



UNIVERSITY OF LEEDS

**WASTE LEAN TIME EFFICIENT**  
**REDUCE TIME PROCESS**  
**STUDENT WORKFLOW**  
**TOOLS MANAGEMENT**  
**QUALITY TIME**  
**LEAN**  
**PROCESS COLLEAGUES**  
**HIGHER CUSTOMER**  
**EDUCATION APPROACH IMPROVE**

Student Education Service

**LEAN COMPETENCY FRAMEWORK**



## FOREWORD

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**Lean Methodology engages everyone, every day, in solving problems and eliminating waste from business processes. This is why we refer to Lean Ways of Working and want these to become second nature for how we approach improvement in the Student Education Service.**

Lean focuses on the needs of key stakeholders for the process; in our case our students, colleagues and Government bodies, keeping *their* needs in mind. The approach involves and engages those who do the work in the re-design of the processes, making changes practical and logical. Once changes have been made, the impact of the changes are measured to ensure benefits are achieved and the improvement cycle continues.

A skilled network of Lean Practitioners is required to deliver Lean projects across SES to help us improve the way we do things, and team members to focus on smaller, local improvements. The Lean Competency Framework details the capabilities required for this network. Drawing from other HE recognised competency systems, it defines the learning principles and outcomes anticipated and enables learning to be taken from the classroom and applied in practice.

The SES Lean Competency Framework has 5 levels as shown in the House of Lean diagram in the next section. **All SES staff** will attend Lean Introduction training to ensure the service has a good understanding of the approach and can contribute to Lean projects. The direction taken with Lean development after that depends upon a number of factors. Each competency provides more information to help with identification of appropriate competencies for you or your staff.

To progress between certain levels involves assessment, however the service is not only interested in what was achieved, but how it was achieved. Lean projects don't always deliver the results expected, but they do provide a learning opportunity. This ability to reflect, adjust and adapt is a feature of Lean Ways of Working that is applied to individuals and the processes with which they work.

Appropriately scaled training is provided for each competency level. Training alone will not enable the results required by the service. What will make a difference is taking action. Support will be provided for Lean development and delivery of Lean projects. You will find:

- Lean networks which meet regularly to explore, engage and learn from each other
- Resources to learn from and contribute to
- Coaches to support project delivery and Lean development objectives
- Modular training to select from to meet Lean development needs
- Learning events and peer networks for additional support

The SES Lean Competency Framework is aligned to a recognised competency framework. The approach we are taking should enable us to pursue accreditation for the Introduction, Lean Practitioner and Lean Advanced Practitioner levels should this be required. This would require significant effort to achieve. So, for now, the focus is on development of our people and achieving results within the service.

