



# Institute of Management Services

*Achieving excellence through people and productivity*



## Membership and Examination Regulations

IMS qualifications and grades  
Education Providers Edition  
September 2024

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## 1. INSTITUTE OF MANAGEMENT SERVICES

The Institute was formed in 1941 and is the principal body in the UK concerned with the promotion, practice, and development of the range of methodologies and techniques for the improvement of productivity and quality, known collectively as 'Management Services'.

This embraces the disciplines of industrial engineering, work study, organisation and methods, Productivity analyst, systems analysis, and a wide range of management information and control techniques as illustrated in our body of knowledge. Though other specific tools and techniques become fashionable and topical, the Institute is primarily concerned with establishing the need for a structured and disciplined approach to productivity measurement, analysis and improvement.

The Institute is the qualifying body for the Management Services profession focusing on Productivity Improvement in the UK and worldwide.

It acts as the 'guardian' of the body of knowledge relating to productivity improvement and as a forum for information exchange. Our members work under a variety of job titles across most business sectors and the whole of the UK economy and the wider world. Membership, and the associated professional qualifications and development it brings, helps them make a more effective contribution to the performance and well-being of their own organisation and to the nation's economy as a whole.

In addition to creating and upholding professional standards for the practice of management services through the adoption of a code of ethics and the provision of a system of qualifying examinations, the Institute of Management Services collaborates with national and international professional bodies in similar fields.

### **The Institute's mission is:**

to promote to key stakeholders in UK government and commerce:

- an understanding of the concept of productivity and its improvement.
- the importance of structured approaches to productivity analysis, measurement and enhancement.
- to identify good practice and professional standards in productivity improvement by Individuals or organisations.
- to create and deliver education, training, qualifications, advisory and support services aimed at helping individuals and organisations to establish and maintain that good practice and those professional standards.

## 2. ACTIVITIES

### Information dissemination

We have an informative website which provides members with resources on productivity, latest news topics, some book reviews, details of membership benefits and our Approved Education Providers.

The Institute publishes a digital, quarterly Journal *Management Services*, which is available as a free download for IMS members from the website. It carries a host of news stories and features, enabling readers to keep abreast of developments in the profession.

It can also be purchased as a digitally printed Journal on an annual basis (4 editions). Please contact [admin@ims-productivity.com](mailto:admin@ims-productivity.com)

In addition to the Journal the Institute also keeps its members up to date with a bi-monthly Productivity Newsletter which is emailed to members.

Furthermore, the Institute can help with an information service, by contacting head office.

### Professional development

In addition to the professional development opportunities provided through access to the various information sources above, the Institute organises seminars and conferences on a range of productivity-related topics – and directs members to similar events globally.

Our website also contains a regular blog on productivity issues.

### **3. TYPES OF MEMBERSHIP**

The Institute offers two types of membership

#### **3.1 5 YEAR AFFILIATE MEMBERSHIP**

From 2018, Annual Membership was discontinued. It was replaced with “5 year Affiliate membership”. Current fees are on page 10 “Membership Type and Grade” template

It is then renewable at the end of 5 years, if still an Affiliate. Renewal fees are also on page 10 Membership Type and Grade template.

5 year Affiliate Membership must be current through the education process when undertaking any or all of:

- a) Registration for “IMS Measurement Practitioner” - Time Study Practical, Module 2a, for Rated Activity Sampling Module 2c, or the full IMS Productivity Analyst course.
- b) Registration for one of the of exempt work measurement techniques, in lieu of the Time Study Practical, or Rated Activity Sampling modules, as part of IMS qualifications.
- c) Application for the IMS Productivity Analyst qualification, with registration of the final 2 modules, at successful completion of the IMS Productivity Analyst courses, which then leads to Life Membership.

Following the AGM, usually October each year, the Membership fees will be reviewed and if changed, implemented from the following 1<sup>st</sup> January.

It is not mandatory that 5 year Affiliate Membership is renewed when it expires. However, Life Membership is necessary as part of the completion and certification of “IMS Productivity Analyst” qualification. It includes an upgrade to Associate with designatory letters AMS.

#### **3.2 LIFE MEMBERSHIP**

Having completed and as part of the award of IMS Productivity Analyst, Life Membership is required with a one off payment, usually arranged by your IMS Training Provider.

For Life Membership subscription rates, please see page 10 Membership Type and Grade template or contact Head Office, or your Education Provider.

After the AGM in October each year, the fee is reviewed and if changed, implemented from the 1<sup>st</sup> January following year.

Life Membership can also be applied for, as part of a Reinstatement of membership, providing that previous IMS qualifications and grade qualify for a minimum of Associate grade. It may be possible to Reinstatement with an upgrade, to take Life Membership, subject to Application.

When Life Membership is applied and paid for, at point of application for the IMS Productivity Analyst qualification through your Education Provider, then application to upgrade from Affiliate to Associate grade is also included at no additional cost as a concession.

See section 4.2 for Associate grade.

### 3.3 REINSTATEMENT OF LAPSED MEMBERSHIP

If you have previously been an Annual member of the Institute and wish to reinstate your membership, you will be asked to complete an IMS Membership Application Form with updated contacts and information, with payment of the fees to reinstate as either.

