



SC21 Programme

OE Practitioner Qualification Guide

SC21 Excellence Assessments

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**Prepared by - The SC21 Performance, Development and
Quality (PDQ) Special Interest Group (SIG)**

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Document History

Date	Version	Author(s)	Summary of Changes	Approved by
Dec 2017	2	Peter Laurie	2017 Issue. (This and any previous documents not fully version controlled)	PDQ SIG
Mar 2019	3	Ross Harrison	Update to align to The EFQM (European Foundation for Quality Management) Model 2020. Formatting, Document structure, Practitioner training process, increased detail & information to drive standardisation in approach.	PDQ SIG
Jan 2021	3b	Colin Hart	Added Classroom Training Framework for Modules 1-5: - Module 1 - SC21 Knowledge Overview Module 2 - SC21/EFQM Foundation Training Module 3 - SC21 EFQM 2020 Practitioners Update Module 4 – SC21 Relationship Management Module 5 - SC21 Quality, Man Ex, Cyber & Workshop	
Jan 2021	3c	Marika De Rosa	Indication of Relationship Management Review Process Guide ref. and correction of typos	
May 2021	3d	Colin Hart	Restructure to revised modules and insertion of Quality requirements. Module 1a - SC21 Knowledge Overview Module 1b - SC21 Quality, CSR, Cyber Module 2a - SC21 Manufacturing Excellence -Day 1 Module 2b – SC21 Manufacturing Excellence Day 2 Module 3a - SC21 Business Excellence Day 1 Module 3b – SC21 Business Excellence Day 2 Module 4 – SC21 Relationship Management Module C2- SC21 EFQM2020 Practitioner Conversion 1 Module C3 - SC21 EFQM2020 Practitioner Conversion 2	
June 2021	3e		Further update to the Module 1b content and also 1a . Also spelling and grammar checks	
July 2021	4	Marika De Rosa	Publication	

Scope of Applicability

SC21 Lite	SC21 OE	SC21 C&G
Y	Y	N

Associated Documents

Document Title	Document No.
Bus Ex Assessment Process Guide	BxP01
Man Ex Assessment Process Guide	MxP01
Relationship Management Review Process Guide	RxP04

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Contents

Document History	2
Scope of Applicability	2
Associated Documents	2
1.Introduction	5
2. Definitions	5
Practitioner - Responsibilities and Skills – (Individuals)	5
Strategic Partner - (Organisations)	5
Training Partner - (Organisations)	5
3. Practitioner Role	7
Assessment Team Structure	7
Practitioner Capability Profile	8
Role	8
Background Knowledge and Experience	8
Education	9
Additional Qualities	9
4. Practitioner Qualification Route- Classroom Based Training	9
SC21 OE Classroom Based Training	10
Module 1a - SC21 Knowledge Classroom Based Training	11
Module 1b - SC21 Quality Performance Classroom Based Training	14
Module 2a & 2b - Manufacturing Excellence Classroom based Training	19
Module 3a & b -Business Excellence Classroom Based Training -	19
Module 4 -Relationship Management Classroom Based Training	20
Module C2&C3 - EFQM2020 Practitioner Conversion Training Module -	22
5 Practitioner Qualification – Practical Experience & Sign off	23
Shadow Assessment	23
Lead Assessment	23
Practitioner Sign Off	23
Lead Practitioner Qualification	23
Lead Practitioner Sign Off	23
Practitioner status lapsed	24
Appendices	25
Appendix A – PT01 Practitioner Training Record	25

1. Introduction

This document describes the qualification route an individual must undertake to become an SC21 Practitioner who participates in the SC21 Operational Excellence Programme.

To qualify as a Practitioner an individual must have: -

- an overview of the SC21 Programmes including Quality performance
- hold a Practitioners responsibility for one of more of the following disciplines

Business Excellence	(Bus Ex),
Manufacturing Excellence	(Man Ex),
Relationship Management	(Rel Ex)

2. Definitions

Practitioner - Responsibilities and Skills – (Individuals)

Practitioner – Expertise in Bus Ex, Man Ex, Rel Ex, and Quality proving independent diagnostic assessments to recognised SC21 Standards. Can support but not lead the assessment.

LEAD Practitioner – Expertise in Bus Ex, Man Ex, Rel Ex, and Quality proving independent assessments to recognised SC21 standards

MASTER Practitioner – Necessary skills, knowledge and experience to train, coach, and mentor an individual to become a Practitioner.

Strategic Partner - (Organisations)

A Strategic Partner (SP) is an organisation which has sufficient expertise and resources to deliver FULL awareness of the SC21 programme (Quality Interventions, Development and performance and Relationship Management) including diagnostics and action plan.

If a Qualified Practitioner, or their organisation wishes to act as a Strategic Partner, then their organisation will need to undergo a separate path to becoming an Approved Strategic Partner (SP) for the SC21 Operational Excellence Programme:

The detailed process for becoming a SP is cover in Document “PPXX How to become a Strategic Partner”

Training Partner - (Organisations)

An organisation with resources to deliver Specialist Training, Coaching and Mentoring in a specific discipline / topic. It is NOT able to deliver a whole programme but may deliver specialist approved training as part of the improvement action plan.

