Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques

Specification

BTEC Specialist qualification

For first teaching September 2010

Issue 2

Edexcel, BTEC and LCCI qualifications

Edexcel, BTEC and LCCI qualifications are awarded by Pearson, the UK's largest awarding body offering academic and vocational qualifications that are globally recognised and benchmarked. For further information, please visit our qualifications website at qualifications.pearson.com. Alternatively, you can get in touch with us using the details on our contact us page at qualifications.pearson.com/contactus

About Pearson

Pearson is the world's leading learning company, with 35,000 employees in more than 70 countries working to help people of all ages to make measurable progress in their lives through learning. We put the learner at the centre of everything we do, because wherever learning flourishes, so do people. Find out more about how we can help you and your learners at qualifications.pearson.com

This specification is Issue 2. Key changes are listed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

This qualification was previously known as:

Edexcel BTEC Level 2 Certificate in Lean Organisation Management Techniques (QCF)

The QN remains the same.

Summary of Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques specification Issue 2 changes

Summary of changes made between previous Issue 1 and this current Issue 2	Page/section number
All references to QCF have been removed throughout the specification	Throughout
Definition of TQT added	1
Definition of sizes of qualifications aligned to TQT	1
TQT value added	4
QCF references removed from unit titles and unit levels in all units	15-37
Guided learning definition updated	10

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: qualifications.pearson.com/en/support/contact-us.html.

BTEC Specialist qualification titles covered by this specification

Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques

Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding.

The qualification and unit codes will appear on learners' final certification documentation.

The Qualification Number for the qualification in this publication is:

Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques   501/0020/8

This qualification title will appear on learners' certificates. Learners need to be made aware of this when they are recruited by the centre and registered with Pearson.

This qualification is accredited by Ofqual as being Additional and Specialist Learning within 14-19 Diplomas.

Welcome to BTEC Level 2 Certificate in Lean Organisation Management Techniques

Focusing on the BTEC Level 2 Certificate in Lean Organisation Management Techniques

This nationally recognised qualification provides:

- education and training for those in the business sector who are responsible for providing a cost-effective service

- knowledge and understanding, skills and techniques learners need for successful performance in working life

- access into the business sector or progression to further qualifications such as the BTEC Level 3 Award and Certificate in Management.

Straightforward to implement, teach and assess

Implementing BTECs couldn't be easier. They are designed to easily fit into your curriculum and can be studied independently or alongside existing qualifications, to suit the interests and aspirations of learners. The clarity of assessment makes grading learner attainment simpler.

Engaging for everyone

Learners of all abilities flourish when they can apply their own knowledge, skills and enthusiasm to a subject. BTEC qualifications make explicit the link between theoretical learning and the world of work by giving learners the opportunity to apply their research, skills and knowledge to work-related contexts and case studies. These applied and practical BTEC approaches give all learners the impetus they need to achieve and the skills they require for workplace or education progression.

Recognition

BTECs are understood and recognised by a large number of organisations in a wide range of sectors. BTEC qualifications are developed with key industry representatives and Sector Skills Councils (SSC) to ensure that they meet employer and learner needs — **in this case the Council for Administration (CfA) SSC**.

All you need to get started

To help you off to a flying start, we've developed an enhanced specification that gives you all the information you need to start teaching BTEC. This includes:

- a framework of equivalencies, so you can see how this qualification compares with other Pearson vocational qualifications

- information on rules of combination, structures and quality assurance, so you can deliver the qualification with confidence

- explanations of the content's relationship with the learning outcomes

- guidance on assessment, and what the learner must produce to achieve the unit.

Don't forget that we're always here to offer curriculum and qualification updates, local training and network opportunities, advice, guidance and support.

Contents

What are BTEC Level 2 Specialist qualifications?

BTEC Specialist qualifications are work-related qualifications available from Entry to Level 3 in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment in a specific occupational area. The qualifications also provide career development opportunities for those already in work. The qualifications may be offered as full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

Sizes of Specialist qualifications

For all regulated qualifications, Pearson specify a total number of hours that it is estimated learners will require to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.
Within the TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve tutors and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions.
In addition to guided learning, other required learning directed by tutors or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

BTEC Specialist qualifications are generally available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

Pearson BTEC Level 2 Certificate

The Pearson BTEC Level 2 Certificate offers an engaging programme for those who are clear about the vocational area they want to learn more about. These learners may wish to extend their programme through the study of a related GCSE, a complementary NVQ or other related vocational or personal and social development qualification. These learning programmes can be developed to allow learners to study complementary qualifications without duplication of content.

For adult learners the Pearson BTEC Level 2 Certificate can extend their knowledge and understanding of work in a particular sector. It is a suitable qualification for those wishing to change career or move into a particular area of employment following a career break.

Key features of the Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques

The Pearson BTEC Level 2 in Lean Organisation Management Techniques has been developed to give learners the opportunity to:

- engage in learning that is relevant to them and which will provide opportunities to develop a range of skills and techniques, personal skills and attributes essential for successful performance in working life

- achieve a nationally recognised Level 2 vocationally-related qualification

- progress to employment in a particular vocational sector

- progress to related general and/or vocational qualifications.

National Occupational Standards

Where relevant, Pearson BTEC Level 2 qualifications are designed to provide some of the underpinning knowledge and understanding for the National Occupational Standards (NOS), as well as developing practical skills in preparation for work and possible achievement of NVQs in due course. NOS form the basis of National Vocational Qualifications (NVQs). Pearson BTEC Level 2 qualifications do not purport to deliver occupational competence in the sector, which should be demonstrated in a work context.

Each unit in the specification identifies links to elements of the NOS in *Annexe C*.

The Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques relates to the following NOS:

- Management and Leadership

- Business Improvement Techniques.

Rules of combination

The rules of combination specify the credits that need to be achieved, through the completion of particular units, for the qualification to be awarded. All accredited qualifications have rules of combination.

Rules of combination for the Pearson BTEC Level 2 qualifications

When combining units for the Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques, it is the centre's responsibility to ensure that the following rules of combination are adhered to.

Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques

1   Qualification credit value: a minimum of 15 credits.

2   Minimum credit to be achieved at, or above, the level of the qualification: 15 credits.

3   All credits must be achieved from the units listed in this specification.

Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques

The Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques is a 15-credit and 90 guided learning hour (GLH) qualification that consists of 3 mandatory units that provide for a combined total of 15 credits.

The Total Qualification Time (TQT) for this qualification is 150.

Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques			
Unit	**Mandatory units**	**Credit**	**Level**
1	Lean Organisation Techniques in Business	5	2
2	Business Improvement Tools and Techniques	5	2
3	Working in Business Teams	5	2

Assessment

All units within this qualification are internally assessed. The qualifications are criterion referenced, based on the achievement of all the specified learning outcomes.

Each of the units within the qualification has specified assessment criteria and grading criteria which must be used. A summative unit grade can be awarded at pass, merit or distinction.

- To achieve a 'pass' a learner must have successfully completed **all** the assessment criteria

- To achieve a 'merit' a learner must **additionally** have successfully completed **all** the merit grading criteria

- To achieve a 'distinction' a learner must **additionally** have successfully completed **all** the distinction grading criteria.

Guidance

The purpose of assessment is to ensure that effective learning has taken place to give learners the opportunity to:

- meet the standard determined by the assessment and grading criteria and

- achieve the learning outcomes.

