Development Pack
National Occupational Standards

for

Construction Senior Management

Project 2019 / 2020

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September 2019

Contents

CFAM LDA2

Recruit, select and retain people

Overview

This standard is about recruiting and selecting people to undertake identified activities or work roles within your area of responsibility. This standard is not intended for human resources specialists. It is relevant to managers and leaders who are responsible for recruiting and selecting people for their organisation or their particular area of responsibility.

This standard links closely to CFAM&LDA1 Plan the workforce and CFAM&LDA2 Induct individuals into their roles.

Performance criteria

You must be able to:

P1 Engage appropriate people within your organisation and other key stakeholders in recruiting and selecting people.

P2 Ensure you comply with your organisation's recruitment and selection policies and procedures

P3 Seek and make use of specialist resources, where required.

P4 Review, on a regular basis, the work required in your area of responsibility, identifying any shortfall in the number of people or their knowledge, skills and competence.

P5 Identify and evaluate the options for addressing any identified shortfalls and decide on the best options to follow.

P6 Ensure the availability of up-to-date job descriptions and person specifications where there is a need to recruit.

P7 Establish the stages in the recruitment and selection process for identified vacancies, the methods that will be used, the associated timings and who is going to be involved.

P8 Ensure that any information on vacancies is fair, clear and accurate before it goes to potential applicants.

P9 Draw up fair, clear and appropriate criteria for assessing and selecting applicants, taking into account their knowledge, skills and competence and their potential to work effectively with colleagues.

P10 Ensure the recruitment and selection process is carried out fairly, consistently and effectively.

P11 Keep applicants fully informed about the progress of their applications, in line with organisational policy.

P12 Offer positions to applicants who best meet the selection criteria.

P13 Provide clear, accurate and constructive feedback to unsuccessful applicants, in line with organisational policy.

P14 Evaluate whether the recruitment and selection process has been successful and identify any areas for improvements.

P15 Seek to provide work opportunities that challenge individuals to make effective use of their knowledge, skills and competences and develop their potential

P16 Review individuals' performance and development systematically and provide feedback designed to improve their performance.

P17 Recognise individuals' performance and recognise their achievements in line with your organisation's policy.

P18 Help individuals appreciate the opportunities for career and professional development within the organisation and to take advantage of them.

Performance criteria

P19 Provide opportunities for individuals to discuss issues about their work or development with you.

P20 Identify when individuals are dissatisfied with their work or development and seek with them solutions that meet both the individual's and organisation's needs.

P21 Recognise when individuals' values, motivations and aspirations are incompatible with your organisation's vision, objectives and values and seek alternative solutions with the individuals concerned.

P22 Discuss their reasons with individuals planning to leave your organisation and seek to resolve any issues or misunderstandings.

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

K1 How to engage employees and other stakeholders in recruitment, selection and retention activities.

K2 How to review the workload in your area in order to identify shortfalls in the number of colleagues and the pool of knowledge, skills and competence.

K3 How to identify actual skills and avoid stereotyping with regard to skills levels and work ethics.

K4 Different options for addressing identified shortfalls and their associated advantages and disadvantages.

K5 What job descriptions and person specifications should cover and why it is important to consult with others in producing or updating them.

K6 Different stages in the recruitment and selection process and why it is important to consult with others on the stages, recruitment and selection methods to be used, associated timings and who is going to be involved.

K7 Different recruitment and selection methods and their associated advantages and disadvantages.

K8 Why it is important to give fair, clear and accurate information on vacancies to potential applicants.

K9 How cultural differences in language, body language, tone of voice and dress can differ from expectations.

K10 How to measure applicants' competence and capability and assess whether they meet the stated requirements of the vacancy.

K11 How to take account of equality, diversity and inclusion issues, including legislation and any relevant codes of practice, when recruiting and selecting people and keeping colleagues.

K12 Active listening and questioning techniques.

K13 The importance of keeping applicants informed about progress and how to do so.

K14 The importance of providing clear, accurate and constructive feedback to unsuccessful applicants and how to do so.

K15 How to review the effectiveness of recruitment and selection in your area

K16 The importance of recognising individual performance and how to do so.

K17 The importance of providing opportunities for individuals to discuss issues with you.

K18 Alternative solutions that may be deployed when individuals' values, motivations and aspirations are incompatible with their work or your organisation's vision, objectives and values.

K19 The importance of understanding the reasons why individuals are leaving an organisation.

Knowledge and understanding

Industry/sector specific knowledge and understanding

K20 Recruitment and selection issues and specific initiatives and arrangements within the industry/sector.

K21 Working culture and practices of the industry/sector.

Context specific knowledge and understanding

K22 Individuals within your area of responsibility, their roles, responsibilities, competences and potential.

K23 Work requirements in your area.

K24 Agreed operational plans and changes in your area.

K25 The staff turnover rate in your area.

K26 Job descriptions and person specifications for confirmed vacancies.

K27 Local employment market conditions.

K28 Your organisation’s structure, values and culture.

K29 Employment policies and practices within your organisation – including recruitment, selection, induction, development, promotion, retention, redundancy, dismissal, pay and other terms and conditions.

K30 Specialist resources available to support recruitment, selection and retention, and how to make use of them.

Behaviours

- Seize opportunities presented by the diversity of people
- Identify people's information needs
- Present information clearly, concisely, accurately and in ways that promote understanding
- Keep people informed of plans and developments in a timely way
- Give feedback to others to help them maintain and improve their performance
- Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
- Act within the limits of your authority
- Show integrity, fairness and consistency in decision-making
- Protect the confidentiality and security of information
- Check the accuracy and validity of information
- Take and implement difficult and/or unpopular decisions, where necessary

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

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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

You must be able to:

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, identify 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 standards 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

You need to know and understand:

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 how to identify and take due account of health and safety issues in the planning, allocation and checking of work.

K5 why it is important to allocate work across the team on a fair basis and how to do so.

K6 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.

K7 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.

K8 concerns team members may have about their work and how to address these concerns

Industry/sector specific knowlege and understanding

K9 industry/sector specific legislation, regulations, guidelines, codes of practice relating to carrying out work.

K10 industry/sector requirements for the development or maintenance of knowledge, skills and competence

Context specific knowledge and understanding

K11 the purpose and objectives of your team.

K12 the work required of your team.

K13 the available resources for undertaking the required work.

K14 the organisation's written health and safety policy statement and associated information and requirements.

K15 your team's plan for undertaking the required work.

K16 the knowledge, skills, competence and workloads of team members.

K17 the bakcgrounds and experience of team members

K18 team members' existing workloads

K19 opportunities for team members' development

K20 your organisation's policy and procedures for personal and professional development

K21 reporting lines in the organisation and the limits of your authority

K22 your organisation's standards or levels of expected performance

Behaviours

- Seize opportunities presented by the diversity of people
- Identify people's information needs
- Identify people's preferred ways of communicating
- Use communication media and styles appropriate to different people and situations
- Act within the limits of your authority
- Show integrity, fairness and consistency in decision-making
- Prioritise objectives and plan work to make the effective use of time and resources
- Clearly agree what is expected of others and hold them to account
- Check individualss' commitment to their roles and responsibilities
- Create a sense of common purpose
- Model behaviour that shows, and inspires others to show, respect helpfulness and cooperation

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

CFAM LDB2

Allocate work to team members

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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

You must be able to:

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

You need to know and understand:

	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 of 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 organsiation 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

- Seek opportunities to improve performance
- Find practical ways to overcome obstacles
- Identify people's preferred ways of communicating
- Use communication media and styles appropriate to different people and situations
- Make time available to support others
- Give feedback to others to help them maintain and improve their performance
- Recognise the achievements and success of others
- Show integrity, fairness and consistency in decision-making
- Monitor the quality of work and progress against plans and take appropriate corrective action, where necessary
- Take pride in delivering high quality, accurate work
- 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

CFAM LDB3

Quality assure work in your team

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Relevant occupations	Management & Leadership
Suite Management & Leadership	Management & Leadership
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Lead meetings to achieve objectives

Overview

This standard is about leading meetings in order to achieve their objectives, which may be to solve problems, take decisions, consult with people or to exchange information and knowledge.

This standard is relevant to managers and leaders who are required to lead meetings to achieve objectives.

This standard links closely with all the other standards in key area DD Build and sustain relationships and particularly to CFAM&LDD7 Represent your area of responsibility in meetings.

Performance criteria

You must be able to:

P1 establish the purpose and objectives of the meeting

P2 confirm that a meeting is the best way to achieve the objectives

P3 prepare carefully how you will lead the meeting and identifying who needs to participate

P4 invite participants, giving them sufficient notice to enable them to attend and stating:

- P4.1 the importance of the meeting
- P4.2 the role they will be expected to play, and
- P4.3 the preparation they need to do

P5 circulate relevant information in advance and, if required, brief participants individually on the context and purpose of the meeting and their roles

P6 set a fixed time for the meeting to begin and end and allocate time appropriately for each agenda item.

P7 state the purpose of the meeting at the start and check that all participants understand why they are present

P8 clarify specific objectives at the beginning of each agenda item

P9 encourage all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledging and building on the contributions of other participants

P10 discourage unhelpful comments and digressions, refocusing attention on the objectives of the meeting

P11 manage time flexibly, giving more time to particular agenda items, if necessary, whilst ensuring key objectives are met and participants are kept informed of changes in the agenda

P12 summarise the discussion at appropriate tines and allocate action points to participants at the end of each agenda item

P13 take decisions within the meeting's authority, remit or terms of reference

P14 observe any formal procedures or standing orders that apply to the meeting

P15 check that decisions and action points are accurately recorded and promptly communicated to those who need to know

P16 evaluate whether the purpose and objectives of the meeting have been achieved

P17 identify how future meetings could be made more effective

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

K1 the importance of establishing the purpose and objectives of the meeting and how to do so

K2 the importance of confirming a meeting is the best way to achieve these objectives

K3 the importance of preparing how you will lead the meeting and how to do so

K4 how to identify who needs to participate in the meeting

K5 the importance of inviting participants, giving them sufficient notice to enable them to attend

K6 the importance of informing participants of the role they will be expected to play, the preparation they need to do and the importance of the meeting

K7 how to identify relevant information participants require in advance of the meeting

K8 the importance of circulating relevant information in advance and, if required, briefing participants individually on the context and purpose of the meeting and their roles

K9 the importance of setting a fixed time for the meeting to begin and end and allocating time appropriately for each agenda item

K10 how to allocate time appropriately for each agenda item

K11 the importance of stating the purpose of the meeting at the start and checking that all participants understand why they are present and what is expected of them

K12 the importance of clarifying specific objectives at the beginning of each agenda item

K13 the importance of encouraging all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledging and building on the contributions of other participants, and how to do so

K14 the importance of discouraging unhelpful comments and digressions, refocusing attention on the objectives of the meeting, and how to do so

K15 how to manage time flexibly, giving more time to particular agenda items, if necessary, whilst ensuring the key objectives are met and participants are kept informed of changes in the agenda

K16 the importance of summarising the discussion at appropriate times and allocating action points to participants at the end of each agenda item and how to do so

K17 the importance of taking decisions within the meeting's authority, remit or terms of reference and how to do so

K18 the importance of checking that decisions and action points are accurately recorded and promptly communicated to those who need to know

Knowledge and understanding

K19 how to evaluate whether the purpose and objectives of the meeting have been achieved and how future meetings could be made more effective

Industry/sector specific knowledge and understanding

K20 industry/sector requirements for leading meetings

Context specific knowledge and understanding

K21 the people who need to participate and the roles they will be expected to play

K22 the types and sources of information required in advance of the meeting

K23 the meeting's authority, remit or terms of reference

K24 any formal procedures or standing orders that apply to the meeting

K25 the people who are affected by the decisions and need to know about them

Behaviours

- address multiple demands without losing focus or energy
- listen actively, ask questions, clarify points and restate or rephrase statements to check mutual understanding
- present information clearly, concisely, accurately and in ways that promote understanding
- show respect for the views and actions of others
- comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
- show integrity, fairness and consistency in decision-making
- prioritise objectives and plan work to make the effective use of time and resources
- clearly agree what is expected of others and hold them to account
- make effective use of existing sources of information
- model behaviour that shows, and inspires others to show, respect, helpfulness and cooperation
- recognise when there are conflicts, acknowledge the feelings and views of all parties, and redirect people's energy towards a common goal
- specify the assumptions made and risks involved in understanding a situation
- take timely decisions that are realistic for the situation

Skills

- Building consensus
- Communicating
- Consulting
- Decision-making
- Information management
- Involving others
- Leadership
- Obtaining feedback
- Planning
- Presenting information
- Providing feedback
- Setting objectives
- Time management

CFAMLDD6

Lead meetings to achieve objectives

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CFAMLDD7

Represent your own area of responsibility in meetings

Overview

This standard is about taking the lead in representing your area of responsibility in meetings involving other work areas or other organisations.

