

ST0753 Express Delivery Sortation Hub Operative Training Plan Version 2.3

LEARNING MODULE TITLE	KNOWLEDGE SKILLS BEHAVIOURS	ASSESSMENT METHOD	CONTENT OF TRAINING
1. The Express Delivery Landscape	K1: Concept of the last mile and the different types of express delivery business models.	MCT	<p><i>What is this thing called express, last mile, final mile? Express delivery services sit in four streams, mail, parcel, food and meal. They include; next day, same day, oversize to letter, national and international services.</i></p> <p><i>Express delivery business models respond to the unique demands of mail, parcel, food and meals delivery. Business models include trunked and line haul national networks compared to dedicated regional networks. Rural and urban density models define a range of Logistics Service providers.</i></p> <p><i>References:</i></p> <ol style="list-style-type: none"> <i>1. IOC triangle diamonds diagram.</i> <i>2. IOC History of the courier industry</i>
	K2: The range of different job roles across express delivery, from supplier through to sortation hub and final mile services.	I	<p><i>Range of different job roles includes on the road and in the depot. Sorting parcels, sortation, customer services, dealing with trace and tracking of goods, management, and customer service teams. Supporting roles include, administration, payroll, HR.</i></p> <p><i>Roles on the road are outdoors, working in all weathers, rolls in sortation are indoors and often in shift patterns. All roles involve many different types of parcels and vehicles, trollies, cycles, cargo bikes, motor bikes, vans.</i></p> <p><i>Range of jobs vary by delivery density, by geographic location on the networks, Depot, station and hub roles, super hubs to city depot sortation, both rural and urban.</i></p> <p><i>Line management between shifts, depot and region and the shifts within the roles. Use of sub-contract and franchise engagement alongside in-house, flexible working practices and worker status roles in express.</i></p>
	B1: Takes ownership of work.	0	<p><i>The behaviour of following correct working practices and taking responsibility to achieve first time every time for the brand. Delivering the customer promise on final mile, last mile.</i></p> <p><i>Never throw a package, never damage a package, take ownership of goods,</i></p>

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			<i>show integrity and trust.</i>
2. Postal Regulations	K16: Postal regulations and universal service obligation.	MCT	<i>The UK mail and postal market is regulated by Postcomm, under the Postal Services Act 2011. Postcomm's licensing regime allows potential entrants to carry mail for all or part of the journey through framework called Downstream Access (DSA). This allows competitors to ask for access to Royal Mails network. Operators are able to collect mail from businesses sort the mail and trunk it, in Royal Mail's case to their Inward Mail centre for final walk sequence sorting, distribution to delivery office and final mile delivery.</i>
3. The Sortation Hub	K3: The importance of the sortation hub in completing a successful express delivery service.	I	<i>Sortation is at the heart of express delivery. 40 billion units sorted and delivered in the 2020 lockdown year.</i> <i>Sortation operatives were recognised as key workers during COVID pandemic, part of the critical infrastructure to achieve delivery to the door.</i>
	B4: Committed to keeping up to date with industry best practice.	I	<i>Keeping up to date in express delivery is knowing all the options; same day, next day Sat or Sunday delivery. Matching goods to service and service to value. Matching goods to most up to date service and delivering the buzz of getting it sorted every time.</i>
4. Parcel volume, weight and service	K9: Techniques to match service cost to size weight and volume.	MCT	<i>Volume and weight of packages or goods, establish the boundaries between letters, small and large goods. Establish metric measurement. Understand techniques to calculate and measure goods. Calculate volume and recognise when girth or length exceed service options and become oversize.</i>
	S8: Match item cost to delivery service and respond to irregularities.	I	<i>Variations in express service from speed & time such as same day to next day, and geography including Highlands and Islands.</i> <i>Speed & time of delivery, service impact on the four streams of mail, parcel, food and meal, from small and large envelope in mail (first and second class stamps) to delivering food chilled or meals hot impacts on the customer promise and the specific stream of goods.</i> <i>Delivery service is also affected by the weight and size of the goods. Use techniques of measurement to compare goods of all streams to service, how that may affect service and exclude from service. Respond to irregular goods and match to different service such as two-person delivery, oversize, volume or</i>