All the assignments created by centres should be reliable and fit for purpose, and should be built on the unit assessment and grading criteria. Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the specified criteria. Centres should enable learners to produce evidence in a variety of different forms, including performance observation, presentations and posters, along with projects, or time-constrained assessments.

Centres are encouraged to emphasise the practical application of the assessment and grading criteria, providing a realistic scenario for learners to adopt, and making maximum use of practical activities. The creation of assignments that are fit for purpose is vital to achievement and their importance cannot be over-emphasised.

The assessment and grading criteria must be clearly indicated in the assignments briefs. This gives learners focus and helps with internal verification and standardisation processes. It will also help to ensure that learner feedback is specific to the assessment criteria.

When designing assignments briefs, centres are encouraged to identify common topics and themes. A central feature of vocational assessment is that it allows for assessment to be:

- current, ie to reflect the most recent developments and issues

- local, ie to reflect the employment context of the delivering centre

- flexible to reflect learner needs, ie at a time and in a way that matches the learner's requirements so that they can demonstrate achievement.

Qualification grade

Learners who achieve the minimum eligible credit value specified by the rule of combination will achieve the qualification at pass grade.

In the Pearson BTEC Level 2 Specialist qualifications each unit has a credit value which specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit. This has been based on:

- one credit for those learning outcomes achievable in 10 hours of learning time

- learning time being defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria

- the credit value of the unit remaining constant regardless of the method of assessment used or the qualification to which it contributes.

Quality assurance of centres

Pearson BTEC Level 2 qualifications provide a flexible structure for learners enabling programmes of varying credits and combining different levels. For the purposes of quality assurance, all individual qualifications and units are considered as a whole.

Centres delivering the Pearson BTEC Level 2 must be committed to ensuring the quality of the units and qualifications they deliver, through effective standardisation of assessors and verification of assessor decisions. Centre quality assurance and assessment is monitored and guaranteed by Pearson.

The Pearson quality assurance processes will involve:

- centre approval for those centres not already recognised as a centre for BTEC qualifications

- approval for the Pearson BTEC Level 2 qualifications and units

- **compulsory** Pearson-provided training and standardisation for internal verifiers and assessors leading to the accreditation of lead internal verifiers via the OSCA system

- quality review of the centre verification practice

- centre risk assessment by Pearson of overarching processes and quality standards

- remedial training and/or assessment sampling for centres identified through standardisation or risk assessment activities as having inadequate quality, assessment or internal verification processes.

Approval

Centres are required to declare their commitment to ensuring the quality of the programme of learning and providing appropriate assessment opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Centres already holding BTEC approval are able to gain qualification approval online. New centres must complete a centre approval application.

Quality Assurance Guidance

Details of quality assurance for the Pearson BTEC Level 2-3 qualifications are set out in centre guidance which is published on our website (qualifications.pearson.com).

Programme design and delivery

Mode of delivery

Pearson does not normally define the mode of delivery for Pearson BTEC Entry to Level 3 qualifications. Centres are free to offer the qualifications using any mode of delivery (such as full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specification and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. The use of assessment evidence drawn from learners' work environments should be encouraged. Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to ensure a course relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- linking with company-based/workplace training programmes
- making full use of the variety of experience of work and life that learners bring to the programme.

Resources

Pearson BTEC Level 2 qualifications are designed to give learners an understanding of the skills needed for specific vocational sectors. Physical resources need to support the delivery of the programme and the assessment of the learning outcomes, and should therefore normally be of industry standard. Staff delivering programmes and conducting the assessments should be familiar with current practice and standards in the sector concerned. Centres will need to meet any specific resource requirements to gain approval from Pearson.

Where specific resources are required these have been indicated in individual units in the *Essential resources* sections.

Delivery approach

It is important that centres develop an approach to teaching and learning that supports the vocational nature of Pearson BTEC Level 2 qualifications and the mode of delivery. Specifications give a balance of practical skill development and knowledge requirements, some of which can be theoretical in nature. Tutors and assessors need to ensure that appropriate links are made between theory and practical application and that the knowledge base is applied to the sector. This requires the development of relevant and up-to-date teaching materials that allow learners to apply their learning to actual events and activity within the sector. Maximum use should be made of learners' experience.

Functional skills

Pearson Level 2 BTEC Specialist qualifications give learners opportunities to develop and apply functional skills. Functional skills are, however, not required to be achieved as part of the BTEC Specialist qualification(s) rules of combination. Functional skills are offered as stand-alone qualifications.

Access and recruitment

Pearson's policy regarding access to its qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualifications and that the qualification will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Pearson's policy on learners with particular requirements.

Centres will need to review the entry profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a higher level qualification.

Restrictions on learner entry

The Pearson BTEC Level 2 in Lean Organisation Management Techniques is accredited for learners aged 16 and above.

Access arrangements and special considerations

Pearson's policy on access arrangements and special considerations for BTEC and Pearson NVQ qualifications aims to enhance access to the qualifications for learners

with disabilities and other difficulties (as defined by the 2010 Equality Act) without compromising the assessment of skills, knowledge, understanding or competence.

Further details are given in the policy document *Access Arrangements and Special Considerations for BTEC and Pearson Edexcel NVQ Qualifications*, which can be found on the Pearson website (qualifications.pearson.com). This policy replaces the previous Pearson policy (Assessment of Vocationally Related Qualifications: Regulations and Guidance Relating to Learners with Special Requirements, 2002) concerning learners with particular requirements.

Recognition of Prior Learning

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Pearson encourages centres to recognise learners' previous achievements and experiences whether at work, home and at leisure, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. Provided that the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Unit format

Each unit has the following sections.

Unit title

This is the formal title of the unit that will appear on the learner's certificate.

Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

Level

All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.

Credit value

All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.

Guided learning hours

Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

Unit aim and purpose

The aim provides a clear summary of the purpose of the unit and is a succinct statement that summarises the learning outcomes of the unit.

Unit introduction

The unit introduction gives the reader an appreciation of the unit in the vocational setting of the qualification, as well as highlighting the focus of the unit. It gives the reader a snapshot of the unit and the key knowledge, skills and understanding gained while studying the unit. The unit introduction also highlights any links to the appropriate vocational sector by describing how the unit relates to that sector.

Learning outcomes

The learning outcomes of a unit set out what a learner is expected to know, understand or be able to do as the result of a process of learning.

Assessment and grading criteria

The assessment and grading criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or set of learning outcomes, has been achieved. The learning outcomes and assessment and grading criteria clearly articulate the learning achievement for which the credit will be awarded at the level assigned to the unit.

Unit content

The unit content identifies the breadth of knowledge, skills and understanding needed to design and deliver a programme of learning to achieve each of the learning outcomes. This is informed by the underpinning knowledge and understanding requirements of the related National Occupational Standards (NOS), where relevant. The content provides the range of subject material for the programme of learning and specifies the skills, knowledge and understanding required for achievement of the unit.

Each learning outcome is stated in full and then the key phrases or concepts related to that learning outcome are listed in italics followed by the subsequent range of related topics.

Relationship between content and assessment and grading criteria

The learner should have the opportunity to cover all of the unit content.

It is not a requirement of the unit specification that all of the content is assessed. However, the indicative content will need to be covered in a programme of learning in order for learners to be able to meet the standard determined in the assessment and grading criteria.