This standard is relevant to managers and leaders who are required to represent their area of responsibility in meetings. This standard links closely with all the other standards in key area DD Build and sustain relationships and particularly to CFAM&LDD6 Lead meetings to achieve objectives.

Performance criteria

You must be able to:

P1 Brief yourself on the purpose, objectives and agenda of the meeting

P2 Identify relevant information and clarify your opinions regarding the various agenda items.

P3 Consult with relevant people in your area of responsibility in order to understand and be able to represent their interests and opinions.

P4 Clarify your objectives from the meeting – what you hope the meeting will achieve.

P5 Present relevant information to the meeting clearly and concisely.

P6 Present your opinions and the interests of those you are representing in a convincing way, providing evidence to support your case, where required.

P7 Identify any issues emerging from discussions which impact on your area of responsibility.

P8 Propose and evaluate possible solutions which meet the needs of your area of responsibility.

P9 Acknowledge and constructively discuss information and opinions provided by other people.

P10 Trade concessions to arrive at decisions which balance the needs of your area of responsibility with the needs of other stakeholders.

P11 Clarify decisions taken on the various agenda items, where necessary.

P12 Communicate information and decisions clearly, concisely, accurately and in a timely way to relevant people in your area of responsibility, in line with any communication protocol agreed at the meeting.

P13 Seek and provide feedback to others to improve the effectiveness of future meetings, where appropriate.

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

K1 The importance of briefing yourself on the purpose, objectives and agenda of the meeting.

K2 How to identify relevant information for the meeting and clarify your opinions on the various agenda items.

K3 The importance of consulting relevant people in your area of responsibility, and how to do so in order to understand and be able to represent their interests and opinions.

K4 The importance of setting your own objectives for the meeting, and how to do so.

K5 The importance of presenting relevant information and opinions to the meeting clearly and concisely, and how to do so.

K6 How to present your opinions and the interests of those you are representing in a convincing way.

K7 The importance of identifying and articulating any issues and problems emerging from discussions, and how to contribute to resolving them.

K8 The importance of acknowledging information and opinions provided by other people and how to discuss these constructively.

K9 The importance of trading concessions to arrive at consensus, and how to do so.

K10 The importance of clarifying decisions taken on various agenda items, where necessary, and how to do so.

K11 The importance of communicating decisions clearly, concisely, accurately and in a timely way to relevant people in your area of responsibility, and how to do so in line with any communication protocol agreed at the meeting.

K12 How to seek and provide feedback.

Industry/sector specific knowledge and understanding

K13 Industry/sector requirements for participating in meetings.

Context specific knowledge and understanding

K14 The types and sources of information relevant for the meeting.

K15 Relevant people in your area of responsibility and their interests.

Behaviours

- Address multiple demands without losing focus or energy
- Listen actively, ask questions, clarify points and restate or rephrase statements to check mutual understanding
- Present information clearly, concisely, accurately and in ways that promote understanding
- Keep people informed of plans and developments in a timely way
- Show respect for the views and actions of others
- State your own position and views clearly and confidently in conflict situations
- Make effective use of existing sources of information
- Check the accuracy and validity of information
- Seek to understand people's needs and motivations
- Communicate clearly the value and benefits of a proposed course of action
- Present ideas and arguments convincingly in ways that engage people
- Use a range of legitimate strategies and tactics to influence people
- Work towards win-win solutions
- Acknowledge differing points of view and seek to build consensus

Skills

- Communicating
- Consulting
- Decision-making
- Involving others
- Obtaining feedback
- Planning
- Presenting information
- Providing feedback
- Setting objectives
- Time management

CFAMLDD7

Represent your own area of responsibility in meetings

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Suite	Management & Leadership
Keywords	Management & leadership; represent in meeting; achieve objectives

Overview

This unit is about identifying the team resources that are needed to deliver a particular project, and how the significant factors will impact on your team selection. You will select the project team following contractual and statutory rules and recognised industry processes.

You will identify stakeholders and establish working relationships with them and your colleagues. You will consult with them in relation to key decisions, fulfil agreements made with them, promptly advise them of any difficulties encountered and resolve any conflicts with them. You will produce evidence to show that you have monitored and reviewed the effectiveness of working relationships.

Performance criteria

You must be able to:

Select and form a project team

P1 identify the team resources that are needed and where they can be obtained, and select those that meet agreed timescales and budget limits

P2 identify any significant factors which will affect the number, type and availability of team resources

P3 evaluate the quality and potential reliability of team resources and circulate the results to decision makers

P4 negotiate and agree proposals of contractual arrangements for team resources which are likely to produce an effective team and follow necessary rules and formalities

P5 follow the rules and formalities for obtaining team resources

Develop and maintain working relationships

You must be able to:

P6 develop, maintain and encourage working relationships with people which promote goodwill, trust and respect

P7 inform people about work activities in an appropriate level of detail and with an appropriate degree of urgency

P8 offer advice and help to people about work activities with sensitivity and encourage questions, requests for clarification and comments

P9 present proposals for action clearly to people at an appropriate time and with the right level of detail for the degree of change, expenditure and risk involved

P10 clarify with people objections to proposals and suggest alternative proposals

Knowledge and understanding

You need to know and understand:

Select and form a project team

K1 what to identify as the team resources that are needed and where they can be obtained (understanding)

K2 how and why to select team resources that meet agreed timescales and budget limits (evaluation)

K3 what to identify as significant factors which will affect the number, type and availability of team resources (understanding)

K4 how and why to evaluate the quality and potential reliability of team resources (evaluation)

K5 how to circulate to decision makers the results of the evaluations of the quality and reliability of team resources (application)

K6 how and why to negotiate proposals of contractual arrangements for team resources (synthesis)

K7 how and why to agree proposals of contractual arrangements for team resources (evaluation)

K8 how to follow the rules and formalities for obtaining team resources (application)

Develop and maintain working relationships

You need to know and understand:

K9 how and why to develop working relationships with people which promote goodwill, trust and respect (synthesis)

K10 how to maintain working relationships with people which promote goodwill, trust and respect (application)

K11 how to encourage working relationships with people which promote goodwill, trust and respect (application)

K12 how to inform people about work activities in an appropriate level of detail and with an appropriate degree of urgency (application)

K13 how and why to offer advice and help to people about work activities (synthesis)

K14 how to encourage questions, requests for clarification and comments (application)

K15 how to present proposals for action to people (application)

K16 how to clarify with people objections to proposals (application)

K17 how and why to suggest alternative proposals where objections have been raised (synthesis)

Scope/range

Select and form a project team

1 Team Resources:
- 1.1 management
- 1.2 technical staff
- 1.3 specialist sub-contractors
- 1.4 specialist services
- 1.5 workforce

2 Significant factors:
- 2.1 location
- 2.2 cost
- 2.3 time
- 2.4 skills, experience and knowledge required and availability
- 2.5 training and development requirements
- 2.6 impact of new technology processes and materials on skills
- 2.7 diversity
- 2.8 language
- 2.9 accreditation requirements

3 Rules and formalities:
- 3.1 contractual
- 3.2 statutory
- 3.3 recognised industry processes
- 3.4 organisational processes
- 3.5 certification of competence

Develop and maintain working relationships

4 Working relationships:
- 4.1 formal (contractual and statutory)
- 4.2 informal

5 People:
- 5.1 clients and customers
- 5.2 employers
- 5.3 employees
- 5.4 statutory and regulatory bodies

Scope/range

- 5.5 users and community groups
- 5.6 contractors
- 5.7 consultants
- 5.8 partners
- 5.9 near neighbours
- 5.10 occupiers
- 5.11 general public
- 5.12 people with specific access and communication needs
- 5.13 suppliers of products and services
- 5.14 government agencies
- 5.15 non-English speakers

6 Promote goodwill, trust and respect:
- 6.1 demonstrating a duty of care
- 6.2 ethical relationships
- 6.3 professional independence
- 6.4 honouring promises and undertakings
- 6.5 honest relationships
- 6.6 constructive relationships
- 6.7 equal opportunities
- 6.8 acknowledge diversity

7 Inform, offer advice, present and clarify:
- 7.1 orally
- 7.2 in writing
- 7.3 using graphics
- 7.4 electronically

8 Work activities:
- 8.1 proposals and their impact
- 8.2 progress
- 8.3 results
- 8.4 achievements
- 8.5 potential problems
- 8.6 risks
- 8.7 opportunities

Manage teams in construction management

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Provide advice, judgement and service ethically in construction management

Overview

This unit is about obtaining and evaluating information which is sufficiently detailed for the purpose and presenting it in an appropriate manner. You will be able to present clear, accurate and valid technical recommendations, judgement and service ethically.

Following recognised good practice you will need to make ethical judgements and offer advice which balances the needs of the organisation, its clients and society.

You will need to make judgements and offer advice which balances the needs of the client, the resources available and the needs of the people in the community, which identifies ethical standards (including health, safety and welfare) and any conflicts of interest.

You should identify where complex, indeterminate situations exist. You will need to assess the validity and completeness of the available information and analyse it and draw valid and justifiable conclusions.

You should reflect on the conclusions and interpret them into detailed issues that enable known opportunities and solutions to be identified and utilised for establishing policy.

Provide advice, judgement and service ethically in construction management

Performance criteria

You must be able to:

Exchange information and present advice on technical issues

- P1 obtain and evaluate information which is sufficiently detailed for the purpose
- P2 present technical information and advice which is complete, summarised accurately and relevant to technical issues
- P3 present technical recommendations and judgements which are clear, accurate and valid, and which represent the best advice possible, given the information and resources available
- P4 give technical instructions and guidance which are likely to be understood by the people who will follow them
- P5 present technical recommendations and judgements using a style of communication which is appropriate to the people receiving information and advice
- P6 adapt and modify the presentation of technical recommendations and judgements where people have difficulties understanding them

Resolve complex indeterminate situations

You must be able to:

- P7 identify where complex indeterminate situations exist estimate their effects realistically and summarise the issues for the organisation
- P8 assess the validity and completeness of the information available and identify any significant gaps
- P9 specify and obtain sufficient additional information to cover any gaps and to provide a valid starting point for the analysis of the situation
- P10 analyse information and draw valid and justifiable conclusions
- P11 apply decision making techniques which increase the reliability of the conclusions
- P12 reflect on the conclusions and interpret them into detailed issues that enable known opportunities and solutions to be identified and utilised for establishing policy

Practice within an ethical framework

You must be able to:

- P13 make judgements and offer advice which balance the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected
- P14 take clear and unequivocal personal responsibility for your own decisions and the decisions of others in your organisation
- P15 behave in an ethical manner and take appropriate action if unethical behaviour is brought to your attention
- P16 establish a system of communication to report instances of unethical behaviour which encourages responsibility and empowerment at all levels
- P17 offer judgements and advice which recognise the needs of other people

Performance criteria

P18 manage criteria that identify offers and contracts which are illegal and which may generate conflicts of interest and reject those that fail the criteria

P19 define the limits of your professional expertise and set perimeters to work within them

P20 disclose information obtained from clients only to those who have a legitimate right to receive it

P21 enter into formal and informal contracts and agreements for advisory and problem-solving services which conform to legal requirements, ethical standards and recognised good practice and that service providers adhere to relevant conditions

P22 communicate with clients in a style and manner which maintains professional independence and maximises goodwill and trust

P23 define and agree the working practices and the expectations of the people involved in the contract

P24 set up and implement systems to protect the individual, and the interests of society and to indemnify clients where the advice given results in loss or damage to the client

P25 keep all funds, including interest, held on behalf of clients, separate from personal and organisational funds

P26 promote a culture of honesty and equity with people, identify areas of weakness and recommend or implement improvements

Knowledge and understanding

You need to know and understand:

Exchange information and present advice on technical issues

K1 how to obtain information which is sufficiently detailed for the purpose (application)

K2 how and why to evaluate information which is sufficiently detailed for the purpose (evaluation)

K3 how to present technical information and advice which is complete, summarised accurately and relevant to technical issues (application)

