioners are primarily responsible to the management of the organisation in which they are employed, they also have obligations to their profession and must always attempt to use their professional skills with integrity and objectivity in the interests of the organisation as a whole. Should practitioners at any time find these two commitments conflicting they should stress their professional accountability and the overriding need for trust within the organisation that their skills will be used impartially and responsibly.
2. The work of management services practitioners can be concerned with people at any level within an organisation and management services practitioners should therefore aim to build relationships based on mutual respect. To do this they must be alert and self disciplined at all times when carrying out their professional duties and extremes of behaviour or dress should be avoided. It should be clear from the demeanour of management services practitioners that they are responsible members of the management team.
3. As management services practitioners are responsible for assembling facts, analysing particular situations, and for making recommendations for action, they should ensure that management are fully aware of all the effects that the implementation of the recommendations might entail. This will particularly apply to the field of industrial relations when the management services practitioner is involved with the assessment of work and methods of payment.
4. Management services practitioners should not give a direct order to those who are responsible to the manager or supervisor of the particular work situation with which they are currently engaged unless specifically authorised to do so. They should always refer to the manager or supervisor matters concerning technical aspects of the work under review and should not allow themselves to be used as a diversion for complaints about management or supervision.
5. Management services practitioners should always attempt to be fully conversant with current industrial and other appropriate legislation and ensure that any recommendations for which they are responsible accord with such legislation.
6. There can be no objection to management services practitioners joining trade unions in their own individual capacity. They should however not allow any conflict to affect the objectivity of their professional skills.

7 **MANAGEMENT SERVICES CERTIFICATE (Fees to students)**

Membership fee

All students undertaking schemes leading to the Management Services Certificate must be affiliate members of the Institute and pay the currently prevailing membership fee.

Learner registration fee

Those undertaking a scheme (or an individual component) must also be registered as 'a learner'; the separate learner registration fee of £50. Candidates may register up to twelve months after completing an approved module at an approved provider.

Examination Fees

Where providers are setting and marking their own written assessments, no examination fees will be charged by the Institute to the provider or to the student.

The IMS practical tests organised and marked by the Institute, an examination fee of £50 will be charged. These will be the only practical tests that will be recognised by the IMS except by a process of exemption (see below) where other competency/practical achievements (such as attaining competency in a recognised pre-determined motion-times system) may be recognised as contributing to the Productivity Toolkit.

Exemption from modules

Learners may apply for exemption from particular components of the Certificate based on prior study and accreditation. An administration fee of £50 will apply to each exemption claimed.

Certificate Application

A fee of £50 per application will be charged for issue of a single, multiple and final certificate.

Appeal fees

Where a provider wishes to appeal to the Institute against the results of an assessment, there is a fee of £50

VAT is not applicable to these fees.

Head Office: Brooke House, 24 Dam Street, Lichfield Staffordshire WS13 6AA
Telephone: 01543 266909 Fax:01543 257848