- a) **5 year Affiliate Membership** if you have not yet completed the education process or just hold the IMS Measurement Practitioner Certificate (or IMS Time Study Practical/Certificate pre 2021). You can simply extend your 5 year Affiliate membership with a modest Renewal fee, if it is expiring - see page 10

or

- b) **Life Membership** providing you qualify. You can be reinstated with your previous Associate/AMS grade or Member/MMS grade or Member of Diploma/MMS(Dip) grade, Fellow/FMS grade and membership number. The Application will need to be provided with the appropriate fee.

If you qualify for and wish to upgrade your membership you should complete the “IMS Application Form” (web home page, Membership tab) with the supporting information as requested. To upgrade your membership, see section 4)

**You must pay the Life Membership Fee, plus any upgrade fee.**

**Affiliate to Associate grade (AMS)** fee at 2024 is £65.00 and must hold the IMS Certificate, which will be pre 2018, when it then became IMS Productivity Analyst.

**Associate to Member Grade (MMS)** fee is £65.00, at 2024. See page 10 Membership/Grade template and sections 4.2 and 4.3.

**Please note that you cannot reinstate as Fellow unless this was your previous grade.**

### 3.4 DIRECT ENTRY

Please note that you cannot apply for Fellow grade as a Direct Entry.

By exception only, the Institute offers possible direct entry, to potential members engaged in Management Services or directly related functions, with suitable qualifications and experience. To join the Institute using this route, you must apply for the grade of either Associate (AMS) or Member (MMS) using the appropriate IMS Application Form and having referred to Membership Type and Grade Template on page 10.

All the required information is necessary, and we will be happy to initially provide guidance. The appropriate Direct Entry Grade fee, plus Life Membership fee, will be required with Application.

#### **Direct Entry as Associate**

You must meet the grade criteria (see section 4.2 Associate Grade) **and be supported by two referees of Fellow Grade, who must hold current IMS Life Membership.**

Fees payable are the current Life Membership Fee, plus Direct Entry Grade Fee to Associate Grade (AMS) which is currently £175.00, providing you meet the Associate grade criteria. – see page 10

## **Direct Entry as Member Grade MMS**

This is a Corporate membership grade and will require a higher level of relevant qualification and experience, than as Associate. You will be able to vote at AGM and could be eligible for election to Council as an IMS Trustee.

Fees are current Life Membership fee plus Direct Entry Grade Fee at Member Grade (MMS) which is currently £240.00, providing you meet the Member grade criteria. (see page 10 – By exception – Direct Entries)

If you would like further information on this route into membership, please contact our head office. Telephone: 01684 252360 or email: [admin@ims-productivity.com](mailto:admin@ims-productivity.com).

## 4. GRADES AND RULES OF MEMBERSHIP

Your qualifications, relevant work experience and achievements, together with any previous IMS Membership and qualifications, will determine a suitable grade. We can advise you.

“Grades” or “Upgrade” have to be formally applied for, supplying the information required on the reverse of the IMS “Membership Application form. This form can be downloaded from our website home page at [www.ims-productivity.com](http://www.ims-productivity.com) or by contacting Head Office, or your Education Provider.

You cannot apply for a “Grade” or an “Upgrade” with designatory letters, unless you have current IMS Life Membership or are reinstating with Life Membership at the same time.

Upgrades can only be awarded when you hold, or are committing to Life Membership.

### 4.1 AFFILIATE GRADE can be held without Life Membership

This is the initial entry grade granted when applying to join the Institute. It is the grade included with 5 year Affiliate membership and always applies when someone takes initial IMS membership to register for and commence the education process.

Anyone who has a particular interest in, or a role relevant to Management Services, can apply to join IMS as 5 year Affiliate member. It will require a completed Application Form and the relevant fee.

### 4.2 ASSOCIATE GRADE

**(This is a Non- Corporate Grade - designatory letters AMS and a grade certificate will be issued.)**

**Associate can be awarded, on application, having:**

- a. completed the IMS Productivity Analyst programme/qualification (or prior to 2018, the IMS Certificate) and are now committing to Life Membership
- b. by special consideration, with demonstrable experience over 3 to 5 years in formal work measurement (probably with an IMS work measurement qualification, but not holding IMS Productivity Analyst), apply for a concession to become a Life member with AMS upgrade.

Associate allows the IMS Certificate/IMS Productivity Analyst holding member, to then use the designatory letters “AMS” after their name, to recognise their professional standing.

An Associate (AMS) grade is an Associate Member of the Institute of Management Services.

Life Membership is taken at the point of award of the IMS Productivity Analyst qualification, and your Provider will ensure that upgrade to Associate is automatic and there is no extra fee for the upgrade.

If Life membership and upgrade to Associate is taken at a much later date, having completed IMS Certificate with membership lapsed, there is a £65.00 upgrade fee. – see page 10

**or**

By exception under the Direct Entry route as Associate (see section 3.4 Direct Entry Route)

Have an equivalent qualification in “Management Services” which is acceptable to the Institute. You should complete the IMS Application Form and provide supporting information as requested. Also supported by two referees of Fellow Grade, who must hold IMS Life Membership of the Institute and can confirm the required competence in Management Services. We can help with guidance

The fee payable will be the current Life Membership fee plus the £175.00 direct entry / upgrade fee to Associate grade. – see page 10



### 4.3 MEMBER GRADE

**(This is a Corporate Member Grade - designatory letters MMS and a grade certificate will be issued)**

**Those applying for upgrade to Member grade** must have all of the following:

- Hold Life Membership and already hold the grade of Associate (AMS)
- Have completed the IMS Productivity Analyst or IMS Certificate qualification
- Have three years relevant experience in Management Services, with at least two years following award of IMS Productivity Analyst or IMS Certificate.
- Formally apply with the upgrade fee and supporting information required

Member grade allows use of the designatory letters MMS to denote professional standing – Member of the Institute of Management Services.