Content structure and terminology

The information below shows the unit content is structured and gives the terminology used to explain the different components within the content.

- Learning outcome: this is shown in bold at the beginning of each section of content.

- Italicised sub-heading: it contains a key phrase or concept. This is content which must be covered in the delivery of the unit. Colons mark the end of an italicised sub-heading.

- Elements of content: the elements are in plain text and amplify the sub-heading. The elements must be covered in the delivery of the unit. Semi-colons mark the end of an element.

- Brackets contain amplification of content which must be covered in the delivery of the unit.

- 'eg' is a list of examples, used for indicative amplification of an element (that is, the content specified in this amplification could be covered or could be replaced by other, similar material).

Essential guidance for tutors

This section gives tutors additional guidance and amplification to aid understanding and a consistent level of delivery and assessment. It is divided into the following sections.

- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance about possible approaches to delivery. This section is based on the more usual delivery modes but is not intended to rule out alternative approaches.

- *Assessment and grading* – gives amplification about the nature and type of evidence that learners need to produce in order to achieve the unit. This section should be read in conjunction with the assessment and grading criteria.

- *Essential resources* – identifies any specialist resources needed to allow learners to generate the evidence required for each unit. The centre will be asked to ensure that any requirements are in place when it seeks approval from Pearson to offer the qualification.

- *Indicative resource materials* – gives a list of learner resource material that benchmarks the level of study.

Units

Specification – Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques –

Unit 1: Lean Organisation Techniques in Business

Unit reference number: T/502/5352

Level: 2

Credit value: 5

Guided learning hours: 30

Unit aim

The aim of this unit is to enable learners to understand the concept of lean organisation techniques through developing their knowledge and understanding of lean manufacturing techniques, and highlighting the differences between lean production and lean office principles to put the concept in context.

Unit introduction

'Lean' is a term used to express a range of business improvement techniques. It originated from the need to constantly improve quality while reducing the costs of the production performance in the manufacturing industry. The concepts of this approach are now used as the basis for improvement in the workplace in non-manufacturing processes, such as an office or service industry environment, to improve business performance by eliminating waste and increasing efficiency.

The unit looks at the factors that affect an organisation's productivity, such as the types of waste and non-value-added work that affect efficiency and, ultimately, the customer.

To manage and improve productivity, it needs to be measured. In order to do this, learners will initially undertake a Productivity Needs Analysis (PNA) to identify key areas of opportunity. It is important for learners to understand that the purpose of the PNA is to establish a starting point on the productivity improvement journey. It is not a benchmarking exercise to compare one company's performance against another'.

This unit will also introduce learners to flow process analysis through application of a Service Excellence Needs Analysis (SENA), which will enable them to map the process and measure improvement. The process is mapped in detail and identifies any concerns and improvements needed, defining value-added and non-value-added processing steps and forms of waste that may be inherent. Learners will see how a process map can be applied to their own processes and will produce one for assessment, although this will not be completed until the end of the learning programme.

Learning outcomes

On completion of this unit a learner should:

1   Understand the concept of a lean environment

2   Be able to implement the productivity needs analysis process

3   Be able to produce a process map.

Unit content

1 Understand the concept of a lean environment

Lean principles: definition of lean production techniques; background to lean principles; design and state of the workspace; differences between lean production and lean organisation techniques; benefits of lean

2 Be able to implement the productivity needs analysis process

Purpose: starting point of productivity improvement journey; ways to improve; meeting targets

Productivity needs: common data (turnover, cost of customer services); labour (headcount, staff turnover, rewards and benefits, absenteeism rate, temporary staff); material (not right first time, rework levels, waste); overheads (floor space utilisation, contract penalties); supplier information by spend and volume

Process: necessary information requirements; information from appropriate stakeholders; score the current status of the organisation; skill control; gap analysis; implementation plan

3 Be able to produce a process map

Process map: definition of a process in its elements/activities of work; flow process analysis using symbols and abbreviations defined by ASME (American Standard for Methods Engineering); identification of variation; value-added and non-value-added activities; waste; improvements to the process; action plan; effectiveness of improvements

Assessment and grading criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria for a pass grade describe the level of achievement required to pass this unit.

Assessment and grading criteria		
To achieve a pass grade the evidence must show that the learner is able to:	**To achieve a merit grade the evidence must show that, in addition to the pass criteria, the learner is able to:**	**To achieve a distinction grade the evidence must show that, in addition to the pass and merit criteria, the learner is able to:**
P1 describe the principles of lean organisation techniques	M1 explain the benefits of lean organisation techniques	D1 analyse the benefits of lean organisation techniques.
P2 explain the benefits of a lean environment		
P3 describe the process for conducting a productivity needs analysis		
P4 undertake a productivity needs analysis in a selected organisation	M2 identify improvements and draw up an action plan for their implementation.	
P5 produce a process map using appropriate symbols and terminology for an identified process.		

Essential guidance for tutors

Delivery

This unit explores the principles and techniques of lean manufacturing and how they have affected non-manufacturing environments to improve business performance. The background on the concept and origin of lean principles and techniques must be studied to set this unit in context. Tutors can introduce this topic by asking learners to work in small groups and research the origins of the term 'lean' and to identify lean techniques in an office environment. Next, each group could prepare a short presentation, listing the similarities and differences between lean production and lean organisation techniques. Tutors should raise awareness of the need to modify the techniques to apply to information flows and meet the needs of people in non-manufacturing environments.

Learners should understand that improving productivity is not simply about controlling cost. Discussion groups can think about all the factors involved such as being competitive, introducing change and sustaining performance. The purpose of analysing an organisation's productivity needs can be investigated through group work where learners can discuss the productivity needs in their own workplace and produce a mindmap splitting these into labour, material and overheads categories. Tutors can use case study materials showing examples of different types of organisations to illustrate the three main factors that affect an organisation's operating costs.

In this unit learners will look at how to improve organisational processes and services by undertaking process mapping using Service Excellence Needs Analysis. The aim is to make learners aware of the methodology to produce a process map using symbols and terminology determined by ASME (American Society of Mechanical Engineers). It is important that tutor input on this process is delivered in this unit to raise awareness, although this part of the assessment will not be completed until the end of the learning programme. The process should be mapped in detail and must identify concerns and improvements needed, defining value-added and non-value-added processing steps and forms of waste that may be inherent.

This forms the basis and direction of specific improvement activities and from this current state, an action plan should be devised to bring about an improved 'future state'.

For full-time learners, visits to the workplace, or case studies, will be essential.

Outline learning plan

The outline learning plan has been included in this unit as guidance and can be used in conjunction with the programme of suggested assignments.

The outline learning plan demonstrates one way in planning the delivery and assessment of this unit.

Topic and suggested assignments/activities and/assessment
Induction and outline scheme of work/programme of assignments.
Formal theory input on lean organisation.
Assignment 1: Lean Organisation Techniques
Research and visits to businesses.
Formal theory input on productivity needs analysis.
Research and visits to businesses.
Assignment 2: Productivity Needs Analysis
Formal theory input on mapping and flow process analysis.
Research and visits to businesses.
Assignment 3: Mapping
Non-supervised study time and completion of assignments.

