

# National Occupational Standards

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## Footwear, Leathersgoods & Leather Production

February 2013

Updated 12.02.2014

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## Introduction

The footwear, leathersgoods and leather production sector covers the leather processing, footwear and leathersgoods supply chain. The following activities are included:

- Fellmongery
- Manufacture of leather clothing
- Dressing and dyeing of fur
- Tanning and dressing of leather
- Manufacture of luggage, handbags and leather accessories including gloves
- Manufacture of footwear
- Wholesale of hides, skins and leather
- Wholesale of footwear
- Repair of boots, shoes and other articles of leather

The key activities in terms of size are manufacture of footwear, repair of footwear and manufacture of leathersgoods. The footwear, leathersgoods and leather production sector in general is unevenly distributed across the UK, reflecting the pattern of traditional industry specialisms at country and regional level - the three English regions of the East Midlands, North West and London together account for around a half of total employment. There are also strong concentrations of activity at sub-regional level; for example, the county of Northamptonshire accounts for around two-thirds of employment in its parent region of the East Midlands. The four county / unitary authority areas of Northamptonshire, Lancashire, Walsall and Somerset account for 30 per cent of total employment in this sector.

The key characteristics of the sector in terms of its distribution at regional level are as follows:

- The bulk of the remaining leather production capacity is found in the South West of England and in Scotland (Renfrewshire)
- Leathersgoods manufacturing is mainly focused on the West Midlands and the South West
- The majority of employment in footwear manufacturing is concentrated in the East Midlands, with much of the remainder in the North West
- Repair activity is fairly evenly distributed across the UK.

## Footwear, Leathersgoods & Leather Production Standards format

The Standards for Footwear, Leathersgoods & Leather Production are formatted to make it easy for readers to identify what knowledge they need to have and what they need to be able to do carry out such work. Each Standard contains the following information:

- Title - The footwear, leathersgoods or leather production function (types of activity) to which the Standard applies.
- Overview - A broad description of the function to which the Standard refers. It places the function and the Standard in context for the reader, and helps the reader see who the Standard might apply to.

- **Performance Criteria** - Performance Criteria detail what individuals must be able to do in order to be competent in a Standard. Each performance criteria specifies the quality of a performance outcome that enables performance to be judged. The function to which a Standard applies is not the same as a job. It usually takes a number of Standards to cover the demands of a job.
- **Knowledge and Understanding** - This section details the knowledge that is needed in order to fulfill the requirements of the Standard. Some knowledge is very specific to the Standard, whilst other knowledge may be broader and may apply to more than one Standard. The section is entitled 'knowledge and understanding' to highlight the need for individuals to understand concepts and ideas, specific facts and ways of working (*know what* and *know how*) in order to complete aspects of their work successfully.

## Complementary Standards

The following standards have been imported into the Footwear, Leathersgoods and Leather Production suite. These standards, developed by Creative Skillset or other Standards Setting Bodies, are to be read in conjunction with this suite and cover the areas of performance assessment, maximising sales and management practices.

Ref.	Title	Owner
SKSMSP1	Look after the work area	Creative Skillset
SKSMSP2	Maintain the quality of production working with textiles, leather and materials	Creative Skillset
CFAM&LAA2	Develop your knowledge, skills and competence	Skills CFA
CFAM&LBA9	Develop operational plans	Skills CFA
CFAM&LBA3	Lead your team	Skills CFA
CFAM&LBB4	Ensure compliance with legal, regulatory, ethical and social requirements	Skills CFA
CFAM&LDB2	Allocate work to team members	Skills CFA
CFAM&LDB3	Quality assure work in your team	Skills CFA
CFAM&LDD2	Develop and sustain productive working relationships with stakeholders	Skills CFA
CFAM&LFA3	Manage business processes	Skills CFA
CFACSB10	Organise the delivery of reliable customer service	Skills CFA
CFACSC5	Monitor and solve customer service problems	Skills CFA
PROHSS6	Conduct a health and safety risk assessment of a workplace	Proskills
LSILADD07	Facilitate individual learning and development	Learning and Skills Improvement Service

## Uses of Standards

Standards are nothing unless they are put into practice. They offer a framework for good employment practice from induction to job descriptions to managing your own learning and development. The rounded picture of work that the Standards give may help to

produce entrants who are attuned to the way the sector operates and the demands they will have to meet, or improve the skill level of existing employees.

Standards are a tool to boost the more effective processes of learning and working that the sector has developed and to steer less effective processes in a positive direction.

## Footwear, Leathergoods & Leather Production Functional Map

To design, develop, produce and supply footwear and leathergoods to meet customer demands

Design and develop products to meet customer demand	Leather processing	Bespoke / orthopaedic footwear manufacture	Footwear manufacture	Leathergoods (including Saddlery) manufacture	Footwear repair
<p>Conduct market research</p> <p>Create story boards / design briefs</p> <p>Design by hand / CAD</p> <p>Create and test samples / prototypes</p> <p>Create final patterns via hand or CAD to produce agreed products</p> <p>Deliver design services</p>	<p>Source materials and components</p> <p>Processing hides</p> <p>Finish hides</p> <p>Grade hides and materials</p> <p>Measure and despatch hides</p>	<p>Identify client needs and suitable product type</p> <p>Bespoke footwear preparatory operations</p> <p>Lasting and making bespoke footwear</p> <p>Bespoke footwear shoe room techniques</p> <p>Fit the shoe to the client</p>	<p>Source materials</p> <p>Footwear production preparatory operations</p> <p>Lasting, making and closing shoes</p> <p>Footwear finishing</p> <p>Shoe room activities</p>	<p>Prepare components for leathergoods</p> <p>Manufacture leathergoods</p> <p>Customer service</p>	<p>Repair Footwear</p> <p>Produce duplicate keys</p> <p>Service and repair watches</p> <p>Engrave items</p> <p>Sell shoe care and ancillary products</p>

## SKSHS1 – Health, safety and security at work

This standard is for all those personnel who take responsibility for their own health, safety and security in the workplace and is about using the correct procedures to prevent, control and minimise risk to yourself and others in the workplace. You will be required to take appropriate action in the event of an accident or incident within your own area of responsibility.

### Overview:

You will be responsible for the health, safety and security of yourself and others in the workplace, taking action in the event of any potential hazards and security breaches to make the workplace safe.

The job role may involve:

1. contributing to the safety and security in the workplace
2. taking action in the event of an incident
3. raising the alarm
4. following correct procedures for shut down and evacuation
5. using emergency equipment correctly and safely
6. monitor the workplace for hazards

### Performance Criteria:

- P1 identify the location and type of accident / incident
- P2 recognise the sound/s of alarms
- P3 raise the alarm(s)
- P4 take action in the event of fire, emergencies or accidents
- P5 recognise and rectify where possible potential hazards in the workplace
- P6 follow the organisational procedures for shut down and evacuation when required
- P7 use, maintain and replace emergency equipment and protective clothing and equipment
- P8 monitor the workplace for hazards
- P9 report hazards which cannot be rectified immediately
- P10 use correct handling and lifting techniques
- P11 report any security breaches
- P12 follow organisational procedure for any loss of property
- P13 safely handle and move waste and debris
- P14 store materials and equipment in line with manufacturer's and organisational requirements
- P15 identify and correct (if possible) malfunctions in machinery and equipment
- P16 recognise and report any service malfunctions that cannot be rectified
- P17 recognise and report any hazardous substance leaks (contamination, spillages or emissions)
- P18 complete all forms, records, reports and other documentation
- P19 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 where alarms, emergency exits, escape routes, emergency equipment and assembly points are located
- K2 what the alarm sounds like
- K3 what hazardous substances are used in the workplace
- K4 methods of making safe or reducing the danger of hazardous substances in the event of an accident
- K5 how to handle and store hazardous substances in line with COSHH (Control of



Substances Hazardous to Health)

- K6 what the most likely accidents and emergencies in the workplace are and how to respond to them
- K7 who the nominated first aiders are
- K8 how to respond to loss of property
- K9 your responsibility to health, safety and security in the workplace
- K10 environmental requirements

# SKSFDT1 – Footwear product development

## Overview:

This standard is for technicians who are responsible for interpreting footwear designs and is about designing new and/or adapting existing patterns, sourcing materials, moulds and factories to manufacture footwear products to a required quality.

You will be producing and costing samples for customers prior to production based on footwear designs and ensuring the footwear meets customer expectations. You will need to know about foot anatomy, how to design and grade lasts and footwear construction methods.

The job role may involve:

1. sourcing materials, moulds and factories
2. creating samples
3. liaising with relevant people in different organisations/departments as necessary

## Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 follow specification to interpret footwear designs
- P3 design new or adapt existing footwear pattern to meet the initial footwear design
- P4 source materials for the production of the footwear
- P5 adapt existing footwear moulds, procuring new moulds where required
- P6 source factories with capability to manufacture product to quality required
- P7 create pattern and engineer as required
- P8 create footwear sample
- P9 cost the footwear sample
- P10 liaise with external partners on sample production (i.e. factories, suppliers) to ensure the footwear produced meets with customer expectations in terms of quality and deadlines
- P11 comply with written instructions
- P12 complete forms, records and other documentation
- P13 work to legal requirements, standards and regulations, policies, procedures and professional codes

## Knowledge and Understanding:

- K1 foot anatomy
- K2 principles of last designing
- K3 principles of last grading
- K4 footwear sizing systems
- K5 last construction
- K6 material types and characteristics (leather, synthetic and textile)
- K7 footwear construction methods
- K8 foot comfort requirements
- K9 footwear manufacturing processes
- K10 legal/labelling requirements regarding manufacturing materials & chemicals
- K11 statutory responsibilities under health, safety and environmental legislation and regulations
- K12 the organisation's rules, codes, guidelines and standards
- K13 equipment operating procedures
- K14 manufacturer's instructions
- K15 the General Products Safety Directive
- K16 the organisation's ethical trading / social accountability policies, where applicable
- K17 the use of banned and restricted substances / REACH, if applicable
- K18 common hazards in the work area and workplace procedures for dealing with them

## SKSFDT2 – Footwear and leathersgoods product testing

### Overview:

This standard is for laboratory technicians who test the physical performance characteristics materials used in footwear and leathersgoods products to determine their suitability for use in the chosen item.

You will be determining the tests to be carried out on particular materials, carrying out, analysing and recording tests on materials in a controlled environment. You will write detailed reports on the findings, identifying areas of non-conformance or variation and give feedback to technicians and others.

You will need to know about a range of general testing principles and the specialist properties of a range of materials used in footwear production.

The job role may involve:

1. carrying out standard tests on relevant materials
2. analysing test results
3. preparing reports

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 determine the tests to carry out on particular materials
- P3 select equipment/tools for the testing process
- P4 ensure the test environment meets requirements for the testing process
- P5 ensure there are no foreign bodies (i.e. broken needles, blades, tacks, metal content) within the product
- P6 carry out testing to methods prescribed by the organisation and manufacturer
- P7 carry out all tests in a controlled environment
- P8 carry out simulation processes to determine how the product acts with age
- P9 analyse, interpret and record test results
- P10 write detailed report on results highlighting any areas of variation/non-conformance
- P11 report feedback from testing to sample technician and other interested parties
- P12 comply with written instructions
- P13 complete forms, records and other documentation
- P14 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 general footwear/leathersgoods testing principles:
  - K1.1 colourfastness
  - K1.2 chemical testing
  - K1.3 physical testing
  - K1.4 tensile testing
  - K1.5 flex testing
  - K1.6 abrasion testing
- K2 specialist properties of materials used in the production of footwear
- K3 the key tests to carry out for a range of materials and components and banned and resistant substances
- K4 test control methods
- K5 which materials to test and how
- K6 standard test methods (abrasion resistance, colour fastness, washfastness etc.)
- K7 statistical variation
- K8 testing conditions required
- K9 the organisation's approach and policy on ethical trading / social accountability

- K10 statutory responsibilities under health, safety and environmental legislation and regulations
- K11 common hazards in the work area and workplace procedures for dealing with them
- K12 the organisation's rules, codes, guidelines and standards
- K13 equipment operating procedures
- K14 manufacturers' instructions
- K15 the General Products Safety Directive
- K16 the use of banned and restricted substances / REACH, if applicable
- K17 footwear labelling directives

## SKSFDT3 – Footwear product trialling

### Overview:

This standard is for technicians who conduct wearer trials on participants to determine the footwear products' fitness for purpose and is about organising and carrying out wearer trials, including taking measurements and fitting shoes to wearers. It also involves interpreting and sharing results and making recommendations for changes.

The job role may involve:

1. organising wearer trials
2. fitting shoes to wearers
3. analysing and sharing results

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 estimate the number of products required to conduct an effective trial, checking specifications
- P3 organise wearer trials, including
  - P3.1 selection of fitting panel
  - P3.2 criteria to follow (different foot types)
- P4 take relevant foot measurements
- P5 fit footwear onto wearers, applying fitting standards and techniques
- P6 interpret and analyse returned footwear
- P7 feedback into sample making on trial results
- P8 produce report making recommendations for change based on the footwear trials
- P9 comply with written instructions
- P10 complete forms, records and other documentation
- P11 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 how to measure foot comfort when wearing footwear
- K2 the foot anatomical pressure points when wearing footwear
- K3 foot measurement and methods of assessing the fit
- K4 key safety related properties
- K5 key quality related properties
- K6 the organisation's approach and policy on ethical trading / social accountability
- K7 the client and organisational returns system
- K8 fit reports and how to complete them
- K9 children's fitting criteria (e.g. the correct growth area required)
- K10 the organisation's rules, codes, guidelines and standards
- K11 equipment operating procedures
- K12 manufacturers' instructions
- K13 the General Products Safety Directive
- K14 the organisation's ethical trading / social accountability policies, where applicable
- K15 the use of banned and restricted substances / REACH, if applicable
- K16 footwear labelling directives
- K17 common hazards in the work area and workplace procedures for dealing with them
- K18 statutory responsibilities under health, safety and environmental legislation and regulations

## SKSFW1 – Carry out basic operations within footwear

### Overview:

This standard is for those who carry out basic operations in any area within footwear / leathersgoods production and is about checking equipment and materials to make sure they are correct and to the standard required, carrying out foundation footwear / leathersgoods operations to a stated quality standard safely and at a rate that maintains production flow in order to meet targets.

You will need to be aware of the product styles currently being produced by the organisation and what the finished product should look like. You will also need to know which tools, settings and equipment are required and how to handle materials without damaging them.

The job role may involve:

1. checking that materials are available
2. making sure that materials are to the correct quality standard
3. carrying out the work required

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 follow the instructions on the work ticket
- P3 check for special instructions
- P4 use the correct tools and equipment
- P5 check that equipment is safe and set up in readiness for use
- P6 select the correct component parts for the style being worked on
- P7 check that the materials to be used are free from faults
- P8 ensure the materials used meet the specification in terms of colour matching
  - P8.1 within a product
  - P8.2 between a pair of products where applicable
- P9 report faults in the materials
- P10 carry out foundation footwear / leathersgoods operations safely and at a rate which maintains work flow and meets production targets
- P11 process component parts to the quality standard required
- P12 promptly correct work that does not conform to company quality standards
- P13 report any damaged work to the responsible person
- P14 follow company reporting procedures about defective tools and machines which affect work
- P15 sort and place work to assist the next stage of production and minimise the risk of damage
- P16 leave work area safe and secure when work is complete
- P17 comply with written instructions
- P18 complete forms, records and other documentation
- P19 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 styles of products currently being produced
- K2 appearance of the final product
- K3 what the common faults are
- K4 how to handle materials and avoid making them unusable
- K5 which tools, equipment and settings are needed for the operation
- K6 common faults in tools and equipment and implications of working with faulty equipment
- K7 how to handle tools and equipment safely and the health and safety implications of not doing so

- K8 the organisation's rules, codes, guidelines and standards
- K9 equipment operating procedures
- K10 statutory responsibilities under health, safety and environmental legislation and regulations
- K11 common hazards in the work area and workplace procedures for dealing with them
- K12 manufacturers' instructions

## SKSFW2 – Carry out ancillary footwear / leathersgoods operations

### Overview:

This standard is for those who carry out ancillary operations in any area within footwear / leathersgoods manufacture, where the actions do not physically alter the product and is about providing support to the quality and effectiveness of the footwear / leathersgoods process, including, for example: identification of natural and synthetic materials, assembly, testing (e.g. heat seal, bond), sorting, track feeding, examining work-in-progress.

You will need to be aware of the styles of product currently being produced by the organisation and what the finished product should look like. You will also need to know the common faults in materials and the common faults that affect the final product as well as how to handle materials without damaging them.