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			<p><i>weight. Not all goods sort to all vehicles, goods appropriate to trolley or cycle are different to cargo cycle or van.</i></p> <p><i>Reference:</i></p> <p><i>1. Rate and service cards of express operators.</i></p>
5. Parcel Arrival	K5: Manual handling and mechanical handling. Techniques for different types of goods. The principles for selecting the safest option applicable to the circumstances.	O	<p><i>The HSE provide free, online guidance on manual handling and how best to avoid injury and accidents. Key points from HSE guidance are:</i></p> <ul style="list-style-type: none"> <i>• Where possible manual lifting should be avoided and mechanical lifting devices such as sack trucks or trollies should be used whenever possible.</i> <i>• There is no legal maximum weight that a person can safely lift. Lifting any weight can cause injury and much depends on the object being lifted, the environment, the shape of the object, the physical characteristics of the lifter and well as the distance of the object from the spine.</i> <i>• There is no single correct way to lift. The technique for lifting will depend on many things such as the weight and size of the object. For example, it would be easier to pick up something that is boxed and has handholds than something awkwardly shaped or where the weight is unevenly distributed.</i>
	S2: Matches items for sortation with the correct manual, mechanical, or automated handling technique.	O	<p><i>Manual handling can be a significant part of the work of a sortation hub operative and brings a risk of both accident and injury. It is therefore covered by regulations and organisational procedures.</i></p> <p><i>The main regulations are the Manual Handling Operations Regulations 1992 (as amended) (MHOR) which define manual handling as: "...any transporting or supporting of a load (including the lifting, putting down, pushing, pulling, carrying or moving thereof) by hand or bodily force".</i></p> <p><i>A load is a moveable object, such as a box or package or something being pushed or pulled, such as a tote box or roll cage".</i></p> <p><i>Organisations are required to create a 'safe system of work' for employees who carry out manual handling operations and these should be part of organisational procedures and the training given to sortation hub operatives.</i></p>
6. Identifying Goods	K8: The range of labels and the	MCT	<p><i>Barcodes are at the heart of express sortation. They are printed on labels.</i></p>

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	<p>instructions for use in sortation.</p>		<p><i>Automatic scanners and scanner arrays on conveyors can read and distinguish several barcodes with different formats on a box and/or on a label. For instance, each box at distribution centre might have a pack label as well as a courier label before it enters the sortation depot.</i></p> <p><i>One label is the key instruction. Packages with barcodes on previous labels are problematic and best avoided. Reading barcodes and matrix codes on a high speed sortation line is a sufficient challenge without adding complications, rejects and errors.</i></p> <p><i>Range of labels is broad and should be understood. The label face material must be strong enough to prevent damage during handling and transit. Knowledge of label materials covers different face adhesives for different substrates. Labels with unsuitable adhesives may come off recycled cardboard containing silicones. Grades of adhesive include permanent, semi-permanent, removable and repositionable. These terms are relative to the substrate to which the label is applied.</i></p>
	<p>K15: The European agreement concerning the International carriage of dangerous goods (ADR). Techniques to apply this legislation within own area of responsibility when working with dangerous goods.</p>	<p>I</p>	<p><i>Dangerous good (ADR) are rare in express sortation. Some activities or substances are so inherently hazardous that they require licensing, for example carrying package which contain goods which are explosive or corrosive requires an ADR licence.</i></p> <p><i>Always check the labelling or marking on the goods or their packing. By knowing what dangers may arise from the goods, decisions can be made as to the best way to handle them.</i></p>
	<p>S7: Assess and update labelling where required to support smooth transition through sortation to delivery.</p>	<p>I</p>	<p><i>Ability to deal with transshipment in sortation is important for all streams. In cases where the delivery is completed by another service, a new label may be required. Skills include printing on a desktop or mobile label printer.</i></p> <p><i>The ramifications of this process would a matter of system design. Establishing an effective track and trace process.</i></p> <p><i>Example (brand distribution): the logistics company responsible for international distribution of a famous brand of consumer products uses third</i></p>