For above, the upgrade fee is £65.00, and you must already hold Life Membership.

#### **Member (Dip) – MMS (Dip) (not available as Direct Entry)**

Only those Life Members holding both the IMS Productivity Analyst or Management Services Certificate and the Management Services Diploma, can use the designatory letters MMS (Dip). A Membership Certificate will be issued for this grade on completion of the Management Services Diploma, or at Reinstatement if a IMS Diploma holder.

The upgrade fee from MMS to MMS (Dip) is £65 and an MMS (Dip) grade certificate will be provided.

**By exception under Direct Entry as Member grade** (see section 3.4 Direct Entry Route).

By formal application using the Membership Application Form.

Have an equivalent qualification in “Management Services” or closely related disciplines which is acceptable to the Institute. Provide supporting information as requested and be supported by two referees of Fellow Grade who must hold IMS Life Membership and can confirm the required competence in Management Services.

The fee payable will be the current Life Membership fee plus the £240.00 direct entry and upgrade fee to Member grade. See page 10 Template.

### 4.4 FELLOW GRADE

**(Corporate Member Grade - designatory letters FMS and a grade certificate will be issued)**

Fellow grade is not available as Direct Entry

**Those applying for Fellow Grade** must already hold Life Membership for the preceding five years, at the grade of Member or Member Dip. You must formally apply, with the required information and the appropriate upgrade fee.

This is the highest membership grade and applications have to be approved by an FMS panel and will require two referees of Fellow Grade who hold IMS Life Membership. Only in exceptional circumstances will we accept references from Senior Managers.

You may wish to contact IMS Head Office for guidance on referees and provisional feedback for a potential application.

**Fellow grade requires:**

- a) Age 30+
- Having current Life Membership and the grade of Member or Member (Dip), for no less than the preceding 5 years.
  - Also currently having and being able to demonstrate significant practical experience, responsibility and influence in Management Services.

**Or**

- b) Age 35+
- Having current Life Membership with grade Member or MMS Dip, for no less than the 5 preceding years
  - And either a senior position of demonstrable influence and responsibility for Management Services activities  
Or having a major responsibility for advising on areas, within the Institutes body of knowledge.

For a) and b) above, the upgrade fee is £90.00. – see page 10

**Or**

- c) In truly exceptional circumstances, so very rarely, if by special invitation of IMS Council.

The 'Fellow' Grade allows use of the designatory letters FMS to denote professional standing – Fellow of the Institute of Management Services.

**5. CORPORATE GRADE MEMBERS AND AGM VOTING RIGHTS**

All Corporate Grade Members which include MMS, MMS (Dip), and FMS are entitled to vote at Annual General Meetings. Also are eligible for elections and a position on Council.

**6. APPLICATION FOR MEMBERSHIP**

Application for membership should be made on the appropriate "Membership Application Form". This is available on our website, Head Office or from your Approved Provider which will probably include the required 5 year Affiliate membership at commencement of your education programme.

Institute of Management Services  
8/9 Acorn Business Centre  
Hanley Swan  
Worcestershire  
WR8 0DN

Tel: 01684 252360  
Email: [admin@ims-productivity.com](mailto:admin@ims-productivity.com)

Website: [www.ims-productivity.com](http://www.ims-productivity.com)

**Please note - those who have previously held membership will need to complete their basic details on a Member Application Form, effectively a Reinstatement. Please contact the IMS office and quote your old membership number if possible and the approximate year in which previous membership expired. See page 4 Reinstatement and page 10 Template.**

## **7. FOR CURRENT MEMBERSHIP AND UPGRADE FEES**

Please see page 10 for our Membership Type and Grade Template or please contact Head Office for further information or guidance.

**Please note that students are not eligible for Life membership until**

**a) they have obtained the IMS Productivity Analyst qualification (or pre 2018 IMS Certificate)**

**Or b) occasionally having significant practical experience after Measurement Practitioner at renewal of 5 year Affiliate. See sect 4.2b page 6**

**Or perhaps c) after qualifying for a formal Direct Entry route. Sect 3.4**

## **8. THE STUDENT OF THE YEAR AWARD**

Each year the Institute awards the IMS Student of the Year Award to the student, completing the IMS Productivity Analyst qualification and programme that, in the opinion of the Council of Management, is the most deserving.

There may also be a Russell Currie Memorial Fund award for Best Overseas Student (living and working overseas) who has completed IMS exams and become a Life Member, whether trained overseas, or on courses in the UK.



# Membership Type and Grade Template

Guide to requirements (Fees to December 2024)