The job role may involve:

1. providing support to the quality and effectiveness of the shoe making process, including, for example: assembly, testing (e.g. heat seal, bond), sorting, track feeding, examining work-in-progress

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 follow the instructions on the work ticket
- P3 check for special instructions
- P4 identify and use materials used in the process of producing footwear / leathersgoods component parts, both natural or synthetic materials
- P5 choose the batch of materials needed and check availability
- P6 check that the materials are free from faults and fit for purpose
- P7 take the necessary action when materials do not conform to company quality standards
- P8 report any damaged work to the responsible person
- P9 carry out work safely and at a rate which maintains work flow
- P10 report to the responsible person when the work flow of other production areas disrupts work
- P11 test, sort, track feed and examine work in progress
- P12 fault-find materials and components for:
  - P12.1 creased
  - P12.2 stained
  - P12.3 damage
  - P12.4 incorrectly made up component parts
- P13 follow company reporting procedures for defective equipment
- P14 sort and place work to assist the next stage of production
- P15 leave the work area safe and secure when work is completed
- P16 comply with written instructions
- P17 complete forms, records and other documentation
- P18 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 styles of product currently being produced
- K2 appearance of the final product
- K3 where own work fits in the process
- K4 common faults affecting the appearance of the final product
- K5 how to handle materials and avoid making them unusable
- K6 common faults in materials and the implications of processing faulty work
- K7 how to carry out work safely and avoid disrupting the work flow
- K8 the normal work flow and how to maintain it



- K9 common methods of identifying and reporting faults in ancillary operations
- K10 the action to take when own workflow is disrupted by others
- K11 the organisation's rules, codes, guidelines and standards
- K12 equipment operating procedures
- K13 statutory responsibilities under health, safety and environmental legislation and regulations
- K14 common hazards in the work area and workplace procedures for dealing with them
- K15 manufacturers' instructions
- K16 the implications of not meeting quality and production targets

## SKSFW3 – Carry out multiple operations in footwear / leathersgoods manufacture

### Overview:

This standard is for those who carry out multiple operations in footwear/leathersgoods production or modular bespoke footwear manufacture and involves carrying out a number of footwear / leathersgoods operations and working with a range of materials, machinery, tools and equipment within or across departments in footwear / leathersgoods productions. The role could involve moving to a variety of production operations when required to maintain a required level of workflow.

You will need to know the production schedules, targets and sequences and the tolerances allowed when monitoring for quality.

The job role may involve:

1. carrying out a number of footwear operations
2. working with a range of materials, machinery, tools and equipment within or across departments in footwear production.
3. having the flexibility to move to other operations in production when and where required.

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 make sure that the work required is necessary and adequate to assist the production workflow
- P3 make sure that the next operation is appropriate to the sequence of footwear / leathersgoods production
- P4 check with the responsible person if unsure which operation is most urgent
- P5 check company requirements on the work ticket before starting a new operation
- P6 check specifications for the work to be carried out
- P7 estimate materials for the work to be carried out
- P8 select the correct tools, equipment and materials for the operation
- P9 monitor that the quality of the work from previous operations are:
  - P9.1 within the tolerances required of the operation currently being worked on
  - P9.2 acceptable for company quality requirements
- P10 maintain a level of workflow acceptable for the operation
- P11 identify and make adjustments to work to ensure maximum quality within tolerances
- P12 complete work for each operation to the correct quality requirements
- P13 sort and place work to assist the next stage of production and minimise risk of damage
- P14 leave the work area safe and secure once the current operation is complete
- P15 comply with written instructions
- P16 complete forms, records and other documentation
- P17 work to legal requirements, standards and regulations, policies, procedures and professional codes

### orthopaedics (only applicable to those who work in this area):

- P18 apply fittings and produce modular last
- P19 order uppers as required

### Knowledge and Understanding:

- K1 styles of product currently being produced
- K2 production schedules and targets associated with each operation within the footwear production department(s)
- K3 production sequences and the timing of key operations

- K4 when to involve the responsible person regarding the production sequence
- K5 which aspects of the work tickets are appropriate to the operations
- K6 which tools, equipment, settings and materials are needed for each operation
- K7 how to make suitable adjustments to tools, equipment, settings and materials to maintain safety and quality standards
- K8 the importance of, and what to look for in, monitoring the quality of the work for every operation undertaken
- K9 the tolerances required for each operation
- K10 the implications of not completing work correctly on final production and the product
- K11 the reasons for placing work carefully for the next process
- K12 the correct procedure for the closedown of machines
- K13 how to make the work area safe and secure
- K14 statutory responsibilities under health, safety and environmental legislation and regulations
- K15 common hazards in the work area and workplace procedures for dealing with them
- K16 the organisation's rules, codes, guidelines and standards
- K17 equipment operating procedures
- K18 manufacturers' instructions

## SKSFW4 – Carry out upper making / leathersgoods / saddlery closing / machining and associated operations

### Overview:

This standard is for those who carry out upper making, closing and other associated operations within footwear / leathersgoods / saddlery manufacture and is about following specifications to maintain quality of work and meet production targets whilst minimising damage to the completed work. Work will then need to be passed on to the next production stage.

You need to know the styles currently in production and how to interpret the work ticket, what the production targets are and what needs to be done to meet them.

The job role may involve:

1. carrying out upper making / leathersgoods / saddlery closing / machining and associated operations
2. following specifications and maintaining quality
3. passing completed work onto the next stage in production

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 check the work ticket
- P3 select and use the correct type of machine for the work
- P4 make sure that the machine and any associated equipment is properly and safely set up for the style being worked on
- P5 make adjustments to the tools, equipment, settings and materials as appropriate to maintain safety and quality standards
- P6 check the quality of components for use in closing and associated operations
- P7 position and lay out components to ensure maximum production targets and quality standards
- P8 make sure that closing and associated operations are in the correct sequence for the style being worked on
- P9 report faults with the machine / equipment promptly
- P10 use the tools, equipment, settings and materials needed for each operation
- P11 use joining and associated operations needed for the operation
- P12 check that work is:
  - P12.1 completed to the correct quality standards
  - P12.2 correctly sorted to assist the next stage of production
  - P12.3 carefully placed to minimise the risk of damage
- P13 close down the machines in a safe manner when work is complete
- P14 comply with written instructions
- P15 complete forms, records and other documentation
- P16 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 styles currently being produced in the department
- K2 the information on the work ticket and how it relates to the work
- K3 production schedules and targets for each stage of closing
- K4 how to meet the production targets
- K5 what the production operations are before and after the work
- K6 procedures for reporting faults on the machines / equipment
- K7 the implications of using defective machines
- K8 what to look for when checking the quality of the work
- K9 what the correct procedures are for setting up, closing down and cleaning machines
- K10 machine controls and equipment

- K11 the organisation's rules, codes, guidelines and standards
- K12 equipment operating procedures
- K13 statutory responsibilities under health, safety and environmental legislation and regulations
- K14 common hazards in the work area and workplace procedures for dealing with them
- K15 manufacturers' instructions

## SKSFW5 – Carry out lasting, making and associated operations

### Overview:

This standard is for those who carry out lasting and making operations for multiple operations in footwear / leathersgoods production or modular/bespoke footwear manufacture and involves interpreting work tickets and producing uppers through the lasting and making process. The correct tools and equipment will need to be selected prior to the operation and completed work will need to be checked for quality before passing on to the next stage.

You need to know how to interpret the work ticket, set up, adjust and position machines and equipment and the faults associated with components and what to do to rectify them.

The job role may involve:

1. interpreting prescription / work ticket
2. using equipment suitable for the footwear
3. producing uppers through the lasting and making process
4. checking own completed work to meet company quality standards

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 follow the work ticket to meet company requirements
- P3 select and use the correct equipment and tools
- P4 make sure that the components are of the correct quality before carrying out the operation
- P5 carry out operations in the correct sequence to ensure the work pairs up
- P6 use the appropriate handling methods during processing to make sure that the work is to the correct quality
- P7 make appropriate adjustments in equipment settings during processing
- P8 make sure that work is:
  - P8.1 completed to the correct quality standards
  - P8.2 correctly sorted to assist the next stage of production
  - P8.3 carefully placed to minimise the risk of damage
- P9 carry out the correct closedown procedures to leave the work area safe and secure
- P10 comply with written instructions
- P11 complete forms, records and other documentation
- P12 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 which aspects of the prescription / work ticket are relevant to the work
- K2 how to set up, adjust, and position machines and equipment for the last shape being worked on
- K3 how to make sure that footwear / leathersgoods is processed as required
- K4 implications for production
- K5 appearance of the final product when not processed correctly
- K6 common hazards in the work area and the procedures for rectifying them
- K7 which faults commonly appear in components and how to rectify them
- K8 common characteristics of the material being used in lasting and making operations
- K9 possible causes of incorrect lasting and how to rectify them
- K10 the sequence in which the operation fits in with other operations
- K11 the importance of making sure components and other sundry items are readily available and the implications on work flow if they aren't
- K12 the importance of production targets and workflow levels
- K13 how to minimise the risk of damage to lasted uppers during and after lasting and

making operations

K14 how to make the work area safe and secure

K15 the organisation's rules, codes, guidelines and standards

K16 the production quality standards required

K17 equipment operating procedures

K18 statutory responsibilities under health, safety and environmental legislation and regulations

K19 common hazards in the work area and workplace procedures for dealing with them

K20 manufacturers' instructions

**orthopaedics (only applicable to those who work in this area):**

K21 the basic anatomy of the foot

K22 what the common foot conditions are

## SKSFW6 – Finish footwear / leathersgoods / saddlery

### Overview:

This standard is for those who finish footwear / leathersgoods / saddlery ready for inspection and despatch and involves selecting and using the correct tools to meet the requirements of the work ticket and to achieve the required final agreed standard whilst minimising risk of damage.

You will need to know the styles of footwear / leathersgoods / saddlery currently in production, production targets, schedules and the operations required in order to meet targets.

The job role may involve:

1. finishing footwear / leathersgoods / saddlery
2. using appropriate tools to meet the requirements of the work ticket
3. achieve the required final appearance and cleanliness

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 follow the specifications using the tools and equipment appropriate for the work
- P3 make sure that tools and equipment are set up and positioned safely and correctly
- P4 check that tools and equipment for finishing are clean and fit for purpose
- P5 check that components are of the correct quality
- P6 carry out finishing activities in the correct sequence to meet the requirements of the specification
- P7 operate tools and equipment to health, safety and environmental requirements
- P8 remove excess materials using the most effective method and technique
- P9 make sure that the original contour is maintained whilst carrying out finishing activities
- P10 make sure that surface finishes meet the requirements of the style being worked on
- P11 make sure that work is:
  - P11.1 completed to the appropriate quality standards
  - P11.2 correctly sorted to assist the next stage of production
  - P11.3 carefully placed to minimise the risk of damage
- P12 comply with written instructions
- P13 complete forms, records and other documentation
- P14 work to legal requirements, standards and regulations, policies, procedures and professional codes

### knowledge and understanding:

- K1 styles of footwear / leathersgoods / saddlery currently being produced
- K2 the specification and associated workflow
- K3 data on the specification and how it relates to the work
- K4 production schedules and targets associated with each stage of finishing and how to meet them
- K5 what the production operations are before and after work in finishing
- K6 common faults are associated with the tools and equipment
- K7 tools and equipment required for the finishing activity
- K8 the implications of using defective machines on the products
- K9 common types of finishing required for styles produced by the organisation
- K10 how to maintain the original contour of the footwear / leathersgoods / saddlery
- K11 methods and techniques for removing excess materials and of obtaining the correct surface finish
- K12 the requirements for dealing with rejected components
- K13 correct procedures for setting up and closing down machines, their controls and equipment



- K14 the organisation's rules, codes, guidelines and standards
- K15 equipment safe operating procedures
- K16 statutory responsibilities under health, safety and environmental legislation and regulations
- K17 common hazards in the work area and workplace procedures for dealing with them
- K18 manufacturers' instructions

**orthopaedics (only applicable to those who work in this area):**

- K19 the common foot conditions

## SKSF77 – Examine finished footwear / leathersgoods

### Overview:

This standard is for those who examine finished footwear / leathersgoods products and is about inspecting the quality of the finished product and identifying the nature of the fault where the product is below standard.

You may be required to carry out minor repairs where the fault is recoverable before passing to the next stage of production. Where non-recoverable faults are identified these will need to be isolated and marked before informing the appropriate person. You will need to know the styles of footwear currently in production, the importance of the final specification and the common defects associated with different specifications and materials.

The job role may involve:

1. inspecting the quality of the work
2. taking corrective action

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 carry out visual inspections of the finished product with regard to the:
  - P2.1 quality of the workmanship
  - P2.2 overall finished appearance
  - P2.3 cleanliness of the product
  - P2.4 specification
- P3 identify the type and nature of fault where the product is below the quality standard
- P4 carry out minor repair operations where the fault is recoverable and return the approved product to the next stage of production
- P5 isolate non-recoverable faults and mark the location of the fault
- P6 inform the appropriate person(s) of the faults identified and the action taken
- P7 pass on to the next stage of production if necessary
- P8 choose packaging materials to meet customers' requirements
- P9 package the items and any support material
- P10 prepare packaged orders to meet the production requirements
- P11 label goods correctly
- P12 comply with written instructions
- P13 complete forms, records and other documentation
- P14 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 styles of footwear / leathersgoods currently being produced
- K2 the production schedule
- K3 where to find and how to identify the final specification and quality standard requirements expected by the customer
- K4 the importance of the final specification and how to access this information and identify any changes made
- K5 the standard quality of the final product
- K6 the common defects associated with different specifications and materials
- K7 the importance of reporting faults promptly
- K8 the organisation's rules, codes, guidelines and standards
- K9 company procedures for dealing with rejected and substandard footwear
- K10 equipment operating procedures
- K11 statutory responsibilities under health, safety and environmental legislation and

regulations

K12 common hazards in the work area and workplace procedures for dealing with them

K13 manufacturers' instructions

## SKSFW8 – Carry out component moulding operations

### Overview:

This standard is for those who carry out moulding operations to produce components for use in footwear / leathersgoods production and is about selecting moulds and materials for moulding. The machine will need to be set up and adjusted to achieve the stated quality standard and moulded components produced to a required standard and at an agreed level of productivity. You will need to be able to identify and rectify problems where possible, before the next stage of production can commence.

You need to know characteristics of materials used for moulding and the implication of not selecting the right materials and failure to achieve quality and production targets.

The job role may involve:

1. producing moulded components

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 follow the work ticket to meet quality standards and company requirements
- P3 select the moulds
- P4 transport the moulds using the appropriate lifting aid
- P5 select the materials for moulding
- P6 set up the machine to produce the required component
- P7 identify and make the necessary adjustments in machine settings to achieve the correct quality standard whilst in production
- P8 remove all surplus materials according to company requirements
- P9 ensure that components are correctly placed to avoid damage and assist the next stage of the process
- P10 maintain an agreed level of productivity
- P11 carry out close down procedures to leave the work area safe and secure
- P12 report work which cannot be rectified to the responsible person
- P13 comply with written instructions
- P14 complete forms, records and other documentation
- P15 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the parts of the work ticket relevant to the work
- K2 the varying characteristics of the materials used for moulding, and the implications of not selecting the correct materials
- K3 what the company tolerances are for the addition of regrind
- K4 what the best practices are when using mould release agents
- K5 the appropriate lifting gear to use and the safety implications
- K6 how to set up the machine in readiness to process
- K7 the implications of failing to achieve quality and production requirements
- K8 how to deal with sub-standard components
- K9 how to deal with waste materials
- K10 why components must be placed carefully for the next process
- K11 the correct procedure for the closedown of machines
- K12 the organisation's rules, codes, guidelines and standards
- K13 the company quality standards and production targets applicable to the process
- K14 equipment operating procedures
- K15 common hazards in the work area and the work place procedures for dealing with them
- K16 how to make the work area safe and secure
- K17 statutory responsibilities under health, safety and environmental legislation and

regulations

K18 common hazards in the work area and workplace procedures for dealing with them

K19 manufacturers' instructions

## SKSFW9 – Carry out multiple shoe room operations

### Overview:

This standard is for those who carry out multiple shoe-room operations and is about using equipment and materials to transform a lasted or finished product to a saleable item of footwear. You will need to carry out quality checks on work from previous operations and, where work cannot be rectified, report to the appropriate person. Work should be completed to an agreed quality standard and at a rate that maintains workflow within the team.

You will need to know the production targets and workflow levels associated with the style of footwear being worked on as well as the materials used in the process of shoe rooming products and how upper and soling materials and shoe room materials interact.