K4 how to present technical recommendations and judgements which are clear, accurate and valid, and which represent the best advice possible, given the information and resources available (synthesis)

K5 how and why to give technical instructions and guidance which are likely to be understood by the people who will follow them (application)

K6 how to present technical recommendations and judgements using a style of communication which is appropriate to the people receiving information and advice (application)

K7 how to adapt the presentation of technical recommendations and judgements where people have difficulties understanding them (application)

K8 how to modify the presentation of technical recommendations and judgements where people have difficulties understanding them (application)

Resolve complex indeterminate situations

You need to know and understand:

K9 what to identify as existing complex indeterminate situations (understanding)

K10 how and why to estimate realistically the effects of complex indeterminate situations (analysis)

K11 how to summarise the issues of complex interminate situations for the organisation (application)

K12 how and why to assess the validity and completeness of the information available (analysis)

K13 what to identify as any significant gaps in the validity and completeness of the information available (understanding)

K14 how and why to specify sufficient additional information to cover any gaps and to provide a valid starting point for the analysis of the situation (evaluation)

K15 how to obtain sufficient additional information to cover any gaps and to provide a valid starting point for the analysis of the situation (application)

K16 how and why to analyse information (analysis)

K17 how and why to draw valid and justifiable conclusions from information (evaluation)

K18 how to apply decision making techniques which increase the reliability of the conclusions (application)

Knowledge and understanding

K19 how and why to reflect on the conclusions (analysis)

K20 how and why to interpret the conclusions into detailed issues that enable known opportunities and solutions to be identified and utilised for establishing policy (analysis)

Practice within an ethical framework

You need to know and understand:

K21 how and why to make judgements and offer advice which balance the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected (evaluation)

K22 how and why to offer advice which balance the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected (synthesis)

K23 how and why to take clear and unequivocal personal responsibility for your own decisions and the decisions of others in your organisation (evaluation)

K24 how to behave in an ethical manner by taking appropriate action if unethical behaviour is brought to your attention (application)

K25 how and why to establish a system of communication to report instances of unethical behaviour which encourages responsibility and empowerment at all levels (synthesis)

K26 how and why to offer judgements and advice which recognise the needs of other people (synthesis)

K27 how and why to manage criteria that identify offers and contracts which are illegal and which may generate conflicts of interest (evaluation)

K28 how and why to reject criteria which are illegal and which may generate conflicts of interest that fail the criteria (evaluation)

K29 how and why to define the limits of your professional expertise and set perimeters to work within them (evaluation)

K30 how to disclose information obtained from clients only to those who have a legitimate right to receive it (application)

K31 how and why to enter into formal and informal contracts and agreements for advisory and problem-solving services which conform to legal requirements, ethical standards and recognised good practice and that service providers adhere to relevant conditions (evaluation)

K32 how to communicate with clients in a style and manner which maintains professional independence and maximises goodwill and trust (application)

K33 how and why to define the working practices and the expectations of the people involved in the contract (evaluation)

K34 how and why to agree the working practices and the expectations of the people involved in the contract (evaluation)

Knowledge and understanding

K35 how and why to set up systems to protect the individual, and the interests of society and to indemnify clients where the advice given results in loss or damage to the client (synthesis)

K36 how to implement systems to protect the individual, and the interests of society and to indemnify clients where the advice given results in loss or damage to the client (application)

K37 how to keep all funds, including interest, held on behalf of clients, separate from personal and organisational funds (application)

K38 how and why to promote a culture of honesty and equity with people (synthesis)

K39 what to identify as areas of weakness in the culture (understanding)

K40 how and why to recommend improvements to the culture (synthesis)

K41 how to implement improvements to the culture (application)

Scope/range

Exchange information and present advice on technical issues

1 Purpose:
- 1.1 sharing experience
- 1.2 issuing instructions
- 1.3 making judgements
- 1.4 increasing understanding
- 1.5 implementing a solution
- 1.6 dealing with confrontation
- 1.7 negotiation

2 Present:
- 2.1 orally
- 2.2 in writing
- 2.3 graphically
- 2.4 electronically

3 Technical recommendations and judgements include:
- 3.1 realistic estimates of the implications of other options which have been considered
- 3.2 clear descriptions of the information sources consulted
- 3.3 the analysis techniques applied
- 3.4 the criteria used for making evaluations and reaching justifiable conclusions

4 People receiving information and advice:
- 4.1 peers and other related occupations
- 4.2 clients and customers
- 4.3 technical and non-technical team members
- 4.4 craftspeople and operatives
- 4.5 senior and junior colleagues
- 4.6 members of the public
- 4.7 people with individual needs

Resolve complex indeterminate situations

5 Information:
- 5.1 project information
- 5.2 own experience and practice

Scope/range

5.3 manual and electronic information systems (e.g. libraries, technical journals, databases)

5.4 published research

5.5 other colleagues and specialists

5.6 continuing professional development

6 Reflect:

6.1 comparison between previous cases and the current situation

6.2 the outcomes required

6.3 known and anticipated limitations and opportunities

Practice within an ethical framework

7 Conflicts of interest:

7.1 actions which may mislead other individuals

7.2 offers which involve the financial interest of the practitioner

7.3 giving unfair advantage to the practitioner's family or friends

7.4 as defined by legislation

8 Ethical standards and recognised good practice:

8.1 personal beliefs

8.2 mandatory ethical codes of practice within the occupation, discipline or organisation

8.3 national and international statute law

8.4 national and international voluntary codes of practice and guidance

9 Systems:

9.1 organisational policies

9.2 indemnity insurance

9.3 guarantees

9.4 contract conditions

9.5 bonds

COSCSMO03

Provide advice, judgement and service ethically in construction management

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Keywords	Ethics; judgement; technical

Develop self and others in construction management

NATIONAL OCCUPATIONAL STANDARDS

Overview

This unit is about promoting personal development and providing opportunities for others to learn from your experiences.

It concerns the need for all individuals to carry out their own continuing development to keep abreast of changes in technology, legislation, materials and practices. It is also concerned with the advice and support offered to others to assist them in their development. You will need to have a clear view of your development needs, and undertake learning activities over a sustained timescale to address any weaknesses or exploit any strengths.

You will need to assist others in planning their personal development, taking into consideration available opportunities and resources. You will also need to provide feedback to others in relation to objectives that have been set.

Performance criteria

You must be able to:

Manage your own resources and undertake continuing personal development in the occupational practice area

P1 develop and maintain personal networks of contacts, which are appropriate to meet your current and future needs for information and resources

P2 check, on a regular basis, how you are using your time at work and identify possible improvements

P3 ensure that your performance consistently meets or goes beyond agreed requirements

P4 get regular and useful feedback on your performance from those who are in a good position to judge it and provide you with objective and valid feedback

P5 discuss and agree, with those you report to, any changes to your personal work objectives and development plan in the light of performance, feedback received, any development activities undertaken and any wider changes

P6 define the personal aims and objectives for undertaking personal development

P7 identify and contact sources of support and guidance for undertaking personal development

P8 identify and select relevant standards of competence against which personal development can be measured

P9 analyse the current personal level of performance against the identified standards of competence and record a profile of present competence and personal development needs

P10 prepare a development plan for achieving identified development needs

P11 undertake development activities aimed at achieving identified development needs, review and record progress and the effectiveness of the activities

P12 measure the achievement of identified development needs and record evidence of competence gained against the identified standards of competence

P13 review the cycle of personal development aims and objectives and revise and update aims and objectives to suit changing circumstances

Enable people and yourself to learn and benefit from practice experience

You must be able to:

P14 identify, through discussion with people, areas where they need help to achieve their agreed competence levels and use the information to produce an agreed personal development plan

P15 identify and offer adequate and appropriate opportunities and resources for people to learn

P16 select and summarise relevant and up to date information about knowledge and practice in a format which is suitable for distribution and for developing learning materials

P17 acknowledge appropriate opportunities to learn from other people

Performance criteria

P18 advise and coach people so that they can identify their current level of competence, their learning needs and targets

P19 select and use appropriate learning techniques and methods which are suitable for the topic and the needs of the individual

P20 present information to people using a pace, style and form which is appropriate to their needs

P21 encourage people to ask questions, seek clarification and advice when they need help and during learning activities

P22 review peoples' progress towards agreed objectives and give realistic and positive feedback on achievements

Knowledge and understanding

You need to know and understand:

Manage your own resources and undertake continuing personal development in the occupational practice area

K1 how and why to develop personal networks of contacts, which are appropriate to meet your current and future needs for information and resources (synthesis)

K2 how to maintain personal networks of contacts, which are appropriate to meet your current and future needs for information and resources (application)

K3 how to check, on a regular basis, how you are using your time at work (application)

K4 what to identify as possible improvements to how you utilise your time at work (understanding)

K5 how to ensure that your performance consistently meets or goes beyond agreed requirements (application)

K6 how to get regular and useful feedback on your performance from those who are in a good position to judge it and provide you with objective and valid feedback (application)

K7 how and why to discuss with those you report to, any changes to your personal work objectives and development plan in the light of performance, feedback received, any development activities undertaken and any wider changes (synthesis)

K8 how and why to agree with those you report to, any changes to your personal work objectives and development plan in the light of performance, feedback received, any development activities undertaken and any wider changes (evaluation)

K9 how and why to define the personal aims and objectives for undertaking personal development (evaluation)

K10 what to identify as sources of support and guidance for undertaking personal development (understanding)

K11 how to contact sources of support and guidance for undertaking personal development (application)

K12 what to identify as relevant standards of competence against which personal development can be measured (understanding)

K13 how and why to select relevant standards of competence against which personal development can be measured (evaluation)

K14 how and why to analyse the current personal level of performance against the identified standards of competence (analysis)

K15 how to record a profile of present competence and personal development needs (application)

K16 how and why to prepare a development plan for achieving identified development needs (synthesis)

Knowledge and understanding

K17 how to undertake development activities aimed at achieving identified development needs (application)

K18 how and why to review progress and the effectiveness of the development activities (analysis)

K19 how to record progress and the effectiveness of the development activities (application)

K20 how to measure the achievement of identified development needs (application)

K21 how to record evidence of competence gained against the identified standards of competence (application)

K22 how and why to review the cycle of personal development aims and objectives (analysis)

K23 how to revise aims and objectives to suit changing circumstances (application)

K24 how to update aims and objectives to suit changing circumstances (application)

Enable people and yourself to learn and benefit from practice experience

You need to know and understand:

K25 what to identify as areas where people need help to achieve their agreed competence levels (understanding)

K26 how to use the information from discussions to produce an agreed personal development plan (application)

K27 what to identify as adequate and appropriate opportunities and resources for people to learn (understanding)

K28 how to offer adequate and appropriate opportunities and resources for people to learn (application)

K29 how and why to select relevant and up to date information about knowledge and practice in a format which is suitable for distribution and for developing learning materials (evaluation)

K30 how to summarise relevant and up to date information about knowledge and practice in a format which is suitable for distribution and for developing learning materials (application)

K31 how to acknowledge appropriate opportunities to learn from other people (application)

K32 how and why to advise and coach people so that they can identify their current level of competence, their learning needs and targets (synthesis)

K33 how and why to select appropriate learning techniques and methods which are suitable for the topic and the needs of the individual (evaluation)

K34 how to use appropriate learning techniques and methods which are suitable for the topic and the needs of the individual (application)

K35 how to present information to people using a pace, style and form which is appropriate to their needs (application)

Knowledge and understanding

K36 how to encourage people to ask questions, seek clarification and advice when they need help and during learning activities (application)

K37 how and why to review peoples' progress towards agreed objectives and give realistic and positive feedback on achievements (analysis)

Scope/range

Manage your own resources and undertake continuing personal development in the occupational practice area

1 Development plan includes:
   - 1.1 priorities
   - 1.2 target dates
   - 1.3 development activities

2 Development activities:
   - 2.1 formal courses
   - 2.2 research
   - 2.3 work experience
   - 2.4 personal study
   - 2.5 work shadowing/secondment
   - 2.6 mentoring including professional discussions
   - 2.7 developing personal networks
   - 2.8 publications

3 Aims and objectives:
   - 3.1 preparation for career development
   - 3.2 intellectual challenge
   - 3.3 need to provide evidence of vocational competence
   - 3.4 compliance with employer and professional requirements
   - 3.5 awareness of development needs
   - 3.6 developing personal networks

4 Personal development:
   - 4.1 development of new competence
   - 4.2 maintenance of existing competence
   - 4.3 improvements of existing competence
   - 4.4 commitment to vocational excellence

5 Sources of support and guidance:
   - 5.1 national/industry bodies
   - 5.2 professional Institutions
   - 5.3 education and training providers
   - 5.4 in house
   - 5.5 National Occupational Standards

Scope/range

- 5.6 current publications
- 5.7 benchmarks
- 5.8 mentoring

6 Standards of competence:
- 6.1 job descriptions and personal specification
- 6.2 professional institution requirements
- 6.3 national occupational standards

Enable people and yourself to learn and benefit from practice experience

7 People:
- 7.1 colleagues
- 7.2 junior colleagues
- 7.3 trainees and students
- 7.4 potential entrants to the industry

8 Opportunities and resources:
- 8.1 paid time
- 8.2 personal time
- 8.3 office
- 8.4 site
- 8.5 collaboration with others

9 Knowledge and practice:
- 9.1 lessons from own experience
- 9.2 lessons from others experience
- 9.3 published sources

10 Learning techniques and methods:
- 10.1 attending training and educational programmes
- 10.2 coaching
- 10.3 mentoring
- 10.4 instructing
- 10.5 agreeing work based learning opportunities
- 10.6 performance appraisal
- 10.7 work shadowing/secondments

COSCSMO04

Develop self and others in construction management

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Relevant occupations	Managers in construction
Suite	Construction Senior Management
Keywords	Professional; ethical; learning; self-evaluation

Prepare and agree a project brief and outline programme in construction management

Overview

This unit is about managing projects and the team that delivers design solutions to meet the project brief. It is about ascertaining stakeholders' requirements, exploring the constraints and risks and agreeing deliverables to meet the various demands and needs. You must have a detailed knowledge of the stakeholders' areas of operation and future aspirations. You need to clarify the project stakeholders' understanding of project processes and peoples' roles and responsibilities.