Assessment

It is important for learners to select an appropriate work area or activity to complete the assessment for this unit. P1 requires learners to explain the background to the concept of 'lean', drawing on its inception in Japanese manufacturing production, and linking this to current lean office application. Learners should explain the benefits of the lean approach for P2.

For P3 and P4, learners should ensure they describe key areas of opportunity which can be used to measure the progress of improvement. This will require analysis of the productivity needs and their purpose to the selected organisation, eg an organisation may need to address the three main factors affecting its operating costs: labour, overheads and materials.

P5 will not be assessed until completion of the learning programme. Evidence in the form of a process map, appropriately annotated, will form the basis for an action plan identifying and justifying improvements. Learners must demonstrate their understanding of flow process analysis through identifying value-added, non-value-added processing steps, and waste.

For merit criteria, benefits of lean techniques and identification of improvements and an action plan are needed.

For distinction, the ability to analyse the benefits of these techniques is required.

Programme of suggested assignments

The table below shows a programme of suggested assignments that cover the criteria in the assessment grid. This is for guidance only and it is recommended that centres either write their own assignments or adapt Pearson assignments to meet local needs and resources.

Criteria covered	Assignment title	Scenario	Assessment method
P1, P2, M1, D1	Assignment 1: Lean Organisation	Lean organisation Techniques.	Assignment.
P3, P4, M2, D1	Assignment 2: Productivity Needs Analysis	Productivity needs.	Assignment.
P5	Assignment 3: Mapping	Process map.	Map.

Essential resources

Learners can find information using company annual reports, journals, magazines, company websites and newspapers.

Indicative resource materials

Textbooks

Clark A C – *The Gist of Process Mapping: How to Record, Analyse and Improve Work Processes* (Word4Word, 2005) ISBN 095412099X

Madison D – *Process Mapping, Process Improvement and Process Management: A Practical Guide to Enhancing Work and Information Flow* (Paton PR, 2005) ISBN 1932828044

Sayer N J and Williams B – *Lean for Dummies* (Wiley & Sons, 2007) ISBN 0470099313

Sioukas T – *The Solution Path: A Step-by-Step Guide to Turning your Workplace Problems into Opportunities* (Jossey Bass, 2003) ISBN 0787962759

Swanson A R – *Analysis for Improving Performance* (Berrett Koehler, 2007) ISBN 1576753417

Unit 2: Business Improvement Tools and Techniques

Unit reference number: **L/502/5356**

Level: **2**

Credit value: **5**

Guided learning hours: **30**

Unit aim

The aim of this unit is to enable learners to investigate the continuous improvement of process management in business and will equip the learner with tools and techniques that can be applied within the workplace to facilitate lean systems of working.

Unit introduction

This unit has been designed to give learners the understanding and confidence to employ world-class techniques within a working environment. These techniques can be applied to improve a wide range of operations, for example from payroll to room usage.

The unit will enable learners to investigate the continuous improvement of process management and will give the learner Kaizen tools and techniques which can be applied within the workplace to facilitate lean systems. Learners will also develop their knowledge and understanding of the principles of workplace organisation to increase the 5S/5C score, and visual management systems.

Learning outcomes

On completion of this unit a learner should:

1   Know about continuous improvement techniques (Kaizen)

2   Understand the principles and techniques of workplace organisation (5S/5C)

3   Be able to use visual indicators to improve the work environment

4   Know ways to eliminate variance from processes in the workplace.

Unit content

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1 Know about continuous improvement techniques (Kaizen)

Kaizen principles and application: definition of Kaizen; benchmarking to set quantifiable targets and objectives; identify forms of waste, problems or conditions in the work area or activity; benefits of improvements (reduced product cost, improved safety, improved quality, improvements to working practices and procedures, reduction in lead time, reduction/elimination of waste); standard operating procedures (SOPs) to sustain improvements; health and safety practices and procedures; organisational policies and procedures; limits of own responsibility

2 Understand the principles and techniques of workplace organisation (5S/5C)

Principles of workplace organisation: definition of 5S/5C – Seiri (Clear out), Seiton (Configure), Seiso (Clean and Check), Seiketsu (Conformity), Shitsuke (Custom and Practice); select work area or activity; increase 5S/5C score

Techniques: establish area score; identify missing information, tools and/or equipment; identify improvements in existing SOPs; techniques to communicate information using visual controls; health and safety requirements

3 Be able to use visual indicators to improve the work environment

Indicators: purpose; stages of process; application, principles (standardisation, format, positioning, relevance); measures of performance; benefits

4 Know ways to eliminate variance from processes in the workplace

Eliminate variance: principles and benefits (safety, quality, efficiency); standard working methods; standardised work documents; safe working method; responsibility

Assessment and grading criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria for a pass grade describe the level of achievement required to pass this unit.

Assessment and grading criteria		
To achieve a pass grade the evidence must show that the learner is able to:	**To achieve a merit grade the evidence must show that, in addition to the pass criteria, the learner is able to:**	**To achieve a distinction grade the evidence must show that, in addition to the pass and merit criteria, the learner is able to:**
P1 identify the main Kaizen principles and their application	M1 explain the main Kaizen techniques and their application in a given organisation	D1 evaluate Kaizen and workplace organisation techniques in a given organisation.
P2 explain areas of weakness in workplace organisation and suggest improvements		
P3 identify elements that contribute to good visual management in the workplace		
P4 prepare appropriate visual indicators	M2 suggest visual management improvements to workplace.	
P5 describe the benefits of standard working methods and prepare a standardised work document suggesting how to eliminate variance to process.		

Essential guidance for tutors

Delivery

This unit offers learners the opportunity to apply the principles and techniques of workplace organisation to their work area and establish an area score. Tutors can introduce this topic by the interpretation of the 5Ss/5Cs from Japanese.

Tutors can explain how to establish an area score using case studies. Learners can then consider their own work area and its activity and determine where information, tools and/or equipment are missing and where improvements to the area or activity could be made.

Learners should understand the purpose of producing standard operating procedures and visual controls for the work area in order to improve existing practices. They could work in small groups to research existing standard operating procedures and visual controls, which could cover such things as: producing shadow boards to standardise the storage and location of area equipment, colour coding of equipment, cleaning and maintenance of equipment, production operations and health and safety. Each group could present their findings to the rest of the class for discussion and comparison.

Learners need to be aware that the concept of continuous improvement (Kaizen) is an important part of the lean philosophy. They can work in groups to research the definition of Kaizen and discuss the key features of this approach. Learners need to develop their knowledge and understanding of the importance of setting quantifiable objectives and targets for the improvement activity.

The definition of waste should be introduced, and groups can examine case studies to identify all forms of waste, and problems or conditions within the work area or activity where improvements can be made. This can be developed to explore waste in learners' own work environments and to examine how it can be eliminated. Learners can thought shower what would reduce product cost, improve safety, improve quality, improve working practices and procedures, reduce lead time and reduce or eliminate waste.

Finally, learners should develop their knowledge of the principles and procedures of visual management systems and the types of information to be displayed. A visit to an organisation carrying out these practices would be useful.

Outline learning plan

The outline learning plan has been included in this unit as guidance and can be used in conjunction with the programme of suggested assignments.

The outline learning plan demonstrates one way in planning the delivery and assessment of this unit.