Organisations wishing to act as a Training Partner, will need to undergo a separate path to becoming an Approved Training Partner (TP) for the SC21 Operational Excellence Programme:

The detailed process for becoming a TP is cover in Document “PPXX How to become a Training Partner”

Terms

In this document, the following terms are used:

“shall” indicates a requirement.

“should” indicates a recommendation.

“may” indicates a permission; and

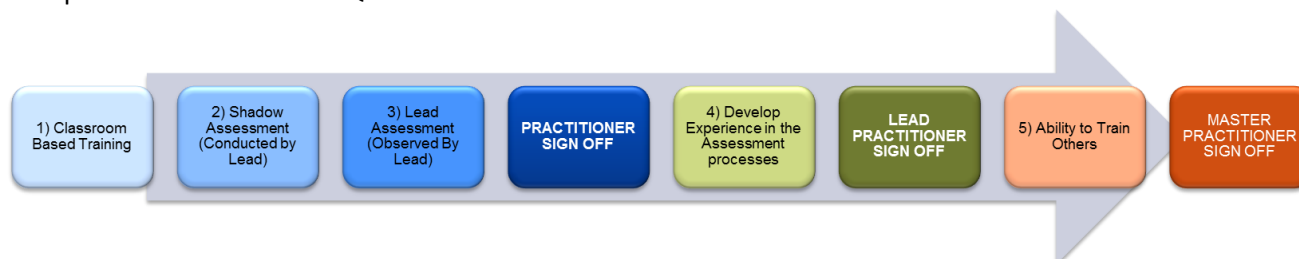
“can” indicates a possibility or capability.

Word's “example” or “e.g.,” indicate suggestions given for guidance. Information marked “NOTE” is for guidance in understanding or clarifying the associated requirement.

3. Practitioner Role

For the purposes of conducting an Excellence Assessment (Manufacturing Excellence, Business Excellence or Relationship Excellence) recognised by the SC21 Programme, Practitioners must be fully trained and accredited by SC21 Performance, Development and Quality Special Interest Group (PDQ SIG), in accordance with this Document.

The qualification route for a Qualified Practitioner is shown below: -



The minimum requirement is that a recognised **Lead Practitioner** forms part of the assessment team, under their guidance unqualified Practitioners may support the assessment, although they should have undertaken classroom-based training modules before doing so.

The current list of approved Practitioners can be found on the following SC21 website page:

<https://www.sc21.org.uk/sc21-knowledge-providers/how-to-be-a-sc21-practitioner/>

Assessment Team Structure

The number of Practitioners involved in an assessment will depend on the size of the organisation and the recognition level to be achieved. It is recommended that a consensus approach is taken when conducting all assessments (a minimum of 2 Practitioners); this is to ensure the assessment scoring is conducted in a fair and balanced manner and the opportunity for individual bias is minimised. Where this is not practical however, and for larger, more mature organisations the minimum numbers mandated by the PDQ SIG for Manufacturing and Business Excellence are highlighted below (limits are not set for the Relationship Excellence Assessment):

Company Size	Bronze	Silver	Gold
Small <50 employees	1	1	2
Medium <250 employees	1	2	3
Large >250 employees	2	3	3

Practitioner Capability Profile

The term “Practitioner” is used in preference to the traditional term “Assessor.” The SC21 approach is that “Practitioner” better describes those who will provide support and guidance to an organisation in developing or supplementing their CSIP.

The information below provides guidance on the role, capabilities and attributes that would be expected for a SC21 Practitioner in Business, Manufacturing and Relationship Excellence.

Role

Being a SC21 Excellence Practitioner is not merely a “technical” exercise but is a demanding task requiring a balance of excellent interpersonal and operational skills coupled with a commitment to prompt and professional performance.

The principal roles of a SC21 Business, Manufacturing and Relationship Excellence Practitioner will include the following: -

- Participation in the launch and subsequent deployment of the Excellence diagnostic assessments.
- Preparation of the feedback report of Strengths and Opportunities for Improvement as recommended inputs for the organisation’s Continuous Sustainable Improvement Plan (CSIP).
- Provide guidance and support in development of a CSIP.
- Ensure that best practice is captured during the assessment and any lessons learned are communicated to the Performance, Development & Quality (PDQ) SIG.
- Advise companies on their SC21 deployment needs from a working knowledge of the complete suite of SC21 diagnostics and process areas (e.g., AS EN 9100, Nadcap, Excellence Assessments, and Relationship Measurement).
- Advise companies on any appropriate skills development opportunities and how these might be delivered.
- Understand how organisations operate and can take an overall view of performance.
- Advise companies on the requirements for SC21 Recognition and how each of the process elements are integrated for delivery of on-going business performance improvement.
- Contribute to the development and implementation of the SC21 National Status Report.