It is about analysing the project brief and developing an outline programme. You will need to advise the project stakeholders about new technological requirements and innovations to enable them to make informed decisions. You will also need to present an outline programme to the stakeholders and agree it with them.

Prepare and agree a project brief and outline programme in construction management

Performance criteria

Prepare proposal for a project brief

You must be able to:

P1 identify and agree the stakeholders' requirements, opinions and aspirations and prepare a project proposal

P2 select data which is relevant and valid, analyse it and qualify its status

P3 estimate and confirm the cost and timescale of the project

P4 review the cost implications of adopting alternative design, construction, services, financing and use strategies and agree them with stakeholders

P5 prepare a draft brief clearly, accurately, unambiguously and within the time agreed, and present the brief to stakeholders

P6 explain and discuss any significant constraints, opportunities and areas of uncertainty relating to the project

P7 modify the draft to reflect the discussion and relevant points which have been raised

P8 negotiate a clear and mutually acceptable agreement on the brief which is in sufficient detail to allow work to start on the next stage of the project

Develop a project outline programme which meets the requirements of the brief

You must be able to:

P9 review the requirements of the brief and check and clarify initial assumptions about the project outline programme with stakeholders

P10 develop a realistic outline programme for the project stages which takes account of identified constraints

P11 discuss the outline programme with stakeholders and agree any necessary modifications to the brief, outline programme and constraints

P12 prepare, present and agree an outline programme which meets the requirements of the brief and the expectations of stakeholders

Identify, assess and agree project requirements and stakeholder preferences

You must be able to:

P13 clarify the project stakeholders' understanding of project processes and procedures and the roles of those who need to be involved

P14 identify and agree with project stakeholders what their goals and priorities are both now and for the future

P15 clarify the project stakeholders' circumstances and requirements, the options available and the constraints and risks which might apply to the project

P16 advise and guide project stakeholders about new regulatory or technological requirements and innovations to enable them to make informed decisions

P17 summarise and present the project requirements and stakeholders' preferences

P18 evaluate project requirements and stakeholders' preferences which do not appear to be realistic and recommend valid options and record agreement

Knowledge and understanding

You need to know and understand:

Prepare proposal for a project brief

K1 what to identify as stakeholders' requirements opinions and aspirations (understanding)

K2 how and why to agree the stakeholders' requirements opinions and aspirations (evaluation)

K3 how to prepare a project proposal (application)

K4 how and why to select data which is relevant and valid (evaluation)

K5 how and why to analyse data and qualify its status (analysis)

K6 how and why to estimate the cost and timescale of the project (analysis)

K7 how to confirm the cost and timescale of the project (application)

K8 how and why to review the cost implications of adopting alternative design, construction, services, financing and use strategies (analysis)

K9 how and why to agree the cost implications of adopting alternative design, construction, services, financing and use strategies with stakeholders (evaluation)

K10 how and why to prepare a draft brief clearly, accurately, unambiguously and within the time agreed (synthesis)

K11 how to present the brief to stakeholders (application)

K12 how to explain any significant constraints, opportunities and areas of uncertainty relating to the project (application)

K13 how and why to discuss any significant constraints, opportunities and areas of uncertainty relating to the project (synthesis)

K14 how to modify the draft to reflect the discussion and relevant points which have been raised (application)

K15 how and why to negotiate a clear and mutually acceptable agreement on the brief which is in sufficient detail to allow work to start on the next stage of the project (synthesis)

Develop a project outline programme which meets the requirements of the brief

You need to know and understand:

K16 how and why to review the requirements of the brief (analysis)

K17 how to check and clarify the initial assumptions about the project outline programme with stakeholders (application)

K18 how and why to develop a realistic outline programme for the project stages which takes account of identified constraints (synthesis)

K19 how to discuss the outline programme with stakeholders (application)

K20 how and why to agree any necessary modifications to the brief, outline programme and constraints (evaluation)

Knowledge and understanding

K21 how and why to prepare an outline programme which meets the requirements of the brief and the expectations of stakeholders (synthesis)

K22 how to present an outline programme which meets the requirements of the brief and the expectations of stakeholders (application)

K23 how and why to agree an outline programme which meets the requirements of the brief and the expectations of stakeholders (evaluation)

Identify, assess and agree project requirements and stakeholder preferences

You need to know and understand:

K24 how to clarify the project stakeholders' understanding of project processes and procedures and the roles of those who need to be involved (application)

K25 what to identify as the project stakeholders' goals and priorities both now and in the future (understanding)

K26 how and why to agree with the project stakeholders what their goals and priorities are both now and in the future (evaluation)

K27 how to clarify the project stakeholders' circumstances and requirements, the options available and the constraints and risks which might apply to the project (application)

K28 how and why to advise project stakeholders about new regulatory or technological requirements and innovations to enable them to make informed decisions (synthesis)

K29 how and why to guide project stakeholders about new regulatory or technological requirements and innovations to enable them to make informed decisions (synthesis)

K30 how to summarise the project requirements and stakeholders' preferences (application)

K31 how to present the project requirements and stakeholders' preferences (application)

K32 how and why to evaluate project requirements and stakeholders' preferences which do not appear to be realistic (evaluation)

K33 how and why to recommend valid options to meet project requirements and stakeholders' preferences (synthesis)

K34 how to record agreement on valid options to meet project requirements and stakeholders' preferences (application)

Scope/range

Prepare proposal for a project brief

1 Stakeholders:

- 1.1 consultants
- 1.2 the client
- 1.3 the client's financial advisers
- 1.4 statutory authorities
- 1.5 CDM co-ordinator (or responsible body under CDM regulations)
- 1.6 project managers
- 1.7 potential contractors
- 1.8 potential subcontractors and suppliers
- 1.9 potential investors
- 1.10 funding agencies
- 1.11 independent client adviser
- 1.12 user groups
- 1.13 community groups
- 1.14 facilities/asset managers

2 Project proposal - will consider:

- 2.1 the client's requirements
- 2.2 project stage information requirements
- 2.3 user requirements
- 2.4 design quality requirements
- 2.5 ergonomic requirements
- 2.6 community requirements
- 2.7 procurement requirements
- 2.8 physical requirements
- 2.9 resource requirements
- 2.10 construction requirements
- 2.11 legal requirements
- 2.12 cost requirements
- 2.13 business opportunities and objectives
- 2.14 risk factors
- 2.15 health, safety and welfare requirements
- 2.16 current and future needs

Scope/range

2.17 energy, water and natural resource management
2.18 compliance with local, regional national development strategies
2.19 Building Information Modelling
2.20 insurance risks/opportunities associated with new technologies
2.21 adaptation and mitigation

3 Review:
3.1 cost benefit analysis
3.2 whole life costing
3.3 value management
3.4 feasibility studies
3.5 elemental cost planning

4 Present:
4.1 orally
4.2 in writing
4.3 graphically
4.4 electronically

Develop a project outline programme which meets the requirements of the brief

5 Programme:
5.1 timetable phasing
5.2 integration of data
5.3 interaction between design consultants
5.4 critical path
5.5 key project stages/gate management plan
5.6 interface between design, procurement, construction, operation and end use
5.7 interaction with design approval stages
5.8 interaction with construction programme
5.9 concurrent design and construction
5.10

6 Stakeholders:
6.1 consultants
6.2 the client
6.3 the client's financial advisers

Scope/range

- 6.4 statutory authorities
- 6.5 CDM co-ordinator (or responsible body under CDM regulations)
- 6.6 project managers
- 6.7 potential contractors
- 6.8 potential subcontractors and suppliers
- 6.9 potential investors
- 6.10 funding agencies
- 6.11 independent client adviser
- 6.12 user groups
- 6.13 community groups
- 6.14 facilities/asset managers

7 Project stages:

- 7.1 Stage 0 (Strategy)
- 7.2 Stage 1 (Brief)
- 7.3 Stage 2 (Concept)
- 7.4 Stage 3 (Definition)
- 7.5 Stage 4 (Design)
- 7.6 Stage 5 (Build and Commission)
- 7.7 Stage 6 (Handover and Closeout)

8 Constraints:

- 8.1 work content
- 8.2 time duration/sequencing
- 8.3 resources available
- 8.4 contingencies
- 8.5 budget
- 8.6 site
- 8.7 risk and valuation
- 8.8 regulations

9 Expectations:

- 9.1 design quality
- 9.2 consultation
- 9.3 timetable
- 9.4 phasing of design development

Scope/range

9.5 best value

Identify, assess and agree project requirements and stakeholder preferences

10 Clarify the project stakeholders' circumstances and requirements by:

- 10.1 reference to standard documentation
- 10.2 checklists
- 10.3 client consultation
- 10.4 questionnaires
- 10.5 comparative field research
- 10.6 market research
- 10.7 identifying options and alternatives
- 10.8 use of benchmarking tool(s)
- 10.9 digital exchange

11 Processes and procedures:

- 11.1 Project Information Plan
- 11.2 Model Delivery Plan
- 11.3 information management accountabilities
- 11.4 implementation plans
- 11.5 capability assessments
- 11.6 delivery plans
- 11.7 execution plans
- 11.8 levels of graphical and non-graphical detail/development

12 Agree:

- 12.1 direct with a client
- 12.2 by negotiation and agreement with partnering team
- 12.3 facilitation

13 Project stakeholders:

- 13.1 consultants
- 13.2 the client
- 13.3 the client's financial advisers
- 13.4 statutory authorities
- 13.5 CDM co-ordinator (or responsible body under CDM regulations)
- 13.6 project managers

Scope/range

13.7 potential contractors
13.8 potential subcontractors and suppliers
13.9 potential investors
13.10 funding agencies
13.11 independent client adviser
13.12 user groups
13.13 community groups
13.14 facilities/asset managers

14 Goals and priorities:
14.1 quantity
14.2 design quality
14.3 time
14.4 use/adaptability/maintenance
14.5 whole life costs
14.6 health, safety and welfare
14.7 sustainability
14.8 economic benefits
14.9 community benefits
14.10 security
14.11 market demands
14.12 changing circumstances

15 Constraints and risks:
15.1 cost
15.2 time
15.3 quality
15.4 health and safety
15.5 the environment
15.6 the client's requirements
15.7 system compatibility
15.8 system interoperability

16 Present:
16.1 orally
16.2 in writing

Scope/range

	16.3	graphically
	16.4	electronically

COSCSMO05

Prepare and agree a project brief and outline programme in construction management

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Keywords	Programme; brief; project; deliverables; legal

Direct the management of design development and processes in construction management

Overview

This unit is about managing projects and the team that deliver design solutions to meet the project brief. It recognises the paramount importance of health, safety and welfare requirements and environmental sustainability issues. It is about ensuring that coherence and consistency is maintained between all aspects of the production and installation design solution and concept.