Topic and suggested assignments/activities and/assessment
Induction and outline scheme of work/programme of assignments.
Formal theory input on Kaizen principles and application.
Research, visits.
Assignment 1: Kaizen
Formal theory input on workplace improvement and techniques.
Research, visits.
Assignment 2: Workplace Improvement Techniques
Formal theory input on visual indicators and variance.
Research, visits.
Assignment 3: Visual Indicators and Variance
Non-supervised study time and completion of assignments.

Assessment

Learners will be expected to produce evidence that shows their knowledge and understanding of business improvement tools and techniques. For P1, learners should identify the concept of Kaizen and describe the stages involved in the improvement cycle, illustrating them with a diagram.

For P2 and P3, learners are required to conduct an audit of a selected work area to determine where information, tools and/or equipment are missing, and where improvements could be made. Learners should justify the suggested improvements.

P4 requires learners to describe the features of a visual management system. They can build on the work for P2 and P3 and identify any visual management improvements, preparing appropriate visual indicators to support this.

For P5, learners must describe the benefits of having standard operating procedures in terms of safety, quality and efficiency. They should design a procedure for a selected activity or area, and outline the improvements it has made to the process.

The merit criteria require more detail on the techniques and their application in a particular organisation. Also suggested improvements to the workplace.

The distinction criterion requires evaluation of Kaizen in a specified organisation.

Programme of suggested assignments

The table below shows a programme of suggested assignments that cover the criteria in the assessment grid. This is for guidance only and it is recommended that centres either write their own assignments or adapt Pearson assignments to meet local needs and resources.

Criteria covered	Assignment title	Scenario	Assessment method
P1, M1, D1	Assignment 1: Kaizen	Kaizen exercise.	Practical and witness statement.
P2, P3, D1	Assignment 2: Workplace Improvement Techniques	Improvement techniques.	Practical and witness statement.
P4, P5, M2	Assignment 3: Visual Indicators and Variance	Variance.	Practical and witness statement.

Essential resources

Learners can find information using company annual reports, journals, magazines, company websites and newspapers. Access to a range of information resources to complete investigative assignments and case studies will be essential, including relevant CD ROMs and the internet.

Indicative resource materials

Textbooks

Mann D – *Creating a Lean Culture: Tools to Sustain Lean Conversions* (Productivity Press, 2005) ISBN 1563273225

Productivity Press Development Team – *Identifying Waste on the Shopfloor* (Productivity Press, 2003) ISBN 1563272873

Productivity Press Development – *Kaizen for the Shopfloor* (Productivity Press, 2002) ISBN 1563272725

Sayer N J and Williams B – *Lean for Dummies* (Wiley & Sons, 2007) ISBN 0470099313

Womack J P and Jones D T – *Lean Thinking: Banish Waste and Create Wealth in your Corporation* (Free Press, New Edition, 2003) ISBN 0743231643

Websites

www.bized.co.uk	A business education resource site
www.canterbury.gov.uk/buildpage.php?id=3225	An example of a specific local business support website
www.news.bbc.co.uk/1/hi/business/default.stm	The business pages of the BBC website
www.thetimes100.co.uk	*The Times* 100 case studies

Unit 3: Working in Business Teams

Unit reference number: L/502/5342

Level: 2

Credit value: 5

Guided learning hours: 30

Unit aim

The aim of this unit is to enable learners to understand how to work effectively in a team, and know the attributes required of a good leader.

Unit introduction

It is often said there is no 'I' in a team. Business success today depends on the flexibility of organisations. They need to be able to respond to the changing environment and meet customer needs. In order to achieve goals, vision and values need to be shared and understood by everyone, and this involves leadership and team working skills.

Working in teams makes the best use of individual strengths so more can be achieved than individually. Members of teams work together and support each other, which means that problems can be solved more easily with the collective knowledge and skills to draw on.

To become fully collaborative, teams need to go through stages of development, with distinct team roles being filled to complete the tasks to achieve the objectives. The team leader needs specific skills to build the team by creating a sense of common purpose and motivating individual members within it. Sometimes when people work in teams, they have their own types of communication behaviour which can affect others and be a cause of conflict or tension. This unit will explore factors that make an effective team and learners will practise working together in team situations. Using feedback from others, learners will help evaluate their own and the team's performance and hence improve both team working and communication skills.

Learning outcomes

On completion of this unit a learner should:

1   Understand what makes an effective team

2   Be able to work effectively in a team

3   Know the role of a team leader.

Unit content

1 Understand what makes an effective team

Team: difference between a group and a team; the potential for high performance; types of team eg work teams, project teams, cross-functional teams, interdependent teams; stages in team development eg forming, norming, storming, performing, transforming; team roles eg Belbin's team role theory, differences between the roles, contribution of each role to the team

Effective team: characteristics eg culture, united in a common purpose, trust each other, committed, open with each other, accepting consensus decisions, supporting each other, dependent on each other, working with conflict

Benefits of team working: for the organisation eg making best use of people's strengths, better internal communication, increased efficiency and productivity, less duplication of tasks, less risk by sharing work, more flexible workforce; for the individual, eg opportunities to stretch talents and take on new responsibilities, increased motivation, opportunities for creativity and initiative

2 Be able to work effectively in a team

Work effectively: showing a positive attitude, respecting others, taking responsibility for own work, clarifying objectives, agreeing tasks, supporting other team members, encouraging other team members to recommend improvements, being receptive to feedback, recognising and dealing with conflict situations; communicating effectively eg listening and speaking skills, body language, assertiveness

Barriers to effective performance: lack of commitment eg leader, team member; poor communication; lack of appropriate skills; resource issues eg financial, physical, staff; personal factors eg challenges to authority, conflict between team members

3 Know the role of a team leader

Leadership: definition; leader's role to meet team, task and individual needs (Adair); leadership styles eg autocratic, persuasive, consultative, participative; motivation theories eg Maslow, McGregor, Herzberg

Attributes of a team leader: setting objectives, good communication eg active listening, questioning, handling conflict; leading by example; showing respect, valuing people, encouraging and supporting other members; showing integrity, fairness and consistency in decision making; offering minimal criticism, giving feedback and recognition

Role of team leader: responsibilities eg delegation of tasks, ensuring organisational needs are met, maintaining quality standards; integration of leadership practices into day-to-day team leading role; mechanisms for integration eg team meetings, one-to-one meetings, informal contact, allocation of work

Assessment and grading criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria for a pass grade describe the level of achievement required to pass this unit.

Assessment and grading criteria		
To achieve a pass grade the evidence must show that the learner is able to:	To achieve a merit grade the evidence must show that, in addition to the pass criteria, the learner is able to:	To achieve a distinction grade the evidence must show that, in addition to the pass and merit criteria, the learner is able to:
P1 describe the characteristics of an effective team		
P2 describe, giving examples, different types of team structure		
P3 explain the benefits of team working	M1 assess the benefits of team working for the organisation and individual team member	
P4 demonstrate working effectively as a team member and team leader dealing with any conflict or difficult situations		
P5 review the team's overall effectiveness and own contribution to achieving goals		D1 evaluate the team's overall effectiveness in meeting goals, making recommendations for improvements.
P6 describe the attributes needed by a team leader	M2 explain how motivation theories are used in the workplace.	
P7 identify ways a leader can motivate team members.		