The job role may involve:

1. using equipment and materials to transform a lasted or finished product to a saleable item of footwear

### Performance Criteria:

- P1 make sure the area is free from hazards
- P2 follow the work ticket to ensure company requirements are met
- P3 select the correct equipment and materials for the operation
- P4 make sure that the quality from previous operations are within tolerances needed for a shoe room activity
- P5 report to the responsible person where work cannot be rectified
- P6 identify and make necessary adjustments to equipment and materials to achieve quality standards
- P7 carry out shoe room operation in the correct sequence
- P8 maintain an acceptable level of work flow in the team
- P9 make sure that work is:
  - P9.1 correctly sorted to assist the next stage of production
  - P9.2 carefully placed to minimise the risk of damage
- P10 make sure that work is completed to the quality standard and that the work is paired up correctly
- P11 place work to assist the next stage of production
- P12 carry out the correct close down procedures to ensure the work area is left safe and secure
- P13 make sure that equipment and materials are tidied away where appropriate, left clean and fit for use
- P14 comply with written instructions
- P15 complete forms, records and other documentation
- P16 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the production targets and workflow levels associated with the style of footwear
- K2 aspects of the work ticket relevant to the work
- K3 materials used in the process of shoe rooming products for point of sale
- K4 the compatibility of shoe room materials with upper and soling materials
- K5 common faults in footwear and how to rectify them
- K6 how to make adjustments to equipment and materials to maintain quality standards
- K7 how to rectify faults in equipment and who to report to when faults cannot be rectified
- K8 the importance of making sure that materials are readily available and the implications of not doing so on the work flow
- K9 how to make sure the work is paired up and the implications of not doing so on production and the final product

- K10 how to handle footwear to minimise the risk of damage
- K11 how to correctly store materials
- K12 the current workplace procedure for the close down of equipment
- K13 the best practices for keeping equipment clean in readiness for further use
- K14 the organisation's rules, codes, guidelines and standards
- K15 the production quality standards required
- K16 equipment operating procedures
- K17 statutory responsibilities under health, safety and environmental legislation and regulations
- K18 common hazards in the work area and workplace procedures for dealing with them
- K19 how to make the work area safe
- K20 manufacturers' instructions

## SKSFW10 – Carry out complex lasting, making and associated operations in handcraft bespoke / orthopaedic footwear

### Overview:

This standard is for those who carry out complex lasting and making operations for Orthopaedic and/or Bespoke footwear manufacture and is about receiving and interpreting draft and plaster cast prescription and specification for the orthopaedic and bespoke footwear manufacturing industry prior to making shoes to required standard. You will need to check work on completion to meet company quality standards.

You need to know basic anatomy of the foot and aspects of prescriptions/ specifications relevant to the work ticket.

The job role may involve:

1. receiving and interpreting draft and plaster cast prescription and specification
2. making shoes to required standard
3. checking own completed work to meet company quality standards

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 interpret the prescription / specification
- P3 refer back to prescriber / specifier
- P4 select and use equipment and tools for the job
- P5 ensure the components meet the appropriate quality standard before carrying out the operation
- P6 use the appropriate handling methods during manufacture to ensure work is to the correct quality
- P7 make appropriate adjustments in equipment settings during manufacture
- P8 ensure that work is:
  - P8.1 completed to the appropriate quality standards
  - P8.2 correctly sorted to assist the next stage of production
  - P8.3 carefully placed to minimise the risk of damage
- P9 carry out closedown procedures to leave the work area safe and secure
- P10 comply with written instructions
- P11 complete forms, records and other documentation
- P12 work to legal requirements, standards and regulations, policies, procedures and professional codes
- P13 carry out lasting and making for bespoke footwear, including
  - P13.1 draft/plaster cast interpretation
  - P13.2 select an appropriate last
  - P13.3 last making
  - P13.4 cast rectification
  - P13.5 cradles
  - P13.6 prepare insoles including following prescription for insoles
  - P13.7 hand lasting including following prescription for stiffening
  - P13.8 sole and heel building including follow prescription for adaptations
- P14 undertake the following shoe room techniques
  - P14.1 last slipping
  - P14.2 polishing & cleaning
  - P14.3 quality inspections
  - P14.4 insert inserts
  - P14.5 socking
  - P14.6 lace, wrap and pack



## Knowledge and Understanding:

- K1 the basic anatomy and terminology of the foot
- K2 aspects of the prescription / specification are relevant to the work
- K3 how to set up and adjust equipment
- K4 how to make sure that footwear is processed as required, the implications for production
- K5 the appearance of the final product
- K6 which faults commonly appear in components and how to deal with them
- K7 common characteristics of the material being used in lasting and making operations
- K8 possible causes of incorrect lasting and how to deal with them
- K9 which sequence in the operation fits in with other operations
- K10 why it is important to make sure that components and other sundry items are readily available and the implications of not doing so on work flow
- K11 the importance of production targets and workflow levels
- K12 how to handle and minimise the risk of damage to lasted uppers during and after lasting and making operations
- K13 how to make the work area safe and secure
- K14 the organisation's rules, codes, guidelines and standards
- K15 the production quality standards required
- K16 equipment operating procedures
- K17 statutory responsibilities under health, safety and environmental legislation and regulations
- K18 common hazards in the work area and workplace procedures for dealing with them
- K19 manufacturers' instructions

### **orthopaedics (only applicable to those who work in this area):**

- K20 common foot conditions
- K21 how to follow prescriptions correcting mechanical foot problems
- K22 how to use specific materials

## SKSFW11 – Carry out assessment and measurements for handcraft bespoke / orthopaedic footwear

### Overview:

This standard is for those who measure and assess for bespoke and/or orthopaedic footwear and is about working with the client to identify their requirements and correctly measuring foot and ankles to make an accurate cast. You may need to re-work casts to ensure they are appropriate for the client's requirements.

You need to know when you should refer the customer for medical assessment, foot measuring protocol, casting and rectifying techniques and how to prescribe corrections for mechanical foot problems.

The job role may involve:

1. assessing the client's requirements
2. measuring for footwear

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 identify clients' footwear aspirations
- P3 find out if the client has fitting and/or walking difficulties
- P4 check if the client has any medical conditions that may put their foot at risk
- P5 refer to qualified consultant/ person if required
- P6 measure the client's foot and ankles as required
- P7 take an appropriate cast
- P8 rectify the cast
- P9 keep a comprehensive record of all information
- P10 comply with written instructions
- P11 complete forms, records and other documentation
- P12 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 how to clarify the client's special requirements
- K2 when to refer for medical assessment
- K3 the British Standards foot measuring protocol
- K4 casting and rectifying techniques
- K5 how to prescribe corrections for mechanical foot problems
- K6 the data protection act as appropriate to the client
- K7 the organisation's rules, codes, guidelines and standards
- K8 the production quality standards required
- K9 equipment operating procedures
- K10 statutory responsibilities under health, safety and environmental legislation and regulations
- K11 common hazards in the work area and workplace procedures for dealing with them
- K12 manufacturers' instructions
- K13 personal protective equipment
- K14 criminal records bureau checks (as necessary)

## SKSFL1 – Carry out cutting operations

### Overview:

This standard is for those who cut materials for use in the manufacture of footwear / leathersgoods / saddlery whether by hand or by machine and is about producing shaped components using tools and equipment to meet the requirements of safety, productivity, quality, and minimising waste. You will need to carry out checks prior to work to ensure company tolerances for pattern interlocking are met. Defects in tools and equipment should be repaired where possible and reported where a repair is not possible. Production targets and quality standards will need to be met and the material correctly sorted and placed for the next stage of production.

You need to know the styles currently being produced, company cutting efficiencies, how to calculate the components required and which equipment you will need to use. You will need to be able to match components by colour and texture and will require decision making skills.

The job role may involve:

1. producing shaped components using tools and equipment to meet the requirements of safety, productivity, quality, and minimising waste.

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 obtain and check the data on the work ticket
- P3 calculate the number of components needed for production
- P4 select and sort the materials for the work
- P5 set up the equipment
- P6 make sure that tools are safe and clean to use on the material
- P7 check the quality and characteristics of the material match the required standards before starting to cut
- P8 use tools and equipment for hand or machine cutting
- P9 make sure that when cutting the material
  - P9.1 avoid damaging self and others
  - P9.2 avoid damage to the knife and other equipment
- P10 avoid any imperfections in the material when cutting
- P11 minimise wastage
- P12 meet company usage tolerances for efficient pattern interlocking
- P13 identify and respond to imperfections, defects and damage due to mishandling
- P14 produce the required batch of components to match the work ticket and the company's production targets
- P15 report defects in the tools and equipment you do not have the authority to repair
- P16 dispose of waste materials safely and promptly return re-useable materials
- P17 carry out closedown procedures on completion of work
- P18 make sure that the cut material is
  - P18.1 correctly sorted to assist the next stage of production
  - P18.2 carefully placed to minimise the risk of damage
- P19 comply with written instructions
- P20 complete forms, records and other documentation
- P21 work to legal requirements, standards and regulations, policies, procedures and professional code

### Knowledge and Understanding:

- K1 styles of footwear / leathersgoods / saddlery currently being produced
- K2 how the data on the work ticket relates to the work and the production schedules associated with them
- K3 how to safely set up and close down cutting and associated equipment in the work station

- K4 which equipment is needed for the cutting activity
- K5 how to calculate the number of components required
- K6 what the common cutting methods are to ensure maximum usage and minimum wastage
- K7 what the company cutting efficiencies are with regard to the material being cut
- K8 the common quality imperfections associated with the materials being cut
- K9 the main characteristics of the materials, how to identify them and what they mean for cutting operations and subsequent operations
- K10 what the implications are of using defective tools and machines on the materials
- K11 responsibilities and lines of reporting within the work area
- K12 the organisation's rules, codes, guidelines and standards
- K13 equipment operating procedures
- K14 statutory responsibilities under health, safety and environmental legislation and regulations
- K15 common hazards in the work area and workplace procedures for dealing with them
- K16 the health and safety procedures for handling the tools and equipment
- K17 the company's procedures with regard to material re-usage and disposal
- K18 quality standards required by the company and the reporting procedures
- K19 the company's procedures for filling out documentation on work completed
- K20 manufacturers' instructions

## SKSFL2 – Contribute to production flow by carrying out complex footwear / leathersgoods / saddlery product operations

### Overview:

This standard is for those who contribute to production flow by carrying out complex operations within footwear / leathersgoods / saddlery products operations and is about identifying bottlenecks in production flow and moving to other operations to assist production flow when required. You will need to carry out quality checks on materials from previous operations and completed work checked to ensure quality standards are maintained before passing to the next stage of production.

You need to know the styles currently being produced, production schedules, targets and sequences.

The job role may involve:

1. identifying bottlenecks in production flow
2. moving to other complex operations to assist production flow
3. using a range of materials, machinery, tools and equipment within and across departments

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 identify where the production flow is holding up other operations
- P3 check that those operations which are in need of extra assistance are within own job capabilities and responsibility
- P4 make sure the operation is appropriate to the production sequence
- P5 check company requirements on the work ticket before starting a new operation
- P6 select and use the correct tools, equipment and materials for the operation
- P7 make sure that tools, equipment and materials are fit for purpose
- P8 check that the quality of the work passed from previous operations are:
  - P8.1 within the tolerances required of the operation
  - P8.2 acceptable for company quality requirements
- P9 maintain an acceptable level and quality of work for the operation
- P10 place all work on completion correctly to assist the next stage of production
- P11 liaise with the relevant person where additional problems are identified
- P12 leave the work area clean, safe and secure
- P13 facilitate the requirements of the relevant department in manufacturing area
- P14 comply with written instructions
- P15 complete forms, records and other documentation
- P16 work to legal requirements, standards and regulations, policies, procedures and professional codes

#### **complex operations (leathersgoods / saddlery production);**

- P17 prepare components of leathersgoods / saddlery
- P18 skive and split materials for leathersgoods / saddlery manufacture
- P19 machine form and embellish components of leathersgoods / saddlery
- P20 machine sew components to produce leathersgoods / saddlery
- P21 process customer orders for leathersgoods / saddlery

### Knowledge and Understanding:

- K1 styles of footwear / leathersgoods / saddlery products currently being produced
- K2 production schedules and targets associated with each operation within the department(s)
- K3 the production sequence and the timing of key operations
- K4 how to identify when the workflow is holding up other operations
- K5 what you need to know before deciding to help out

- K6 what the job role, scope and which complex operations are within own capabilities and training
- K7 which aspects of the work tickets are appropriate to the operations
- K8 which tools, equipment and materials need to be selected for use in each operation
- K9 how to make suitable adjustments to maintain quality standards
- K10 how to check the work area is clean and free from hazards
- K11 the tools, equipment and materials are fit for purpose
- K12 the importance of monitoring the quality of the work for each operation
- K13 what to look for in checking the acceptability of the quality to the company
- K14 the tolerances required for each operation
- K15 the level of workflow required for every operation within scope
- K16 the reasons for placing work carefully for the next process
- K17 the key facts the relevant person needs to know when problems are identified, any possible solutions, and who to inform about what to do to solve the problems
- K18 how to ensure the work area is left clean and safe
- K19 the organisation's rules, codes, guidelines and standards
- K20 equipment operating procedures
- K21 statutory responsibilities under health, safety and environmental legislation and regulations
- K22 common hazards in the work area and workplace procedures for dealing with them
- K23 manufacturers' instructions

## SKSFL3 – Create complex patterns for footwear / leathersgoods / saddlery products

### Overview:

This standard is for those who create complex patterns for footwear / leathersgoods / saddlery production, and which meet company and customer requirements. You will grade patterns and cut and make amendments to meet required standards before issuing. All pattern pieces will require appropriate information for the production to be taken forward.

You need to know the scope of the job and tools needed, the basic rules of pattern grading, benefits of pattern standardisation and methods used in adhering the forme.

The job role may involve:

1. creating complex patterns which are suitable for production, and meet company and customer requirements

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 liaise with the colleagues to confirm:
  - P2.1 when the pattern is required
  - P2.2 the specifications of the design for the pattern
  - P2.3 the types of materials which will be used
  - P2.4 the last style, quantity and size ratio (footwear only)
- P3 adhere the forme material to create inside and outside forms / patterns
- P4 create the mean forme / standard and sectional pieces
- P5 construct a standard for a complex style
- P6 choose the correct equipment to produce the pattern
- P7 produce patterns for footwear / leathersgoods / saddlery products
- P8 cut the patterns
- P9 prepare specifications and liaise with appropriate persons about the construction and best methods
- P10 inspect the prototype and agree any amendments to be made to the patterns
- P11 make adjustments to the pattern to compensate for problems identified during the trial and re-issue if necessary
- P12 grade patterns with required restrictions/groupings
- P13 produce pattern trial for factory testing
- P14 issue patterns for prototype manufacture
- P15 tool up for production
- P16 correctly label and store patterns pieces
- P17 ensure stitch markers and other information are available for production to take the pattern forward
- P18 keep a clean and safe workstation and equipment during pattern work
- P19 comply with written instructions
- P20 complete forms, records and other documentation
- P21 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the scope of the job and the tasks required
- K2 the methods used for creating patterns
- K3 the alterations in the form of the foot during maturity (*footwear only*)
- K4 the tools needed and their limitations, as well as how to use them safely
- K5 the basic rules of pattern cutting and grading
- K6 the benefits of pattern standardisation
- K7 methods used in adhering the forme / pattern material and the various tools and

- equipment used
- K8 the implications of the work for production and an appreciation of costs
- K9 the production of jigs & markers
- K10 how the work and sequence and the processes are carried out in each department
- K11 what the main capabilities are of the machinery in use in production in the company
- K12 the main types of footwear / leathersgoods / saddlery products construction
- K13 the main capabilities, restrictions and characteristics of material / adhesives
- K14 the use of relevant seam constructions
- K15 what the importance is of economy of the pattern in terms of material usage and knives
- K16 how to work safely and ensure a safe and clean work area
- K17 the importance of pattern / fitting trials
- K18 the organisation's rules, codes, guidelines and standards
- K19 equipment operating procedures
- K20 statutory responsibilities under health, safety and environmental legislation and regulations
- K21 common hazards in the work area and workplace procedures for dealing with them
- K22 manufacturer / supplier instructions



## SKSFL4 – Design products using CAD systems

### Overview:

This standard is for those who carry out computer-aided design for footwear / leathersgoods / saddlery and is about liaising with customers to determine the scope and design features and identifying and discussing the options available before designing a product using computer-aided design systems.

You need to know the principles and design capabilities of CAD systems, differences between 2D and 3D CAD and the information required to design concepts with CAD.

The job role will involve:

1. designing products using computer aided design systems

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 liaise with the relevant people to confirm
  - P2.1 the scope of the design
  - P2.2 when the design is required
  - P2.3 main design features
- P3 discuss the options and explain the differences between them clearly and accurately
- P4 set up and operate the computer hardware and software in accordance with supplier instructions and company requirements
- P5 ensure best possible design concepts by utilising the CAD software
- P6 manipulate and alter images in accordance with the scope of the required design to test ideas on the screen using the CAD software
- P7 print off alternative designs to present a range of options suitable for production
- P8 confirm with the final design and record carefully any agreed alterations
- P9 back up the CAD system before turning off
- P10 comply with written instructions
- P11 complete forms, records and other documentation
- P12 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the principles of CAD systems
- K2 the main design capabilities of the CAD system
- K3 how to undertake modelling and testing using the CAD
- K4 the main differences and advantages of 2D and 3D CAD
- K5 the main pieces of information required to get started with designing concepts using CAD
- K6 how to start, operate and close down the CAD system
- K7 the principles of pattern cutting and grading
- K8 the importance of pattern trials
- K9 why it is important to record information clearly about alterations and amendments required to the agreed design before and after factory production trial inspection
- K10 what information is required by those making the factory production trial
- K11 the organisation's rules, codes, guidelines and standards
- K12 equipment operating procedures
- K13 statutory responsibilities under health, safety and environmental legislation and regulations
- K14 common hazards in the work area and workplace procedures for dealing with them
- K15 manufacturers' instructions

## SKSFL5 – Create digitised patterns using CAM systems

### Overview:

This standard is for those who create patterns using CAM systems for footwear and is about liaising with customers to confirm the design of the pattern, types of materials to be used, quantity and sizes required and the creation of digitised patterns using computer-aided manufacturing systems.