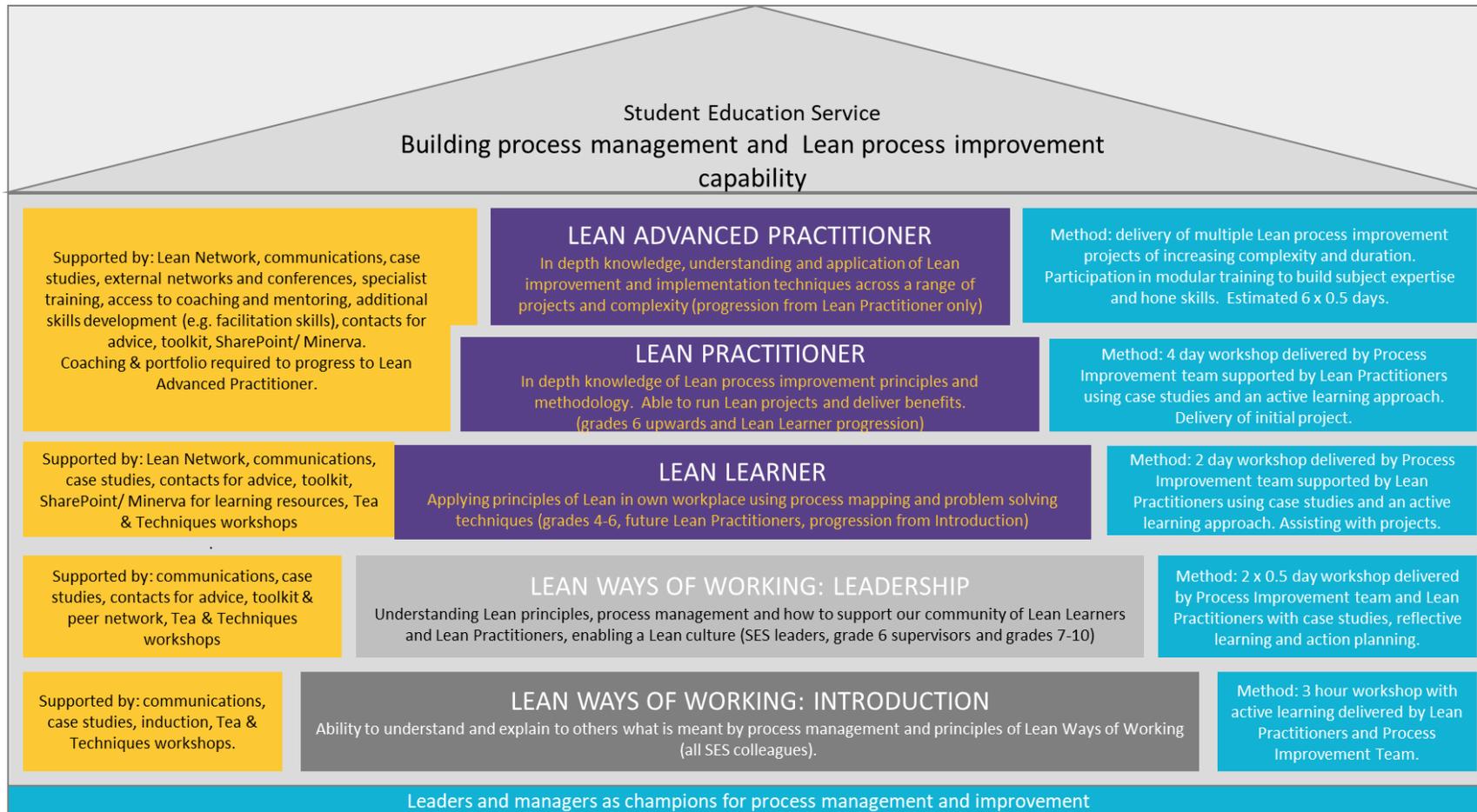
### Use of the Guide

This guide can be accessed when considering Lean development journeys for yourself or your team members. It can also be used as a reference document for Lean Learners and Lean Practitioners when considering what they need to demonstrate to be able to progress



to the next competency level. Additional information including learning outcomes for workshops will be available when enrolling on training.

Figure 1: House of Lean





## LEAN WAYS OF WORKING: INTRODUCTION

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**The Student Education Service has a mission to increase the awareness and capability of colleagues in relation to continuous improvement philosophy and methodology. This is so that we can support process improvement activity related to transformational change programmes, and business as usual activity.**

Lean is an approach which relies on participation of colleagues in mapping processes and rooting out waste i.e. things that don't add value to our students, our colleagues and other customers such as Government bodies. The Introduction training will help all of our colleagues understand the role they have to play in making improvement happen across the service. The Introduction will share how to contribute to and get the most out of Lean workshops. It demonstrates the collaborative approach which relies upon the people who do the work to uncover issues and identify solutions.

Attendance at the Introduction is a pre-requisite to be able to access further Lean training shown in the Progression section below. It is planned that **all SES staff** will attend by the end of 2020.

### KNOWLEDGE AREAS

- Origins and evolution of Lean thinking and continuous improvement
- Underpinning and related concepts and approaches
- Key Lean/continuous improvement (CI) principles and frameworks
- Core elements of Lean and CI
- Awareness of the human and strategic dimensions of Lean thinking

### APPLICATION

Evidence of practical competency is not required at this level, however participants are encouraged to engage with their local Lean Practitioners, the Process Improvement Team and to get involved through submission of improvement ideas.