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			<p><i>party carriers to retail outlets. To ensure 100% delivery and traceability they now use a barcoded consignment number to relate the picking and packing process at their distribution center to their proof of delivery systems.</i></p> <p><i>Occasional/low volume senders may use office printers, laser or ink jet, with compatible labels. Also direct thermal label printers are often simplest and best. Barrier coating to protect the print. Colour ink jet label printers are now cost effective for on-demand applications in sortation and should be familiar tools.</i></p> <p><i>Skills for updating damaged labels. Damaged and missing labels disrupt depot and delivery options as well as tracking. Also dealing with missing label: Best practice is delivery details on a packing slip within the box. This allows the sortation operative to generate a replacement delivery label. Registering the new label in the track and trace system.</i></p>
	<p>S14: Identify and handle dangerous goods correctly in accordance with legislative requirements.</p>	<p>I</p>	<p><i>Some goods such as car tyres are increasingly sold online and sent unpackaged with nothing more than a label. These are dangerous in sortation as they are prone to bounce all over the sortation belts or roll around the chute and may cause a fault in the sortation system.</i></p> <p><i>Check any labelling or marking on the goods or their packing. By knowing what dangers may arise from the goods, the decision can be made as to the best way to handle them.</i></p> <p><i>The majority of goods coming into the sortation hub will have been packaged by the sender, so the main responsibility of the sortation hub operative is to ensure that the carton or packaging remains intact and that there is no possibility of the goods being damaged, through mishandling, weather conditions or incorrect stowage. This can be aided by markings on packages such as 'fragile' and 'this way up', which might be found on a consignment of wine, with six different shaped bottles put in a box case. Poor packaging may result in a single bottle on the corner breaking and damaging many other items around it and creating a risk of injury from broken glass.</i></p> <p><i>Top tip, 'wine is about delivering the bottle, not the fluid inside it.'</i></p>

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7. Load to belt	K4: Machinery operating procedures including sortation belts, chutes, York roll containers, drop bags, mail bags, mail cages, and boom loaders.	O	
	S1: Unload and load items using the correct equipment. For example this may involve cages, bags or booms.	O	
8. Sort and Priority	K7: The terminology and procedures that apply when using dedicated sortation IT equipment and automated sortation systems	O	
	K6: Procedures for collections and returns priority in sortation.	I	
	S3: Prepares and operates sortation equipment in line with operating instructions.	O	
	S4: Responds to deliveries, collections and returns priority in accordance with own organisations procedures and any relevant contractual arrangements.	I	
9. Maintenance	K10: Cleaning and maintenance protocols.	I	

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	K11: Sortation equipment cycles.	O	
	S9: Monitor and maintain sortation equipment to the required functionality.	O	
	S6: Manage IT equipment & machine data to support the correct flow of automated sortation.	O	
10. Faults and reporting	K12: Fault finding principles.	I	
	K13: Reporting and escalation procedures.	I	
	S10: Identify and remedy basic faults in sortation equipment.	I	
	S11: Create reports on sortation performance, within limits of own role.	I	
	S12: Identify problems beyond own responsibility and escalate to the relevant person.	I	
	B5: Sources solutions and seeks to continuously improve and develop.	I	
11. Contingency plans	K14: Contingency plans.		<i>Things going wrong have an impact on goods going out of the depot on time, which will impact the final delivery to the door. A contingency plan sets out what to do when something goes wrong.</i>
	S13: Follow the contingency procedures that relate to incidents and emergencies.	I	<i>Contingencies may include; fire or flood at depot, belt failure More regular contingencies will include broken or damaged goods Re-group with colleagues and evaluate the situation</i>
	B6: Calm under pressure.	I	<i>Stay calm – take a deep breath, the key behaviour in sortation is not to panic. It's about composure when sortation goes wrong. It is about planning ahead. If a sortation belt fails, the outcome will require short progressive steps. This needs positive communication if a delay happens in sortation.</i>
12. Health and Safety	K18: Health and safety legislation and how this applies to sortation.	MCT	<i>All workers in the UK have a legal right to work in places where risks to their health and safety are properly controlled. Health and safety is about stopping</i>