You need to know the principles of pattern cutting and grading, CAM systems and their capabilities, the benefits of pattern standardisation and how to digitise patterns to ensure optimum shape and sizing.

The job role may involve:

1. creating patterns using computer-aided manufacturing systems

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 liaise with the relevant person to confirm
  - P2.1 when the pattern is required
  - P2.2 the main features of the design for the pattern
  - P2.3 the types of materials which will be used
  - P2.4 the last style, quantity and size ratio
- P3 digitise the agreed design into the standard shape and size
- P4 confirm the changes and amendments that need to be made to the patterns once the trial has been inspected
- P5 make adjustments to the pattern to compensate for problems identified during the trial
- P6 ensure the pattern is recreated in sections to the agreed design
- P7 ensure stitch markers and other information is available for production to take the pattern forward
- P8 prepare the relevant technical specification for the agreed design and make it available to those who produce a factory production trial
- P9 shut down, after use, the CAM system carefully and in accordance with company instructions
- P10 comply with written instructions
- P11 complete forms, records and other documentation
- P12 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the principles of pattern cutting and grading
- K2 the importance of pattern trials
- K3 the principles of CAM systems
- K4 the benefits of pattern standardisation as applied to CAM systems
- K5 the main pattern creation capabilities of the CAM system
- K6 how to digitise the patterns and ensure optimum shape and sizing
- K7 the main information required to use digitising equipment
- K8 how to start, operate and close down the CAM system
- K9 the information required about the last style, quantity and size ratio
- K10 the importance of recording information clearly about alterations and amendments required to the agreed design and pattern
- K11 the information required by those making the factory production trial and subsequent production
- K12 the importance of recording information clearly about alterations and amendments required after the factory production trial has been inspected
- K13 the organisation's rules, codes, guidelines and standards

- K14 equipment operating procedures
- K15 statutory responsibilities under health, safety and environmental legislation and regulations
- K16 common hazards in the work area and workplace procedures for dealing with them
- K17 manufacturers' instructions

# SKSFL6 – Create basic patterns for footwear / leathersgoods / saddlery products

## Overview:

This standard is for those who create basic patterns for footwear / leathersgoods / saddlery production. You will be expected to liaise with customers and others to create basic patterns, which are suitable for production and meet company and customer requirements. You will need to be able to create inside and outside formes and construct a standard for a basic pattern, choose equipment to produce the pattern and cut the pattern. You need to know how to choose the tools for the job and their limitations, the basic rules of pattern cutting and grading, the benefits of pattern standardisation and methods used for adhering the forme.

The job role may involve:

1. creating basic patterns which are suitable for production, and meet company and customer requirements

## Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 liaise with the relevant person to confirm:
  - P2.1 when the pattern is required
  - P2.2 the main features of the design for the pattern
  - P2.3 the types of materials which will be used
  - P2.4 the last style and quantity
- P3 identify the parts of the last
- P4 adhere the forme material using the most suitable method to create inside and outside forms
- P5 create the mean forme / standard and sectional patterns
- P6 construct a standard for a basic pattern including last bottom pattern
- P7 choose the correct equipment to produce the pattern(s)
- P8 cut the patterns
- P9 prepare specifications and liaise with appropriate persons about the construction and the best methods to use
- P10 inspect the pattern prototype and agree any amendments to be made to the patterns
- P11 make adjustments to the pattern to compensate for problems identified during the trial and re-issue if necessary
- P12 correctly label & store pattern pieces
- P13 keep a clean and safe workstation and equipment during pattern work
- P14 comply with written instructions
- P15 complete forms, records and other documentation
- P16 work to legal requirements, standards and regulations, policies, procedures and professional codes

## Knowledge and Understanding:

- K1 the scope of the job and the tasks required
- K2 tools needed for the job, their limitations and how to use them safely
- K3 the basic rules of pattern cutting and grading
- K4 the benefits of pattern standardisation
- K5 the methods used in adhering the forme / pattern material, including:
  - K5.1 tape
  - K5.2 paper
  - K5.3 vacuum
  - K5.4 tools and equipment used
- K6 how the work sequence and the processes are carried out in each department
- K7 the main capabilities are of the machinery in use in production in the company

- K8 the main types of footwear or leather products construction
- K9 the main capabilities, restrictions and characteristics of material / adhesives
- K10 the importance of pattern and wear trials
- K11 the use of relevant seam constructions
- K12 how to work safely and ensure a safe and clean work area
- K13 the organisation's rules, codes, guidelines and standards
- K14 equipment operating procedures
- K15 statutory responsibilities under health, safety and environmental legislation and regulations
- K16 common hazards in the work area and workplace procedures for dealing with them
- K17 manufacturers / suppliers instructions

# SKSFS1 – Carry out repairs on footwear / leathersgoods / saddlery

## Overview:

This standard is for those who carry out repairs on footwear / leathersgoods / saddlery whether in a retail or manufacturing environment.

You will be required to identify the repair required, carry out all necessary preparations prior to the repair including checking for faults, attaching new components and completing the repair. Following completion of the repair you will need to be able to polish and buff the article as required.

You need to know different types of construction, characteristics and compatible materials as well as the features of worn goods and the repair options available and associated costs. You also need to know the types of solvents and adhesives used in the construction and repair of leather goods and how they interact with the materials used.

The job role may involve:

1. identifying the repair required
2. carrying out the preparations
3. attaching new components
4. completing the repair

## Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 examine the article to see what repairs are required
- P3 where appropriate, tell the customer what the options are, the likely length of time the repair will take, and expected costs
- P4 prepare the machines and tools
- P5 prepare the article for repair including removing worn or damaged parts and preparing any adhesive solutions
- P6 estimate materials
- P7 make sure that the materials used in the repair are free of faults and compatible with the article's materials
- P8 minimise wastage of repair materials
- P9 attach new components
- P10 correctly and neatly secure fastenings
- P11 complete any final repairs
- P12 trim any excess material
- P13 finish the repair in preparation for customer collection
- P14 comply with written instructions
- P15 complete forms, records and other documentation
- P16 work to legal requirements, standards and regulations, policies, procedures and professional codes

### footwear / leathersgoods only

- P17 prepare the article for repair to receive colouring
- P18 mix and prepare colours

## Knowledge and Understanding:

- K1 the different types of footwear / leathersgoods / saddlery construction, the characteristics, and which materials are compatible
- K2 the features of worn and damaged footwear / leathersgoods / saddlery
- K3 repair options available and the correct combinations of materials and components
- K4 the factors influencing the repair options and their costs
- K5 the different materials used in the construction and repair of footwear / leathersgoods and their availability

- K6 the types of solvents and adhesives used in footwear / leathersgoods / saddlery repair
- K7 which adhesives are compatible with different combinations of materials
- K8 the different tools and machinery used in making repairs
- K9 what the types, sizes and uses are of different fasteners
- K10 common problems encountered when repairing with adhesives and methods to prevent and correct these problems
- K11 techniques used to obtain different surfaces and finishes
- K12 the different types of polishing and buffing materials and equipment
- K13 the organisation's rules, codes, guidelines and standards
- K14 equipment operating procedures
- K15 the safety precautions necessary with:
  - K15.1 the different tools, equipment and materials
  - K15.2 using abrasives, hand tools and other ancillary equipment
  - K15.3 storing and using solvents and adhesives
  - K15.4 equipment used in attaching metal fastenings
  - K15.5 edge cutting and trimming
  - K15.6 storage, handling and use of colouring materials
  - K15.7 various types of polishing equipment
- K16 statutory responsibilities under health, safety and environmental legislation and regulations
- K17 common hazards in the work area and workplace procedures for dealing with them
- K18 manufacturers' instructions

## SKSFS2 – Produce duplicate keys

### Overview:

This standard is for those who produce duplicate keys to order and is about identifying and cutting duplicate keys. You will need to identify and set up the appropriate cutting machine, select the appropriate blank for the key and cut the key to the customer requirements, making sure the finished key is free from burrs, rough and sharp edges. You will need to be able to work on a variety of keys, including: lever; cylinder; cavity.

You need to know which keys cannot be cut and the reasons why not, whether the key cutting facilities are suitable for duplicating the keys presented and the different types of key blank.

The job role may involve:

1. identifying the requirements for key cutting
2. cutting duplicate keys
3. completing the key cutting activity

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 examine the key presented by the customer
- P3 agree customer requirements
- P4 identify the type of key
- P5 determine what will be required to provide the customer with a duplicate
- P6 establish the options, verify what is expected and the length of time the key cutting will take
- P7 identify the appropriate key cutting machine for the key required
- P8 prepare the machines and tools
- P9 select the correct blank
- P10 make adjustments to the machine as appropriate
- P11 carry out basic maintenance to the machine
- P12 carry out the key cutting using the appropriate machine
- P13 check the finished product
- P14 smooth off rough and sharp edges
- P15 compare it with the original where available
- P16 carry out remedial action if required
- P17 repair damaged keys
- P18 ensure that the key meets the agreed requirements
- P19 comply with written instructions
- P20 complete forms, records and other documentation
- P21 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the factors involved in deciding the cutting options
- K2 which keys cannot be duplicated and why not
- K3 whether the available key cutting facilities are suitable for duplicating the customer's key
- K4 whether a suitable blank is available and if not, how long it would take to obtain one
- K5 whether there are any alternatives to cutting a duplicate key i.e. repair of a damaged key
- K6 how to recognise and remedy simple problems with the equipment
- K7 the correct tools to be used when adjusting the equipment
- K8 the importance of the depth guides and how to adjust them
- K9 the different types of key blank available
- K10 how to identify the correct key blank
- K11 the manufacturer's instructions for operation of the equipment
- K12 the types of tools used to finish the keys



- K13 how to check that the finished, duplicate key will operate as required
- K14 the problems commonly met with duplicate keys and how to remedy them
- K15 the organisation's rules, codes, guidelines and standards
- K16 the manufacturer's instructions for setting up, adjusting and operating the equipment
- K17 the manufacturer's specifications and instructions for maintenance of equipment
- K18 the safe working practices recommended by manufacturers and the company safety regulations
- K19 statutory responsibilities under health, safety and environmental legislation and regulations
- K20 common hazards in the work area and workplace procedures for dealing with them
- K21 manufacturers' instructions

## SKSFS3 – Service and repair watches

### Overview:

This standard is for those who service and repair watches to order and is about taking in watches for repair and service, discussing with the customer their requirements and agreeing the work to be done, costs and time frames for the work. You will need to be able to dismantle the watch, clean and make any adjustments and necessary repairs before re-assembly and resetting. The types of watch you will need to be able to repair and service could include: those without moving parts; digital; analogue; those with moving parts.

You need to know different types of watches, characteristics of batteries and cause of common faults with watches.

The job role may involve:

1. identifying the service requirements
2. servicing the watch
3. completing the service of the watch

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 examine the watch presented by the customer and discuss their requirements
- P3 identify the type of watch and the service requirements
- P4 agree the work to be done, the length of time the servicing will take and costs
- P5 select and use the appropriate tools and equipment for the service/repair
- P6 dismantle the watch to its component parts
- P7 test the watch battery
- P8 select the correct battery
- P9 make adjustments to the watch as appropriate
- P10 clean the moving parts of the watch
- P11 check the moving parts
- P12 re-assemble the watch
- P13 re-set and regulate the watch
- P14 make the watch ready for the customer by confirming the serviced watch maintains accurate time
- P15 comply with written instructions
- P16 complete forms, records and other documentation
- P17 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the limitations on the types of watches that can be serviced using the equipment available
- K2 the different types of watches, which you may service
- K3 how to prepare an invoice for the customer and where necessary a receipt for their watch
- K4 the characteristics of different types of battery including:
  - K4.1 replaceable batteries
  - K4.2 rechargeable batteries
- K5 the causes of common or typical faults with watches
- K6 the faults requiring specialist repairers and when to refer on
- K7 the common problems that arise with the moving parts of watches
- K8 the accuracy expected of different types of watches
- K9 those problems, which you cannot repair, during routine servicing
- K10 the organisation's rules, codes, guidelines and standards
- K11 the manufacturer's instructions for setting up, adjusting and operating the equipment
- K12 the manufacturer's specifications and instructions for maintenance of equipment
- K13 the safe working practices recommended by manufacturers and the company safety

regulations

K14 statutory responsibilities under health, safety and environmental legislation and regulations

K15 common hazards in the work area and workplace procedures for dealing with them

K16 manufacturers' instructions

K17 the environmental regulations relating to battery disposal

## SKSFS4 – Carry out engraving to meet customer requirements

### Overview:

This standard is for those who engrave items for customers on a variety of surfaces and is about examining items brought in by the customer and discussing and agreeing their requirements with them, such as choice, size and location of engraving, including checking spelling and dates. Where the customer has brought their own item to be engraved you need to be able to check that it is appropriate for engraving and, where applicable identify and offer from stock an appropriate item for engraving.

You will also have to provide a quotation for engraving based on time taken and costs involved, select the correct tools for the work, prepare the surface and engrave the item to an agreed standard.

You need to know which items can be engraved, different sizes and styles of lettering and how to select the correct tools for the job.

The job role may involve:

1. engraving prescribed words on items provided by customers
2. confirming the engraving requirements
3. undertaking the engraving and completing the service

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 examine the item presented by the customer to be engraved and confirm the acceptability of the item
- P3 discuss the customer's requirements
- P4 offer an appropriate item from those stocked on the premises if the customer has not provided the item
- P5 agree and check
  - P5.1 the choice of words
  - P5.2 location of the engraving
  - P5.3 spellings and dates
  - P5.4 the style and size of lettering
- P6 identify the length of time it will take and costs
- P7 site the item securely ready for the engraving
- P8 prepare the surface ready for engraving
- P9 select the correct tools for the work - tools could include:
  - P9.1 engraving machines
  - P9.2 vices
  - P9.3 files
  - P9.4 abrasives
  - P9.5 wire brushes
  - P9.6 polishes
  - P9.7 pliers
  - P9.8 other hand tools
- P10 select and use appropriate personal protection equipment
- P11 undertake the engraving avoiding damaging the item
- P12 finish the engraved item, including:
  - P12.1 cleaning
  - P12.2 polishing
  - P12.3 deburring
  - P12.4 applying a protective finish where required
  - P12.5 attaching to another item where required (e.g. chain or base plate)

- P13 check the finished item for quality and meeting customer requirements
- P14 make the item ready for collection by the customer
- P15 comply with written instructions
- P16 complete forms, records and other documentation
- P17 work to legal requirements, standards and regulations, policies, procedures and professional codes

### **Knowledge and Understanding:**

- K1 the different items which can be engraved with the available equipment
- K2 whether an item provided by the customer is suitable for engraving
- K3 stock items and the appropriateness to the customer's needs
- K4 the size and style of lettering, which can be produced with the available equipment
- K5 the factors, which determine the cost and timescale of the engraving
- K6 how to negotiate an acceptable timescale for the work and prepare an invoice
- K7 the importance of selecting the correct tools for the work and the necessity for the tools to be regularly maintained or sharpened
- K8 suitable methods to protect engraved surfaces, in different materials
- K9 methods to present the engraved item to enhance its appearance
- K10 the organisation's rules, codes, guidelines and standards
- K11 the manufacturer's instructions for setting up, adjusting and operating the equipment
- K12 the manufacturer's specifications and instructions for maintenance of equipment
- K13 the safe working practices recommended by manufacturers and the company safety regulations
- K14 statutory responsibilities under health, safety and environmental legislation and regulations
- K15 common hazards in the work area and workplace procedures for dealing with them
- K16 the correct safety precautions to be taken

## SKSFS5 – Sell footwear / leathersgoods / saddlery care and ancillary products

### Overview:

This standard for those who sell footwear / leathersgoods / saddlery care and ancillary products to customers by establishing customer requirements and presenting the range of options available. You will need to help the customer make their choice, making sure their requirements are met and then complete the sale.

You need to know the product ranges and prices and compatibility of the products with materials used. As you will be taking payments by a variety of methods you need to know about card transactions and how to respond to card payments being refused.