Essential guidance for tutors

Delivery

Team working can be introduced through learners undertaking one of the many team activities available for use in the classroom. The benefits of team collaboration may then be discussed and contrasted with more individualised ways of working. The role of the team leader, different leadership styles and personal qualities of leadership can be discussed in groups. Learners can then explore the characteristics and styles of different team leaders, through activities such as identifying the skills and traits of well-known leaders. The tutor should stress that an effective team needs to be a mix of capabilities and not consist entirely of those with leadership skills. Tutors should introduce learners to the well-known, action-centred leadership approach of John Adair, which can be represented as a three-circle model showing the responsibilities of the leader in ensuring the satisfaction of task, team and individual needs. Learners could carry out activities positioning the circles from case studies or from their own experiences.

For learning outcome 2 learners need to understand the differences between a group and a team, and the factors that contribute to an effective team. To have a high-performance team, team leaders need to motivate and inspire commitment in their team members. Tutor input on different definitions of motivation will enable learners to investigate what factors motivate them in various aspects of their lives, eg attending college, completing coursework etc. They can then work in groups to research the work of relevant motivational theorists (for example Maslow, Herzberg, McGregor), prepare a chart making reference to at least one theorist, identifying two features of different leadership styles (autocratic, etc) that may lead to motivation for the team.

Tutor input is needed on the concept of teams and stages of team development (for example forming, storming, norming, performing) to put this in the context of working relationships. Learners can work in small groups and list different types of teams they have been a member of, for example in college, outside activities, hobbies etc and the purpose of the team. They can then identify factors that make them effective, and what stages of development they went through. Teams need to be made up of people with different skills. It does not necessarily follow that a team of high performers will produce the best results.

Learners will be carrying out a team activity and need to be familiar with the characteristics of effective teams. This topic could be introduced by learners drawing on their own experiences of working in teams at school or college, such as a sports team, and what was good and bad about it. Learners can practise team working activities through role play, with each person taking a different 'team role'. This can best be illustrated using Belbin's Team Role theory model, which shows that in order to achieve the task a combination of team roles needs to be present, although a team member may display characteristics of more than one team role. To identify their preferred roles, learners could do a Belbin Team Role Analysis exercise, and this might prove useful when allocating tasks for the team activity. Television programmes such as *The Apprentice* and other 'reality' TV programmes are useful in illustrating effective and ineffective features of team activity and how poor team cohesion impacts on the results of the team. Carefully structured role play may also be used and the school or college drama department may be willing

to liaise in sharing teaching ideas. Sporting analogies may be used, but should avoid gender bias.

It is important that learners have plenty of opportunities for working in teams and/or groups, agreeing objectives and using team-working skills to achieve them. There are different ways of delivering the content for learning outcome 2, including team challenges with follow-up analysis and evaluation, video clips, simulation/role play, reflection on learners, own experiences and analysis of case study material. Learners should build on their knowledge of Belbin's team roles to explore the characteristics of different team members and identify their own qualities and skills or traits in actual team situations.

Conflict within teams can be introduced through a group discussion, with learners drawing on their own experiences. The tutor could highlight that not all conflict is negative, and provide examples of instances when it could have a positive effect. A guest speaker could explain how they prevent and diffuse conflict situations within teams. The guest speaker should be briefed to give examples of different sources of conflict (organisation based and team member based) and how they were resolved, also explaining the challenges facing team leaders posed by multicultural and virtual teams.

As communication is such a critical factor in team success it would be useful for the tutor to show DVDs illustrating different behaviours and their impact on team cohesiveness. Learners could role play body language skills, such as delivering a message to another person using only gestures or being distracted whilst receiving a message, and then discuss how it made them feel both as a deliverer and receiver. Learners should be encouraged to draw on their work experience or any part-time employment to understand the theory and practice of effective teams as well as practical team working. Before learners give feedback to one another the tutor should explain the types of feedback (positive, negative, constructive, destructive) and the art of giving constructive feedback. Learners should be encouraged to identify potential improvements in their own use of communication techniques and team skills. Video clips can be used to show examples of good and bad communication skills when working in teams.

Finally, reflecting on own practice is a skilled task and therefore learners must be given a range of opportunities to test out their own skills, for example learners could be asked to evaluate their own performance using familiar situations, such as getting to class on time, preparing for a night out, planning for an assessment. This will help them to identify the key areas to review, and how they could evaluate the performance of the team.

Outline learning plan

The outline learning plan has been included in this unit as guidance and can be used in conjunction with the programme of suggested assignments.

The outline learning plan demonstrates one way in planning the delivery and assessment of this unit.

Topic and suggested assignments/activities and/assessment
Introduction to the unit and the programme of learning.
Theory components of leadership and motivation. Role play on interpersonal skills.
Theory components of effective teams. Group activities on stages of team development and team roles.

Topic and suggested assignments/activities and/assessment
Assignment 1: What Makes an Effective Team?
Theory components on working effectively in a team. Role play on handling conflict. Teamworking activities. Evaluation of team performance.
Assignment 2: Working in a Team
Non-supervised study time and completion of assignments.

Assessment

Learners need to meet all the pass grade criteria to pass this unit. Learners should be put into team-working situations to explore and demonstrate the skills and qualities required by different teams. A reasonable size for the teams would be four to six people.

It will be easier to provide the evidence for P1-3 after completing practical team activities, these can then be used as examples.

Learners should describe what is meant by a team, and the characteristics of an effective team, using examples to illustrate it.

P4 requires learners to work effectively in a team situation, and as a team member they will be expected to make a positive contribution, for example gather information necessary for the completion of the group task. They need not be given distinct roles. Conflict may arise naturally as the activity is happening, and how it is dealt with can be witnessed by the tutor. However, conflict should not be manufactured in a real team-working situation and if it doesn't occur naturally, learners could be assessed via role play in which they play a range of roles related to a selected theme such as negotiation or conflict resolution. Evidence of a learner's performance can be through an observation record signed by both tutor and learner, detailing what has been done and how. It is important that tutors observe discreetly and do not get involved in the team activity.

For P5, the review of the team-working activity can be presented in any appropriate written format and must be done individually. The review should incorporate the characteristics and roles within the teams, how well they worked together as a whole, causes (or possible causes) of conflict and how it was/would be resolved. Feedback between team members may arise naturally as the activity is happening, if not it should be done immediately after the team activities have finished (as a full group or in sub-groups or pairs), and witnessed by the tutor.

P6 requires learners to describe the attributes needed by a team leader. This should start with an explanation of leadership and different leadership styles, and how these impact on team performance, using well-known examples or learners' experiences. Learners should draw on leadership models such as Adair to illustrate the role of the team leader, and how a team leader can motivate members of the team and the benefits of team working.

For a merit grade, learners must extend their knowledge of the team leader role and the benefits of team working. These ideas can be taken forward to M2 as learners explain how motivation theories are used in the workplace. Learners should be able to apply their knowledge of at least two motivational theorists to different scenarios either from their own experience or using case studies. For M1, learners should address the benefits both for team members and the organisation.

For a distinction grade, learners must further extend their evidence by evaluating their performance in the team. They can make justified suggestions on overall team performance, such as improvements to communication, performance monitoring, or the problems with diffusing conflict in the team. When explaining how individuals contribute to the team's effectiveness, learners should give examples based on their chosen teams rather than just general statements about individuals. Evidence should give supported judgements

Programme of suggested assignments

The table below shows a programme of suggested assignments that cover the criteria in the assessment grid. This is for guidance only and it is recommended that centres either write their own assignments or adapt Pearson assignments to meet local needs and resources.