Background Knowledge and Experience

- Managerial experience, ideally in more than one operational area (e.g., Production, Support, Technical, Quality).
- Understanding of the problems which poor delivery and quality cause in both the technical and commercial sense.
- Good background knowledge and experience of the UK Aerospace & Defence sector, the SC21 Programme and the nature and performance of current supply chains.
- Several years’ experience associated with suppliers and their management and development to provide an understanding of underlying process issues and their improvement. In addition, it is of paramount importance that the individual has a practical understanding of the problems which poor delivery and equipment serviceability causes in both the technical and commercial sense.
- Knowledge and experience in the use of the Department of Trade and Industry’s seven measures of Quality, Cost & Delivery. Understanding of how these relate to the specific requirements and standards of the SC21 Programme.
- Good knowledge and experience of the national qualification frameworks supporting business improvement capability in industry.
- Industry knowledge shall include at a minimum, an understanding of the processes and controls for:
 - advance product quality planning.

- change control.
- containment, cause analysis, and corrective action.
- configuration, identification, and traceability.
- critical items and key characteristics.
- design and development.
- external provider approval and control.
- foreign object damage/debris (FOD) prevention programme
- nonconforming material management.
- operational risk management.
- ASD regulatory requirements.
- prevention of counterfeit/unapproved parts.
- product safety.
- production part approval process.
- production processes and product verification/validation; and
- sampling inspection or testing.

Education

- Educated to degree standard in science, engineering, or a related discipline or/
- Educated to HND, HNC or equivalent standard or/
- Completed an apprenticeship in a manufacturing / engineering / service industry.
- Preference for specific Business Improvement / Continuous Improvement qualification such as:
 - Lean Facilitator / Practitioner Training
 - Recognised Six Sigma / Lean Six Sigma Qualification
 - NVQ in Business Improvement Techniques (e.g., at level 4).

Additional Qualities

- Become capable in the deployment of other SC21 elements (e.g., Business and Manufacturing Excellence, Relationship Management, Performance Measurement, CSIP development) to support fellow Practitioners.
- A broad knowledge and experience of management processes.
- Written and verbal fluency in the English language.
- An achiever in respect of business objectives.
- Self-motivated, flexible professional.
- Can gather, assimilate, and analyse evidence to make insightful judgements.
- Can produce and give clear, accurate and relevant feedback.
- The identification of improvement opportunities in respect of short, medium- and long-term requirements.

4. Practitioner Qualification Route- Classroom Based Training

All Operational Excellence Practitioners must follow the qualification route to become a recognised / qualified Practitioner, Lead Practitioner or Master Practitioner. This route is shown below: -

Prior to beginning training, an individual should first be vetted by a Master Practitioner in that discipline to ensure they meet the role capability profile detailed in section 3.

SC21 OE Classroom Based Training

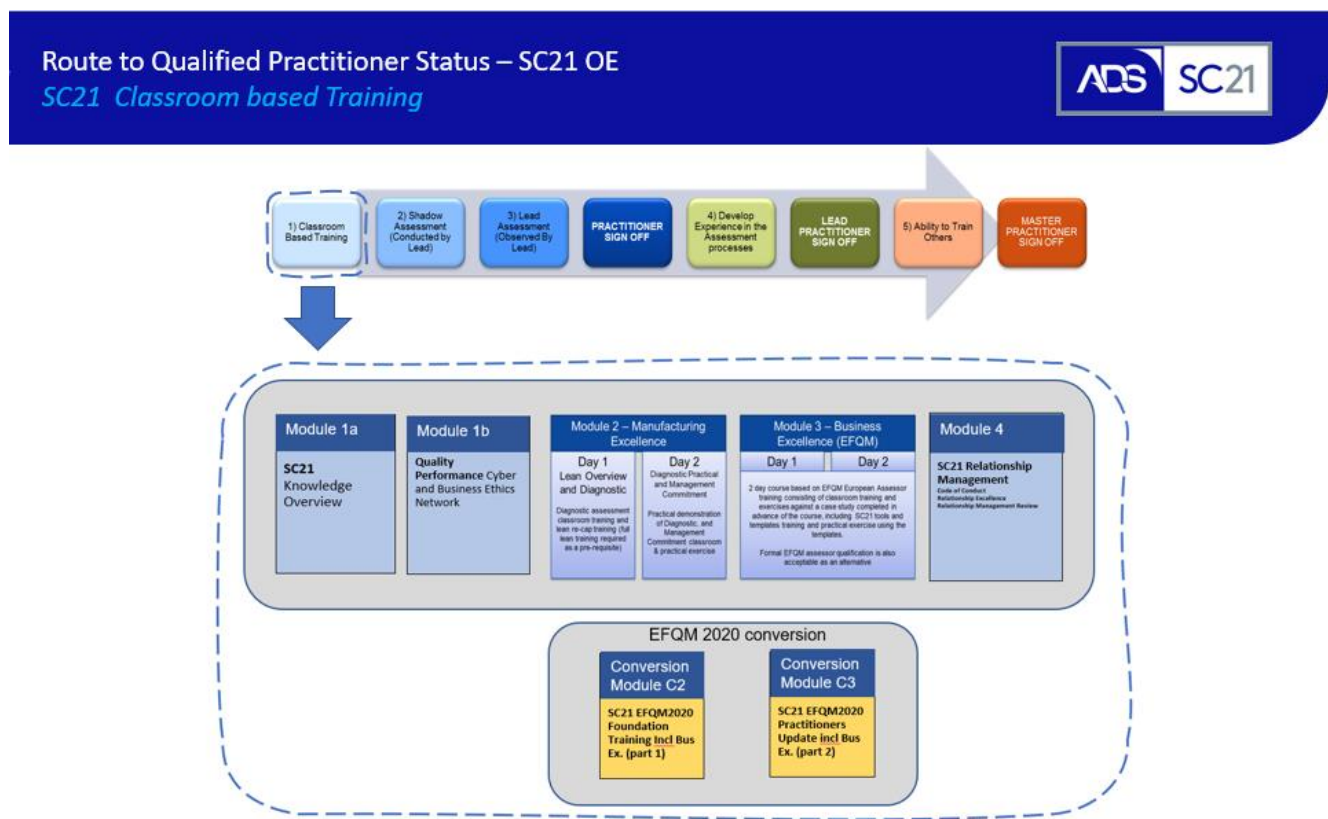
Classroom based training must be completed as the first step in the qualification process