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		<p><i>workers getting hurt at work or ill through work. This applies to all sortation hubs.</i></p> <p><i>The Health and Safety at Work etc. Act 1974 is the primary piece of legislation covering occupational health and safety in Great Britain. It is sometimes referred to as HSWA, the HSW Act, the 1974 Act or HASAWA.</i></p> <p><i>Workplace health and safety regulation to implement the Act is done through; Guidance, Approved Codes of Practice (ACOPs) and Regulations. These are produced by and available from, the Health & Safety Executive (HSE), a government body.</i></p>
<p>S17: Work compliantly by following relevant health and safety legislation.</p>	<p>O</p>	<p><i>Employer are legally responsible for health and safety, but a sortation hub operative must follow the training they have received when using any work equipment or other items their employer has given them.</i></p> <p><i>Organisations will have a written Health and Safety Policy which explains how that organisation implements the ACOPs, guidance and regulations that apply to their operations and the people who work for them.</i></p> <p><i>Working instructions are short documents which ensure that the use of specific equipment and methods of working comply with the health & safety ACOPs, guidance and regulations that apply to the organisation. These deal with issues such as manual handling of goods and how to safely load or unload vehicles or trolleys.</i></p> <p><i>Regular team briefings or tool box talks are often given by supervisors to make sure working instructions are understood and being followed by sortation hub operatives.</i></p>
<p>S5: Adapts own method of communication to the circumstances, using correct sortation terminology.</p>	<p>I</p>	<p><i>Communication between co-workers in a sortation hubs is almost all verbal. Terms should be understood from POB to collection, chute in sortation to ETA at delivery. For sortation a broad geographic terms understanding of depot codes, counties and postcodes is necessary.</i></p> <p><i>Operatives need to be clear and precise in talking to colleagues and carry authority appropriately.</i></p>

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			<p><i>Communication with colleagues and supervisors must be clear and accurate; for example to confirm the operational status of sortation equipment or to report problems or contingencies that are identified.</i></p> <p><i>Reference:</i> <i>1. Glossary of sector terms in the IOC Express Delivery Sortation Hub Operative text book.</i></p>
	B2: Puts safety and security first for themselves and others.	O	<p><i>An employee must take reasonable care of their own and other people's health and safety, co-operate with their employer on health and safety and tell someone (employer, supervisor, or health and safety representative) if they think the work or inadequate precautions are putting anyone's health and safety at serious risk.</i></p>
13. Working in Teams	K20: The principles of working with others in shift patterns.	I	<p><i>Sortation takes place in shift patterns typically outside of conventional nine to five work. Understanding of typical shift patterns and the need for seven-day work.</i></p> <p><i>An example of shift work in sortation: To fulfil the customer promise of 'order by midnight for next day delivery', express operations are based on overnight sortation of the goods with vehicles being loaded at around 6.00am. Deliveries are generally timed for the morning, with collections taking place later in the day. Increasingly sortation is a 24/7 activity but in majority it is a shift pattern role.</i></p>
	K22: Own organisations equality and diversity requirements.	I	<p><i>What is equality and diversity, understanding the code of values of the IOC and the equality and diversity policy of the logistics service provider.</i></p> <p><i>References:</i> <i>1. IOC Code of Values</i> <i>2. Equality & diversity policies of express delivery organisations</i></p>
	K19: A range of communication techniques.	I	<p><i>See it, say it, sort it. Communication in sortation is verbal. It needs to be positive and in the mind set of sorting out the sortation problems from a missing label to damaged package that's blocking a chute.</i></p>
	S15: Coordinate own work with that	O	<p><i>Coordinates own work to engage positively with colleagues and clients.</i></p>

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	<p>of others in the team to provide the required sortation tasks during a shift.</p>		<p><i>The skill of living the job of sortation, remembering the mission – vision statement and be ready to discuss it. A positive relationship with clients and colleagues is by doing it well.</i></p> <p><i>Discuss the mind-set for working in Express Delivery which is about getting on with both colleagues and clients, every role in express is crucial from sortation to driver, IT, customer service and finance. All colleagues are there to help solve challenges and get the deliveries done with great sortation at the heart of every shift.</i></p>
	<p>S19: Support others by following own organisations equality and diversity requirements.</p>	<p>I</p>	<p><i>Equality and diversity is at the heart of all express logistics roles, across the logistics service provider, national, regional and local. The mindset should be understood and lived.</i></p> <p><i>Equality</i> <i>Equality in the workplace means equal job opportunities and fairness for employees and job applicants. People must not be treated unfairly because of reasons protected by discrimination law ('protected characteristics'). For example, because of a person's sex, age or race.</i></p> <p><i>Diversity</i> <i>Diversity is the range of people in the workforce. For example, this might mean people with different ages, religions, ethnicities, people with disabilities, and both men and women. It also means valuing those differences. To avoid bullying, harassment or discrimination, it is important that:</i></p> <ul style="list-style-type: none"> <i>• the workforce and managers understand what is protected by discrimination law</i> <i>• what is expected under discrimination law is actually happening in the workplace</i> <i>• changes are made if what's expected is not happening, for example stepping up staff training</i> <i>• the workforce and managers understand what the benefits can be of having a range of people with different backgrounds</i> <p><i>Inclusion</i> <i>An inclusive workplace can help lower the risk of bullying, harassment and discrimination. An inclusive workplace means everyone feels valued at work. It lets all employees feel safe to:</i></p>