### ATTENDANCE

Communications will be issued via Teams to inform you of when the three hour Lean WoW: Introduction workshops are running. Booking is via links provided to Eventbrite.

### PROGRESSION

Participation may lead to:

- Lean Ways of Working: Leadership for SES leaders who are supervisor grade 6 and manager grades 7-10
- Lean Learner for grades 4-6
- Lean Practitioner for grades 6-10

Participation in Lean Learner, Lean Practitioner and Lean Advanced Practitioner should be consistent with individual development objectives and thus is subject to line manager approval.



## LEAN WAYS OF WORKING: LEADERSHIP

The two, half day Leadership modules provide Managers and Supervisors with an understanding of how Lean Ways of Working can be used as an approach to deliver process improvement across the service. It considers the culture and the behaviours that Managers and Supervisors can demonstrate that will ensure that benefits can be realised. Practical tools are shared so that participants may return to their workplace with things they can deploy immediately to enable improvement.

Lean expertise is achieved through undertaking significant Lean projects over many years and involves a strategic dimension. Given the early stage of establishment of a Lean culture within SES, the training and development approach is not addressing this definition of Lean Leadership.

The training provides a forum in which Managers and Supervisors can draw on their understanding of Lean from having attended Lean Ways of Working: Introduction and perhaps having participated in Lean workshops, and link this to other initiatives, training and support mechanisms across the service. These might include:

- Service Management framework
- Leadership in Practice modules including coaching others
- Delivering results Process Management Framework
- Delivering Results: Project Management

### KNOWLEDGE AREAS

Lean Leadership competency within SES focuses on the ability to:

- Understand critical success factors for leading a learning and improvement culture.
- Understand the behaviour of people in periods of change.
- Use of key people skills or 'soft' skills to effect change, lead, coach, participate and communicate.
- Use Lean tools with team members and colleagues to support local improvements.

Leaders undertaking the role of Sponsor for Lean projects will acquire additional knowledge and skills in order to:

- Measure and track progress of Lean projects.
- Coach or mentor Lean Practitioners and Lean Learners to undertake projects.
- Identify appropriately sized projects for Lean Learners and Lean Practitioners.
- Align project identification to the strategic aims of the organisation.

Additional learning interventions will be provided to enable these skills.

### APPLICATION

Evidence of practical competency is not required for Lean WoW: Leadership level.

### ATTENDANCE

Booking onto the two half day modules is via Eventbrite links released through Teams and a pre-requisite is attendance at Lean WoW: Introduction.

## LEAN WAYS OF WORKING: LEAN LEARNER

This competency has been determined as part of the developmental journey to Lean Practitioner. The focus of this competency level is the delivery of projects of a small size and duration that have stakeholders within the immediate team, but not beyond. It is anticipated that team members achieving this competency level will work with simple processes. They may also support Lean Practitioner projects and undertake data assembly and analyses where abilities permit.

### KNOWLEDGE AREAS

- Purpose, customer/stakeholder value identification and understanding
- Mapping techniques
- Quality approaches
- Problem solving techniques
- Basic data gathering/statistical techniques
- Planning and communication techniques

### APPLICATION

Lean Learner application focuses on the ability to:

- Understand the likely customer needs for local processes and ways to verify them
- Understand business processes in action
- Map known processes e.g. for own Functional area and have them verified

- Understand problem solving techniques and be able to contribute in workshops run by others
- Identify baseline measures for processes in own Functional area and measure impact of change
- Prepare a project proposal with sufficient case to gain agreement to proceed
- Plan own project understanding basic project management terminology including risks, issues, objectives and outcomes
- Identify results achieved from making changes and be able to explain these to colleagues

Assessment will be undertaken in order to determine whether team members working at this level should advance to Lean Practitioner Level following additional training.