All Classroom based training must be conducted by an SC21 recognised Master Practitioner (or EFQM recognised course in the case of Business Excellence).

An approved Practitioner must have an overall knowledge of the programme, and all the elements: Man. Ex, Bus. Ex, Relationship Management, and Quality Interventions. This “overview” knowledge will typically initially be gained by undertaking the classroom-based training: -

[Module 1a SC21 Knowledge & Module 1b Quality Performance.](#)

This knowledge is in addition to the specialist Classroom based knowledge require for each discipline. The specific training needed for each assessment process differs; training requirements for each of the assessment tools (Business Excellence, Manufacturing Excellence and Relationship Excellence) are detailed below and can be obtained by undertaking the relevance Classroom Training Module:



Module 1a - SC21 Knowledge Classroom Based Training

Syllabus

To become a qualified practitioner an individual must undertake the following classroom training: -

SC21 Knowledge

History

- Aims

- 7 Commitments

Programme Governance

Programme overviews (LITE, OE, C&G and SiG (Sharing in Growth))

UK PMO

Vision Mission and Policy

Values and Code of practice

Performance Levels, Awards

Lite (L)

- Deployment roles

- Process overviews

Operational Excellence (OE)

- Deployment roles

- Process overviews

Competitiveness and Growth (C&G)

- Deployment roles

- Process overview

- Improvement Modules & Library

Quality Interventions

- AS/EN91xx series approvals

- Nadcap

- UK Quality Board

Corporate Social Responsibility (CSR)

Explain what CSR is.

Cyber Security

Explain what Cyber Security and direct A&D Supply chain participants to the tools is such as the Cyber [Security Toolkit](#)

Business Ethics Network (BEN)

Explain what the BEN is: -

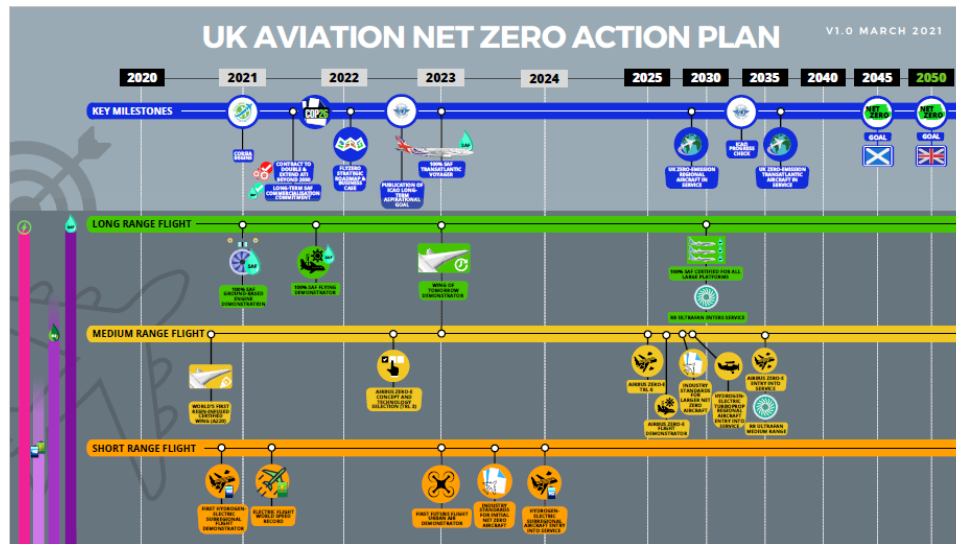
The Business Ethics Network provides ethics-related advice and assistance to UK companies in the Aerospace, Defence and Security sectors. This encompasses not just standard bribery and corruption information, but also much wider issues which impact on business ethics and corporate social responsibility, such as human rights, anti-slavery, conflict minerals, data protection, tax evasion, diversity, and inclusion, etc.