| What would you like to apply for?   | Membership fee required | Existing grade before application | Upgrade fees payable - additional to membership | Must hold IMS Productivity Analyst | Career and experience evidence required? | FMS Referees required |
|---|-------------------------|-----------------------------------|---|------------------------------------|--|-----------------------|
| <b>Memberships</b>  |                         |                                   |   |                                    |  |                       |
| IMS Application Form required for every membership item   |                         |                                   |   |                                    |  |                       |
| Enrol as Affiliate member for education programme (5 years)   | £235                    | Nil, start as Affiliate           | No  | No                                 | No                                       | No                    |
| Renew as Affiliate Member for 5 years   | £90                     | Affiliate                         | No  | No                                 | Yes                                      | No                    |
| Holding Affiliate + Mod 2 Practitioner exam, upgrade to AMS/Life (Minimum 3 years' experience)  | £355                    | Affiliate                         | £65   | Mod 2 Practitioner                 | Yes                                      | No                    |
| Life Membership to AMS having IMS Productivity Analyst and Affiliate Membership   | Life £355               | Affiliate                         | No  | Yes                                | Yes                                      | No                    |
| <b>Grade Upgrades</b>   |                         |                                   |   |                                    |  |                       |
| Affiliate to Associate at point of IMS Productivity Analyst awarded + taking Life Membership (concession)   | Life £275               | Affiliate                         | No  | Yes                                | No                                       | No                    |
| Affiliate to Associate taking Life Membership + upgrade at later date   | Life £355               | Affiliate                         | £65   | Yes                                | Yes                                      | No                    |
| Associate to Member having Life Membership  | Life                    | Associate                         | £65   | Yes                                | Yes                                      | No                    |
| Member (Dip) is only available to Life members who have been awarded the IMS Diploma  | Life Already            | Associate                         | £65 Nil   | Diploma                            | Yes                                      | n/a                   |
| Member to Fellow having had 5 years at both Member grade and Life Membership (a panel decision)   | Life Already            | Member                            | Yes £90   | Yes                                | Yes                                      | Yes                   |
| <b>Reinstate lapsed Membership + upgrades</b>   |                         |                                   |   |                                    |  |                       |
| Reinstate lapsed membership at same grade, with Life, having previously completed IMS Productivity Analyst (IMS Cert)   | Life £355               | Grade prior to lapsed             | No  | Yes                                | Yes                                      | No                    |
| Reinstate lapsed membership + upgrade Affiliate to Associate, with Life   | Life £355               | Affiliate                         | Yes £65   | Yes                                | Yes                                      | No                    |
| Reinstate lapsed membership + upgrade Associate to Member, with Life  | Life £355               | Associate                         | Yes £65   | Yes                                | Yes                                      | No                    |
| Reinstate lapsed member to grade of Fellow or MMS Dip (only if previous grade), with Life   | Life £355               | Fellow or MMS Dip                 | No  | n/a                                | Yes                                      | n/a                   |
| <b>By exception only... Must have 2 Fellow (FMS) grade referees</b>   |                         |                                   |   |                                    |  |                       |
| Direct Entry as Associate with Life Membership – total £530   | Life £355               | n/a                               | Yes £175  | By exception                       | Yes                                      | Yes                   |
| Direct Entry as Member with Life – total £595   | Life £355               | n/a                               | Yes £240  | By exception                       | Yes                                      | Yes                   |
| Direct Entry as Fellow is not available   | n/a                     | n/a                               | n/a   | n/a                                | n/a                                      | n/a                   |
| <b>Copy Certificates</b>  |                         |                                   |   |                                    |  |                       |
| Copy of certificates such as TSP, IMS Certificate, IMS Diploma and Grade Certificates are available to current members at £35 per certificate (£60 for non-members). Copy of Membership Grade Certificates are not available for non-members. |                         |                                   |   |                                    |  |                       |
| In May 2021 IMS TSP Certificate became <b>IMS Measurement Practitioner</b> . IMS Certificate became <b>IMS Productivity Analyst</b> .   |                         |                                   |   |                                    |  |                       |

# The IMS Productivity Analyst Certificate Programme

## 10. INTRODUCTION

Management Services is a generic term covering a wide range of activity which falls within our objective of “Achieving excellence through people and productivity”. The IMS qualifications are designed to meet the needs of:

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

The aim of the IMS qualification programmes is to produce a practitioner able to systematically quantify, examine and challenge activities in order to improve the organisation and effectiveness of working systems, processes and procedures, resulting in the more effective use of human and other resources.

To reflect the breadth of activity covered by the term **management services\***, the qualification programmes are made up of core content, which addresses the underpinning principles of management services work, with 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 qualifications.

Courses are delivered 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 industry or country. 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 the study of time and assessment methods.

Anyone wishing to study for either the IMS Measurement Practitioner or the full IMS Productivity Analyst Certification must become 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/BS3375: Glossary of Terms used in Management Services No 11001**

**BS assigned the Copyright of these Standards to IMS in May 2024 – see page 22**

*“The provision of advisory and information services to assist management in improving effective use of resources. This may embrace the use of work study, O&M, operational research, data processing, ergonomics, economic forecasting, and industrial engineering”.*

The programmes 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 designed and delivered by the specific Approved Provider. Indeed, it should be 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 IMS Productivity Analyst Certification.

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 Institute of Management Services qualification/certification.

**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.**

## **11. 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.**

## 12. GUIDE CONTENT

### 12.1 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

## **12.2 PROCESS QUANTIFICATION / MEASUREMENT OF WORK**

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

This module outlines the importance of activity and time 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 formal activity 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 relaxation factor and 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

## **12.3 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

## **12.4 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 specialisation may 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 etc.

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 IMS Productivity Analyst certification, 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, formal and relevant courses as exemption (i.e. MOST and PADS) against credit points of the Toolkit. This requires externally registered and recognised 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 and the appropriate exemption fee.

### **13. 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 work measurement 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 a minimum of 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 need to clarify issues of programme structure, mandatory and optional components and assessment processes as part of the process of submitting a programme for approval. It is the aim of the Institute to allow providers to be innovative and flexible in creating their programmes to meet market needs but must set and maintain suitable standards.

