##### How to Complete:

* Replace the instructions and guidance text in the grey shaded boxes with your response for each section and check boxes where appropriate; attach or embed supporting documents where appropriate.
* This form can be used as a working document, with part completed versions submitted for comment and review. A Progress Checklist will be issued each time a draft is submitted.
* State if the information required is not applicable in your circumstances.
* Note that several tables, forms and templates that need to be completed are embedded in this document and can be opened and used. These are also available on the LCS website.
* Refer to the GUIDE TO SME ACCREDITATION for more information on the accreditation process.

# Organisation & Background

## Organisation Name

|  |
| --- |
| The organisation entity - eg company - that will be accredited. |

## Portfolio Author

|  |
| --- |
| The person responsible for writing the submission and to whom queries and comments can be addressed. |

## Organisation Background

|  |
| --- |
| A brief description of the organisation, indicating its formation, ownership main activities, size and any relevant strategic information. |

## Organisation’s Use of the LCS

|  |
| --- |
| Tick all boxes below that apply and provide explanatory text here if necessary. |
| Own staff training Client staff training Public training Supplier training Home country training International training |

## LCS Levels to Which Training System Aligned

|  |
| --- |
| Tick all boxes that apply below and provide explanatory text here if necessary. Note that you can plan to increase the number of levels over time as the training system matures. |
| 1a 1b 1c 2a 2b |

## Certificates Issue Forecast

|  |
| --- |
| An estimate of certificates to be issued over the two year accreditation period |

# Course Information

## Courses Details

For each course you deliver, list in a table below its title, aim, learning outcomes, topics covered and learning hours. Copy the table as required for additional courses.

Learning outcomes are statements about what participants should know and/or be able to do at the end of the course. In learning time, show the number of contact hours and how these are organised over a particular time. Learning time can include class based face-to-face teaching, web based learning, post course activities, assessments, self-study, follow up reading and research, and work based learning.

|  |  |
| --- | --- |
| Course title 1: | x |
| Aim: | x |
| Learning Outcomes: | x |
| Topics covered: | x |
| Learning hours: | x |

## Course alignment with LCS framework

|  |
| --- |
| Briefly describe how the course(s) aligns with one or more of the seven levels of the Lean Competency System. |

## LCS alignment matrix

Complete an LCS alignment matrix. This shows how the training links to the levels of lean competency. A copy of the matrix is embedded[[1]](#footnote-1) below. Word and Excel versions are available – the latter is for larger or more complex systems.

Check box to indicate an alignment matrix is attached

or

Check box to indicate an alignment matrix is embedded below

|  |  |
| --- | --- |
| Embed document here ->  (blank templates included) |  |

# Training Material & Teaching

## Training Material Source & Development

|  |
| --- |
| Tick all boxes that apply below and provide explanatory text here if necessary. |
| Developed in house Provided by or adapted from external trainers/consultants Developed from education and training courses attended Other |

## Training Material Examples

Provide representative examples of presentations, workbooks, guides and other handouts used in courses.

Check box to indicate example materials are attached

or

Check box to indicate example materials are embedded below

|  |  |
| --- | --- |
| Embed documents here -> |  |

List the documents attached or embedded in the box below:

|  |
| --- |
|  |

## teaching style

|  |
| --- |
| Tick all boxes that apply below and provide explanatory text here if necessary. |
| Classroom based teaching Workshops Online Self study Workplace based teaching Other\_\_\_\_\_\_\_\_\_\_\_\_\_ |

## practical activities

|  |
| --- |
| Describe the practical activities, simulations, interactions used in teaching |

## Class Size

|  |
| --- |
| Describe the approach taken to class sizes, including the expected number in groups. |

# Assessment

Learners need to demonstrate both knowledge and practical capability for each LCS level through which they progress, except for Level 1a, where only the knowledge aspect applies. Demonstrating knowledge is achieved through an online test, which for SME accreditation is organised centrally by the LCS using its Assessment Centre. The accredited organisation is responsible for assessing practical capability for all accreditation types.

For LCS levels 1b and 1c, evidence of a learner’s practical capability can be in a variety of formats. The learner should have played a meaningful role in the activity, usually as part of a team with a specific role or on an individual basis. The evidence should be endorsed by an appropriate manager/stakeholder to signify it is an accurate account of what happened.

For LCS Level 2, the evidence of the practical capability should be more formal, through, for example, an assessed project implementation report, clearly demonstrating aspects such as leadership, planning and advanced lean knowledge.

The approach should be consistent with key assessment LCS principles:

i) There should be a knowledge test for each LCS level where a certificate is awarded.

ii) There should be implementation evidence linked to courses (except 1a).

iii) An appropriate training course should be delivered for each LCS level where a certificate is awarded.