The supporting material for Ethics is available from the SC21 PMO in the document “EG08 - ADS Business Ethics Toolkit”.

UK Aviation Net Zero Action Plan

Explain what the plan is and where to find it!

The Government has stated its intentions to work with international partners to push a significant reduction in global carbon emissions with new or updated 2030 targets ahead of COP26, as well as to gain commitments from countries, regions, businesses that set a course for net zero.



And 4 themes to achieve the 2035 goal:

- 1) Improvements in aircraft and engine technologies could achieve emission reductions of 37%
- 2) Using sustainable aviation fuels (SAFs) could achieve emission reductions of 34%
- 3) Implementing economic measures could achieve emission reductions of 8%
- 4) Improvements in air traffic management (ATM) and aircraft operations could achieve emission reductions of 6%

The detailed supporting training materials for this Module are held by the SC21 PMO (Programme Management Office):

Module ref.	Module description
4.2.4	Capacity Planning and Management
2.4.2	Risk Management and Escalation
4.3.1	Inventory Management
3.2.4	7 Wastes
2.5.2	Failure Modes and Effects Analysis
1.3.1	Planning your Future Factory
2.1.1	Product Lifecycle Management

1.4.6	Corporate Social Responsibility
4.2.3	Materials Requirements Planning (MRP)
1.4.5	Ethical Performance
3.5.1	Cost Benefit from Recycling and Energy
3.3.7	Six Sigma Variation Reduction Toolset and Managing Variation
1.4.3	Environmental Legislation Activities
2.4.3	Change Management
1.4.7	Obsolescence Management

Module 1b - SC21 Quality Performance Classroom Based Training

Syllabus – Note: This syllabus has been reviewed with reference to the latest revisions of the International Aerospace Quality Group (IAQG) 9104/1 and 9104/2 standards, the International Organization for Standardization (ISO) / International Electrotechnical Commission (IEC) 17021-1 and 17021-3 standards, and incorporates lessons learned from past activities, including feedback from interested parties. This work continues to be ongoing and is being led by Mr Peter Cracknell (BAE)

To become a Qualified Practitioner an individual must be able to present and explain -

International Aerospace Quality Group (IAQG)

Explain what the IAQG is and what it does and its relationship to the participant: -

Industry established the IAQG, with representatives from Aviation, Space, and Defense (ASD) companies in the Americas, Asia/Pacific, and Europe, to implement initiatives that make significant improvements in quality and reductions in cost throughout the value stream.

The IAQG developed a global scheme for the acceptance and recognition of audits performed by Certification Bodies (CBs), using the 9100-series standards and considering the schemes already in use or under development in the various IAQG sectors, including the application of a:

3rd party audit certification scheme with specific ASD requirements, under the guidance and oversight of the ASD industry; and

harmonized approach for the purpose of improving the quality and process control throughout the entire supply chain.

Confidence and reliance in the audit process depend on the development and provision of auditor training, robust auditor authentication, and competence of those conducting the audits. Competence is based on the demonstration of personal attributes, and the ability to apply knowledge and skills gained through education, training, and experience.

European Aerospace Quality Group (EAQG)

Explain what the EAQG is and what it does

UK Quality Board

Explain what the ADS UK Quality Board is a broad multi-sector, interest group with a national and international focus on all aspects of a value based strategic direction for quality that delivers mutual benefit.

Explain its purpose

The ADS Quality Board is to create and decide on a strategic direction for quality in the industry, to look at specific actions and combine specialties to bring solutions to problems in the industry, to respond to and support National and International Bodies, to facilitate communication to ADS Board & Member companies.

- Influence, respond and provide support to IAQG/EAQG proposals from a National Industry viewpoint
- Influence, respond and provide support to CAA/EASA/MOD/MAA Quality developments and proposals.

The UK Quality - Route to Safety

Explain what the UK Quality 0 Route to Safety is and what it does

AS/EN91xx series Quality Management for Aviation, Space and Defence

Explain what the AS/EN91xx series approvals are and how a participant can identify which are applicable to their business.

AS/EN 9100 series

AS/EN 9100 is the internationally recognized Quality Management System (QMS), for the aerospace industry. It helps organizations continually improve, focus on meeting customer requirements, and ensure customer satisfaction

What is the AS/EN 9100 series of standards?

They are the internationally recognized quality management standards for the aerospace industry and are operated by the International Aerospace Quality Group (IAQG).

The 3 main standards in the AS 91XX series:

AS 9100 - QMS for quality assurance in design, development, production, installation, and servicing

AS 9110 - QMS for maintenance, repair, and overhaul of aerospace/Defence parts

AS 9120 - QMS for quality assurance in stockholding and distribution of aerospace /Defence parts

(Based on ISO 9001:2015, the AS versions were published in 2016, with the EN versions of these standards having been updated in 2018.)