### ATTENDANCE

Line Managers will be encouraged to nominate team members to be Lean Learners through contacting the Process Improvement Team by emailing [processimprovement@leeds.ac.uk](mailto:processimprovement@leeds.ac.uk). Team members will be included in a waiting list and notified when workshop dates become available. Participants must have completed the Lean Ways of Working: Introduction before attending this two day course.

## LEAN WAYS OF WORKING: LEAN PRACTITIONER

This competency level is intended to be the main source of knowledge and resource for process improvement projects to be undertaken across the service. The Lean Practitioners will be equipped with training and support mechanisms including coaching to deliver benefits to the service through systematically removing waste. The level of Lean Practitioner is a highly regarded achievement within many organisations and the SES will be no exception in this.

### KNOWLEDGE AREAS

As per the Lean Learner competency list, but to a deeper level:

- Purpose, customer/stakeholder value identification and understanding
- Mapping techniques
- Quality approaches
- Problem solving techniques
- Basic data gathering/statistical techniques
- Planning and communication techniques

Plus the following:

- Demand and capacity analysis and understanding techniques
- Project prioritisation

### APPLICATION

The Lean Practitioner competency focuses on the ability to:

- Analyse a process/value stream through the application of mapping and other diagnostic techniques.

- Use problem-solving techniques to identify and define problems and issues and improve processes and quality.
- Understand how to improve and plan for improvements as a result of diagnostic activities.
- Undertake activities and use techniques to understand customer value and the 'voice of the customer'
- Recognise and map different types of value streams in organisations to create the 'current state'.
- Map processes in organisations.
- Understand variation
- Solve problems
- Develop 'future state' maps
- Undertake basic data gathering and statistical techniques to help diagnose and solve problems
- Understand customer/stakeholder value and analyse customer demand data
- Understand how to use the project hopper and decision making criteria for project prioritisation

### ATTENDANCE

An application process will be communicated via Teams when additional opportunities for Lean Practitioner are available.

Participants must have completed the Lean Ways of Working: Introduction before attending this four day course.

Where participants are progressing from Lean Learner to Lean Practitioner, attendance at **modules** within the four day course will be required.



## LEAN WAYS OF WORKING: LEAN ADVANCED PRACTITIONER

**This competency level recognises the significant achievements of Lean Practitioners which will have been delivered over a number of years, usually in excess of three. The Lean Practitioners aiming to progress to Lean Advanced Practitioner will be able to demonstrate having delivered multiple Lean projects of varying scale, duration and complexity. They will have an excellent understanding of organisational change and have planned and deployed a variety to meet the specific needs and circumstances of their stakeholders in order to ensure project success.**

The Lean Advanced Practitioners will be able to design solutions with their stakeholders that utilise organisational resources to an optimum. They will have effective project management skills in order to deliver changes of long duration and high complexity. They will be known as influential within the organisation, using communications effectively to enable project success. They will have a network of Lean Learners and Lean Practitioners to draw on and pay back into through coaching and mentoring.

Progression to Lean Advanced Practitioner is subject to assessment panel and completion of learning modules.

### KNOWLEDGE AREAS

- Workplace organisation and optimisation techniques
- Standard operations
- Visual management and performance measures
- Scheduling, and capacity planning
- Enablers for flow
- Management and planning
- People, teams and sustainability

### APPLICATION

Application focuses on:

- Applying workplace organisation techniques

- Implementing standard work principles and tools
- Using visual management and performance measures for effective communication and control
- Implementing capacity planning techniques and scheduling approaches
- Applying tools to enable flow
- Applying quality tools
- Applying techniques to understand the nature of demand and manage it effectively.
- Using policy deployment techniques to plan, measure and communicate
- Using key people or 'soft' skills to effect change, lead, coach, participate and communicate

### ATTENDANCE

Lean Practitioners will have a development plan and attend learning modules to support their plan. These modules will be a combination of sessions offered via Teams and booked using Eventbrite, plus Lean Network and additional short, learning events.