Managing sustainable development of organizations –

Part 2: Framework for assessment against BS 8900-1 – Specification

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Summary of pages

This document comprises a front cover, an inside front cover, pages i to ii, pages 1 to 8, an inside back cover and a back cover.

Foreword

Publishing information

This part of BS 8900 is published by BSI Standards Limited, under licence from The British Standards Institution, and came into effect on 31 July 2013. It was prepared by Technical Committee SDS/1, *Sustainable Development*. A list of organizations represented on this committee can be obtained on request to its secretary.

Supersession

Together with BS 8900-1:2013, it supersedes BS 8900:2006 which is withdrawn.

Relationship with other publications

This British Standard is published in two parts:

- Part 1: Guide; and

- Part 2: Framework for assessment against BS 8900-1 – Specification.

Presentational conventions

The provisions of this standard are presented in roman (i.e. upright) type. Its requirements are expressed in sentences in which the principal auxiliary verb is "shall".

Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.

Contractual and legal considerations

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

Compliance with a British Standard cannot confer immunity from legal obligations.

0   Introduction

0.1   Context

BS 8900 is concerned with the strategic management for sustainable development. To engage with the guidance of BS 8900-1 and the requirements of BS 8900-2, it is necessary for the leaders of the organization to take ownership and drive the management of sustainable development on a continuing basis, and to ensure drive down into the operational management level. BS 8900-2 is not a management system specification. Instead, it provides a strategically based framework, or scheme, which will direct and lead the organization's approach.

BS 8900-2 sits above existing management system specifications (for example, accountancy, people management, quality, environmental and health and safety) and leads and directs them. It does not duplicate them; rather, it maximizes the value of existing approaches such as management systems and reporting. In this, it provides for the formulation of high level sustainable development objectives.

Sustainable development management is about the leaders of businesses and other organizations and their employees taking a responsible approach to social, economic and environmental matters that are relevant to the organization, and expressing these in line with the business case.

Some examples of sustainable development matters are:

- social issues: fair treatment and development of employees; positive involvement in the community; providing work-based learning opportunities and any appropriate work with schools, colleges and universities; providing local employment opportunities;

- economic issues: providing stable employment; pursuing innovation in processes, products and management methods, including linking this to any relevant environmental and social factors; understanding and meeting customer requirements in relation to sustainable development; fair treatment of suppliers and customers; and

- environmental issues: reducing waste, energy use, material use; providing products and services that reduce adverse impacts on the environment.

Taking into account the legitimate interests of the stakeholders of the organization is of central importance.

0.2   Application

The purpose of BS 8900-2 is to provide a framework for assessment against the guidance contained in BS 8900-1. It is suitable for any type or size of organization and can be used as a tool to help understand and embed the sustainable development principles set out in BS 8900-1, thus helping an organization to determine and follow its own pathway on sustainable development.

The requirements summary can be used in two ways.

1. Self-assessment

For an organization in the process of developing a strategic understanding of sustainable development, the requirements can be used as a starting point to understand where and how sustainable development can be embedded, i.e. for self-assessment purposes. Using the requirements to discuss sustainable development principles in the context of the organization's activities and involving a range of stakeholders in this process can provide a helpful steer.

This process of evaluation can also be repeated over time, thus sustaining a proactive approach to sustainable development in the organization. The person(s) leading this self-assessment should be in a position that permits them to take a strategic view of an organization's activities in respect to sustainable development and implement improvements or changes where appropriate. It is vital that the process is owned and driven by those responsible for strategic management in the organization.

During the assessment process objective evidence is gathered by considering documentary evidence, interviews and inspection/observation.

2. Third-party assessment

For an organization seeking a third-party assessment of its sustainable development activities, the requirements provide a structure for the assessment process, but not a scoring mechanism. An assessor can use the questions to establish the organization's current position, and also to gauge progress over time.

0.3   The assessment process

The assessment process is intended to establish that the organization has taken a genuine and effective approach to addressing sustainable development management in line with the guidance in BS 8900-1, as expressed in the requirements in BS 8900-2.

In accordance with BS 8900-1, the organization's approach is to be founded on declaration of its principles of sustainable development and adherence to the guidance given in the various sections of the standard.

This includes the formation of a sustainable development maturity matrix, which:

- is a descriptive document, not numeric;
- is unique to the organization; and
- sets out in clear, descriptive terms the organization's position of progress in relation to its declared principles of sustainable development.