Criteria covered	Assignment title	Scenario	Assessment method
P1, P2, P3, P6, P7, M1, M2	Assignment 1: What Makes an Effective Team?	Brief from local business wanting to develop an in-house training programme for graduate recruits.	Presentation on the role of the team leader, leadership qualities and attributes, and the benefits of team working.
P4, P5, D1	Assignment 2: Working in a Team	Team activities such as *Apprentice*-style challenges.	Witness testimonial from tutor confirming ability to work in team towards the team's objectives, supported by slides etc. Learner review (either one-to-one with tutor or written document) on the team's effectiveness and their contribution to the activities.

Essential resources

Many of the outcomes for this unit require learners to undertake research. To enable research skills to be effectively developed they should have access to as many different forms of information as possible, for example libraries and other research facilities, including the internet.

Indicative resource materials

Textbooks

Adair J – *Effective Teambuilding: How to Make a Winning Team* (Pan Books, 1987) ISBN 0330298097

Belbin M – *Team Roles at Work* (Butterworth-Heinemann, 1996) ISBN 0750626755

Cole K – *Leadership for Dummies* (John Wiley & Sons Australia, 2008) ISBN 0731407873

Honey P – *Teams and Teamwork* (Peter Honey, 2001) ISBN 1902899156

Websites

www.bized.co.uk	Business education website including learning materials and quizzes
www.businessballs.com	Free materials, articles and ideas for team roles and leadership
www.cfa.uk.com	Council for Administration
www.cipd.co.uk	Chartered Institute of Personnel and Development
www.google.com	Search for team-working sites, articles on leadership and textbooks
www.i-l-m.com	Institute of Leadership and Management
www.managers.org.uk	Chartered Management Institute

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Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html

- books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk

Key publications:

- *Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))

- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)

- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)

- *Equality Policy* (Pearson)

- *Recognition of Prior Learning Policy and Process* (Pearson)

- *UK Information Manual* (Pearson)

- *BTEC UK Quality Assurance Centre Handbook*

All of these publications are available on our website.

Publications on the quality assurance of BTEC qualifications are also available on our website.

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please visit our website.

Additional resources

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

Any publisher can seek endorsement for their resources and, if they are successful, we will list their BTEC resources on our website.

How to obtain National Occupational Standards

Information on the Management Standards NOS can now be obtained from the pan-sector SSC:

The Council for Administration (CfA)
6 Graphite Square
Vauxhall Walk
London
SE11 5EE

Telephone: 020 7091 9620
Website: www.cfa.uk.com

Professional development and training

Pearson supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered on our website.

The support we offer focuses on a range of issues, such as:

- planning for the delivery of a new programme

- planning for assessment and grading

- developing effective assignments

- building your team and teamwork skills

- developing learner-centred learning and teaching approaches

- building in effective and efficient quality assurance systems.

The national programme of training we offer is on our website. You can request centre-based training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

BTEC training and support for the lifetime of the qualifications

Training and networks: our training programme ranges from free introductory events through sector-specific opportunities to detailed training on all aspects of delivery, assignments and assessment. We also host some regional network events to allow you to share your experiences, ideas and best practice with other BTEC colleagues in your region.

Regional support: our team of Curriculum Development Managers and Curriculum Support Consultants, based around the country, are responsible for providing advice and support in centres. They can help you with planning and curriculum developments.

To get in touch with our dedicated support teams please visit our website.

Your Pearson support team

Whether you want to talk to a sector specialist, browse online or submit your query for an individual response, there's someone in our Pearson support team to help you whenever – and however – you need:

- Subject Advisors: find out more about our subject advisor team – immediate, reliable support from a fellow subject expert

- Ask the Expert: submit your question online to our Ask the Expert online service and we will make sure your query is handled by a subject specialist.

Please visit our website at qualifications.pearson.com/en/support/contact-us.html

Annexe A

The Pearson/BTEC qualification framework for the business sector

Progression opportunities within the framework.

Level	General qualifications	Diplomas	BTEC vocationally-related qualifications	BTEC specialist qualification/ professional	NVQ/competence
8					
7				BTEC Award/Certificate/Diploma /Extended Diploma in Strategic Management and Leadership	NVQ Diploma in Management
6					
5			BTEC HND Diploma in Business	BTEC Award/Certificate/Diploma in Management and Leadership	NVQ Diploma in Management
4			BTEC HNC Diploma in Business		NVQ Certificate/Diploma in Business and Administration
3	GCE in Applied Business GCE in Business	Principal Learning in Business, Administration and Finance	BTEC Certificate/Subsidiary Diploma/Diploma/Extended Diploma in Business	BTEC Award/Certificate in Management	NVQ Certificate/Diploma in Business and Administration NVQ Certificate in Management

Level	General qualifications	Diplomas	BTEC vocationally-related qualifications	BTEC specialist qualification/ professional	NVQ/competence
2	GCSE in Business GCSE in Applied Business	Principal Learning in Business, Administration and Finance	BTEC Certificate/Extended Certificate and Diploma in Business	BTEC Award/Certificate in Team Leading	NVQ Award/Certificate and Diploma in Business and Administration NVQ Certificate in Team Leading
1		Principal Learning in Business, Administration and Finance			NVQ Award/Certificate in Business and Administration
Entry					

Annexe B

Wider curriculum mapping

Study of the Pearson BTEC Level 2 qualifications gives learners opportunities to develop an understanding of spiritual, moral, ethical, social and cultural issues as well as an awareness of citizenship, environmental issues, European developments, health and safety considerations and equal opportunities issues.

Spiritual, moral, ethical, social and cultural issues

Throughout the delivery of these qualifications learners will have the opportunity to actively participate in different kinds of decision making. They will have to consider fair and unfair situations and explore how to resolve conflict. Working in small groups they will learn how to respect and value others' beliefs, backgrounds and traditions.

Citizenship

Learners undertaking these qualifications will have the opportunity to develop their understanding of citizenship issues.

Environmental issues

Developing a responsible attitude towards the care of the environment is an integral part of this qualification. Learners are encouraged to minimise waste and discuss controversial issues.

European developments

Much of the content of the qualification applies throughout Europe, even though the delivery is in a UK context.

Health and safety considerations

Health and safety is embedded within many of the units in this qualification. Learners will consider their own health and safety at work, how to identify risks and hazards and how to minimise those risks.

Equal opportunities issues

There will be opportunities throughout this qualification to explore different kinds or rights and how these affect both individuals and communities, for example learners will consider their rights at work and the rights of employers and how these rights affect the work community.

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Issue 2 – September 2017 © Pearson Education Limited 2017

Annexe C

National Occupational Standards/mapping with NVQs

The grid below maps the knowledge covered in the Pearson BTEC Level 2 Specialist qualification in Lean Organisation Management Techniques against the underpinning knowledge of the Level 2 NVQ in Team Leading; National Occupational Standards in Business Improvement Techniques and the National Occupational Standards in Management and Leadership.