You will need to take responsibility for ensuring that risk reduction measures comply with relevant health, safety and welfare regulations and guidelines.

Performance criteria

Identify and assess hazards, and identify risks

You must be able to:

P1 check that clients are made aware of the relevant health, safety and welfare regulations and legal framework and their obligations in relation to them

P2 collaborate with stakeholders to ensure the compliance of designs with relevant health, safety and welfare regulations and legal framework

P3 ensure that hazards and their consequences arising from operations and individual activities are identified and prioritised

P4 ensure that hazards are assessed to identify the significance of risks on an iterative basis throughout the development process

Make design choices to reduce health and safety risks

You must be able to:

P5 ensure that identified hazards are eliminated and reduced whilst developing and modifying designs and conflicting demands are taken into account

P6 ensure that community measures are given equal priority over project measures when reducing risks

P7 take responsibility for ensuring that the risk reduction measures comply with relevant health and safety regulations and guidelines

P8 ensure that the information needed by other people involved is recorded in any design documentation so that they can comply with their duties under relevant health and safety regulations

P9 promote the implementation of the risk reduction measures with other people involved

P10 encourage a responsible culture of health, safety and welfare in design processes and decision making

Manage the design process

You must be able to:

P11 agree with the stakeholders the purposes which will be served by production and installation design information appropriate to the project stage

P12 choose a format for presenting the production and installation design information which meets the requirements of the stakeholders

P13 identify which parts of the overall project require production and installation design information

P14 ensure that the parts of the project design which interact with each other are identified and suitable ways to maintain coherence and consistency between all aspects of the production and installation design information are agreed

P15 ensure that procedures are set up which will maintain coherence and consistency between the production and installation design solutions and the overall development concept

Performance criteria	P16	ensure that techniques are confirmed which are suitable for investigating, calculating, testing, developing and specifying the production and installation design which are consistent with best practice and conform to relevant codes and standards

Knowledge and understanding

You need to know and understand:

Identify and assess hazards, and identify risks

K1 how to check that clients are made aware of the relevant health, safety and welfare regulations and legal framework and their obligations in relation to them (application)

K2 how to collaborate with stakeholders to ensure the compliance of designs with relevant health, safety and welfare regulations and legal framework (application)

K3 how to ensure that hazards and their consequences arising from operations and individual activities are identified and prioritised (application)

K4 how to ensure that hazards are assessed to identify the significance of risks on an iterative basis throughout the development process (application)

Make design choices to reduce health and safety risks

You need to know and understand:

K5 how to ensure that identified hazards are eliminated and reduced whilst developing and modifying designs and conflicting demands are taken into account (application)

K6 how to ensure that community measures are given equal priority over project measures when reducing risks (application)

K7 how and why to take responsibility for ensuring that the risk reduction measures comply with relevant health and safety regulations and guidelines (evaluation)

K8 how to ensure that information needed by other people involved is recorded in any design documentation so that they can comply with their duties under relevant health and safety regulations (application)

K9 how and why to promote the implementation of the risk reduction measures with other people involved (analysis)

K10 how to encourage a responsible culture of health, safety and welfare in design processes and decision making (application)

Manage the design process

You need to know and understand:

K11 how and why to agree with the stakeholders the purposes which will be served by production and installation design appropriate to the project stage (evaluation)

K12 how and why to choose a format for presenting the production and installation design which meets the requirements of the stakeholders (evaluation)

K13 what to identify as parts of the overall project which require production and installation design information (understanding)

K14 how to ensure that the parts of the project design which interact with each other are identified and suitable ways to maintain coherency and consistency between all aspects of the production and installation design are agreed (application)

K15 how to ensure that procedures are set up which will maintain coherence and consistency between the production and installation design solutions and the overall development concept (application)

Knowledge and understanding	K16	how to ensure that techniques are confirmed which are suitable for investigating, calculating, testing, developing and specifying the production and installation design which are consistent with best practice and conform to relevant codes and standards (application)

Scope/range

Identify and assess hazards, and identify risks

1 Clients:
- 1.1 customers
- 1.2 owners
- 1.3 users
- 1.4 occupiers

2 Relevant health, safety and welfare regulations and legal framework:
- 2.1 current health, safety and welfare regulations
- 2.2 construction and building regulations
- 2.3 international law, standards and practice
- 2.4 contract and procurement

3 Stakeholders:
- 3.1 CDM co-ordinator (or recognised body under the CDM code of practice)
- 3.2 other designers
- 3.3 advisors
- 3.4 clients
- 3.5 construction managers
- 3.6 contractors and specialist contractors

4 Hazards:
- 4.1 working at height
- 4.2 slips, trips and falls (same height)
- 4.3 debris
- 4.4 falling or moving objects
- 4.5 incorrect manual handling
- 4.6 health issues
- 4.7 power sources
- 4.8 hazardous substances
- 4.9 trapped by something collapsing or overturning
- 4.10 confined spaces
- 4.11 fire obstructions
- 4.12 moving vehicles
- 4.13 water
- 4.14

Scope/range

4.15 lack of security/breaches

4.16 sector or context specific

5 Consequences:

5.1 injuring people

5.2 causing ill health

5.3 damaging property

5.4 adversely affecting the natural and built environment

5.5 contravening legislative requirements

5.6 litigation and prosecution

5.7 causing adverse publicity/perception

5.8 working conditions and circumstances, buildability

5.9 alienating workforce/team members

5.10 economic and business factors (positive or negative)

5.11 language barriers

6 Operations and individual activities during:

6.1 site establishment

6.2 constructing (infrastructure, structure, building fabric, prefabrication, finishes, services and equipment, landscape, temporary works)

6.3 using and operating plant and machinery

6.4 cleaning

6.5 maintaining

6.6 altering

6.7 demolition

6.8 commissioning and decommissioning

6.9 refurbishing

6.10 proximity to existing services and obstructions

7 Assess:

7.1 likelihood of occurrence

7.2 severity of harm incurred

8 Significance of risks:

8.1 common

8.2 generic

8.3 not obvious to a competent contractor or designer

Scope/range

8.4 likely to be difficult to manage effectively

Make design choices to reduce health and safety risks

9 Hazards:

- 9.1 working at height
- 9.2 slips, trips and falls (same height)
- 9.3 debris
- 9.4 falling or moving objects
- 9.5 incorrect manual handling
- 9.6 health issues
- 9.7 power sources
- 9.8 hazardous substances
- 9.9 trapped by something collapsing or overturning
- 9.10 confined spaces
- 9.11 fire obstructions
- 9.12 moving vehicles
- 9.13 water
- 9.14 lack of security/breaches
- 9.15 sector or context specific
- 9.16

10 Developing and modifying design:

- 10.1 identifying project requirements
- 10.2 planning
- 10.3 investigation
- 10.4 verifying competence and resources
- 10.5 analysis
- 10.6 identifying interactions
- 10.7 calculation
- 10.8 testing
- 10.9 selecting materials, components and systems
- 10.10 assessing costs & benefits (including life cycle)
- 10.11 detailing and specifying
- 10.12 assessing buildability

Scope/range

11 Measures:
- 11.1 control at sources
- 11.2 cumulative protection
- 11.3 manage residual risks

12 Risks:
- 12.1 common
- 12.2 generic
- 12.3 not obvious to a competent contractor or designer
- 12.4 likely to be difficult to manage effectively

13 Relevant health and safety regulations and guidelines:
- 13.1 current health, safety and welfare regulations
- 13.2 construction and building regulations
- 13.3 international law, standards and practice
- 13.4 codes of practice
- 13.5 industry guides

14 Other people involved:
- 14.1 contractors
- 14.2 cleaners
- 14.3 maintainers
- 14.4 owners
- 14.5 users

15 Design documentation:
- 15.1 drawings
- 15.2 specifications
- 15.3 models
- 15.4 calculations
- 15.5 health and safety plans and files

Manage the design process

16 Stakeholders:
- 16.1 the client
- 16.2 CDM Coordinator (or recognised body under the CDM code of practice)
- 16.3 consultants

Scope/range

16.4 potential contractors
16.5 potential subcontractors and suppliers
16.6 regulatory authorities
16.7 facilities/asset maintenance managers
16.8 users
16.9 general public
16.10 site visitors

17 Project Stages:
17.1 Stage 4 (Design)
17.2 Stage 5 (Build and Commission)

18 Format:
18.1 in writing
18.2 graphically
18.3 electronically

19 Parts of the overall project design:
19.1 location and size
19.2 assembly and construction/installation
19.3 components and systems
19.4 specification
19.5 environmental assessment objectives

20 Maintain coherence and consistency:
20.1 visual and spatial
20.2 functional performance
20.3 technical performance
20.4 quality
20.5 requirements of relevant legislation and codes
20.6 obsolescence/design life
20.7 cost
20.8 health and safety environmental
20.9 factors sustainability
20.10 buildability/disassembly
20.11 maintenance/operation and use
20.12

Scope/range

20.13 value management

20.14 concurrent design and construction

20.15 minimise emissions and waste

20.16 energy use (U value calculations, Building Energy Assessment. carbon rating)

20.17 protect archaeological and historically valuable resources

20.18 carbon footprint

20.19 grey water usage

20.20 risk/confidence in information

21 Techniques:

21.1 data research

21.2 comparison with regulations

21.3 specialist guidance and best practice

21.4 relevant previous solutions and feedback

21.5 computer modelling

21.6 Building Information Modelling

21.7 calculation

21.8 lifetime impact modelling

21.9 maintain risk register

21.10 performance dynamic modelling

21.11 comparison of costs of new and renewable energy

COSCSMO06

Direct the management of design development and processes in construction management

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Originating organisation	ConstructionSkills
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Relevant occupations	Managers in construction
Suite	Construction Senior Management
Keywords	Design; solutions; constraints; risks; hazards; health, safety and welfare

Assess and evaluate the sustainability and environmental impact of developments in construction management

Overview

This unit is about managing the impact of the built environment on the natural environment. You will need to investigate requirements for assessing the environmental impact of proposals. You will also need to select the factors and the criteria used to assess the impact and assess their significance.

You will need to investigate and evaluate the best balance between the potential asset value and sustainability and project design, function, performance and return on investment. You will then need to present you development strategies to decision makers.

Finally, you will need to investigate the factors which impact on the utilisation and sustainability of resources and identify potential alternatives. You will need to carry out investigations and assessments of alternative resources to identify technical and environmental advantages. You will also need to present your recommendations for suitable strategies for using alternative resources to decision makers.

Assess and evaluate the sustainability and environmental impact of developments in construction management

Performance criteria

You must be able to:

Assess the environmental impact of development proposals

P1 investigate the requirements for assessing the environmental impact of proposals by examining policy documents, consulting stakeholders and experts

P2 select the factors which will be included in the assessment and the criteria to be used for assessing the impact

P3 collate relevant data and examine the proposal in its context

P4 identify and review alternative solutions which will improve environmental quality and increase sustainability

P5 analyse and forecast the environmental impact of the selected factors, both individually and in combination

P6 assess, quantify and report on the significance of each factor and suggest measures which will reduce the environmental impact

Evaluate and present sustainable requirements

You must be able to:

P7 identify goals and priorities for potential development, both currently and in the future

P8 investigate and identify the design, function and performance requirements of the potential project

P9 investigate economic factors and resources, environmental and ecological factors, and social views that affect the future asset value and sustainability of potential development and consider alternatives

P10 evaluate the best balance between the potential asset value and sustainability and project design, function, performance and return on investment

P11 present development strategies in a suitable format and justify them to decision makers

P12 decide whether and how to implement potential sustainable development projects to achieve key requirements

Identify and evaluate sustainable resources

You must be able to:

P13 investigate, from appropriate information sources, the factors which impact on the utilisation and sustainability of renewable resources

P14 assess accurately the costs and implications of the management and replacement of renewable resources

P15 identify and summarise appropriate and valid information sources and identify potential alternative resources

P16 compare the technical performance and environmental implications of alternative resources with the performance of existing finite resources with a similar function and calculate any variances

Performance criteria

P17 investigate, assess and recommend suitable strategies for developing alternative resources, which indicate positive technical and environmental advantages

P18 present strategies in a suitable format and justify them to stakeholders

Knowledge and understanding

You need to know and understand:

Assess the environmental impact of development proposals

K1 how and why to investigate the requirements for assessing the environmental impact of proposals by examining policy documents, consulting stakeholders and experts (analysis)

K2 how and why to select the factors which will be included in the assessment and the criteria to be used for assessing the impact (evaluation)