For the assessment, the organization needs to demonstrate how it is meeting the guidance given in BS 8900-1, as expressed in the requirements in BS 8900-2. Each of the requirements in BS 8900-2 needs to be addressed, making appropriate reference to key evidence, including, where appropriate, relevant supporting qualitative and quantitative data.

A portfolio (including a description of the scope of the activities and operations of the organization and evidence demonstrating the organization's approach to sustainable development) can assist in the assessment process. Evidence would typically be drawn from existing internal processes and/or systems. As such, a portfolio should integrate rather than duplicate (i.e. by providing appropriate signposting to supporting systems and documents).

1 Scope

This British Standard provides a framework for assessment against BS 8900-1, *Managing sustainable development of organizations – Part 1: Guide*.

BS 8900-2 is to be read and used in conjunction with BS 8900-1.

This British Standard is intended to:

- be an evaluative framework, to support organizational self-assessment or third-party assessment;
- result in formative outcomes.

It is not intended to:

- result in a summative score;
- support direct comparisons between organizations.

This British Standard is applicable to any type or size of organization.

2 Normative references

The following documents, in whole or in part, are normatively referenced in this document and are indispensable for its application. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

BS 8900-1:2013, *Managing sustainable development of organizations – Part 1: Guide*

3 Principles of sustainable development

The organization shall decide what sustainable development means in relation to what it does and what it stands for by developing its own principles of sustainable development (see BS 8900-1:2013, Clause **3**) with reference to:

- inclusivity;
- integrity;
- stewardship;
- transparency; and
- other principles that it sees fit to adopt.

The organization shall use these principles to form the basis for a sustainable development maturity matrix (see Clause **5** and BS 8900-1:2013, Clause **5**, for further details).

4 Putting sustainable development into practice

4.1 The organization: its vision and principles

The organization shall use its principles of sustainable development (see Clause **3**) as the basis for making a statement of its vision, which is:

- a publicly available document and communication tool, made available to stakeholders;
- used in communications to promote the stance of the organization on sustainable development.

This statement could, for example, be in the form of a policy, a mission statement, etc., and shall be drawn up by senior management and endorsed by the leader of the organization.

4.2 Identification of issues and stakeholder engagement

4.2.1 General

The organization shall identify and manage its sustainable development issues.

NOTE   *The main mechanism is by stakeholder engagement; see **4.2.2** and **4.2.3**.*

4.2.2 Stakeholder identification

The organization shall identify and regularly review key internal and external stakeholders, including their interest and relationship with the organization.

4.2.3 Stakeholder engagement and ongoing management

The organization shall document evidence that stakeholder engagement is being undertaken with appropriate transparency and accountability, and appropriate opportunities for dialogue to understand the social, economic and environmental impacts of its activities.

The organization shall develop a good level of trust with stakeholders, through both performance regarding stakeholder concerns and through transparency and accountability for decisions affecting stakeholders.

The cycle of dialogue with stakeholders shall be continuous.

Stakeholders that are identified as being key to the organization shall be provided with information that informs them of how the organization has responded to their views.

4.3 Capabilities of the organization

4.3.1 General

The principles of inclusivity, integrity, stewardship and transparency (and any other principles identified by the organization) shall be considered at strategic management level, in both the allocation of resources and in the confirmation of the existence and availability of appropriate competencies.

4.3.2 Resource allocation

In relation to sustainable development objectives, the organization shall identify the required types and levels of resources. The organization shall use its planning and budgeting processes to make resources available. The organization shall make appropriate arrangements to allocate responsibilities and confer authority to enable it to achieve its sustainable development objectives.

4.3.3 Competence building

The organization shall identify training and development needs of both managers and employees to enable them to implement the organization's sustainable development objectives.

The organization shall carry out a review of existing learning and development programmes to ensure that:

- recruitment and induction programmes clearly outline the organization's vision and objectives for sustainable development;

- sustainable development issues and their management are woven into all relevant professional and functional training;

- learning and development resources provide opportunities to adapt and develop the organization's culture and behaviour where necessary; and

- competencies required to manage sustainable development form part of the performance appraisal system.

4.4 Management

4.4.1 General

The leaders of the organization shall define a robust strategic approach to the management of sustainable development, whether by directing, appropriately extending and adding to existing management systems or by other means such as a performance-based approach.

