WORKING MATERIAL 1.15 · CHAPTER 1 — THE VISION OF OWNERSHIP · SETTING: BOHINJ, SLOVENIA

Starting Small: Scope and a Stepwise Plan

Source: Francesco Dore, The Helm and the Lens, Volume 9a — The Small Property, subchapter 1.15 (book page 197)

GUIDING QUESTION

If you could put only four things in order this year before the next season swallows you whole, which would they be? And where, in your house, does the thing you are putting in order end?

1 · Verification Pact: market claims against the standard

Copied from the book. The last column is for your property: what holds here, and how you know it.

What is claimed	Binding?	What actually holds	In our property
The scope must cover the whole business	Only partially true	The house determines boundaries and applicability (4.3)	
Whatever is difficult can simply be left out	Only partially true	Issues and requirements under 4.1 and 4.2 must be considered (4.3)	
The scope must be in writing	Yes	It must be available as documented information (4.3)	
A system must be in place within six months	No	The standard names no deadline and no pace (4.4)	
You need a project plan with milestones	No	Phases are guidance in ISO 14005; required is the system under 4.4	
It cannot be done without software	No	No tool and no form are prescribed	
A maturity model is mandatory	No	The maturity matrix in Annex A of ISO 14005 is guidance	

2 · Common mistakes — a self-check

Tick each mistake you recognise in your own property, and note where it shows.

☐ Starting everything at once: by August most of it lies untouched.

☐ Starting with the tool: software asks for content that does not yet exist.

☐ Waiting for the quiet season: in a small house it never comes.

☐ Cutting the scope for convenience: what clients and authorities care about cannot be defined away.

☐ Building the system for one client: the next one asks something else.

☐ Leaving the edges open, so nobody knows whose duties and meters count.

☐ Planning every phase in detail before the first has shown anything.

☐ Forgetting the review, so the first phase becomes an abandoned start.

3 · A Checklist for Setting the First Phase

The book's checklist, with a column for your own answer.

Question	Why it matters	Our answer
Have we written down what the house already proves (1.2)?	The start begins there, not at zero	
Is the scope set in a few sentences, with reasons?	A scope cut for convenience fails at the first client	
Are the interfaces with other family businesses named?	A farm or a shuttle is a delivery, not part of the system	
Does the first phase hold four or five projects at most?	More will not survive the summer	
Does each project have a person, hours, a date and a sign of completion?	Without them a project is a wish	
Is the date of the first review already fixed?	Without it the first phase never becomes a second	

4 · What would show this is working

Questions drawn from the subchapter's reading of the standards and its practical application. Clause numbers in brackets point to the harmonized structure or the standard the subchapter names; where the evidence lives, and the sheets named, are this book's method, not a requirement of any standard.

Question	Where the evidence lives	Seen?
Is the scope set in a few sentences, with reasons, and kept as documented information (4.3)?	The scope sheet in the folder and the file on the computer	☐
Are the interfaces with other family businesses named and treated as deliveries?	The scope sentences; the context sheet	☐
Does the first phase hold no more than four or five projects?	The stepwise plan	☐
Has each project a person, hours, a date and a sign of completion?	The stepwise plan, one line per project	☐
Does the obligations list record what does not apply, with the date it was checked?	The obligations list	☐
Is the date of the first review already in the calendar?	The house calendar	☐

> *What this sheet is not: no management-system standard prescribes this form, and filling it shows conformity with nothing. It is a working aid drawn from the book; the standards' own texts govern the real case, and legal duties are established with competent local expertise. Independent material; not affiliated with or endorsed by ISO or any certification, accreditation or scheme-owning body. The standards' own texts prevail; legal duties must be confirmed locally.*