The job role may involve:

1. confirming the customer's requirements
2. completing the sale

### Performance Criteria:

- P1 establish the customer requirements, their budget and their preferences
- P2 present the options and choice of products available
- P3 help the customer with their choice, offering guidance when required
- P4 check that the customer's requirements have been met
- P5 pack the goods in an appropriate manner
- P6 operate the equipment used in taking payment
- P7 prepare and check a receipt
- P8 complete the sale
- P9 comply with written instructions
- P10 complete forms, records and other documentation
- P11 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the range of products customers may require
- K2 what the product range is (including polishes etc.), what is currently available and prices
- K3 what the compatibility is of the different products with the materials used in the construction of the footwear / leathersgoods / saddlery
- K4 the purposes to which customers may put the product
- K5 stock control / tracking methods
- K6 the action to take if the card transaction is refused
- K7 the correct behaviour which will encourage the customer to visit again
- K8 the organisation's rules, codes, guidelines and standards
- K9 statutory responsibilities under health, safety and environmental legislation and regulations
- K10 common hazards in the work area and workplace procedures for dealing with them

## SKSFS6 – Repair footwear / leathersgoods / saddlery care and ancillary products

### Overview:

This standard is for those who carry out footwear / leathersgoods / saddlery repairs using stitching machines whether in retail or a manufacturing environment and is about repairing footwear / leathersgoods / saddlery and ancillary products either by hand or machine. You will need to agree the repair with the customer, including timescales and costs, select the appropriate method of repair, make sure that machines are set up and operating efficiently, adjusting where necessary and carry out the repair ready for the customer. Hand sewing when re-welting or piece welting repairs are required.

You need to know whether the repair is to be made by hand or machine, the main equipment used and their capabilities and what problems may occur when undertaking the repair and how to prevent/rectify them. As adhesives will be used you need to know how to use and store them safely.

The job role may involve:

1. repairing footwear / leathersgoods / saddlery of specific types
2. hand sewing when re-welting or piece welting repairs are required

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 examine the specific item to identify what type of repair is best suited
- P3 establish the options, agree the decision with the customer
- P4 confirm the expected length of time the repair will take
- P5 prepare the item for repair
- P6 select the correct equipment for the repair
- P7 check the equipment prior to making the repair, including:
  - P7.1 correct controls
  - P7.2 correct attachments
  - P7.3 changing needles
  - P7.4 changing threads
  - P7.5 changing awls
- P8 make sure the equipment runs smoothly and adjust where necessary, including:
  - P8.1 adjusting tension
  - P8.2 adjusting stitch length
- P9 carry out the repair
- P10 remove excess materials by hand knife or machine, maintaining original contours
- P11 groove by machine or by hand
- P12 finish the repair
- P13 polish and bag ready for handover to the customer
- P14 comply with written instructions
- P15 complete forms, records and other documentation
- P16 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the types of footwear / leathersgoods / saddlery requiring repairs by hand or machine stitching
- K2 what the range of options are and which are most suited to the different types of footwear / leathersgoods / saddlery construction
- K3 which common factors affect repair
- K4 the main pieces of equipment needed to repair the item and their capabilities
- K5 what the characteristics are of the materials and how they differ

- K6 what the problems may be when stitching different constructions
- K7 how to use, apply and store adhesives
- K8 how to maintain, adjust and replace worn parts on the machines required for different types of attachment
- K9 the organisation's rules, codes, guidelines and standards
- K10 statutory responsibilities under health, safety and environmental legislation and regulations
- K11 common hazards in the work area and workplace procedures for dealing with them
- K12 the manufacturer's instructions for setting up, adjusting and operating the equipment
- K13 the manufacturer's specifications and instructions for maintenance of equipment
- K14 the safe working practices recommended by manufacturers and the company safety regulations
- K15 the correct safety precautions to be taken when making repairs



# SKSLG1 – Prepare components for footwear / leathersgoods / saddlery

## Overview:

This standard is for those who prepare components for footwear / leathersgoods / saddlery; carry out operations by hand or using machinery that requires good hand-eye co-ordination and is about selecting components for footwear / leathersgoods / saddlery to meet a prescribed specification, assembling and fixing the selected components using the right tools and equipment. Because you will be using glues and solvents you will need to know the health and safety factors about the use and storage of adhesives and the hazards associated with them.

The job role may involve:

1. selecting components to meet the product specification
2. preparing them safely, using the appropriate tools and equipment

## Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 choose the components to meet the product specification, including:
  - P2.1 knives
  - P2.2 tools for positional marking
  - P2.3 tools for decorative marking
  - P2.4 staining
  - P2.5 fixing
  - P2.6 forming
- P3 identify the factors affecting the techniques for assembly, fixing and forming
- P4 identify wear and tear on tools and equipment and remedy where possible, reporting where unable to
- P5 identify faulty or unsuitable components
- P6 make the work space ready for the assembly and fixing work
- P7 assemble and fix the selected components safely using the appropriate tools and equipment
- P8 complete in accordance with the product specification and production schedule
- P9 safely dispose of waste and surplus materials
- P10 comply with written instructions
- P11 complete forms, records and other documentation
- P12 work to legal requirements, standards and regulations, policies, procedures and professional codes

## Knowledge and Understanding:

- K1 how to interpret product specifications
- K2 where components are stored
- K3 what constitutes an unacceptable deviation from the component specification
- K4 who should be notified of production problems or faulty components
- K5 the detail of the components used in the production process
- K6 who will perform the next stage in the preparation of the leathersgoods / saddlery
- K7 what constitutes an acceptable assembled component
- K8 the organisation's rules, codes, guidelines and standards
- K9 statutory responsibilities under health, safety and environmental legislation and regulations
- K10 common hazards in the work area and workplace procedures for dealing with them
- K11 safety precautions to be taken
- K12 the hazards associated with different fixing materials and processes
- K13 the regulations for use, storage and disposal of solvents and adhesives

## SKSLG2 – Skive and/or split material for footwear / leathersgoods / saddlery manufacture

### Overview:

This standard is for those who skive and/or split materials for footwear / leathersgoods / saddlery manufacture and is about producing leathersgoods products by hand and/or machine to an agreed specification. You will need to choose the most suitable tools for the job and may be shaping materials by cutting off thin layers or pieces (skiving) or by splitting.

You need to know how to select the right machine for the material being used, and set up and close down machines and the hazards that may be encountered in their use. You also need to know the characteristics of different materials and the flaws and faults that may be found in them.

The job role may involve:

1. shaping materials safely and to specification

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 choose the tools suitable for the job
- P3 fit to the machine according to the manufacturer's instructions
- P4 operate the machines safely and in accordance with operating guidelines
- P5 produce products by hand/machine
- P6 check that products conform to their specification
- P7 minimise waste and dispose of all waste materials in the approved manner
- P8 make machines safe and clean after use
- P9 safely store and dispose of waste materials
- P10 comply with written instructions
- P11 complete forms, records and other documentation
- P12 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the functions of different tools for machine shaping
- K2 how to reject worn, faulty or defective tools and who to notify for their replacement
- K3 what hazards are involved in operating the machines
- K4 what problems and hazards can be encountered when setting up the machines
- K5 what is the importance of storing tools safely and correctly
- K6 what the different characteristics are of the various materials
- K7 which machines to use for different components
- K8 how to operate the machine safely and effectively
- K9 which characteristic flaws and faults may be found in the different materials
- K10 the organisation's rules, codes, guidelines and standards
- K11 statutory responsibilities under health, safety and environmental legislation and regulations
- K12 common hazards in the work area and workplace procedures for dealing with them
- K13 safety precautions to be taken
- K14 the potential hazards involved in the machine shaping operations
- K15 company policy on storage of tools, etc.

## SKSLG3 – Machine form and embellish components of footwear / leathergoods

### Overview:

This standard is for those who use machines to form and embellish components of footwear / leathergoods; carry out operations by hand or using machinery that requires good hand-eye co-ordination to an agreed standard. You will have to select the machine to be used appropriate to the material and set it up ready for the process. You will also need to be able to identify a variety of common faults associated with both the materials and the machine used, remedying problems where possible.

The job role may involve:

1. setting up forming and embellishing machines
2. operating them effectively and safely
3. meeting production schedules

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 set up appropriate machines according to manufacturers' instructions and the production schedule
- P3 select foils for different materials
- P4 select and use materials appropriate for the production specification
- P5 operate the machines safely and in accordance with operating guidelines
- P6 meet the production schedule whilst ensuring that the components are of the required quality
- P7 identify and rectify incorrect splits and skives on the forming process
- P8 minimise waste materials and dispose of in the approved manner
- P9 leave the work area, machines and equipment safe, clean and secure
- P10 comply with written instructions
- P11 complete forms, records and other documentation
- P12 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 which machines are used with each component
- K2 which common faults may be encountered during embellishing
- K3 how to reject worn, faulty or defective tools and who to notify for their replacement
- K4 typical faults and problems associated with the different components
- K5 the different characteristics of the various materials used for embellishing
- K6 the typical faults that can arise and how to respond to them
- K7 who the responsible person is, in the event of problems
- K8 the organisation's rules, codes, guidelines and standards
- K9 statutory responsibilities under health, safety and environmental legislation and regulations
- K10 common hazards in the work area and workplace procedures for dealing with them
- K11 regulations and guidelines for storage and disposal of waste materials
- K12 the potential hazards associated with the different types of machine

## SKSLG4 – Machine sew components to produce leathersgoods / saddlery

### Overview:

This standard is for those who use machines to sew components to produce leathersgoods / saddlery in order to meet agreed production schedules and quality standards. You will need to be able to set up machines and their controls and operate them safely. You need to know the consequences of not setting up the machine properly and the common faults associated with industrial sewing machines. You will also be responsible for carrying out routine maintenance on your machine.

The job role may involve:

1. setting up sewing machines
2. operating them effectively and safely
3. producing components for leathersgoods / saddlery
4. fulfilling production schedules

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 set up machines according to manufacturers' instructions and production requirements
- P3 use the correct machines, tools and equipment
- P4 set machine controls for the materials being sewn
- P5 perform a test run to ensure machine is operating correctly
- P6 adjust machine controls where necessary
- P7 report defective machines, tools and/or equipment to the responsible person
- P8 operate machines safely and in accordance with guidelines
- P9 optimise the positioning and layout of materials to ensure a smooth and rapid throughput
- P10 sew the correct materials in the right sequence as required by the production specification
- P11 check that sewn items meet the production specification and pass to the next stage in the manufacturing process
- P12 respond accordingly where sewn items do not meet production specification
- P13 minimise and dispose of waste materials in the approved manner
- P14 clean and make safe machines after use
- P15 carry out basic maintenance of own machines
- P16 comply with written instructions
- P17 complete forms, records and other documentation
- P18 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 how to set and adjust machine controls
- K2 the consequences of wrongly set controls
- K3 the typical faults of industrial sewing machines
- K4 which types of sewing faults are correctable and which are not
- K5 what the consequences are of incorrectly adjusted machine controls
- K6 the actions to take in the event of a machine ceasing to function correctly
- K7 the organisation's rules, codes, guidelines and standards
- K8 statutory responsibilities under health, safety and environmental legislation and regulations
- K9 common hazards in the work area and workplace procedures for dealing with them
- K10 regulations and guidelines for storage and disposal of waste materials
- K11 the relevant health and safety regulations and procedures
- K12 the hazards associated with the machines and the safety precautions that must be taken
- K13 the limits of your own personal responsibility and the appropriate persons to whom problems should be referred

## SKSLG5 – Process customers' orders for footwear / leathersgoods / saddlery

### Overview:

This standard is for those who inspect, package and despatch footwear / leathersgoods / saddlery and is about selecting and inspecting footwear / leathersgoods / saddlery to make sure they conform to the order and are of an agreed quality. You will need to know the quality standards and what to look for when inspecting items. Once inspected and passed you will need to package them along with any support materials, label and despatch to customers.

The job role may involve:

1. collating footwear / leathersgoods / saddlery
2. inspecting them
3. packaging them
4. ensuring footwear / leathersgoods / saddlery are despatched to the correct destination

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 obtain details of the order
- P3 interpret customers' orders
- P4 recognise appropriate products from order information
- P5 inspect footwear / leathersgoods / saddlery to ensure that they agree with the order
- P6 remove rejected items from the accepted ones and report
- P7 choose packaging materials to meet customers' requirements
- P8 select support materials to accompany the products
- P9 package the items and any support material
- P10 prepare packaged orders to meet the production requirements
- P11 label goods correctly
- P12 despatch goods to customers in accordance with company requirements and customer instructions
- P13 check that specified transportation arrangements are used to meet the agreed delivery schedule
- P14 check all details and pass documentation to the relevant person for invoicing purposes
- P15 comply with written instructions
- P16 complete forms, records and other documentation
- P17 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the quality standards and how to maintain them
- K2 who rejected items should be referred to
- K3 the factors determining the type of transportation used
- K4 necessary documentation when goods are exported
- K5 the organisation's rules, codes, guidelines and standards
- K6 statutory responsibilities under health, safety and environmental legislation and regulations
- K7 common hazards in the work area and workplace procedures for dealing with them
- K8 regulations and guidelines for storage and disposal of waste materials
- K9 the hazards associated with the machines and the safety precautions that must be taken

## SKSL1 – Manufacture material to add value in leather production (chemical processing)

### Overview:

This standard is about chemically processing materials in a specific area of production (e.g. beamhouse, tannage, post tannage and finishing), safely and to an agreed standard. You will need to be able to identify, select and confirm the type grade and quantity of materials for the work ticket and know how to handle a variety of materials to avoid damage and contamination.

The job role may involve:

1. chemically processing and completing materials in a specific area of production, e.g. beamhouse, tannage, post tannage and finishing

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 chemically process the material including the operations involved in one of the following production areas - beamhouse, tannage, post tannage or finishing
- P3 identify, select and confirm the type, grade and quantity of materials to be processed matches the work ticket
- P4 accurately follow the essential information contained on the work ticket
- P5 handle and transport material, including hides, skins, leather, chemicals, in the most effective manner and in the correct sequence
- P6 follow the process instruction sheet to meet production targets
- P7 accurately weigh and handle chemicals appropriately
- P8 report any deviations from the process sheet to line manager
- P9 complete the process to the required standard
- P10 clean and store work equipment safely after use
- P11 comply with written instructions
- P12 complete forms, records and other documentation
- P13 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the main types and characteristics of hides, skins or leather produced by the company
- K2 the action to be taken when correct material for work is not available
- K3 an appreciation of each operation involved in the company's production process
- K4 the sections of the work ticket relevant to the work required
- K5 how material can be contaminated or damaged during processing and the effects on quality
- K6 what essential information is needed to be passed on and to whom
- K7 the company's rules, codes, guidelines and standards
- K8 company rules for safe disposal of waste and the implications of failing to follow the rules
- K9 the hazards associated with the machines and the safety precautions that must be taken
- K10 statutory responsibilities under health, safety and environmental legislation and regulations
- K11 common hazards in the work area and workplace procedures for dealing with them

## SKSL2 – Manufacture material to add value in leather production (mechanical processing)

### Overview:

This standard is about mechanically processing materials such as: fleshing; splitting; shaving; drying; softening; spraying and embossing. You will need to be able to identify the main types and characteristics of hides, skins or leathers produced by the company and operate the equipment and machines used in the process, safely and to a specified standard in the right sequence.

The job role may involve:

1. mechanically processing and completing materials

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 process the material by carrying out a mechanical operation such as: fleshing, splitting, shaving, drying, softening, spraying, embossing
- P3 identify and select the type, grade and quality of materials to be processed
- P4 confirm that the material received matches the work ticket
- P5 accurately follow the essential information contained on the work ticket
- P6 handle and transport material, including hides, skins, leather, in the most effective manner and in the correct sequence
- P7 follow the start-up sequences and operate the equipment controls correctly:
  - P7.1 adjust the equipment to ensure the specified quality standards are achieved
  - P7.2 handle the material in order to avoid contaminating and damaging the material during the process
- P8 complete the process to the specified standard required for the next operation
- P9 shut down the equipment
- P10 carry out basic maintenance on the equipment
- P11 clean and store work equipment safely after use
- P12 comply with written instructions
- P13 complete forms, records and other documentation
- P14 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the main types and characteristics of hides, skins or leather produced by the company
- K2 an appreciation of all the main stages involved in the company's production
- K3 the purpose of each operation in the production process
- K4 the sections of the work ticket relevant to the work required
- K5 equipment capabilities
- K6 how material can be contaminated or damaged during processing and the effects on quality
- K7 the action to be taken when correct material for work is not available
- K8 what essential information is needed to be passed on and to whom
- K9 the by-products and waste produced during processing
- K10 the company's rules, codes, guidelines and standards
- K11 company rules for safe disposal of waste and the implications of failing to follow the rules
- K12 the hazards associated with the machines and the safety precautions that must be taken
- K13 statutory responsibilities under health, safety and environmental legislation and regulations
- K14 common hazards in the work area and workplace procedures for dealing with them

## SKSL3 – Respond to production quality problems

### Overview:

This standard is for those who deal with poor production performance occurring during manufacturing operations and is about identifying and reacting to production faults. You will need to liaise with the others to establish what is affecting performance and carry out tests to establish the root cause of the fault before taking corrective action to rectify the fault.