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			<ul style="list-style-type: none"> • <i>come up with different ideas</i> • <i>raise issues and suggestions to managers, knowing this is encouraged</i> • <i>try doing things differently to how they've been done before, with management approval</i> <p><i>References:</i></p> <ol style="list-style-type: none"> 1. <i>IOC code of values</i> 2. <i>Equality & diversity policies of express delivery organisations</i>
	B3: Team-focused and works effectively with colleagues and others.	O	<p><i>Team focus is about being proactive in working with colleagues to resolve problems which might affect sortation. Living it, living with colleagues. Being ready to discuss communication to resolve sortation of collections and deliveries, living the time it takes, sorting to depot and postcode destination. Working pro-actively, spotting problems and communicate with colleagues to solve the challenge for others</i></p> <p><i>Discussing the mind-set for working in Express Delivery with colleagues is about recognising the goods meet the volume, weight size and service in the whole stream of sortation. Don't forget the colleagues in customer service, IT, finance and on the road.</i></p>
14. Security and Data protection	K21: The principles for maintaining the integrity of mail, packages, packets and parcels.	MCT	<p><i>Andy Magromallis of Rico Logistics explains 'Threat and theft to parcels': 'Goods crime in Express Logistics has moved during COVID & operators are adapting best practice. Keeping ahead of crime that is moving on-line, preventing criminality is the focus of the Institute of Couriers sub group for express security. Techniques to engage & exchange knowledge in express logistics to combat crime and prevent criminality in final mile focus on threat and theft to parcels, from vehicle to sortation. Romanian rolls to tracking goods from sortation.'</i></p> <p><i>Techniques to maintain the integrity of goods in express include, obtaining a complete picture of threats, identifying vulnerability, mitigating such vulnerability. Techniques of observing unusual behaviour.</i></p>
	K17: Data protection legislation and how this applies to sortation.	MCT	<p><i>Data is personal, data about the goods, the package collection and destination the client it is delivered to, it is all important data and must be secure. The tracking or sort code is at the heart of it, a tool to follow the goods but a code</i></p>

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			<p><i>that must be kept secure and safe for everyone and everything.</i></p> <p><i>Reference:</i></p> <p><i>1. Data Protection Act 2018, as amended to be read in conjunction with the new UK-GDPR</i></p>
	S18: Maintain the integrity and security of items in line with procedures.	I	<p><i>Integrity is the mind-set to do the right thing. Security is protecting the goods from loss.</i></p> <p><i>Be aware of the complete picture of threats in sortation. Develop practical solutions to the threats. Identify vulnerabilities such as high value goods from credit cards to mobile phone and mitigate those vulnerabilities.</i></p>
	S16: Store and share data only when it is permitted to do so, in line with data protection legislation.	I	<p><i>The tracking code of the goods is the key to following the journey from collection to delivery, the journey across depots and sort to fulfil the customer promise. Follow company procedures in dealing with tracking codes to achieve information and advice of goods locations while maintaining data protection.</i></p>
	B7: Acts with integrity, following own organisations required standards.	I	<p><i>The behaviour and mind set of doing the right thing. Increase awareness of express courier crime by reporting to line management. Increase response to express courier crime. Promote a high standard of response to express courier crime. Be aware of potential depot property crime.</i></p> <p><i>Reference:</i></p> <p><i>1. IOC Code of Values.</i></p>