AS/JISQ/EN9100.

Explain what the AS/JISQ/EN9100 standard is, how it is based on ISO9001 quality management system requirements and specifies additional requirements for the aerospace, Defence and space sector.

Customer Approvals

Explain what Customer Approvals are and how a participant can identify which are applicable to their business

Online Aerospace Supplier Information System (OASIS)

What is OASIS and how to access it - more than 1000+ UK aerospace sites already registered.

Nadcap

Explain what is Nadcap –

“An industry-managed approach to conformity assessment that brings together technical experts from both Industry and Government to establish requirements for accreditation, accredit Suppliers and define operational program requirements.”

Explain how it conducts more-in-depth, technically superior special process audits that: -

- Improves supplier quality throughout industry through stringent requirements

- Reduces costs through improved standardization

- Utilizes technically expert auditors to assure process familiarity

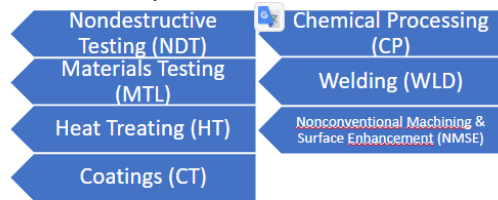
- Provides more frequent audits for Primes, fewer audits for Suppliers.

- That Nadcap accreditation is a contractual requirement and not a mandatory AS/EN9100 requirement.

- How Nadcap is overseen by audit by PRI (Performance Review Institute) personnel.

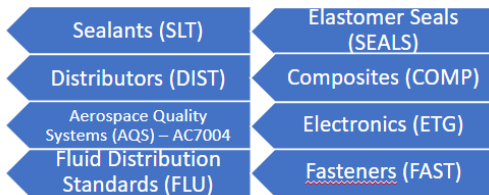
Which Special process it covers

Special Processes



Which Systems and Products it covers

Systems & Products



Cost of Quality

Explain what COQ is.

Cost of quality (COQ) is defined as a methodology that allows an organization to determine the extent to which its resources are used for activities that prevent poor quality, that appraise the quality of the organization's products or services, and that result from internal and external failures.

Route Cause Corrective Action

Explain what is

Root Cause Analysis (RCA) is a method of problem solving used for identifying the root causes of faults or problems.

It is widely used in IT operations, telecommunications, industrial process control, accident analysis (e.g., in aviation, rail transport, or nuclear plants), medicine (for medical diagnosis), healthcare industry (e.g., for epidemiology), etc.

RCA can be decomposed into four steps:

Identify and describe the problem clearly.

Establish a timeline from the normal situation up to the time the problem occurred.

Distinguish between the root cause and other causal factors (e.g., using event correlation).

Establish a causal graph between the root cause and the problem.

Advanced Product Quality Planning (APQP)

Explain what APQP is: -

APQP is a structured approach to product and process design. This framework is a standardized set of quality requirements that enable suppliers to design a product that satisfies the customer.

*The primary goal of product quality planning is to facilitate communication and collaboration between engineering activities. A Cross Functional Team (CFT), involving marketing, product design, procurement, manufacturing, and distribution, is used in the APQP process. APQP ensures the **Voice***

***of the Customer (VOC)** is clearly understood, translated into requirements, technical specifications, and special characteristics. The product or process benefits are designed in through prevention.*

Module 2 Manufacturing Excellence

Syllabus

Additional Background Knowledge and Experience

To be effective in the Manufacturing Excellence Practitioner role an individual must demonstrate that they have an appropriate level of experience within the following areas relating to the effective use of Business Improvement systems and methodologies: -

- Business Improvement tools & techniques.
- Demonstrable knowledge and application experience in a wide range of business improvement tools & techniques including (as a minimum) those contained within the scope of the Manufacturing Excellence Diagnostic assessment.
- Demonstrable understanding and experience of what influences the effectiveness and sustainability of their application.
- Anticipated minimum of 2 years of 'Tools & Techniques' deployment and use experience. It is expected that this experience would be gained within a role as a 'Change Agent,' 'Consultant,' (MAS or similar) 'Practitioner' or 'Supplier Development Engineer.'
- Preferred that this experience would include the use of business improvement tools & techniques in business support areas as well as manufacturing operations.
- Clear knowledge of how a business improvement approach links to the Operational and Financial performance of a company.
- Demonstrable knowledge and experience in a variety of effective Business Improvement 'Approaches' such as the Toyota Production System (TPS), 'Lean,' 6 Sigma and a clear understanding of the principles and differences of the various systems.
- Clear understanding of how the various approaches generate and prioritise a company's business improvement effort to optimum effect.
- EFQM RADAR logic: -
 - Knowledge and experience of the use of the EFQM RADAR logic.
 - Specific experience in the use of this format in the evaluation of the effectiveness of business improvement approaches within companies.