K3 how to collate relevant data (application)

K4 how and why to examine the proposal in its context (analysis)

K5 what to identify as alternative solutions which will improve environmental quality and increase sustainability (understanding)

K6 how and why to review alternative solutions which will improve environmental quality and increase sustainability (analysis)

K7 how and why to analyse the environmental impact of the selected factors, both individually and in combination (analysis)

K8 how and why to forecast the environmental impact of the selected factors, both individually and in combination (analysis)

K9 how and why to assess and quantify the significance of each factor (analysis)

K10 how to report on the significance of each factor (application)

K11 how and why to suggest measures which will reduce the environmental impact (synthesis)

Evaluate and present sustainable requirements

You need to know and understand:

K12 what to identify as the goals and priorities for potential development, both currently and in the future (understanding)

K13 how and why to investigate the design, function and performance requirements of the potential project (analysis)

K14 what to identify as the design, function and performance requirements of the potential project (understanding)

K15 how and why to investigate economic factors and resources, environmental and ecological factors, and social views that affect the future asset value and sustainability of potential development and consider alternatives (analysis)

K16 how and why to evaluate the best balance between the potential asset value and sustainability and project design, function, performance and return on investment (evaluation)

K17 how to present development strategies in a suitable format (application)

K18 how and why to justify development strategies to decision makers (synthesis)

K19 how and why to decide whether and how to implement potential sustainable development projects to achieve key requirements (evaluation)

Knowledge and understanding

You need to know and understand:

Identify and evaluate sustainable resources

K20 how and why to investigate, from appropriate information sources, the factors which impact on the utilisation and sustainability of renewable resources (analysis)

K21 how and why to assess accurately the costs and implications of the management and replacement of renewable resources (analysis)

K22 what to identify as appropriate and valid information sources (understanding)

K23 how to summarise appropriate and valid information sources (application)

K24 what to identify as potential alternative resources (understanding)

K25 how and why to compare the technical performance and environmental implications of alternative resources with the performance of existing finite resources with a similar function and calculate any variances (synthesis)

K26 how and why to investigate and assess suitable strategies for developing alternative resources, which indicate positive technical and environmental advantages (analysis)

K27 how and why to recommend suitable strategies for developing alternative resources, which indicate positive technical and environmental advantages (synthesis)

K28 how to present strategies in a suitable format to stakeholders (application)

K29 how and why to justify strategies to stakeholders (evaluation)

Scope/range

Assess the environmental impact of development proposals

1 Requirements:
   - 1.1 social and community obligations
   - 1.2 legal obligations
   - 1.3 current codes of practice
   - 1.4 feasibility
   - 1.5 conditions to be applied to the proposal
   - 1.6 significant environmental issues and effects
   - 1.7 examining alternatives
   - 1.8 proposing appropriate mitigation measures

2 Proposals:
   - 2.1 individual projects
   - 2.2 strategic policies, plans and proposals

3 Factors:
   - 3.1 environmental impact and sustainability
   - 3.2 quantity
   - 3.3 quality (including design)
   - 3.4 cost (including whole life costs/return on investment)
   - 3.5 time
   - 3.6 social (community use and adaptability)
   - 3.7 programme
   - 3.8 transport impact minimisation

4 Criteria:
   - 4.1 primary and secondary effects
   - 4.2 positive and negative
   - 4.3 risk and opportunity
   - 4.4 construction, operation and decommissioning stages
   - 4.5 temporary, cumulative and permanent
   - 4.6 short and long term

5 Relevant data:
   - 5.1 project baseline information
   - 5.2 survey information
   - 5.3 relevant standards

Scope/range

- 5.4 relevant legal, regulatory and policy requirements
- 5.5 historical
- 5.6 project

6 Alternative solutions:
- 6.1 different locations
- 6.2 different sites
- 6.3 brownfield development
- 6.4 different layouts
- 6.5 extending the use of existing resources
- 6.6 renewable energy technology
- 6.7 use of alternative resources
- 6.8 changes to implementation and phasing
- 6.9 not carrying out the proposal

Evaluate and present sustainable requirements

7 Goals and priorities:
- 7.1 quantity
- 7.2 cost (including whole life costs)
- 7.3 time
- 7.4 development
- 7.5 improvement
- 7.6 use
- 7.7 maintenance
- 7.8 low carbon design
- 7.9 environmental impact and sustainability
- 7.10 security
- 7.11 health and safety
- 7.12 logistics

8 Investigate:
- 8.1 use of benchmarking tools
- 8.2 insurance risk
- 8.3 research
- 8.4 consultancy advice

Scope/range

8.5 regulatory advice

9 Economic factors and resources:

9.1 finance

9.2 fiscal policy (including carbon tax/incentives)

9.3 water demand/supply/use minimisation

9.4 payback/return on investment

9.5 carbon trading schemes/carbon reduction credits

9.6 climate change levy agreements

9.7 workforce (skills)

9.8 raw materials

9.9 manufactured systems and component/modular systems

9.10 energy use/demand minimisation

9.11 water demand/supply/use minimisation

9.12 brownfield development

9.13 land use

9.14 resource efficient low carbon urban design

9.15 market demands and social factors

10 Environmental and ecological factors:

10.1 natural resources

10.2 emissions (air, land, water)

10.3 waste and recycling

10.4 effluent

10.5 access to environmentally sensitive areas

10.6 effects of climate change

10.7 land use contamination

10.8 carbon use minimisation

10.9 water use

10.10 biodiversity

10.11 renewable energy technology

10.12 protect archaeological and historically valuable resources

10.13 transport impact minimisation

11 Social views:

11.1 client

Scope/range

11.2 funders/investors

11.3 workforce

11.4 suppliers

11.5 users

11.6 community (including public and private space)

12 Asset value and sustainability:

12.1 provide capital growth

12.2 location in relation to a stable economy and community

12.3 saleable revenue

12.4 minimising running costs (environmental and economic)

12.5 minimising maintenance

12.6 location in relation to flooding/ground conditions

12.7 energy use/demand minimisation

12.8 district heating

Identify and evaluate sustainable resources

13 Information sources:

13.1 desk research of published literature

13.2 commissioned research

13.3 consultation with appropriate authorities

13.4 consultation with colleagues

14 Factors:

14.1 nature

14.2 location

14.3 continued availability

14.4 energy use/demand/storage capacity

14.5 climate change impact

14.6 carbon use

14.7 waste

14.8 water use

14.9 biodiversity

15 Utilisation:

15.1 historic use

Scope/range

15.2 current use

15.3 anticipated future use

16 Resources:

16.1 alternative power generation schemes and implications on design and master planning

16.2 solar, wind, biomass, CHP, photovoltaic, ground source heat pump, air source heat pump, hydrogen; fuel cell)

16.3 hydro, wave and tidal power

17 Environmental implications:

17.1 social

17.2 cultural

17.3 technical

17.4 economic (including funding/tax incentives)

17.5 visual

17.6 political

17.7 legal

18 Present:

18.1 oral written

18.2 graphically

18.3 electronically

18.4

19 Stakeholders:

19.1 immediate superiors and managers

19.2 elected representatives

19.3 public servants

19.4 shareholders

COSCSMO07

Assess and evaluate the sustainability and environmental impact of developments in construction management

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Relevant occupations	Managers in construction
Suite	Construction Senior Management
Keywords	Environmental; evaluate; manage; judgement; sustainable

Evaluate sustainable resources and requirements for the whole life cycle of a construction project

Overview

This unit is about assessing and quantifying the whole life cost and low carbon cost implications for the project. You will need to review them against the project criteria and energy goals and priorities and select the most viable options.

You will also need to ensure that solutions that meet the energy use and control criteria are specified. You will need to prescribe commissioning procedures and certification for the property and systems and identify any improvements required. You will also need to provide operations and maintenance instructions to users.

Performance criteria

Evaluate project whole life and low carbon costs

You must be able to:

P1 confirm energy goals and priorities for the project, both currently and in the future

P2 confirm assumptions about cost elements, alternative designs, construction, services, financing and use options for the project stage with stakeholders

P3 review and present the potential whole life costs and low carbon cost of the project from available design and development information

P4 assess and quantify the whole life costs and low carbon cost implications for the project taking into account the views of experts and project stakeholders

P5 review the whole life costs and low carbon costs against the project criteria and energy goals and priorities

P6 summarise and present clearly and accurately the whole life costs and low carbon costs

P7 discuss the whole life costs and low carbon costs with stakeholders and select and agree the most viable options

Assess and provide for the conservation of energy use

You must be able to:

P8 review legislative requirements in order to identify the energy use and control criteria relevant to the type of property and systems

P9 ensure that the information on the property and systems necessary to assess energy use is gathered and recorded

P10 ensure that solutions which meet the criteria for the type of property and systems are reviewed, calculated and specified

P11 prescribe commissioning procedures and certification necessary for property and systems

P12 identify and define any consequent improvements that may be required to meet energy use and control criteria relevant to the type of property and systems

P13 provide operating and maintenance instructions to users to enable property and systems to be operated in an energy efficient manner

Evaluate sustainable resources and requirements for the whole life cycle of a construction project

Knowledge and understanding

You need to know and understand:

Evaluate project whole life and low carbon costs

K1 how to confirm energy goals and priorities for the project, both currently and in the future (application)

K2 how to confirm assumptions about cost elements, alternative designs, construction, services, financing and use options for the project stage with stakeholders (application)

K3 how and why to review the potential whole life costs and low carbon costs of the project from available design and development information (analysis)

K4 how to present the potential whole life costs and low carbon costs of the project from available design and development information (application)

K5 how and why to assess and quantify the whole life costs and low carbon costs implications for the project taking into account the views of experts and project stakeholders (analysis)

K6 how and why to review the whole life costs and low carbon costs against the project criteria and energy goals and priorities (analysis)

K7 how to summarise the whole life costs and low carbon costs (application)

K8 how to present the whole life costs and low carbon costs (application)

K9 how and why to discuss the whole life costs and low carbon costs with stakeholders (synthesis)

K10 how and why to select the most viable options (evaluation)

K11 how and why to agree the most viable options (evaluation)

Assess and provide for the conservation of energy use

You need to know and understand:

K12 how and why to review legislative requirements in order to identify the energy use and control criteria relevant to the type of property and systems (analysis)

K13 how to ensure that the information on the property and systems necessary to assess energy use is gathered and recorded (application)

K14 how to ensure that solutions which meet the criteria for the type of property and systems are reviewed, calculated and specified (application)

K15 how and why to prescribe commissioning procedures and certification necessary for property and systems (evaluation)

K16 what to identify as consequent improvements that may be required to meet energy use and control criteria relevant to the type of property and systems (understanding)

K17 how and why to define any consequent improvements that may be required to meet energy use and control criteria relevant to the type of property and systems (evaluation)

K18 how to provide operating and maintenance instructions to users to enable property and systems to be operated in an energy efficient manner (application)

Scope/range

Evaluate project whole life and low carbon costs

1 Energy goals and priorities:
- 1.1 energy sources and infrastructure
- 1.2 energy consumption
- 1.3 low carbon targets
- 1.4 use of renewable resources
- 1.5 use of non-renewable resources
- 1.6 energy reduction programmes
- 1.7 heat recovery and re-use energy efficient technologies
- 1.8 energy efficient practices

2 Project Stage:
- 2.1 Stage 0 (Strategy)
- 2.2 Stage 1 (Brief)
- 2.3 Stage 2 (Concept)
- 2.4 Stage 3 (Definition)

3 Stakeholders:
- 3.1 the client
- 3.2 financial advisers
- 3.3 consultants
- 3.4 potential contractors
- 3.5 potential subcontractors and suppliers
- 3.6 potential investors
- 3.7 partners in the development programme
- 3.8 facilities/asset managers

4 Whole life costs and low carbon cost:
- 4.1 energy sources and infrastructure
- 4.2 design stage
- 4.3 materials and components (including embodied energy)
- 4.4 construction and installation
- 4.5 energy use
- 4.6 grey water usage
- 4.7 operations/maintenance
- 4.8 adaptation/demolition/decommissioning

Scope/range

5 Assess and quantify:

- 5.1 cost benefit analysis
- 5.2 whole life
- 5.3 life cycle costing
- 5.4 lifetime impact modelling
- 5.5 in-use asset performance
- 5.6 carbon accounting
- 5.7 value management feasibility studies
- 5.8 elemental cost planning
- 5.9 risk management
- 5.10 cost effective out-performance of statutory requirements
- 5.11 decision tools for passive/active systems
- 5.12 model costs of alternative designs

6 Present:

- 6.1 orally
- 6.2 in writing
- 6.3 graphically
- 6.4 electronically
- 6.5 simulation

Assess and provide for the conservation of energy use

7 Criteria:

- 7.1 carbon dioxide emissions
- 7.2 efficiency of construction
- 7.3 efficiency of building services and installation
- 7.4 u values
- 7.5 continuity of insulation
- 7.6 air leakage

8 Property and systems:

- 8.1 new development
- 8.2 existing development

9 Information:

- 9.1 building type

Scope/range

- 9.2 building size and capacity
- 9.3 current energy usage
- 9.4 building fabric
- 9.5 building heating, lighting and ventilation

10 Gathered and recorded:

- 10.1 design proposals
- 10.2 measured survey
- 10.3 condition survey
- 10.4 energy measurement and assessment tools

COSCSMO08

Evaluate sustainable resources and requirements for the whole life cycle of a construction project

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Relevant occupations	Managers in construction
Suite	Construction Senior Management
Keywords	Sustainable; project; risks; energy; whole life costs; low carbon costs

COSCSMO09

Establish project procurement arrangements in construction management

Overview

This unit is about the establishment of project procurement strategies from inception to implementation by way of procurement methods, their objectives and criteria. Project stakeholders and legal and contractual constraints are considered. You will need to demonstrate how you have brought the procurement strategy forward to implementation. You will need to consider the interests and involvement of project stakeholders in the project. You will procure suppliers and services for the project to comply with project objectives. You will facilitate project team meetings to promote collaborative working arrangements. You will demonstrate the selection and agreement of forms of contract to satisfy the interests of the project.