### **14. BECOMING AN APPROVED PROVIDER – ELIGIBILITY ASSESSMENT**

All providers will first need to be validated and registered with approved courses as Approved Providers.

A registration approval will be for a period of two years and a registration fee of £350 will be charged to cover that two year period. This fee is reviewable bi-annually.

An IMS certification for Approved Provider status will be issued by the Institute, valid for 2 years.

## **15. APPROVAL OF QUALIFICATION/CERTIFICATION PROGRAMMES – COURSE ASSESSMENT**

Approved Providers will then be required to submit details of their particular scheme intending to lead to award of the IMS Measurement Practitioner and IMS Productivity Analyst Certificates. 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 £400 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.

## **16. SCHEME AUDIT PROCESS**

An IMS-approved moderator will be responsible for conducting Annual audit reviews of all IMS Certified schemes. This audit will involve a visit to the provider's delivery centre. The audit process will be charged at £275 bi-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, including transition to Life Membership and appropriate upgrades

## **17. GENERAL INFORMATION**

### **17.1 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, such as referring to knowledgeable colleagues and by reading the Institute's journal *Management Services*.

Be aware that many articles available from the internet and social media may not be authoritative and could well be flawed.

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

Shortcomings in this respect may lead to a student's failure in their examination.

### **17.2 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, knowledgeable, 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 necessarily expect extensive course time to be occupied by formal lecturing.

Some Approved Providers may also include short residential periods as part of their requirements and as an essential component of the course.

### **17.3 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 IMS Certification would be expected to have appropriate employment experience, reasonable numeric and literacy skills, or academic skills to cope with the programme. Background could be Industrial, Commercial, Retail, Service, or Public sector.

The nature of the profession requires clear and logical thinking with analytical skills to correctly use, present and explain data sources and outcomes.

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

### **17.4 EXAMINATION CENTRES**

Candidates will normally sit the examinations at the establishment where they are studying or Approved Providers delivering compliant courses at customer sites.

See our IMS website for Approved Providers details.

### **17.5 RESULTS AND CERTIFICATES**

Once results have been logged and noted by the IMS Moderators, students will be notified by their respective Approved Course Provider. Whether the “IMS Measurement Practitioner” certificate, or the “IMS Productivity Analyst” certificate, they will be forwarded automatically, after the official issue of the results, to those who have successfully completed the appropriate approved scheme.

For those completing the final 4 week module with Life Membership they will receive the appropriate ‘grade’ certificate.

If any duplicate certificate is required, each may be issued on payment of £35.00 so long as Institute membership is current.

Non-members for each replacement certificate is £60.00.

### **17.6 VALIDITY OF IMS QUALIFICATIONS AND GRADES OUTSIDE IMS MEMBERSHIP**

Please note that “Grade certificates”, or copies can only be provided to current IMS membership.

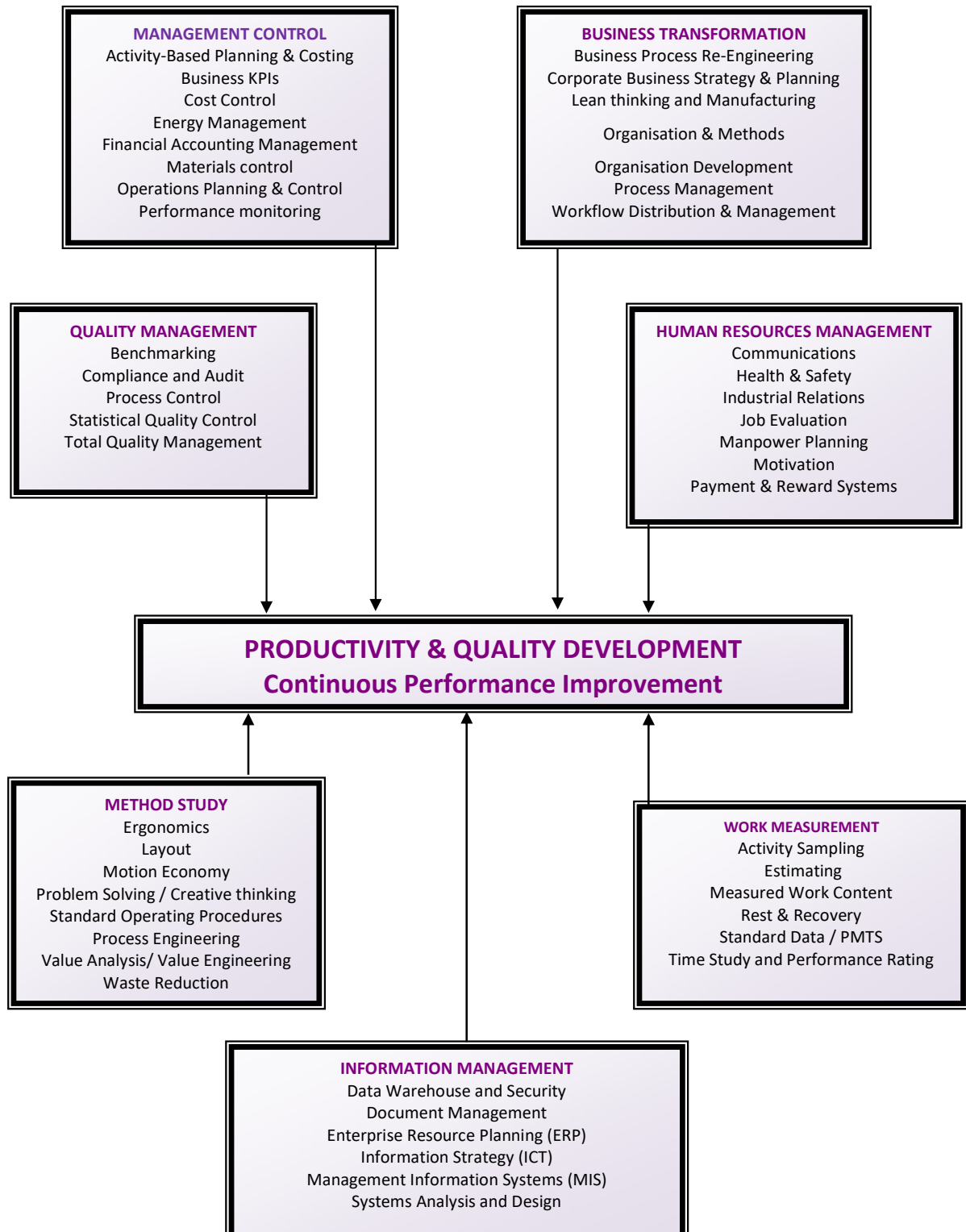
- A grade isn’t a qualification, it is literally a membership grade. Without IMS membership a grade is no longer valid
- IMS qualifications are still valid even if IMS membership has expired