Module 2a & 2b - Manufacturing Excellence Classroom based Training

To become a practitioner an individual must take part in the following: -

1. SC21 recognised Manufacturing Excellence Framework Awareness Training.
2. SC21 recognised Lean Tools and Techniques Training covering the 20 Diagnostic elements of Manufacturing Excellence.
3. SC21 recognised training in conducting / facilitating a Management Commitment Workshop.
4. SC21 recognised training in performance measurement (covering performance measurement related to the lean diagnostics and management commitment).

It is recognised that the 4 elements above may all fall under the umbrella of a single course "Manufacturing Excellence Practitioner Training" rather than 4 separate courses.

The detailed supporting training materials for this Module are held by the SC21 PMO Ref PXnn

Module 3a & b -Business Excellence Classroom Based Training -

Syllabus

To become a practitioner an individual must take part in the following: -

1. EFQM Awareness Training (if needed – not mandatory if an individual has prior experience)
2. EFQM accredited Assessor level training: -
 - Has taken part in and passed an EFQM European Assessor Training® Competency Assessment.
 - Or has completed EFQM Assessor level training through either
 - EFQM European Assessor training course
 - EFQM Recognised training course (e.g., BQF).
3. SC21 PDQ SIG approved course (led by Master Practitioner).
 - Has undertaken EFQM model update training as applicable.

All training routes will involve assessing a case study against the EFQM Excellence Model® and taking part in a 2/3-day workshop of: -

- advanced understanding of the Excellence Model
- scoring using the RADAR matrix
- an in depth understanding the organisation being assessed
- identifying key themes
- reaching consensus with other participants
- identifying areas to be addressed in site visits
- Preparing and delivering a feedback presentation and report.

The detailed supporting training materials for this Module are held by the SC21 PMO Ref PXnn

Module 4 -Relationship Management Classroom Based Training

Syllabus

Code of Practice

To become a practitioner an individual must be able to present and explain the benefits of Code of Practice: -

Code

Communication

Creating an environment that fosters co-operation, openness, and sharing of information is key to developing trust and enabling joint performance improvement

Through life capability management

Delivering integrated supply solutions utilising the capabilities and knowledge at all levels of the supply chain, to fulfil customer requirements in the most cost-effective way throughout the life of the project, product, or service.

Continuous improvement

Driving a lean management culture within enterprises and between supply chains, to remove waste and aspire to six sigma levels of quality. Be prepared to share knowledge and experience to enable our industry to always be a leader in competitive value chains.

Commercial agreements

Effective commercial agreements establish a framework within which teams can work together to deliver on their individual and joint commitments to meet the customer's needs. Successful commercial relationships a

Business Ethics

All business must be conducted in a principled manner with the highest degree of personal and business integrity.

Benefits

Implementing the code of practice creates an open environment which enables the following:

- Improved time to contract through joint working and parallel activities
- Reduced lead times (from contract to first delivery) as a result of improved planning, concurrent engineering and design, and the early engagement of the supply chain
- Improved delivered quality
- Improved customer satisfaction through a more open dialogue enabling requirements to be better understood and discharged at all levels in the supply chain
- Reduced programme risk and overruns by joint problem solving
- Reduced product, service, and support costs, or enhancing capability at existing cost, by the elimination of waste in business processes
- Improved 'On Time In Full' schedule adherence underpinned by accurate demand forecasting
- Reduced inventory benefiting from predictable and stable delivery performance as a result of open and shared planning
- Effective investment planning throughout the supply chain.
- Focussed business planning, including capacity and skills

Relationship Excellence Training

To become a practitioner an individual must take part in the following: -

1. SC21 recognised Relationship Excellence Framework Awareness Training
2. SC21 recognised Relationship Excellence Assessor level training.

This shall cover: -

Relationship Excellence

- Knowledge of Rel Ex Model
- ISO44001
- Rel Ex
 - Roles
 - Launch Meeting
 - Conduct a RelEx assessment
 - Present feedback
 - Interface with CSIP/EFQM2020

Relationship Management Review (RMR) Practitioner level training

This shall cover: -

Relationship Management Review

- Knowledge of RMR process and SCRIA
 - Roles
 - Launch Meeting
 - Conduct an RMR
 - Present feedback
 - Interface with CSIP/EFQM2020

Module C2&C3 - EFQM2020 Practitioner Conversion Training Module -

Syllabus

To maintain their status as an active practitioner an individual must take part in the following: -

4. EFQM Awareness Training (if needed – not mandatory if an individual has prior experience)
5. EFQM accredited Assessor level training: -
 - Has taken part in and passed an EFQM European Assessor Training® Competency Assessment.
 - Or has completed EFQM Assessor level training through either
 - EFQM European Assessor training course
 - EFQM Recognised training course (e.g., BQF).
6. SC21 PDQ SIG approved course (led by Master Practitioner).
 - Has undertaken EFQM model update training as applicable.