## Overall Approach to Practical Assessment

|  |
| --- |
| Describe the assessment approach for evidencing practical competence. |

## Types of Practical assessments used

|  |
| --- |
| Tick all boxes that apply below and provide explanatory text here if necessary. |
| A3 reports Project reports Workbooks Project portfolio Diary Interviews Other\_\_\_\_\_\_\_\_\_\_\_\_\_ |

## Assessment Examples

Provide examples of assessments – eg A3 templates, proformas, interview guides etc

Check box to indicate example assessments are attached

or

Check box to indicate example assessments are embedded below

|  |  |
| --- | --- |
| Embed documents here -> |  |

## Methods used to record and assess Level 2 implementation

|  |
| --- |
| For example, project qualifying criteria, the nature of project reports, assessment methods and criteria. |

# Course Teaching

At present, it Is not mandatory for those who deliver training to hold LCS or similar qualifications and an assessment of overall system teaching capability is made via the information submitted (see below). However, there are clear advantages for trainers to be formally qualified and the LCS Approved Prior Learning & Experience route can be used to certify experienced delivery personnel at [LCS Level 2](http://www.leancompetency.org/accreditation/lcs-level-2-certification/).

## Delivery capability matrix

A delivery capability matrix should be completed and included in the portfolio. This indicates the relative strength of the delivery resources across the key LCS knowledge levels and can be produced through a staff self-assessment exercise. A template for this is embedded below.

Check box to indicate a Delivery Capability Matrix is attached

or

Check box to indicate a Delivery Capability Matrix is embedded below

|  |  |
| --- | --- |
| Embed document here  (blank template attached) |  |

## Trainers Biographical Information

Provide a list of those who will deliver training along with biographical information for each containing relevant information about their lean work experience/teaching credentials. A template for this is embedded below.

☐ Check box to indicate biographical Information is attached

or

☐ Check box to indicate biographical Information is embedded below

|  |  |
| --- | --- |
| Embed document here  (blank template attached) |  |

## External Delivery Resources

|  |
| --- |
| Provide a statement of the policy towards using external delivery resources (if applicable). |

# E Learning

If applicable

## Which elements are delivered online?

|  |
| --- |
| Detail which parts of the training use the web |

## Learning platform used

|  |
| --- |
| Detail the learning management system, software, or e-learning provider used for e-learning |

## Learning path

|  |
| --- |
| Provide an outline of how learners progress through the e-learning. For example, course entry, interaction with material, navigation through specific modules, specific activities undertaken, tests taken |

## Provide access to the training website (if available)

|  |
| --- |
| url |

## Online Material Examples

|  |
| --- |
| Provides examples or screenshots |

# Quality Assurance & Continuous Improvement

## Admitting course participants

|  |
| --- |
| Describe the approach to selecting participants for courses, for example, the prerequisites required, experience, role and qualifications (If applicable) |

## Indicate how training is evaluated by participants

|  |
| --- |
| Tick all boxes that apply below and provide explanatory text here if necessary. |
| End of course questionnaire (physical) End of course questionnaire (web)  Course group wrap up sessions Informal, ad hoc feedback Other\_\_\_\_\_\_\_\_\_\_\_\_\_ |

## Examples of Evaluation Questionnaires

Provide examples of any evaluation questionnaires used.

☐ Check box to indicate evaluation questionnaire is attached

or

☐ Check box to indicate evaluation questionnaire is embedded below

|  |  |
| --- | --- |
| Embed document here |  |

## Courses Continuous Improvement Process

|  |
| --- |
| Indicate the measures that demonstrate that there is a continuous improvement process in place after course evaluation and review. |

## International Delivery - Coordination & Management

|  |
| --- |
| Where a training system is to be used on an international scale, detail the management control approach taken to ensure consistency in the delivery of the programme and the maintenance of standards.  Detail the regions/countries in which the training system will operate, indicating how it is resourced, managed, levels to which it trains, language capability and any other relevant information. |

# Training Support & Administration

## Training Facilities

|  |
| --- |
| Describe the facilities that will be used for training. This may not be applicable to training companies that use client facilities. |

## Training Programme Management & Support

|  |
| --- |
| Describe how the training will be managed and supported. |

## Training Records

|  |
| --- |
| Indicate how records are stored so that there is a secure history of a learners training history (eg date courses taken, assessments taken, certificate awarded, etc.) |

## Training Records Examples

Provide an example of a training record (eg screenshot, spreadsheet, etc.)

☐ Check box to indicate training record example attached

or

☐ Check box to indicate training record example is embedded below

|  |  |
| --- | --- |
| Embed document here  (blank template attached) |  |

# Consent and Date

I consent to Lean Competency Services Ltd collecting and storing data from this form.

03/03/2018 = Date of Submission

1. To embed a file in this document 1) copy the file icon; 2) place cursor in destination location; 3) Click paste special; 4) select Microsoft Excel/Word Worksheet Object and check Display as Icon; 5) Click OK [↑](#footnote-ref-1)