# INSTITUTE OF MANAGEMENT SERVICES BODY OF KNOWLEDGE



The management Services profession includes people who can be specialists in some or many of these disciplines – all impacting on quality and productivity improvement.



# An Important Notice About British Standards



bsi

There are two long-standing British Standards developed for productivity improvement and management services. The Institute of Management Services was involved as part of the 'Technical Committee' responsible for the establishment of both these Standards, (which were last updated in the 1990s) and has continued to be involved. Since then, the Standards have been, and indeed continue to be fundamental to work study, industrial engineering and productivity improvement and to work measurement in particular.

## The Standards are:

**BS3138:1992 'Glossary of Terms used in Management Services'**

In September 2020 it was discovered that, without notification, this Standard had been classed as 'withdrawn' by BSI earlier that year, despite it being specified regularly in various formal public tenders.

and **BS3375: Management Services**

In July 2022, again without notification, these were also classed by BSI as 'withdrawn':

|             |  |
|-------------|--|
| Part 1:1995 | Guide to organization study  |
| Part 2:1993 | Guide to Method Study  |
| Part 3:1993 | Guide to Work Measurement  |
| Part 4:1993 | Guide to work performance control  |
| Part 5:1997 | Guide to determination of exposure limits, recovery times and relaxation times in work measurement (a very complex standard) |

## The Legal Assignment of Copyright

In May 2024, the IMS signed their agreement to formally accept from BSI the legal Assignment of Copyright for both of these British Standards, thereby protecting the essential heart of all aspects of productivity improvement. From the BSI side, they have 'withdrawn' from the ownership of the copyright of the content of both BS3138:1992 and BS3375.

The Assignment of Copyright to the IMS ensures that the well proven content of these Standards and their definition numbers will all be maintained, thereby continuing to be 'live' and valid.



Alongside the IMS, our principal training provider Scott-Grant Limited believes that the definitions in both these Standards are both practically and absolutely relevant for the work measurement and productivity improvement profession, even if they do not now technically exist within BSI. The Standards have not been amended in any way.

## Industry Benchmark of Definitions

We ask all members of the Institute to bear this information in mind when you see references to BS3138 or BS3375 in your own workplace or on the internet generally. Any BS numbers quoted, other than these two, within the 3138 or 3375 Standards, are definition numbers.

If you are quoting BS3138 or BS3375 in any formal situation, please do it with care and explain that, although they were technically 'withdrawn' by BSI, with this Assignment of Copyright the IMS has secured continuity to ensure they remain officially valid as the industry benchmark of terms used in 'Management Services'.





## *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 any former or their current 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 practising 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.

**18. IMS CERTIFICATION FEES** (Fees payable for students), possibly through your Accredited Provider

**18.1 INITIAL 5 YEAR AFFILIATE MEMBERSHIP FEE**

All students undertaking courses leading to IMS certification must become “5 year Affiliate” members of the Institute. This requires an IMS Application Form and payment of the prevailing 5 year Affiliate fee. See Membership Type and Grade Template, page 10.

**18.2 LEARNER COURSE REGISTRATION FEE**

Those undertaking an IMS certified course (or an individual module) must also be registered as ‘a learner’. The separate learner registration fee is £100. Candidates may register up to twelve months after completing an approved module at an approved provider, if a completed module didn’t require registration/certification.

**18.3 EXAMINATION FEES**

Where Approved 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.

For the IMS practical tests organised and marked by the Institute, an examination and certification fee of £100 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). 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 be able to apply for exemption from particular components of the certified course based on prior study and accreditation, with directly relevant content. An administration fee of £100 will apply to each exemption claimed.

**18.4 CERTIFICATE APPLICATION**

As indicated in 18.3 above, a fee of £100 per student application will be charged for the appropriate Module 2 technique or exemption.

A further £100 per student is payable for Certification, after 4 weeks, as IMS Productivity Analyst.

**18.5 COMPLETION OF MODULES 1, 2, 3, 4**

This results in “IMS Productivity Analyst” qualification.