All training routes will involve assessing a case study against the EFQM Excellence Model® and taking part in a 2/3-day workshop of: -

- advanced understanding of the Excellence Model
- scoring using the RADAR matrix
- an in depth understanding the organisation being assessed
- identifying key themes
- reaching consensus with other participants
- identifying areas to be addressed in site visits
- Preparing and delivering a feedback presentation and report.

The detailed supporting training materials for this Module are held by the SC21 PMO Ref PXnn

5 Practitioner Qualification – Practical Experience & Sign off

Once an individual has undertaken the training relevant to each assessment tool, they must then be able to apply the knowledge they have learnt and demonstrate they are capable. This is achieved through the experience gained and demonstrated by direct involvement in SC21 Assessments and submissions and the following steps: -

Shadow Assessment

- Participate in 'shadow' role in full assessment to gain direct experience in the full content and management of the assessment process from launch event through to submission of the detailed assessment report.
- Observed by Lead Practitioner as evaluator of an individual's performance.

Lead Assessment

- "Lead" an assessment. (As previous but as the responsible practitioner.)
- A Lead practitioner is to be in attendance through the programme as evaluator of practitioner an individual.
- Participation in development of CSIP
- Support in the development of the company's Continuous Sustainable Improvement Plan (CSIP).

Practitioner Sign Off

- A Practitioner will be 'sponsored' by an existing Qualified SC21 Lead Practitioner who will complete the Capability Matrix (as in Appendix A) with an individual and submit to the SC21 Performance, Development & Quality SIG for approval.
- A Practitioner can be a mix of 'High' and 'Medium' as determined by the 'sponsoring' Lead Practitioner.

Lead Practitioner Qualification

Lead Practitioner status is achieved through experience in the use of the assessment tools and development of an individuals' personal knowledge and competency.

- A Lead Practitioner an individual: -
- Must have taken part in a number of assessments observed by a Lead (the required number is not set but is at the discretion of the sponsoring Lead)
- Must have achieved "High" in all experience areas - verified by a Lead
- In addition to the above the Lead Practitioner must: -
- Co-ordinate against National Implementation Plan
- the Launch and deployment of the Business and or Manufacturing Excellence assessment, using trained multi-functional resources from the SC21 Community.
- Lead multi-functional teams drawn from across the SC21 community and work efficiently to deliver the agreed objectives.
- Ensure that motivation, team spirit and focus on objectives are applied consistently to maximise team contribution to the SC21 Programme and benefit to the organisation being assessed.
- Provide appropriate training and mentoring for assessment personnel and accreditation as Practitioner or Lead Practitioner.
- Ensure the process stays current and in line with SC21 Supply Chain PDQ SIG best practice and recommend changes accordingly.

Lead Practitioner Sign Off

- A Lead Practitioner will be 'sponsored' by an existing Qualified SC21 Lead Practitioner who will complete the Capability Matrix (as in Appendix A) with an individual and submit to the SC21 Performance, Development & Quality SIG for approval.
- Lead Practitioner must be rated as 'High' within all elements of the matrix.

Typical set of records could look like this

Organisation	E-Mail	Updated	Man Ex	Bus Ex	Rel Ex	RMR	Quality & Delivery	C&G Cap Ass
Example Enterprises	Fred@enterprise.co.uk	10/02/2021	Learner	Master Practitioner	Lead Practitioner	Lead Practitioner	Lead Practitioner	Learner
AA Limited		15/03/2006	Lead Practitioner	Master Practitioner	Master Practitioner	Master Practitioner	Master Practitioner	Coach
OEM 1		08/03/2016	Master Practitioner	Practitioner	Practitioner	Master Practitioner	Master Practitioner	Lead Assessor
OEM2		25/12/2020	Practitioner	Learner	Lead Practitioner	Practitioner	Practitioner	Learner
BB Limited		25/12/2020	Lead Practitioner	Practitioner	Learner	Learner	Learner	
BB Limited		31/12/2019	Learner	Lead Practitioner	Practitioner	Practitioner	Lead Practitioner	
Example Enterprises		15/03/2006	Practitioner	Master Practitioner	Learner			
Example Enterprises		31/12/2019	Lead Practitioner	Practitioner	Practitioner	Master Practitioner	Practitioner	

Practitioner status lapsed

Classroom Training - SC21 knowledge and Quality

An active Practitioner should undertake a "re fresh" of the classroom training as a minimum every 3 years.

Practical Training

It is important that Practitioners are active in conducting assessments. So, Practitioners who have not conducted assessments for 2 years would have to undergo a shadow assessment to ensure they continue to meet the Practitioner requirements and are able to provide valued feedback to the organisation.

- The Practitioner Capability Matrix and Training Record is shown below in Appendix A, this must be completed for all practitioners and Lead Practitioners and updated periodically (at least every 2 years).
- The Practitioner list is maintained by the SC21 PDQ SIG and is regularly reviewed for Practitioner status.
- 2 years active – 3 years removed from list.

Appendix A – PT01 Practitioner Training Record

[illegible]