The job role may involve:

1. identifying faults
2. seeking technical/production information about the faults
3. establishing the cause
4. taking appropriate action

### Performance Criteria:

- P1 make sure the work area is free from hazards
- P2 identify and react correctly to production faults
- P3 seek clear and accurate technical/ production information about what is affecting performance
- P4 carry our investigations to confirm the accuracy of the information provided
- P5 identify and respond to conflicting technical / production information
- P6 carry out diagnostic test and checks
- P7 identify the nature, characteristics and implications of the fault
- P8 carry out appropriate tests to establish the root cause of the fault
- P9 take corrective action based on the cause of the fault
- P10 negotiate solutions with suppliers of faulty goods
- P11 comply with written instructions
- P12 complete forms, records and other documentation
- P13 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 company procedures for dealing with faults in production
- K2 with whom you should maintain communication during fault identification
- K3 the implications of faults on production and output
- K4 sources of relevant information to collate information from
- K5 factors which influence faults
- K6 how to develop sensible recommendations
- K7 company requirements on completing accurate records
- K8 how to verify that corrective action has been effective
- K9 the organisation's guidelines and procedures
- K10 the hazards associated with the machines and the safety precautions that must be taken
- K11 statutory responsibilities under health, safety and environmental legislation and regulations
- K12 common hazards in the work area and workplace procedures for dealing with them



## SKSL4 – Improve production methods and processes

### Overview:

This standard is for those who work in production and have the responsibility to review the production process and identify opportunities to improve production. You will need to initially establish whether any problems exist and where improvements may be made. You will liaise with others to discuss the opportunities for improvement and develop recommendations, identifying resources required to implement the improvements before presenting your proposals to the relevant people.

The job role may involve:

1. identifying the technical content of customer's requirements
2. carrying out a review to establish where opportunities for improvement can be made
3. consulting with others
4. presenting feasible recommendations

### Performance Criteria:

- P1 conduct a review of the production process stage to identify opportunities for improvement
- P2 establish whether any problem areas exist and where improvements might be made
- P3 record all feasible recommendations for improving production and possible courses of action
- P4 meet with others to consult with them about the options for improvement within production
- P5 encourage those attending the meeting to make useful contributions about the options for improvement
- P6 check that the options meet:
  - P6.1 company objectives
  - P6.2 health, safety and environmental regulations
  - P6.3 customer requirements
- P7 identify what resources, including costs, are required to meet the recommendations to improve production
- P8 present the proposals to relevant people clearly and concisely
- P9 ensure that process and specification are made clear to those in production
- P10 ensure that process and specification are met throughout the production process
- P11 comply with written instructions
- P12 complete forms, records and other documentation
- P13 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the common types and nature of raw materials used
- K2 the company's production methods and techniques
- K3 how to conduct a review process, what to look for and how to collate the information
- K4 how to consult with others in a manner which ensures their views and opinions are sought
- K5 how to manage discussions so that the objectives of the meeting are met within the allocated time
- K6 current company objectives and how to relate them to the review of production
- K7 health, safety and environmental regulations relating to production work
- K8 the requirements of customers and how to apply those to production processes for which you are responsible
- K9 what additional resources would be required to implement proposals
- K10 the organisation's rules, codes, guidelines and standards
- K11 statutory responsibilities under health, safety and environmental legislation and regulations
- K12 common hazards in the work area and workplace procedures for dealing with them
- K13 the hazards associated with the machines and the safety precautions that must be taken

## SKSL5 – Contribute to leather development

### Overview:

This standard is for those who work in leather production and contribute to leather development for the purpose of enhancing the company's product by planning for development work, carrying out tests and trials, analysing results on leather samples and trials and making clear recommendations to the relevant people for future development plans.

The job role may involve:

1. planning
2. carrying out experiments
3. evaluating their results on leather samples and trials

### Performance Criteria:

- P1 ensure plans for development work meet company objectives
- P2 ensure development work can be maintained within budget and time constraints
- P3 ensure experiments take account of
  - P3.1 company capabilities
  - P3.2 health, safety and environmental regulations
  - P3.3 customer requirements
- P4 select samples and carry out trials for production
- P5 design and carry out tests on the trial samples in accordance with industry standards
- P6 identify the pertinent points of the results of experiments and discuss these with relevant people including those managing production
- P7 evaluate the success of experiments within the context of the company objectives and customer requirements
- P8 make clear and realistic recommendations with indicative costs to relevant people for future development plans
- P9 meet with others to discuss new techniques and processes in a way that encourages useful contributions and ideas
- P10 update plans with the following:
  - P10.1 results of the experiments
  - P10.2 recommendations to relevant people
  - P10.3 the agreed outcomes
- P11 comply with written instructions
- P12 complete forms, records and other documentation
- P13 work to legal requirements, standards and regulations, policies, procedures and professional codes

### Knowledge and Understanding:

- K1 the common types and nature of raw materials used in the production of leather in the company
- K2 the company's leather production methods and techniques
- K3 company objectives
- K4 budgets and timescales for development work
- K5 relevant sources of information for keeping up-to-date on new techniques and processes
- K6 the organisation's rules, codes, guidelines and standards
- K7 statutory responsibilities under health, safety and environmental legislation and regulations
- K8 common hazards in the work area and workplace procedures for dealing with them
- K9 the hazards associated with the machines and the safety precautions that must be taken

## SKSMSP1 – Look after the work area in manufacturing sewn products

### Overview:

This standard is for those who organise and maintain their work areas and activities to make sure that agreed production targets and instructions are met.

The job role may involve:

1. organising, cleaning and maintaining the work area
2. organising the work to ensure it flows effectively through the work area
3. carrying out on-going routine maintenance of tools and equipment
4. helping to achieve production targets

### Performance Criteria:

- P1 handle materials, machinery, equipment and tools safely and correctly
- P2 use correct lifting and handling procedures
- P3 use materials to minimise waste
- P4 prepare and organise work
- P5 maintain a clean and hazard free working area
- P6 deal with work interruptions
- P7 move about the workplace with care
- P8 maintain tools and equipment
- P9 carry out running maintenance within agreed schedules
- P10 report the need for maintenance and / or cleaning outside your responsibility
- P11 report unsafe equipment and other dangerous occurrences
- P12 ensure the correct machine guards are in place
- P13 work in a comfortable position with the correct posture
- P14 use cleaning equipment and methods appropriate for the work to be carried out
- P15 dispose of waste safely in the designated location
- P16 store cleaning equipment safely after use
- P17 carry out cleaning according to schedules and limits of responsibility
- P18 complete and store accurate records and documentation

### Knowledge and Understanding:

- K1 how to receive work instructions and specifications and interpret them accurately
- K2 how to make use of the information detailed in specifications and instructions
- K3 how the work role fits in with the overall manufacturing process
- K4 the importance of good time keeping and attendance
- K5 the importance of minimised production costs
- K6 the importance of taking action when problems are identified
- K7 different ways of minimising waste
- K8 the importance of running maintenance and regular cleaning
- K9 effects of contamination on products i.e. machine oil, dirt
- K10 common faults with equipment and how they can be rectified
- K11 maintenance procedures
- K12 hazards likely to be encountered when conducting routine maintenance
- K13 different types of cleaning equipment and substances and their use
- K14 safe working practices for cleaning and how they are carried out
- K15 personal hygiene and duty of care
- K16 safe working practices and organisational procedures
- K17 limits of your own responsibility
- K18 ways of resolving with problems within the work area
- K19 the production process and how your specific work activities relate to the whole process
- K20 the importance of effective communication with colleagues
- K21 the lines of communication, authority and reporting procedures
- K22 the organisation's rules, codes and guidelines (including timekeeping)

- K23 the companies quality standards
- K24 the types of records kept, how are they completed and the importance of keeping them accurate
- K25 the importance of complying with written instructions
- K26 equipment operating procedures / manufacturer's instructions
- K27 statutory responsibilities under health, safety and environmental legislation and regulations

## SKSMSP2 – Contribute to achieving product quality

### Overview:

This standard is for those who monitor the quality of their own production activities and ensure products continue to meet specifications during production.

The job role may involve:

1. inspecting materials and products during the production process
2. meeting product specifications
3. identifying problems and irregularities
4. finding the cause of faults in materials and products
5. taking appropriate corrective action
6. using quality approved systems and reporting procedures

### Performance Criteria:

- P1 ensure materials and component parts meet specification
- P2 report faulty materials and component parts which do not meet specification
- P3 replace identified faulty materials and component parts which do not meet specification
- P4 set up and test equipment to meet quality standard
- P5 carry out quality checks at agreed intervals and in the approved way
- P6 ensure the quality of the product meets specification during production
- P7 apply the allowed tolerances
- P8 identify process problems that effect product quality and report them promptly to appropriate people
- P9 maintain the continuity of production with minimum interruptions and downtime
- P10 identify faults and irregularities in equipment and machinery and take action within the limits of your responsibility
- P11 identify faults in finished products and trace their causes
- P12 follow reporting procedures where the cause of faults cannot be identified
- P13 maintain the required productivity and quality levels
- P14 complete and store accurate records and documentation

### Knowledge and Understanding:

- K1 how to receive work instructions and specifications and interpret them accurately
- K2 how to make use of the information detailed in specifications and instructions
- K3 the types of faults in equipment and machinery and the action to be taken when they occur
- K4 the types of faults in materials and components which need replacing and the action to be taken
- K5 how to identify materials which do not conform to requirements and how to report them to appropriate people
- K6 care and fabric content labels / symbols
- K7 the types of problems that occur during processing
- K8 potential solutions to help rectify faults
- K9 inspection methods and techniques
- K10 the types of adjustments suitable for specific types of faults
- K11 handling techniques for different materials
- K12 awareness of material / fabric / yarn types
- K13 quality control procedures and how to follow them
- K14 the types of problems with quality and how to report them to appropriate people
- K15 the consequences of not rectifying problems
- K16 the importance of keeping accurate quality records
- K17 how to present any ideas for improvement to line manager
- K18 the causes of lost production and material wastage
- K19 how to maintain the flow of production

- K20 the importance of achieving quality and its relation to the end user / customer
- K21 the importance of team work
- K22 safe working practices and organisational procedures
- K23 limits of your own responsibility
- K24 ways of resolving with problems within the work area
- K25 the production process and how your specific work activities relate to the whole process
- K26 the importance of effective communication with colleagues
- K27 the lines of communication, authority and reporting procedures
- K28 the organisation's rules, codes and guidelines (including timekeeping)
- K29 the companies quality standards
- K30 the types of records kept, how are they completed and the importance of keeping them accurate
- K31 the importance of complying with written instructions
- K32 equipment operating procedures / manufacturer's instructions
- K33 statutory responsibilities under health, safety and environmental legislation and regulations

# CFACSB10 – Organise the delivery of reliable customer service

## Overview:

This Standard is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

This Standard is about how you organise the delivery and maintenance of excellent and reliable customer service. Your role may or may not involve supervisory or management responsibilities but you are expected to take some responsibility for the resources and systems you use which support the service that you give. In your job you must be alert to customer reactions and know how they can be used to improve the service that you give. In addition, customer service information must be recorded to support reliable service.

## Performance Criteria:

### Plan and organise the delivery of reliable customer service

- P1 plan, prepare and organise everything you need to deliver services or products to different types of customers
- P2 organise what you do to ensure that you are consistently able to give prompt attention to your customers
- P3 reorganise your work to respond to unexpected additional workloads

### Review and maintain customer service delivery

- P4 maintain service delivery during very busy periods and unusually quiet periods
- P5 maintain service delivery when systems, people or resources have let you down
- P6 consistently meet your customers' expectations
- P7 balance the time you take with your customers with the demands of other customers seeking your attention
- P8 respond appropriately to your customers when they make comments about the services or products you are offering
- P9 alert others to repeated comments made by your customers
- P10 take action to improve the reliability of your service based on customer comments
- P11 monitor the action you have taken to identify improvements in the service you give to your customers

### Use recording systems to maintain reliable customer service

- P12 record and store customer service information accurately following organisational guidelines
- P13 select and retrieve customer service information that is relevant, sufficient and in an appropriate format
- P14 quickly locate information that will help solve a customer's query
- P15 supply accurate customer service information to others using the most appropriate method of communication

## Knowledge and Understanding:

- K1 organisational procedures for unexpected situations and your role within them
- K2 resource implications in times of staff sickness and holiday periods and your responsibility at these times
- K3 the importance of having reliable and fast information for your customers and your organisation
- K4 organisational procedures and systems for delivering customer service
- K5 how to identify useful customer feedback and how to decide which feedback should be acted on
- K6 how to communicate feedback from customers to others
- K7 organisational procedures and systems for recording, storing, retrieving and supplying customer service information.
- K8 legal and regulatory requirements regarding the storage of data

***This standard is imported from Skills CFA, Customer Service suite (January 2013) CFACSB10***



## CFACSC5 – Monitor and solve customer service problems

### Overview:

This Standard is part of the Customer Service Theme of Handling Problems. This Theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

Your job involves delivering and organising excellent customer service. However good the service provided, some of your customers will experience problems and you will spot and solve other problems before your customers even know about them. This Standard is about the part of your job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems.

Remember that some customers judge the quality of your customer service by the way that you solve customer service problems. You can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

### Performance Criteria:

#### Solve immediate customer service problems

- P1 respond positively to customer service problems following organisational guidelines
- P2 solve customer service problems when you have sufficient authority
- P3 work with others to solve customer service problems
- P4 keep customers informed of the actions being taken
- P5 check with customers that they are comfortable with the actions being taken
- P6 solve problems with service systems and procedures that might affect customers before they become aware of them
- P7 inform managers and colleagues of the steps taken to solve specific problems

#### Identify repeated customer service problems and options for solving them

- P8 identify repeated customer service problems
- P9 identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
- P10 work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation

#### Take action to avoid the repetition of customer service problems

- P11 obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
- P12 action your agreed solution
- P13 keep your customers informed in a positive and clear manner of steps being taken to solve any service problems
- P14 monitor the changes you have made and adjust them if appropriate

### Knowledge and Understanding:

- K1 organisational procedures and systems for dealing with customer service problems
- K2 organisational procedures and systems for identifying repeated customer service problems
- K3 how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers
- K4 how to negotiate with and reassure customers while their problems are being solved
- K5 the opportunities and potential for monitoring and solving customer service problems presented by remote information collection and sharing such as through social media

***This standard is imported from Skills CFA, Customer Service suite (January 2013) CFACSC5***

## CFAM&LAA2 – Develop your knowledge, skills and competence

### Overview:

This standard is about taking responsibility for developing your own knowledge, skills and competence to meet the current and future requirements of your work and to support your personal and career development.

This standard is relevant to all managers and leaders.

This standard links closely to *CFAM&LAA1 Manage yourself*. It also links to the standards in key area *DC Develop and support individuals* which are about helping others to develop their knowledge, skills and competence.

### Performance Criteria:

- P1 monitor trends and developments in your sector and area of professional expertise and evaluate their impact on your work role
- P2 evaluate, at appropriate intervals, the current and future requirements of your work role, taking account of the vision and objectives of your organisation
- P3 identify the learning methods which work best for you and ensure that you take these into account in identifying and undertaking development activities
- P4 identify any gaps between the current and future requirements of your work role and your current knowledge, skills and competence
- P5 discuss and agree, with those you report to, a development plan which both addresses any identified gaps in your knowledge, skills and competence and supports your own career and personal goals
- P6 undertake the activities identified in your development plan and evaluate their contribution to your performance
- P7 get regular feedback on your performance from those who are able to provide objective, specific and valid feedback
- P8 review and update your development plan in the light of your performance, any development activities undertaken and any wider changes

### Knowledge and Understanding:

#### General knowledge and understanding

- K1 the principles which underpin professional development
- K2 how to evaluate the current requirements of a work role and how the requirements may evolve in the future
- K3 how to monitor changes, trends and developments
- K4 how to evaluate the impact of different factors on your role
- K5 how to identify development needs to address any identified gaps between the requirements of your work role and your current knowledge, understanding and skills
- K6 what an effective development plan should contain and the length of time that it should cover
- K7 the importance of taking account of your career and personal goals when planning your professional development
- K8 the range of different learning methods and how to identify the methods which work best for you
- K9 the type of development activities that can be undertaken to address identified gaps in your knowledge, skills and competence
- K10 how to evaluate the extent to which development activities have contributed to your performance
- K11 how to update development plans in the light of your performance, any development activities undertaken and any wider changes
- K12 how to identify and use appropriate sources of feedback on your performance

### **Industry/sector specific knowledge and understanding**

K13 industry/sector requirements for the development or maintenance of knowledge, skills and competence

### **Context specific knowledge and understanding**

K14 the requirements of your work role including the limits of your responsibilities

K15 your own career and personal goals

K16 your preferred learning methods

K17 your current levels of knowledge, skills and competence

K18 identified gaps in your current knowledge, skills and competence

K19 your personal development plan

K20 available development opportunities and resources in your organisation

K21 your organisation's policy and procedures in terms of personal development

K22 possible sources of feedback in your organisation

### **Behaviours:**

1. recognise changes in circumstances promptly and adjust plans and activities accordingly
2. seek opportunities to improve performance
3. develop knowledge, understanding, skills and performance in a systematic way
4. encourage and welcome feedback from others and use this feedback constructively
5. reflect on your experiences and use the lessons to guide your decisions and actions
6. agree challenging but achievable objectives
7. demonstrate awareness of your own values, motivations and emotions
8. give a consistent and reliable performance
9. recognise and make the most of your own strengths
10. recognise your limitations and seek to minimise their impact
11. make effective use of available resources
12. seek new sources of support when necessary

### **Skills:**

- communicating
- evaluating
- learning
- obtaining feedback
- planning
- reflecting
- reviewing
- self-assessment
- setting objectives

***This standard is imported from Skills CFA, Management & Leadership suite (March 2012) CFAM&LAA2***

# CFAM&LDD2 – Develop and sustain productive working relationships with stakeholders

## Overview:

This standard is about developing and sustaining productive working relationships with stakeholders. These include colleagues within your own organisation, people within other organisations with which your organisation works and other external stakeholders.