It requires an Application, with completed registration of course qualifications with IMS, for Life Membership. This moderated and combined Life Membership and Upgrade fee is, currently £275. This results in ‘Associate’ grade membership, designatory letters AMS

**18.5 APPEAL FEES**

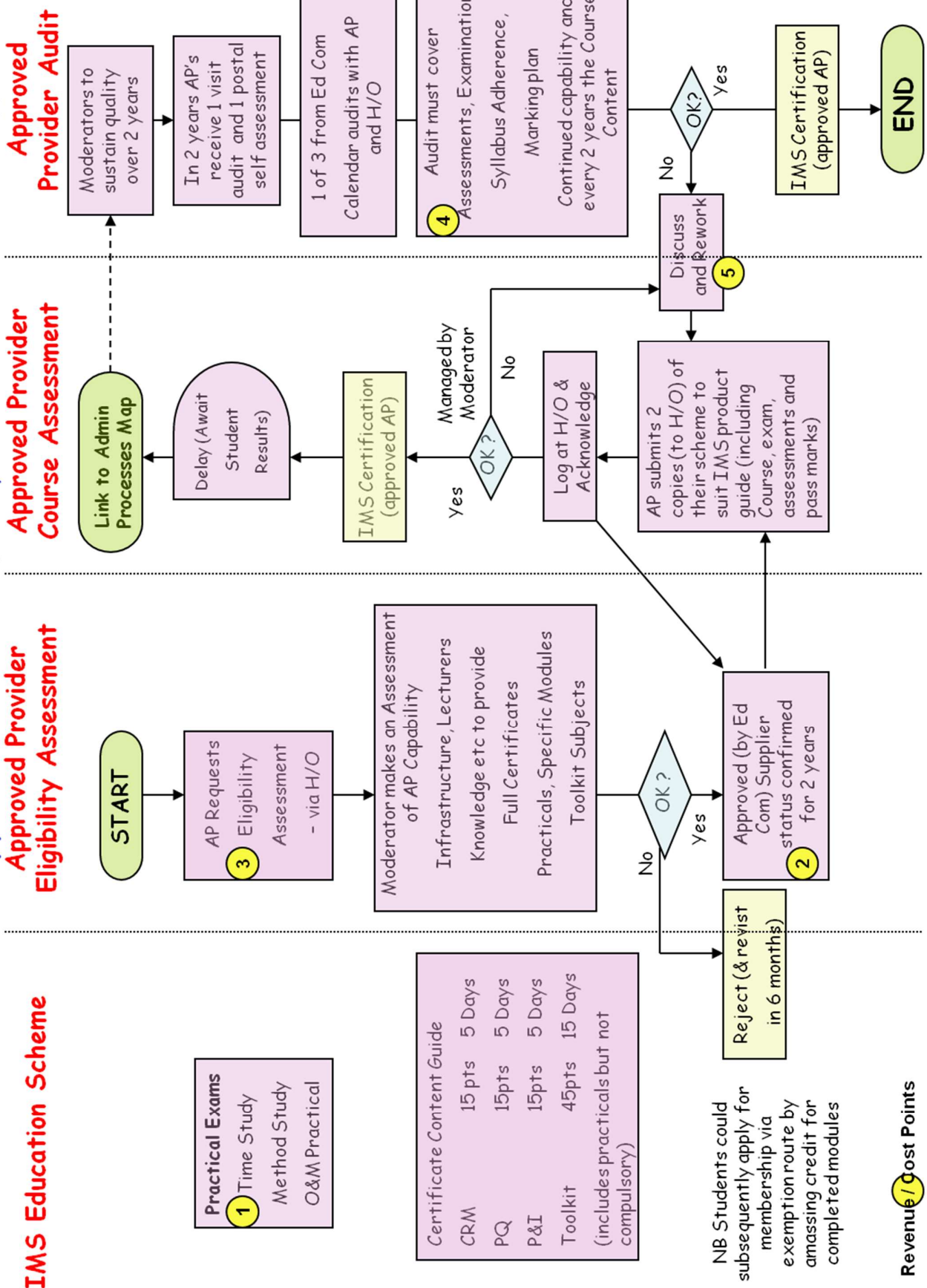
Where a provider wishes to appeal to the Institute against the results of an assessment, there is a fee of £100

**VAT is not applicable to these fees.**

**APPENDICES**

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# IMS Education Process – Approved Provider Quality Assurance Process – Appendix 1