Management for sustainable development shall be firmly expressed and communicated in the organization as a core part of business opportunity/business survival.

4.4.2 Assessing risk and opportunities

In terms of sustainable development issues, the organization shall:

- identify potential issues and impacts, both positive and negative, direct and indirect, and analyse key risks and opportunities (in terms of impact and likelihood) to establish the significant sustainable development issues for the organization; and

- prioritize actions and allocate resources to maximize opportunities and minimize risks, to achieve the organization's sustainable development objectives.

The results of the risk assessment shall be shared with stakeholders and used to establish and refine sustainable development objectives that are informed by the organization's vision and its sustainable development principles.

4.4.3 Identifying performance indicators

Regarding the measurement of sustainable development objectives and to enhance transparency, the organization shall:

- identify indicators that are key to meeting the sustainable development objectives;

- establish the chosen indicators across relevant parts and functions of the organization; and

- define effective methods of assessing performance using these indicators.

4.4.4 Achieving progress

The organization shall arrange reviews against its sustainable development objectives, either through existing management systems or other mechanisms.

This system or other mechanism shall enable the organization to:

- assign specific responsibilities to record, manage and track actual performance against the chosen objectives and indicators;

- ensure the process is comprehensive by embedding and integrating sustainable development objectives in all areas of the organization through inclusion in job responsibilities and personal development objectives; and

- measure performance equitably and ensure it is subject to the same performance management criteria as any other organizational objectives.

4.5   Review

4.5.1   General

Sustainable development shall be integrated into performance review and reporting by:

- identifying opportunities for improvement from reviews and audits;

- developing appropriate recommendations to address any shortcomings; and

- ensuring that these are communicated to and agreed with senior management, employees and other stakeholders, and integrated into future plans.

4.5.2   Review of strategy

The organization shall keep its strategy for sustainable development, including assessment of its principles, under review at appropriate intervals. This shall include:

- stakeholders' issues, and the key impacts the organization has on them;

- checking whether the principles, objectives and overall pathway towards sustainable development are relevant to the organization or require revising;

- ensuring that the organizational culture is consistent and developing in line with its sustainable development principles;

- checking that roles, responsibilities and governance structure remain appropriate and effective; and

- updating the sustainable development maturity matrix of the organization (see Clause **5** and BS 8900-1:2013, Clause **5**).

4.5.3   Operational review

Sustainable development shall be included as part of the organization's operational review and as part of the planning or budgeting cycle.

The organization shall assess the following in the review process, making appropriate changes where necessary:

- how well its performance is meeting relevant stakeholders' expectations;

- what the key impacts, risks and opportunities are, compared with before;

- how appropriate the objectives and targets, policies, key performance indicators are and how well is it meeting these;

- whether information gathering and use is effective and efficient and whether competencies are developing in line with needs;

- whether it has allocated the appropriate resources, training and communication to achieve its objectives; and

- whether monitoring is an integral part of its internal and external performance reporting.

4.5.4   Follow-up

The organization shall follow up on the findings of reviews and take corrective actions where necessary.

4.6   Building confidence

The organization shall build stakeholder confidence in its sustainable development management system by assessing:

* where confidence is needed;

* how confidence is be provided; and

* any indicated needs for culture change.

5   Sustainable development maturity matrix

To indicate its development path towards sustainable development, the organization shall construct and apply a sustainable development maturity matrix, with reference to Clause **3** and Clause **4**, and BS 8900-1:2013, Clause **3**, Clause **4** and Clause **5**. The elements of the matrix shall be appropriate to the scale and nature of the operations.

NOTE   Figure 1 shows an example of how the maturity matrix could be structured. This is identical to BS 8900-1:2013, Figure 1. BS 8900-1 also gives examples of how the matrix has been used by other organizations.

Figure 1   **Example of a sustainable development maturity matrix**

Principles	Practices	Stages of an organization's approach to sustainable development			Maturity →
Integrity					Additional plans and objectives to be determined by each organization may be added to the matrix
Inclusivity					
Stewardship					
Transparency					
Additional principle/s applicable to each organization may be added to the matrix					

NOTE 1   See BS 8900-1:2013, **2.3** for the definition of sustainable development.

NOTE 2   This matrix is intentionally blank. It is intended to be used as an example framework.

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