This standard is relevant to managers and leaders who work with both internal and external stakeholders.

This standard links closely with all the other standards in key area DD Build and sustain relationships and also with CFAM&LAA3 Develop and maintain your professional networks.

## Performance Criteria:

- P1 identify external stakeholders and the nature of their interest in the activities and performance of your organisation
- P2 establish working relationships with relevant internal and external stakeholders
- P3 recognise and respect the roles, responsibilities, interests and concerns of stakeholders and, particularly in situations of matrix management, their managers' requirements
- P4 seek to create a climate of trust and mutual respect, particularly where you have no authority, or shared authority, over those you are working with
- P5 seek to understand difficult situations and issues from stakeholders' perspectives and provide support, where necessary, to move things forward
- P6 provide stakeholders with appropriate information to enable them to perform effectively
- P7 consult stakeholders in relation to key decisions and activities and take account of their views, including their priorities, expectations and attitudes to potential risks
- P8 fulfil agreements made with stakeholders and let them know
- P9 advise stakeholders promptly of any difficulties or where it will be impossible to fulfil agreements
- P10 identify and resolve conflicts of interest and disagreements with stakeholders in ways that minimise damage to work and activities and to the stakeholders involved
- P11 monitor and review the effectiveness of working relationships with stakeholders in order to identify areas for improvement
- P12 seek and provide feedback in order to improve your own and stakeholders' performance
- P13 monitor wider developments in order to identify issues of potential interest or concern to stakeholders in the future and to identify new stakeholders

## Knowledge and Understanding:

### General knowledge and understanding

- K1 the benefits of developing productive working relationships with stakeholders
- K2 different types of stakeholder and key principles which underpin the 'stakeholder' concept
- K3 how to identify your organisation's stakeholders, including background information and the nature of their interest in your organisation
- K4 principles of effective communication and how to apply them in order to communicate effectively with stakeholders
- K5 why it is important to recognise and respect the roles, responsibilities, interests and concerns of stakeholders
- K6 the importance of creating a climate of trust and mutual respect where you have no authority, or shared authority, over those you are working with
- K7 the importance of understanding difficult situations and issues from other perspectives and providing support, where necessary, to move things forward
- K8 how to identify and meet the information needs of stakeholders
- K9 what information it is appropriate to provide to stakeholders and the factors that need to be taken into consideration

- K10 how to consult with stakeholders in relation to key decisions and activities
- K11 the importance of taking account, and being seen to take account, of the views of stakeholders, particularly in relation to their priorities, expectations and attitudes to potential risks
- K12 why communication with stakeholders on fulfilment of agreements or any problems affecting or preventing fulfilment is important
- K13 how to identify conflicts of interest with stakeholders and the techniques that can be used to manage or remove them
- K14 how to identify disagreements with stakeholders and the techniques for sorting them out
- K15 the damage that conflicts of interest and disagreements with
- K16 how to recognise and take account of political issues when dealing with stakeholders
- K17 how to manage the expectations of stakeholders
- K18 how to monitor and review the effectiveness of working relationships with stakeholders
- K19 how to get and make effective use of feedback from stakeholders
- K20 how to provide stakeholders with feedback designed to improve their performance
- K21 the importance of monitoring wider developments in relation to stakeholders and how to do so effectively

#### **Industry/sector specific knowledge and understanding**

- K22 current and emerging trends and developments in your industry or sector
- K23 sector-specific legislation, regulations, guidelines and codes of practice
- K24 standards of behaviour and performance in your industry or sector
- K25 the culture of your industry or sector

#### **Context specific knowledge and understanding**

- K26 the vision, values, objectives, plans, structure and culture of your organisation
- K27 relevant stakeholders, their work roles and responsibilities
- K28 identified stakeholders, their background and interests in the activities and performance of the organisation
- K29 agreements with stakeholders
- K30 the identified information needs of stakeholders
- K31 mechanisms for consulting with stakeholders on key decisions and activities
- K32 your organisation's planning and decision-making processes
- K33 mechanisms for communicating with stakeholders
- K34 power, influence and politics within your organisation
- K35 standards of behaviour and performance that are expected in your organisation
- K36 mechanisms in place for monitoring and reviewing the effectiveness of working relationships with stakeholders

#### **Behaviours:**

When performing to this standard, you are likely to demonstrate the following behaviours:

1. identify people's preferred ways of communicating
2. use communication media and styles appropriate to different people and situations
3. present information clearly, concisely, accurately and in ways that promote understanding
4. keep people informed of plans and developments in a timely way
5. show respect for the views and actions of others
6. comply with and ensure others comply with legal requirements, industry regulations, organisational policies and professional codes
7. seek to understand people's needs and motivations
8. create a sense of common purpose
9. work towards win-win solutions
10. take account of the internal and external politics that impact on your own area of work
11. clarify your own and others' expectations of relationships
12. model behaviour that shows, and inspires others to show, respect, helpfulness and cooperation
13. honour your commitments to others
14. recognise when there are conflicts, acknowledge the feelings and views of all parties, and

- redirect people's energy towards a common goal
15. take account of the impact of your own actions on others
  16. recognise stakeholders' needs and interests and manage these effectively

### **Skills:**

When performing to this standard, you are likely to demonstrate the following skills:

- balancing competing needs and interests
- communicating
- consulting
- empathising
- information management
- involving others
- leadership
- managing conflict
- monitoring
- networking
- obtaining feedback
- presenting information
- prioritising
- problem solving
- providing feedback
- reviewing
- valuing and supporting others

***This standard has been imported from Skills CFA, Management & Leadership suite (March 2012), CFAM&LDD2***

## CFAM&LBA3 – Lead your team

### Overview:

This standard is about providing direction to the members of your team and motivating and supporting them to achieve both team objectives and their individual work objectives.

It is relevant to team leaders, project managers and other managers who are responsible for leading teams. *CFAM&LBA1 Lead your organisation* and *CFAM&LBA2 Provide leadership in your area of responsibility* are complementary standards for managers with wider responsibility.

This standard links to a number of other standards in the key area *DB Manage teams* and also to *CFAM&LFA5 Manage projects*.

### Performance Criteria:

- P1 clearly communicate the purpose and objectives of the team to all members
- P2 involve members in planning how the team will achieve its objectives
- P3 ensure that each member of the team has individual work objectives and understands how these contribute to achieving the objectives of the team and the organisation as a whole
- P4 encourage and support team members to achieve their individual work objectives and those of the team and provide recognition when objectives have been achieved
- P5 steer the team successfully through difficulties and challenges
- P6 encourage and recognise creativity and innovation within the team
- P7 empower team members to develop their own ways of working and take their own decisions within agreed boundaries
- P8 encourage team members to take responsibility for their own development needs
- P9 give team members support and advice when they need it especially during periods of setback and change
- P10 motivate team members to present their own ideas and listen to what they say
- P11 encourage team members to take the lead when they have the knowledge and expertise and show willingness to follow this lead
- P12 win, through your performance and behaviour, the trust and support of team members

### Knowledge and Understanding:

#### General knowledge and understanding

- K1 different ways of communicating effectively with members of a team
- K2 how to set objectives which are SMART (Specific, Measurable, Agreed, Realistic and Time-bound)
- K3 how to plan the achievement of team objectives and the importance of involving team members in this process
- K4 the importance of and being able to show team members how personal work objectives contribute to achievement of team objectives
- K5 how to get and make use of feedback from people on your leadership performance
- K6 how to select and successfully apply methods for motivating, supporting and encouraging team members and recognising their achievements
- K7 types of difficulties and challenges that may arise and ways of identifying and addressing them
- K8 the importance of encouraging others to take the lead and ways in which this can be achieved
- K9 how to encourage and recognise creativity and innovation within a team

#### Industry/sector specific knowledge and understanding

- K10 legal, regulatory and ethical requirements in the industry/sector



### **Context specific knowledge and understanding**

K11 individuals within your team, their roles, responsibilities, competences and potential

K12 your team's purpose, objectives and plans

K13 the personal work objectives of members of your team

K14 the types of support and advice that team members are likely to need and how to respond to these

K15 standards of performance for the work of your team

### **Behaviours:**

When performing to this standard, you are likely to demonstrate the following behaviours:

1. listen actively, ask questions, clarify points and restate or rephrase statements to check mutual understanding
2. make time available to support others
3. support others to make effective use of their abilities
4. encourage others to take decisions autonomously, when appropriate
5. recognise the achievements and success of others
6. encourage and welcome feedback from others and use this feedback constructively
7. act within the limits of your authority
8. refer issues outside the limits of your authority to appropriate people
9. show integrity, fairness and consistency in decision-making
10. take personal responsibility for making things happen
11. protect your own and others' work against negative impacts
12. seek to understand people's needs and motivations
13. create a sense of common purpose
14. model behaviour that shows, and inspires others to show, respect, helpfulness and cooperation

### **Skills:**

When performing to this standard, you are likely to demonstrate the following skills:

- communicating
- consulting
- decision-making
- following
- involving others
- leadership
- leading by example
- managing conflict
- monitoring
- motivating
- obtaining feedback
- planning
- problem solving
- providing feedback
- setting objectives
- team building
- valuing and supporting other

***This standard has been imported from Skills CFA, Management & Leadership suite (March 2012), CFAM&LBA3***

## CFAM&LFA3 – Manage business processes

### Overview:

This standard is about managing business processes to make sure the organisation delivers outputs that meet customers' needs, stakeholders' needs, and organisational and legal requirements.

This standard is relevant to managers and leaders who are responsible for managing business processes.

This standard links closely with CFAM&LED4 Outsource business processes, CFAM&LFA2 Implement operational plans and CFAM&LFE5 Manage continuous improvement.

### Performance Criteria:

- P1 engage those involved and other key stakeholders in managing business processes
- P2 design business processes that deliver outcomes in line with organisational strategy
- P3 identify and make available the resources required for business processes
- P4 ensure business processes make effective, efficient and sustainable use of resources
- P5 take account of factors that may affect how business processes work
- P6 link business processes so that they interact across the organisation to form a complete system
- P7 define individuals' roles and responsibilities within business processes and identify the training, support and supervision they need
- P8 provide sufficient training, support and supervision to allow those involved to carry out their roles and responsibilities effectively
- P9 develop and use efficient measures that provide sufficient information to allow people to manage business processes effectively
- P10 review business processes at regular intervals, and in light of significant changes in customer needs or organisational strategy, to identify how the processes can be made more efficient and effective

### Knowledge and Understanding:

#### General knowledge and understanding

- K1 how to engage employees and other stakeholders in managing business processes
- K2 principles and models of effective process management
- K3 how to define business processes
- K4 types of business process measures and how to assess their suitability
- K5 how to calculate the resources needed for business processes
- K6 how to ensure processes and resources are sustainable and effective in their use, and the importance of doing so
- K7 the difference between process outputs and outcomes
- K8 how to assess process changes for risk and return against their potential investment cost
- K9 how to carry out cost-benefit analyses
- K10 types of analytical and problem-solving tools that you can use when developing business processes
- K11 how to measure the efficiency and effectiveness of business processes
- K12 how to measure the effect of changes in the business process

#### Industry/sector specific knowledge and understanding

- K13 relevant sector trends, developments and competitor performance that affect your business processes

#### Context specific knowledge and understanding

- K14 your organisation's aims and goals

- K15 your organisation's structure, values and culture
- K16 how your organisation adds value through its products, services and processes
- K17 the needs of your actual and potential customers and other key stakeholders
- K18 individuals in your organisation, their roles and responsibilities, competences and potential
- K19 your organisation's products, services and processes and the interdependencies between them
- K20 measures of process performance that are relevant to your organisation

### Behaviours:

- When performing to this standard, you are likely to demonstrate the following behaviours:
1. recognise changes in circumstances promptly and adjust plans and activities accordingly
  2. seek opportunities to improve performance
  3. present information clearly, concisely, accurately and in ways that promote understanding
  4. keep people informed of plans and developments in a timely way
  5. take repeated or different actions to overcome obstacles
  6. comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
  7. clearly agree what is expected of others and hold them to account
  8. monitor the quality of work and progress against plans and take appropriate corrective action, where necessary
  9. focus personal attention on specific details that are critical to achieving successful results
  10. use cost-effective, time-effective and ethical means to gather, store and retrieve information
  11. respond positively and creatively to setbacks
  12. identify systemic issues and seek to mitigate their impact on performance
  13. identify the implications or consequences of a situation

### Skills:

- When performing to this standard, you are likely to demonstrate the following skills:
- analysing
  - assessing
  - communicating
  - influencing
  - information management
  - involving others
  - monitoring
  - negotiating
  - persuading
  - presenting information
  - prioritising
  - problem solving
  - reviewing
  - thinking creatively
  - thinking systematically

***This standard has been imported from Skills CFA, Management & Leadership suite (March 2012), CFAM&LFA3***

## CFAM&LDB2 – Allocate work to team members

### Overview:

This standard is about ensuring that the work required of your team is effectively and fairly allocated amongst team members, taking account of their skills, knowledge and competence, their workloads and opportunities for their development.

This standard is relevant to managers, supervisors and team leaders who allocate work to team members.

This standard links closely to CFAM&LDB3 Quality assure work in your team and CFAM&LDB4 Manage people's performance at work.

### Performance Criteria:

- P1 confirm the work required of the team with your manager and seek clarification, where necessary, on any outstanding points and issues
- P2 plan how the team will undertake its work, identifying any priorities or critical activities and making effective use of the available resources
- P3 allocate work to team members on a fair basis taking account of:
  - P3.1 their skills, knowledge and competence
  - P3.2 their backgrounds and experience
  - P3.3 their existing workloads, and
  - P3.4 opportunities for their development
- P4 brief team members on the work they have been allocated and the standard of performance expected
- P5 encourage team members to ask questions, make suggestions and seek clarification in relation to the work they have been allocated
- P6 address any concerns team members may have about their work

### Knowledge and Understanding:

#### General knowledge and understanding

- K1 different ways of communicating effectively with members of a team
- K2 the importance of confirming/clarifying the work required of the team with your manager and how to do this effectively
- K3 how to plan the work of a team, including how to identify any priorities or critical activities and the available resources
- K4 why it is important to allocate work across the team on a fair basis and how to do so
- K5 why it is important to brief team members on the work they have been allocated and the standard or level of expected performance and how to do so
- K6 ways of encouraging team members to ask questions and/or seek clarification and make suggestions in relation to the work which they have been allocated
- K7 concerns team members may have about their work and how to address these concerns

#### Industry/sector specific knowledge and understanding

- K8 industry/sector specific legislation, regulations, guidelines, codes of practice relating to carrying out work
- K9 industry/sector requirements for the development or maintenance of knowledge, skills and competence

#### Context specific knowledge and understanding

- K10 the purpose and objectives of your team
- K11 the work required of your team
- K12 the available resources for undertaking the required work
- K13 your team's plan for undertaking the required work

- K14 the knowledge, skills, competence and workloads of team members
- K15 the backgrounds and experience of team members
- K16 team members' existing workloads
- K17 opportunities for team members' development
- K18 your organisation's policy and procedures for personal and professional development
- K19 reporting lines in the organisation and the limits of your authority
- K20 your organisation's standards or levels of expected performance

### Behaviours:

When performing to this standard, you are likely to demonstrate the following behaviours:

1. seize opportunities presented by the diversity of people
2. identify people's information needs
3. identify people's preferred ways of communicating
4. use communication media and styles appropriate to different people and situations
5. act within the limits of your authority
6. show integrity, fairness and consistency in decision-making
7. prioritise objectives and plan work to make the effective use of time and resources
8. clearly agree what is expected of others and hold them to account
9. check individuals' commitment to their roles and responsibilities
10. create a sense of common purpose
11. model behaviour that shows, and inspires others to show, respect, helpfulness and cooperation

### Skills:

When performing to this standard, you are likely to demonstrate the following skills:

- communicating
- decision-making
- delegating
- empowering
- information management
- leading by example
- monitoring
- planning
- presenting information
- prioritising
- problem solving
- reporting
- setting objectives
- team building
- time management
- valuing and supporting others

***This standard has been imported from Skills CFA, Management & Leadership suite (March 2012) CFAM&LDB2***

## CFAM&LDB3 – Quality assure work in your team

### Overview:

This standard is about checking on the progress and quality of the work of team members to ensure that the required standard of performance is being met.