Performance criteria

Select and agree procurement strategies

You must be able to:

- P1 identify and agree feasible and realistic procurement objectives and criteria
- P2 identify procurement methods which are capable of meeting the procurement objectives and evaluate them against selected criteria
- P3 select and recommend the most effective procurement methods which meet stakeholders' constraints and relevant legal and industry requirements
- P4 agree and record the selected procurement method and appropriate implementation procedures

Establish project team arrangements

You must be able to:

- P5 identify and confirm with the stakeholders, the type of project work and objectives for project team collaboration
- P6 form a selection panel of stakeholders to assess potential suppliers and services and identify selection criteria
- P7 provide information to potential suppliers and services and invite them to submit a statement of their capabilities
- P8 evaluate the potential suppliers and services using the selection criteria and agree a short-list
- P9 interview and hold discussions with the short-listed potential suppliers and services to assess their suitability, capability and commitment to the project and compliance with selection criteria
- P10 select and confirm the project suppliers and services with the stakeholders
- P11 negotiate agreements and contracts with project suppliers and services
- P12 conduct project team meetings to facilitate collaborative working and agree individual and mutual project objectives

Recommend and agree a form of contract

You must be able to:

- P13 identify clearly the stakeholders and the purpose of the contract
- P14 identify with the stakeholders significant criteria for selecting the form of contract
- P15 select and recommend a form of contract which is appropriate to the type of project work
- P16 give clear and accurate information and advice and provide stakeholders with the opportunities to comment and ask for clarification
- P17 agree a form of contract which is capable of being put into effect

Knowledge and understanding

You need to know and understand:

Select and agree procurement strategies

K1 what to identify as feasible and realistic procurement objectives and criteria (understanding)

K2 how and why to agree feasible and realistic procurement objectives and criteria (evaluation)

K3 what to identify as procurement methods which are capable of meeting the procurement objectives (understanding)

K4 how and why to evaluate procurement methods against selected criteria (evaluation)

K5 how and why to select the most effective procurement methods which meets stakeholders' constraints and relevant legal and industry requirements (evaluation)

K6 how and why to recommend the most effective procurement methods which meets stakeholders' constraints and relevant legal and industry requirements (synthesis)

K7 how and why to agree the selected procurement methods and appropriate implementation procedures (evaluation)

K8 how to record the selected procurement methods and appropriate implementation procedures (application)

Establish project team arrangements

You need to know and understand:

K9 what to identify with the stakeholders as the type of project work and objectives for project team collaboration (understanding)

K10 how to confirm with the stakeholders, the type of project work and objectives for project team collaboration (application)

K11 how and why to form a selection panel of stakeholders to assess potential suppliers and services and identify selection criteria (synthesis)

K12 how to provide information to potential suppliers and services and invite them to submit a statement of their capabilities (application)

K13 how and why to evaluate the potential suppliers and services using the selection criteria (evaluation)

K14 how and why to agree the short-list of potential suppliers and services (evaluation)

K15 how and why to interview and hold discussions with the short-listed potential suppliers and services to assess their suitability, capability and commitment to the project and compliance with selection criteria (analysis)

K16 how and why to select the project suppliers and services with the stakeholders (evaluation)

Knowledge and understanding

K17 how to confirm the project suppliers and services with the stakeholders (application)

K18 how and why to negotiate agreements and contracts with project suppliers and services (synthesis)

K19 how to conduct project team meetings to facilitate collaborative working (application)

K20 how and why to agree individual and mutual project objectives to facilitate collaborative working (evaluation)

Recommend and agree a form of contract

You need to know and understand:

K21 what to identify as the stakeholders and the purpose of the contract (understanding)

K22 what to identify with the stakeholders as the significant criteria for selecting the form of contract (understanding)

K23 how and why to select a form of contract which is appropriate to the type of project work (evaluation)

K24 how and why to recommend a form of contract which is appropriate to the type of project work (synthesis)

K25 how to give clear and accurate information and advice (synthesis)

K26 how to provide stakeholders with the opportunities to comment and ask for clarification (application)

K27 how and why to agree a form of contract which is capable of being put into effect (evaluation)

Scope/range

Select and agree procurement strategies

1 Procurement objectives and criteria:
- 1.1 type and form of contract
- 1.2 definition and coverage of required project services
- 1.3 alignment of interests and benefits
- 1.4 early participation of key suppliers
- 1.5 risk allocation
- 1.6 integrated project insurance
- 1.7 Building Information Modelling protocols
- 1.8 economic, political and social context
- 1.9 funding sources
- 1.10 degree of commercial and financial risk
- 1.11 agreed payment procedures
- 1.12 whole life principles
- 1.13 best overall value
- 1.14 timescales/sequencing
- 1.15 environmental benefits and sustainability
- 1.16 community benefits

2 Procurement methods:
- 2.1 managed forms of construction
- 2.2 design and build
- 2.3 traditional
- 2.4 Public, Private Partnership
- 2.5 prime contracting
- 2.6 partnering
- 2.7 advisory
- 2.8 sole source/single negotiations
- 2.9 competitive tendering
- 2.10 early contractor involvement
- 2.11 service level agreement

3 Legal and industry requirements:
- 3.1 common law
- 3.2 contract law

Scope/range

- 3.3 EU directives on procurement
- 3.4 codes of practice and procedures

4 Implementation procedures:
- 4.1 tendering process
- 4.2 tender evaluation
- 4.3 award recommendation
- 4.4 contract award

Establish project team arrangements

5 Stakeholders:
- 5.1 the client
- 5.2 the client's financial advisers
- 5.3 CDM coordinator (or recognised body under the CDM code of practice)
- 5.4 design consultants
- 5.5 potential contractors
- 5.6 potential subcontractors and suppliers
- 5.7 facilities/asset managers
- 5.8 potential investors funding
- 5.9 agencies independent
- 5.10 client adviser
- 5.11 user groups

6 Type of project work:
- 6.1 design
- 6.2 construction
- 6.3 services
- 6.4 supply
- 6.5 operate and maintain
- 6.6 management
- 6.7 decommissioning

7 Objectives:
- 7.1 business case for integration
- 7.2 commitment to multi-discipline partnering (whole supply chain)
- 7.3 minimum on-site construction period

Scope/range

- 7.4 certainty of completion
- 7.5 minimum whole life cost
- 7.6 sustainable solution
- 7.7 agreed maximum cost
- 7.8 zero defects
- 7.9 respect for people (including health, safety, welfare and the environment)
- 7.10 agree quality working to
- 7.11 budget effective work
- 7.12 scheduling
- 7.13 Building Information Modelling
- 7.14 adoption of industry guidance and benchmarking
- 7.15 sharing knowledge and information

8 Selection criteria:

- 8.1 cost
- 8.2 quality
- 8.3 time
- 8.4 organisational experience
- 8.5 performance measurement
- 8.6 health, safety and welfare record
- 8.7 environmental record
- 8.8 staff competence and development
- 8.9 commitment to integration/partnering
- 8.10 commitment to Building Information Modelling
- 8.11 social inclusivity record

9 Information:

- 9.1 administration details
- 9.2 scope of work
- 9.3 budget
- 9.4 information required from partners
- 9.5 selection criteria and weightings

10 Capability:

- 10.1 information modelling
- 10.2 organisational experience

Scope/range

10.3 performance measurement

10.4 health, safety and welfare record

10.5 environmental record

10.6 staff competence and development

10.7 commitment to integration/partnering

10.8 commitment to BIM capability

10.9 availability of appropriate resources

Recommend and agree a form of contract

11 Stakeholders:

11.1 the client

11.2 the client’s financial advisers

11.3 CDM coordinator (or recognised body under CDM code of practice)

11.4 design consultants

11.5 potential contractors

11.6 potential subcontractors and suppliers

11.7 facilities/asset managers

11.8 potential investors funding

11.9 agencies independent

11.10 client adviser

11.11 user groups

12 Criteria for selecting:

12.1 client’s needs and requirements

12.2 form of procurement

12.3 degree of risk

12.4 technical complexity

12.5 project partnering

12.6 sector practice

13 Form of contract:

13.1 standard

13.2 non standard

14 Type of project work:

14.1 design

Scope/range

14.2 construction

14.3 services

14.4 management

14.5 operate and maintenance

14.6 decommissioning

COSCSMO09

Establish project procurement arrangements in construction management

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Suite	Construction Senior Management
Keywords	Procurement; contracts; legal; strategy; collaborative working

Implement, monitor and control strategic procurement systems in construction management

Overview

This unit is about agreeing and implementing with stakeholders what systems are most effective for managing the project.

The systems identified will need to be prioritised and formalised if necessary through the contract.

Once systems are instigated you will need to identify a method of monitoring the systems and taking corrective action or improvements should the need arise.

You will need to communicate the system and methods in order that all parties are familiar with what is expected of them.

Implement, monitor and control strategic procurement systems in construction management

Performance criteria

You must be able to:

Agree and implement systems with suppliers and services

P1 specify and agree the ways in which systems will be managed and aligned with suppliers and services

P2 identify and agree, with stakeholders, the changes to systems which may be necessary to meet technical and quality requirements

P3 develop and implement systems, identify any problems and make appropriate modifications before moving to full implementation

P4 check that the alignment of systems conforms to the requirements of data protection legislation

P5 negotiate and agree formal contractual arrangements that set out the requirements for the implementation and operation of strategic sourcing partnerships

Monitor and control arrangements for strategic sourcing

You must be able to:

P6 review the terms of contract regularly with suppliers and services and assess whether there are continued benefits

P7 monitor the performance of suppliers and services against agreed standards and quantify any variations in performance

P8 inform suppliers and services about variations in performance from contract terms, and provide them with advice and information about the changes needed and the time allowed to make the changes

P9 investigate variations and problems, identify likely causes and inform all those who are affected

P10 assess existing sourcing arrangements against alternative supply options regularly and estimate the relative benefits and advantages

Knowledge and understanding

Agree and implement systems with suppliers and services

You need to know and understand:

K1 how and why to specify with suppliers and services the ways in which systems will be managed and aligned (evaluation)

K2 how and why to agree with suppliers and services the ways in which systems will be managed and aligned (evaluation)

K3 what to identify with stakeholders as the changes to systems which may be necessary to meet technical and quality requirements (understanding)

K4 how and why to agree with stakeholders the changes to systems which may be necessary to meet technical and quality requirements (evaluation)

K5 how and why to develop systems (synthesis)

K6 how to implement systems (application)

K7 what to identify as any problems with systems (understanding)

K8 how to make appropriate modifications to systems before moving to full implementation (application)

K9 how to check that the alignment of systems conforms to the requirements of data protection legislation (application)

K10 how and why to negotiate formal contractual arrangements that set out the requirements for the implementation and operation of strategic sourcing partnerships (synthesis)