KEY

\#   indicates partial coverage of the NVQ unit

a blank space indicates no coverage of the underpinning knowledge

Units		1	2	3
National Occupational Standards in Business Improvement Techniques	1: Complying with statutory regulations and organisational safety requirements		#	
	5: Applying continuous improvement techniques (Kaizen)		#	
	9: Creating visual management systems		#	
	14: Carrying out statistical process control procedures		#	
Level 2 NVQ in Team Leading	A1: Manage personal development			#
	B5: Set objectives and provide support for team members			#
	D1: Develop working relationships with colleagues			#
	D5: Plan, allocate and monitor work of a team	#	#	#
	D10: Manage conflict in a team			#
	E11: Communicate information and knowledge	#	#	#
National Occupational Standards in Management and Leadership	Unit C1: Support team members in identifying, developing and implementing new ideas	#		

Annexe D

Mapping to Level 2 Functional Skills

Level 2	Unit number		
English — Speaking and Listening	**1**	**2**	**3**
Make a range of contributions to discussions and make effective presentations in a wide range of contexts	3	3	3
English — Reading			
Compare, select, read and understand texts and use them to gather information, ideas, arguments and opinions	3	3	3
English — Writing			
Write documents, including extended writing pieces, communicating information, ideas and opinions, effectively and persuasively			3
Mathematics — learners can:			
Understand routine and non-routine problems in a wide range of familiar and unfamiliar contexts and situations			
Identify the situation or problem and the mathematical methods needed to tackle it			
Select and apply a range of skills to find solutions			
Use appropriate checking procedures and evaluate their effectiveness at each stage			
Interpret and communicate solutions to practical problems in familiar and unfamiliar routine contexts and situations			
Draw conclusions and provide mathematical justifications			
ICT — use ICT systems			
Select, interact with and use ICT systems independently for a complex task to meet a variety of needs	3	3	
Use ICT to effectively plan work and evaluate the effectiveness of the ICT system they have used		3	
Manage information storage to enable efficient retrieval			
Follow and understand the need for safety and security practices			
Troubleshoot			

Level 2	Unit number		
ICT — find and select information	**1**	**2**	**3**
Select and use a variety of sources of information independently for a complex task			3
Access, search for, select and use ICT-based information and evaluate its fitness for purpose	3		
ICT — develop, present and communicate information			
Enter, develop and format information independently to suit its meaning and purpose including: • text and tables • images • numbers • records	3	3	3
Bring together information to suit content and purpose	3	3	3
Present information in ways that are fit for purpose and audience	3	3	3
Evaluate the selection and use of ICT tools and facilities used to present information	3	3	
Select and use ICT to communicate and exchange information safely, responsibly and effectively including storage of messages and contact lists			

Annexe E

Unit mapping overview

BTEC Level 2 short course Certificate in Lean Organisation Management Techniques legacy (specification end date 31/08/2010)/new versions of the BTEC Level 2 Specialist qualifications in Lean Organisation Management Techniques (specification start date 01/09/2010) – Level 2 BTEC Certificate in Lean Organisation Management Techniques

Old units / New units	Unit 1	Unit 2	Unit 3
Unit 1	X		
Unit 2		X	
Unit 3			X

KEY

P – Partial mapping (some topics from the old unit appear in the new unit)

F – Full mapping (topics in old unit match new unit exactly or almost exactly)

X – Full mapping + new (all the topics from the old unit appear in the new unit, but new unit also contains new topic(s))

Specification – Pearson BTEC Level 2 Certificate in Lean Organisation Management Techniques –
Issue 2 – September 2017 © Pearson Education Limited 2017

Annexe F

Glossary of Accreditation Terminology

The following information about this qualification can also be found on the Pearson website.

Accreditation start/end date	The first/last dates that Pearson can register learners for a qualification.
Certification end date	The last date on which a certificate may be issued by Pearson.
Credit value	All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.
Guided Learning Hours (GLH)	Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.
Learning Aims Database	Link to the Learning Aims Database, which features detailed funding information by specific learning aim reference.
Learning Aim Reference	Unique reference number given to the qualification by the funding authorities on accreditation.
Level	All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.
Performance tables	This qualification is listed on the Department for Education (DfE) website School and College Achievement and Attainment Tables (SCAAT) as performance indicators for schools and colleges.
Qualification Number (QN)	Unique reference number given to the qualification by the regulatory authorities on accreditation.
Register of Regulated Qualifications	Link to the entry on the Register of Regulated Qualifications for a particular qualification. This database features detailed accreditation information for the particular qualification.
Section 96	Section 96 is a section of the Learning and Skills Act 2000. This shows for which age ranges the qualification is publicly funded for under-19 learners.

Section 97	Section 97 is a section of the Learning and Skills Act 2000. This shows whether the qualification is publicly funded for learners aged 19 and over.
Title	The accredited title of the qualification.
UCAS points	This/these qualification(s) is/are listed on the Universities and Colleges Admissions Service (UCAS) tariff for those wishing to progress to higher education.

Annexe G

BTEC Specialist and Professional qualifications

BTEC qualifications on the NQF	Level	BTEC Specialist and Professional Qualifications	BTEC qualification suites
BTEC Level 7 Advanced Professional Qualifications BTEC Advanced Professional Award, Certificate and Diploma	**7**	**BTEC Level 7 Professional Qualifications** BTEC Level 7 Award, Certificate, Extended Certificate and Diploma	
BTEC Level 6 Professional Qualifications BTEC Professional Award, Certificate and Diploma	**6**	**BTEC Level 6 Professional Qualifications** BTEC Level 6 Award, Certificate, Extended Certificate and Diploma	
BTEC Level 5 Professional Qualifications BTEC Professional Award, Certificate and Diploma	**5**	**BTEC Level 5 Professional Qualifications** BTEC Level 5 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 5 Higher Nationals** BTEC Level 5 HND Diploma
BTEC Level 4 Professional Qualifications BTEC Professional Award, Certificate and Diploma	**4**	**BTEC Level 4 Professional Qualifications** BTEC Level 4 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 4 Higher Nationals** BTEC Level 4 HNC Diploma
BTEC Level 3 Qualifications BTEC Award, Certificate, Extended Certificate and Diploma	**3**	**BTEC Level 3 Specialist Qualifications** BTEC Level 3 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 3 Nationals** BTEC Level 3 Certificate, Subsidiary Diploma, Diploma and Extended Diploma

BTEC qualifications on the NQF	Level	BTEC Specialist and Professional Qualifications	BTEC qualification suites
BTEC Level 2 Qualifications BTEC Award, Certificate, Extended Certificate and Diploma	**2**	**BTEC Level 2 Specialist Qualifications** BTEC Level 2 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 2 Firsts** BTEC Level 2 Certificate, Extended Certificate and Diploma
BTEC Level 1 Qualifications BTEC Award, Certificate, Extended Certificate and Diploma	**1**	**BTEC Level 1 Specialist Qualifications** BTEC Level 1 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 1 Qualifications** BTEC Level 1 Award, Certificate and Diploma (vocational component of Foundation Learning)
	E	**BTEC Entry Level Specialist Qualifications** BTEC Entry Level Award, Certificate, Extended Certificate and Diploma	**BTEC Entry Level Qualifications (E3)** BTEC Entry Level 3 Award, Certificate and Diploma (vocational component of Foundation Learning)

NQF = National Qualifications Framework

For most qualifications on the **NQF**, the accreditation end date is normally 31 August 2010 or 31 December 2010.

Qualification sizes	
Award	1-12 credits
Certificate	13-36 credits
Diploma	37+ credits