This standard is relevant to managers, supervisors and team leaders who monitor progress of work in their team and check the quality of the output.

This standard links closely to *CFAM&LDB2 Allocate work in your team* and *CFAM&LDB4 Manage people's performance at work*.

### Performance Criteria:

- P1 check regularly the progress and quality of the work of team members against the standard performance expected
- P2 provide team members with prompt, specific feedback designed to maintain and improve their performance
- P3 support team members in identifying and dealing with problems and unforeseen events
- P4 motivate team members to complete the work they have been allocated on time and to the standard required
- P5 provide any additional support and/or resources team members require to complete their work on time and to the standard required
- P6 identify any unsatisfactory performance, discuss the causes and agree ways of improving performance with team members
- P7 recognise successful completion of significant pieces of work by team members
- P8 motivate team members to maintain and continuously improve their performance over time
- P9 use information collected on the performance of team members in any formal appraisal of performance, where appropriate

### Knowledge and Understanding:

#### General knowledge and understanding

- K1 effective ways of regularly and fairly checking the progress and quality of the work of team members
- K2 how to provide prompt and constructive feedback to team members
- K3 how to select and apply different methods for motivating, supporting and encouraging team members to complete the work they have been allocated and continuously improve their performance
- K4 how to select and apply different methods for recognising team members' achievements
- K5 the additional support and/or resources which team members might require to help them complete their work on time and to the standard required and how to assist in providing this

#### Industry/sector specific knowledge and understanding

- K6 industry/sector specific legislation, regulations, guidelines, codes of practice relating to carrying out work

#### Context specific knowledge and understanding

- K7 your team's plan for undertaking the required work
- K8 the knowledge, skills, competence, roles and workloads of team members
- K9 your organisation's policy and procedures in terms of personal and professional development
- K10 reporting lines in your organisation and the limits of your authority
- K11 your organisation's standards or levels of expected performance

- K12 your organisation's policies and procedures for dealing with poor performance  
K13 your organisation's grievance and disciplinary policies and procedures  
K14 your organisation's performance appraisal systems

#### **Behaviours:**

1. seek opportunities to improve performance
2. find practical ways to overcome obstacles
3. identify people's preferred ways of communicating
4. use communication media and styles appropriate to different people and situations
5. make time available to support others
6. give feedback to others to help them maintain and improve their performance
7. recognise the achievements and success of others
8. show integrity, fairness and consistency in decision-making
9. monitor the quality of work and progress against plans and take appropriate corrective action, where necessary
10. take pride in delivering high quality, accurate work
11. seek to understand people's needs and motivations

#### **Skills:**

- communicating
- managing conflict
- monitoring
- motivating
- problem solving
- providing feedback
- reviewing
- team building
- valuing and supporting others

***This standard has been imported from Skills CFA, Management & Leadership suite (March 2012) CFAM&LDB3***

## CFAM&LBB4 – Ensure compliance with legal, regulatory, ethical and social requirements

### Overview:

This standard is about being clear about your organisation's legal, regulatory, ethical and social requirements, providing policies and procedures to ensure compliance, monitoring compliance and taking action to rectify any breaches in compliance and avoid them being repeated.

This standard is for managers and leaders with specific responsibility for ensuring their organisation's compliance with legal, regulatory, ethical and social requirements.

This standard underpins ethical behaviour throughout the standards.

### Performance Criteria:

- P1 monitor relevant national and international legal, regulatory, ethical and social requirements and the effect they have on your organisation, including what will happen if you don't meet them
- P2 develop effective policies and procedures to make sure your organisation meets all the necessary requirements
- P3 make sure people have a clear understanding of relevant policies and procedures and the importance of putting them into practice
- P4 monitor the way policies and procedures are put into practice and provide support, where required
- P5 support people to report any concerns about not meeting the requirements
- P6 identify and correct any failures to meet the requirements
- P7 identify reasons for not meeting requirements and adjust the policies and procedures to reduce the likelihood of failures in the future
- P8 provide full reports about any failures to meet the requirements to the relevant stakeholders

### Knowledge and Understanding:

#### General knowledge and understanding

- K1 the importance of having an ethical and value-based approach to governance and how to put this into practice
- K2 relevant legal requirements governing the running of organisations
- K3 current and emerging social attitudes to management and leadership practice and the importance of being sensitive to these
- K4 ways in which other organisations deal with current and emerging social concerns and expectations

#### Industry/sector specific knowledge and understanding

- K5 legal, regulatory and ethical requirements in your sector, both national and international
- K6 particular current and emerging social concerns and expectations that are relevant to your sector

#### Context specific knowledge and understanding

- K7 the culture and values of your organisation and the effect they have on corporate governance
- K8 policies and procedures that make sure people meet the requirements
- K9 procedures to follow if people do not meet the requirements
- K10 support available to enable people to report concerns about not meeting requirements
- K11 the processes for maintaining the relevant policies and procedures and making sure they continue to be effective
- K12 the different ways in which people may not meet the requirements and the risks of these actually happening



K13 the procedures for dealing with people who do not meet the requirements, including requirements for reporting

### **Behaviours:**

When performing to this standard, you are likely to demonstrate the following behaviours:

1. recognise changes in circumstances promptly and adjust plans and activities accordingly
2. present information clearly, concisely, accurately and in ways that promote understanding
3. make time available to support others
4. give feedback to others to help them maintain and improve their performance
5. comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
6. watch out for potential risks and hazards
7. say no to unreasonable requests
8. identify and raise ethical concerns
9. make appropriate information and knowledge available promptly to those who need it and have a right to it
10. encourage others to share information and knowledge within the constraints of confidentiality
11. recognise stakeholders' needs and interests and manage these effectively
12. take and implement difficult and/or unpopular decisions, if necessary

### **Skills:**

When performing to this standard, you are likely to demonstrate the following skills:

- analysing
- assessing
- communicating
- decision-making
- information management
- involving others
- leadership
- monitoring
- motivating
- presenting information
- providing feedback
- reporting
- risk management
- valuing and supporting others

***This standard has been imported from Skills CFA, Management & Leadership suite (March 2012), CFAM&LBB4***

## CFAM&LBA9 – Develop operational plans

### Overview:

Every organisation should have an overall strategic business plan and each identified area of responsibility should also have an operational plan that will contribute to achieving the objectives set out in the strategic business plan. This standard is about developing that operational plan.

This standard is relevant to managers and leaders with responsibility for developing operational plans for their area of responsibility.

This standard must take account of the organisation's strategy as defined in *CFAM&LBA5 Develop your organisation's vision and strategy* and *CFAM&LBA6 Develop strategic business plans*. The implementation of operational plans is covered in *CFAM&LFA2 Implement operational plans*.

### Performance Criteria:

- P1 engage appropriate people within your area of responsibility and other key stakeholders in developing operational plans
- P2 develop operational plans that are consistent with organisational values and strategy and the specific objectives of your area of responsibility
- P3 ensure the operational plan complements and exploits synergies with other areas within the organisation
- P4 consider both innovative approaches and tried-and-tested solutions
- P5 evaluate the risks involved and develop realistic plans to manage significant risks
- P6 identify resource requirements and evaluate their availability both now and in the future
- P7 identify reliable indicators and methods for monitoring and evaluating the plan
- P8 communicate the plan in ways that engage the commitment of those involved and the support of other key stakeholders
- P9 review and redefine the operational plan, in the light of changes to organisational strategy or the operating environment

### Knowledge and Understanding:

#### General knowledge and understanding

- K1 how to engage employees and stakeholders in operational planning
- K2 principles and methods of short to medium-term planning
- K3 the importance of creativity and innovation in operational planning
- K4 how to develop and assign objectives which are SMART (Specific, Measurable, Agreed, Realistic and Time-bound)
- K5 how to analyse and manage risk
- K6 how to develop and plan for contingencies
- K7 how to identify resource requirements and evaluate their availability and sustainability
- K8 how to develop and use an evaluation framework
- K9 the principles and methods of effective communication, and how to apply them

#### Industry/sector specific knowledge and understanding

- K10 legal, regulatory and ethical requirements in your sector
- K11 significant trends and developments in your sector
- K12 actual and potential competitors, and their strategies and plans
- K13 actual and potential collaborators, and their strategies and plans

#### Context specific knowledge and understanding

- K14 your organisation's operating environment
- K15 the overall vision of your organisation and the objectives you are responsible for achieving
- K16 your organisation's actual and potential customer base

- K17 opportunities in your organisation's operating environment
- K18 how to respond to opportunities in your organisation's operating environment
- K19 colleagues and other key stakeholders, and their needs and expectations
- K20 processes for engaging with employees and their representatives within your organisation
- K21 sources of information you can use to monitor and evaluate plans

#### Behaviours:

1. seize opportunities presented by the diversity of people
2. seek opportunities to improve performance
3. encourage, generate and recognise innovative solutions
4. present information clearly, concisely, accurately and in ways that promote understanding
5. reflect on your experiences and use the lessons to guide your decisions and actions
6. agree challenging but achievable objectives
7. prioritise objectives and plan work to make effective use of time and resources
8. create a sense of common purpose
9. take account of the impact of your own actions on others
10. work towards a clearly defined vision of the future

#### Skills:

- building consensus
- communicating
- consulting
- decision-making
- delegating
- evaluating
- influencing
- innovating
- involving others
- persuading
- planning
- presenting information
- prioritising
- reflecting
- reviewing
- risk management
- setting objectives
- risk management
- setting objectives

***This standard has been imported from Skills CFA, Management & Leadership suite (March 2012), CFAM&LBA9***

## PROHSS6 – Conduct a health and safety risk assessment of a workplace

### Overview:

This Standard is for people carrying out risk assessments in the workplace. This could be an employer, line manager, supervisor, safety representative or employee.

This Standard is about the competence needed to identify hazards, evaluate the risks and make recommendations to control the risk and to review the results.

### Performance Criteria:

- P1 clearly define why and where the risk assessment will be carried out.
- P2 recognise your own limitations and seek expert advice and guidance on operational controls when appropriate.
- P3 select appropriate methods for identifying hazards and evaluating risks.
- P4 prioritise those areas at work where hazards with a potential for serious harm to health are most likely to occur
- P5 identify hazards which have the potential to cause harm and/or loss
- P6 review internal and external standards and guidelines
- P7 confirm that appropriate precautions are in place
- P8 assess the level of risk and record significant findings
- P9 consider and prioritise where further controls are required
- P10 present the results and reasonably practicable recommendations of the risk assessment to the responsible people
- P11 review and revise the risk assessment as appropriate
- P12 maintain suitable and sufficient records
- P13 take suitable action to control or remove imminent risk

### Knowledge and Understanding:

- K1 relevant legal requirements and standards
- K2 the workplace hazards which are most likely to cause harm or loss
- K3 the importance of remaining alert to the presence of hazards in the workplace
- K4 methods of identifying hazards and risk
- K5 the purpose, legal implications and importance of carrying out risk assessments
- K6 techniques for carrying out a risk assessment
- K7 the particular health and safety risks which may affect your own job role and the precautions to be taken
- K8 the resources required for a risk assessment to take place
- K9 information sources for risk assessments (e.g. HSE publications)
- K10 what to do with the results of the risk assessment
- K11 the importance of dealing with, or promptly reporting relevant hazards and risks
- K12 your own limitations, job responsibilities and capabilities
- K13 where to find expert advice and guidance
- K14 the work areas and people for whom you are carrying out the assessment
- K15 work activities of the people in the workplace where you are carrying out the risk assessment
- K16 effective communication methods
- K17 how to identify suitable control measures

### Glossary:

**Control(s):** the means by which the risks identified are eliminated or reduced to acceptable levels.

**Hazard:** a hazard is something with the potential to cause harm (this can include articles, substances, plant or machines, methods of work, the working environment and other aspects of work management)

**Notice:** includes all types of enforceable statutory document which may be drafted and served

on a duty holder, such as improvement, prohibition and deferred prohibition notices, notices of taking into possession or to leave undisturbed, notices under the Food and Environment Protection Act and the Control of Major Accident Hazards Regulations, as well as approvals and licences, and associated notices of withdrawal, amendment or extension

**Personal presentation:** this includes personal hygiene, use of personal protective equipment, clothing and accessories suitable to the particular workplace

**Procedures:** a series of steps, instructions and/or decisions, a task. This includes the documentation prepared by the employer about the procedures to be followed for health, safety and welfare matters.

**Instructions** covering, for example:

1. the use of safe working methods and equipment
2. the safe use of hazardous substances
3. smoking, eating, drinking and drugs
4. what to do in the event of an emergency
5. personal presentation

**Risk:** a risk is the likelihood of potential harm from that hazard being realised. The extent of the risk depends on:

1. the likelihood of that harm occurring;
2. the potential severity of that harm, i.e. of any resultant injury or adverse health effect; and
3. the population which might be affected by the hazard, i.e. the number of people who might be exposed

**Stakeholders:** is any person(s) or group with an interest in an organisation, which may include, employees (at any level), duty holders.

***This standard has been imported from Proskills, Health and Safety suite (July 2011), HSS6***

## LSILADD07 – Facilitate individual learning and development

### Overview:

This standard is about using a range of methods to enable individuals to acquire or improve skills and knowledge and practise their application in context. It also covers providing feedback to learners and encouraging them to reflect on and improve what they do.

This standard could be achieved as part of a coaching and/or mentoring relationship.

### Performance Criteria:

- P1 establish and maintain a professional relationship with the learner that supports individual learning and reflection
- P2 explore and agree the learner's objectives, learning needs and goals
- P3 agree a plan of learning, application and reflection
- P4 use a range of methods and resources to help the learner acquire/develop the skills and knowledge they need
- P5 support the learner in applying their learning in context
- P6 provide constructive and motivational feedback to improve the learner's application of learning
- P7 assist the learner to reflect on their practice and experience
- P8 adapt learning, application and reflection to meet further needs
- P9 maintain the health and safety of the learner, self and other people

### Knowledge and Understanding:

- K1 the principles, uses and value of learning and development on an individual basis
- K2 the characteristics of a relationship that supports individual learning, application and reflection
- K3 aspects of equality and diversity that need to be addressed when facilitating individual learning and development
- K4 the importance of reflective practice in individual learning and development
- K5 key factors to consider when setting and agreeing goals with individual learners
- K6 the range of delivery methods appropriate to individual learning
- K7 the range of resources, including support from others, that are available to support individual learning
- K8 how technology can enhance resources and delivery methods for individual learning
- K9 the range of techniques that can be used to encourage reflective practice by the learner
- K10 how to support different types of learners in applying new or enhanced learning in context
- K11 the types of barriers that learners encounter and how to develop strategies to overcome these
- K12 how to adapt learning plans in response to learner progress and reflection whilst still focusing on learner needs and desired outcomes
- K13 how to assess and manage risk in own area of work whilst facilitating learning and development for individuals

### Glossary:

Please visit the website link to access the NOS suite including the Introduction, which contains valuable context and background information for this suite of NOS.

<http://webarchive.nationalarchives.gov.uk/20110414152025/http://www.lluk.org/standards-and-qualifications/standards/learning-and-development-national-occupational-standards/>

**Application** The process applying new or improved skills and knowledge in a real or realistic context, for example a work situation

**Goals** This refers to interim targets or steps towards learners meeting overall outcomes and objectives

**Health and safety** This includes physical health and safety as well as emotional well-being

**Learner objectives** These will usually be performance objectives – for example doing something or doing something better

**Methods** Any method that supports individual learning and development, for example, instructions, demonstrations, opportunities to apply knowledge and practise skills, experiential learning, individual projects and research

**Other people** This refers to others who may be involved in, or affected by, the learning activities, for example, staff members, volunteers, assistants or people in the same area

**Reflection/reflective practice** The process of thinking critically about what we do, identifying opportunities for improvement and, where appropriate, further learning needs

**Resources** This covers any physical or human resource that supports the learning and development process and could include technical equipment, Information Technology-based learning, handouts, workbooks, people – for example outside speakers – and visits to places of interest

**Risk** This relates to any risk to the facilitation of learning and development. This includes health and safety but could also cover, for example, the risk of setting unrealistic goals or selecting inappropriate learning methods

***This standard has been imported from Learning and Skills Improvement Service, Learning and Development (2010), LaD07***