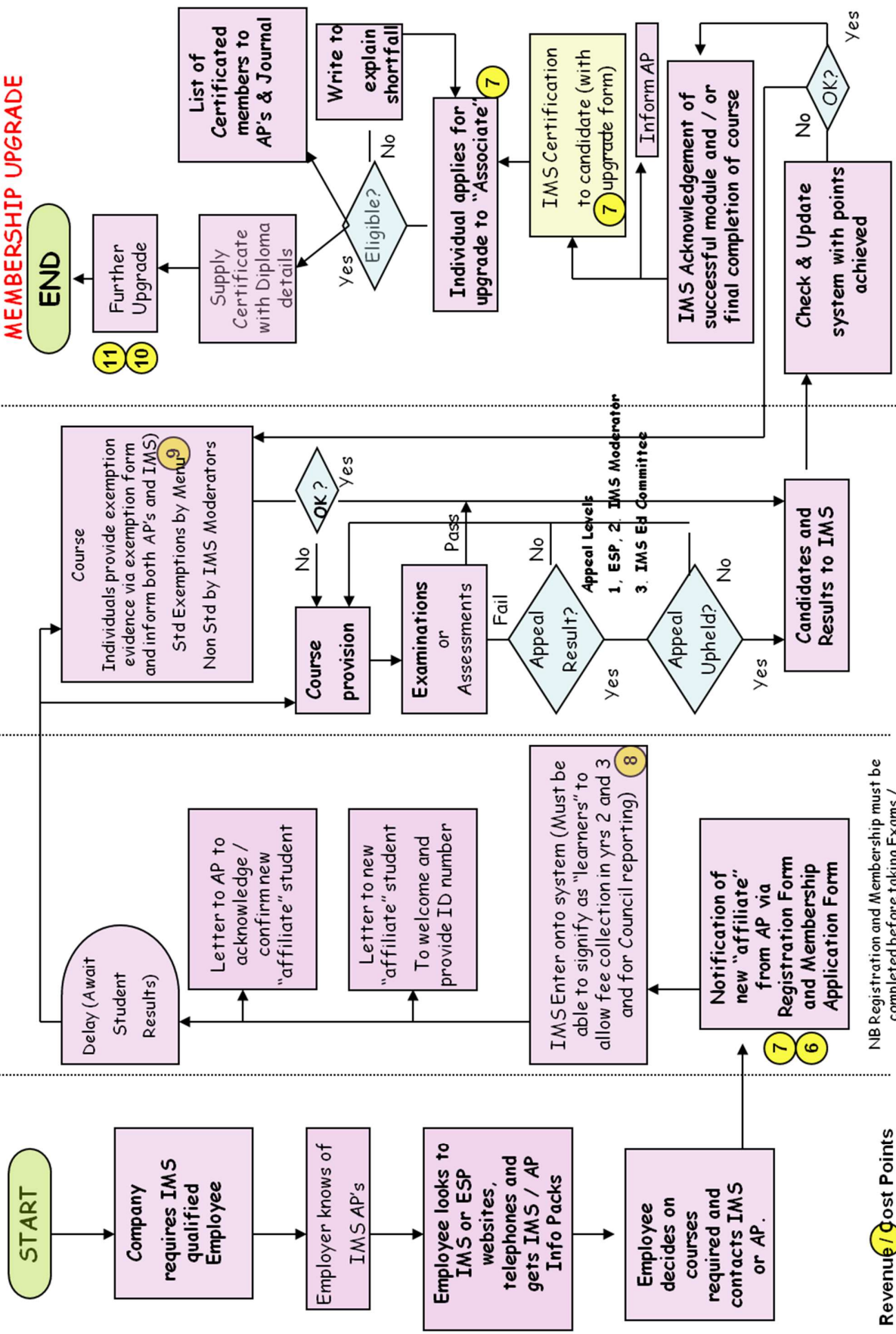


# IMS Education Process - Administration Process - Appendix 2

## REGISTRATION

## COURSE & EXAMS

## CERTIFICATION & MEMBERSHIP UPGRADE



NB Registration and Membership must be completed before taking Exams / assessments

Revenue / Cost Points

## **INSTITUTE of MANAGEMENT SERVICES**

### *Application to be an Approved IMS Education Provider:*

The Application for Approved Provider (AP) Status must be completed by organisations who wish to become an Approved Provider (AP) and offer study programmes leading to the awards, which are recognised and validated by the Institute of Management Services.

“IMS Measurement Practitioner” certification options are Time Study; Rated Activity Sampling; MOST® or a formally accredited synthetic time system.

“IMS Productivity Analyst” certification

“IMS Diploma” (no provider currently offering)

In order that the Provider may be approved by the Institute they must provide information on their infrastructure and capability to deliver a relevant and appropriate programme of education.

The Institute reserves the right to ask for more information, to seek clarification and to seek a meeting/visit where it is felt that this could be helpful.

Upon satisfactory review of the information provided, and receipt of the relevant fees, the organisation submitting the form will be confirmed and designated as an Approved Provider (AP).

This status will normally last 2 years, although the Institute reserves the right to ensure that the appropriate quality standards are being maintained, and may withdraw AP status if this is not so.

Following the 2 year period (or at any earlier stage determined by the institute) an AP will be asked to submit an updated Application Renewal for Approved provider Status, with the relevant fee.

The completed Application for Approved provider Status form should be submitted in triplicate to the IMS Head Office at Hanley Swan, by email please [admin@ims-productivity.com](mailto:admin@ims-productivity.com) .

## **INSTITUTE of MANAGEMENT SERVICES**

### *The Role and Responsibilities of the Moderator*

#### **Introduction**

The IMS operates a system Devolved and Retained responsibility in relation to its education provision.

Retained is the responsibility for:

- Core subject content
- Syllabus level and standards
- Setting and marking of external examinations
- Quality
- Consistency
- Validation of examination and assessment procedure
- Prescribing IMS course registration and exam, Certification and membership fees
- Formal Certification of IMS qualifications and Grades

Devolved is the responsibility for:

- Development and delivery of educational programmes
- Examination and invigilation process
- Marking of scripts
- Associated administration
- Marketing/advertising/scheduling course
- Collecting and forwarding customer course fees, prior to course commencement

#### **Operational Protocol**

IMS Approved Providers (AP) will submit education schemes to the IMS who will assign a “Moderator” to undertake a review of the submission.

The AP will determine the timing of educational programmes, assessment and examination dates and venues.

#### **Role of the Moderator**

To establish a formal working relationship with the Approved Provider, the assigned moderator will:

- Attend an audit review meeting every year
- Attend student award events to support APs to promote the IMS
- To approve structured (tailored) programmes