K11 how and why to agree formal contractual arrangements that set out the requirements for the implementation and operation of strategic sourcing partnerships (evaluation)

Monitor and control arrangements for strategic sourcing

You need to know and understand:

K12 how and why to review the terms of contract with suppliers and services (analysis)

K13 how and why to assess whether the terms of contract provide continued benefits (analysis)

K14 how and why to monitor the performance of suppliers and services against agreed standards (analysis)

K15 how and why to quantify any variations in performance of suppliers and services (analysis)

K16 how to inform suppliers and services about variations in performance from contract terms (application)

K17 how and why to provide suppliers and services with advice and information about the changes needed and the time allowed to make the changes (synthesis)

K18 how and why to investigate variations and problems (analysis)

K19 what to identify as the likely causes of variations and problems (understanding)

Knowledge and understanding	K20	how to inform all those who are affected (application)
	K21	how and why to assess existing sourcing arrangements against alternative supply options (analysis)
	K22	how and why to estimate the relative benefits and advantages of alternative supply options (analysis)

Scope/range

Agree and implement systems with suppliers and services

1 Systems:

- 1.1 manual
- 1.2 electronic
- 1.3 Building Information Modelling
- 1.4 TQM systems
- 1.5 design
- 1.6 commercial
- 1.7 health and safety
- 1.8 environmental
- 1.9 time management
- 1.10 open book forms linked to outcomes
- 1.11 agreed payment procedure

2 Stakeholders:

- 2.1 the client
- 2.2 the client's financial advisers
- 2.3 design consultants
- 2.4 potential contractors
- 2.5 potential subcontractors and suppliers
- 2.6 facilities/asset managers
- 2.7 potential investors funding
- 2.8 agencies independent
- 2.9 client adviser
- 2.10 user groups

Monitor and control arrangements for strategic sourcing

3 Monitoring - methods:

- 3.1 in-house reporting
- 3.2 consultant

4 Those who are affected:

- 4.1 suppliers
- 4.2 users

COSCSMO10

Implement, monitor and control strategic procurement systems in construction management

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Suite	Construction Senior Management
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Implement procurement processes in construction management

Overview

This unit is about implementing an appropriate procurement strategy and shortlisting and selecting appropriate tenderers. It is also the about the review and amendment of tender documents and ensuring that addendums are issued.

You will need to develop a potential list of tenderers who meet the contract criteria. You will also need to send tender enquiries to potential tenderers and evaluate those that respond in order to shortlist them against chosen selection criteria.

You will need to select an appropriate tender and ensure that tender documents are issued. You will also need to respond to any queries from tenderers and pass on any amendments to procurement information and documents.

You will need to acknowledge and evaluate tenders against the criteria and if necessary modify and repeat tendering processes in consultation with the client. You will need to choose the best tenderers to appoint them formally and notify unsuccessful tenderers. You will also need to negotiate and agree any variations, adjustments and corrections with tenderer(s) subject to contract.

Performance criteria

You must be able to:

Evaluate pre-qualification of tenderers

P1 implement an appropriate type of procurement strategy which aligns with legal and statutory requirements and decide which potential tenderers could meet the contract conditions

P2 decide which potential tenderers could meet the contract specification to fulfil the selected type of procurement process

P3 decide how many tenderers to invite, taking into account the value and size of the contract

P4 send enquiries to potential tenderers, in accordance with regulatory requirements, requiring them to provide evidence about their experience and capability

P5 choose selection criteria which are suitable to weight and rate performance for the type of work described in the tender

P6 evaluate potential tenderers who respond to the invitation against the selection criteria, place them in rank order and choose the number needed

P7 offer advice and information to decision makers about potential tenderers and the selection criteria and modify the tender list to reflect any agreed changes

P8 confirm that the selected tenderers are willing to tender

P9 add more potential tenderers from the evaluation list which meet the selection criteria if those contacted are not willing to tender

Obtain bids and tenders

You must be able to:

P10 ensure that procurement information and documents are drafted which meet statutory regulations, codes of practice and the organisation's policies

P11 ensure that procurement information and documents are issued to all the tenderers on the agreed list, following the agreed procedures

P12 respond to queries from tenderers promptly and pass on any additional information which they need

P13 pass on to all the tenderers the information given to individual tenderers, and amendments to procurement information and documents

P14 ensure that accurate records are kept of procurement information and documents issued, feedback, queries and information from tenderers

P15 ensure that required action is implemented when tenderers withdraw from the process

Analyse and select successful bids and tenders and negotiate changes

You must be able to:

P16 ensure that the tenders received are stored in a secure place and opened on the closing date in line with the organisation's procedures and regulatory requirements

Performance criteria

P17 select for evaluation those tenders which meet the criteria and reject those that do not

P18 check with tenderers if any discrepancies, omissions and errors are found in the tenders, and agree and make any amendments with tenderers

P19 analyse the tenders which are selected against the agreed criteria and choose the tender which best meets the criteria

P20 check that the successful tenderer and the client can meet the obligations of the contract and recommend a preferred tender to the client

P21 negotiate and agree any variations, adjustments and corrections with the successful tenderer and confirm them in writing, subject to contract

P22 accept the successful tender formally and notify tenderers who have been unsuccessful, about the result

P23 modify and repeat the procurement process if too few tenders are received to show that there has been adequate competition

Knowledge and understanding

You need to know and understand:

Evaluate pre-qualification of tenderers

K1 how and why to implement an appropriate type of procurement strategy which aligns with legal and statutory requirements (application)

K2 how and why to decide which potential tenderers could meet the contract conditions (evaluation)

K3 how and why to decide which potential tenderers could meet the contract specification to fulfil the selected type of procurement process (evaluation)

K4 how and why to decide how many tenderers to invite, taking into account the value and size of the contract (evaluation)

K5 how to send enquiries to potential tenderers, in accordance with regulatory requirements, requiring them to provide evidence about their experience and capability (application)

K6 how and why to choose selection criteria which are suitable to weight and rate performance for the type of work described in the tender (evaluation)

K7 how and why to evaluate potential tenderers who respond to the invitation against the selection criteria (evaluation)

K8 how and why to place potential tenderers in rank order (analysis)

K9 how and why to choose the number of potential tenderers needed (evaluation)

K10 how and why to offer advice and information to decision makers about potential tenderers and the selection criteria (synthesis)

K11 how to modify the tender list to reflect any agreed changes (application)

K12 how to confirm that the selected tenderers are willing to tender (application)

K13 how to add more potential tenderers from the evaluation list which meet the selection criteria if those contacted are not willing to tender (application)

Obtain bids and tenders

You need to know and understand:

K14 how to ensure that procurement information and documents are drafted which meet statutory regulations, codes of practice and the organisation's policies (application)

K15 how to ensure that procurement information and documents are issued to all the tenderers on the agreed list, following the agreed procedures (application)

K16 how to respond to queries from tenderers promptly (application)

K17 how to pass on any additional information to tenderers which they need (application)

K18 how to pass on to all the tenderers the information given to individual tenderers, and amendments to procurement information and documents (application)

Knowledge and understanding

K19 how to ensure that accurate records are kept of procurement information and documents issued, feedback, queries and information from tenderers (application)

K20 how to ensure that required action is implemented when tenderers withdraw from the process (application)

Analyse and select successful bids and tenders and negotiate changes

You need to know and understand:

K21 how to ensure that the tenders received are stored in a secure place and opened on the closing date in line with the organisation's procedures and regulatory requirements (application)

K22 how and why to select for evaluation those tenders which meet the criteria (evaluation)

K23 how and why to reject tenders which do not meet the criteria (evaluation)

K24 how to check with tenderers if any discrepancies, omissions and errors are found in the tenders (application)

K25 how and why to agree any amendments with tenderers (evaluation)

K26 how to make any amendments with tenderers where discrepancies, omissions and errors are found in the tenders (application)

K27 how and why to analyse the tenders which are selected against the agreed criteria (analysis)

K28 how and why to choose the tender which best meets the criteria (evaluation)

K29 how to check that the successful tenderer and the client can meet the obligations of the contract (application)

K30 how and why to recommend a preferred tender to the client (synthesis)

K31 how and why to negotiate any variations, adjustments and corrections with the successful tenderer (synthesis)

K32 how and why to agree any variations, adjustments and corrections with the successful tenderer and (evaluation)

K33 how to confirm any variations, adjustments and corrections with the successful tenderer in writing, subject to contract (application)

K34 how and why to accept the successful tender formally (evaluation)

K35 how to notify tenderers who have been unsuccessful, about the result (application)

K36 how to modify the procurement process if too few tenders are received to show that there has been adequate competition (application)

K37 how to repeat the procurement process if too few tenders are received to show that there has been adequate competition (application)

Scope/range

Evaluate pre-qualification of tenderers

1 Procurement strategy:
   - 1.1 estimate
   - 1.2 open competitive tender
   - 1.3 two stage tender
   - 1.4 ‘two envelope’ tender
   - 1.5 selected list tender
   - 1.6 negotiated
   - 1.7 bid
   - 1.8 design and build
   - 1.9 design, build, finance and operate

2 Tenderers:
   - 2.1 contractors
   - 2.2 sub/works/trade contractors
   - 2.3 suppliers
   - 2.4 consultants

3 Regulatory requirements:
   - 3.1 compulsory competitive tendering
   - 3.2 international
   - 3.3 in-house
   - 3.4 national
   - 3.5 local

4 Evidence:
   - 4.1 documentary
   - 4.2 references
   - 4.3 interview

5 Selection criteria:
   - 5.1 quality of delivery record
   - 5.2 added value (including past performance)
   - 5.3 acceptability of known sub-contracting arrangements & supply chain organisation
   - 5.4 acceptability to client
   - 5.5 financial resources

Scope/range

5.6 credit rating
5.7 references from previous clients and bankers
5.8 health, safety and welfare record
5.9 competence of people
5.10 Building Information Modelling capability
5.11 systems compatibility
5.12 resources (human, materials, facilities)
5.13 insurance environmental
5.14 record design quality and
5.15 costing innovation record
5.16 local economic benefit
5.17

Obtain bids and tenders

6 Procurement information and documents:
- 6.1 invitation to tender
- 6.2 form of tender
- 6.3 returns procedure
- 6.4 surveys
- 6.5 models
- 6.6 graphical and non-graphical electronic data files
- 6.7 drawings, schedules and programmes
- 6.8 bills of quantities
- 6.9 health, safety and welfare record
- 6.10 environmental record
- 6.11 scope of services
- 6.12 terms and conditions
- 6.13 schedules of rates
- 6.14 evaluation criteria and procedures

7 Tenderers:
- 7.1 contractors
- 7.2 sub/works/trade contractors
- 7.3 suppliers

Scope/range

7.4 consultants

8 Queries:

8.1 errors

8.2 omissions

8.3 ambiguities

9 Amendments:

9.1 extension to tender period

9.2 changes resulting from queries

Analyse and select successful bids and tenders and negotiate changes

10 Regulatory requirements:

10.1 statutes

10.2 regulations

10.3 codes of practice and procedure

11 Criteria:

11.1 quality and delivery record

11.2 technical viability

11.3 financial viability

11.4 timescale

11.5 resources

11.6 cost (budgets, rates)

11.7 loading and cash flow

11.8 policies which offer added value

11.9 comparative criteria (benchmarking)

11.10 weighting

11.11 organisational policies

11.12 regulatory requirements

11.13 competence of people

11.14 Building Information Modelling capability

11.15 information delivery

11.16 design quality and costing

11.17 community benefits

11.18 best whole life value

Scope/range

11.19 open book accounting

12 Tenderers:

12.1 contractors

12.2 sub/works/trade contractors

12.3 suppliers

12.4 consultants

13 Variations, adjustments and corrections:

13.1 price quantity

13.2 quality

13.3 standards

13.4 logistics

13.5 completion

13.6 maintenance

13.7 after sales service

13.8 method of payment

13.9 contract conditions

13.10 scope of service

13.11 terms and conditions

13.12 client amendment

13.13

COSCSMO11

Implement procurement processes in construction management

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Manage the preparation and submission of estimates, bids and tenders in construction management

Overview

This unit is about managing the technical content of the tendering process.

You will need to manage the tender process in terms of resources and time. You will need to ensure that resource cost requirements are estimated. You will need to produce the overall costings and conclude the process by proposing payment profiles.

You will need to consider the risks and opportunities in a tender and specified qualifications to the tender based on the enquiry. You will manage the completion of the tender and present it to the organisation. You will conclude the process by storing all of the tender information securely.

Manage the preparation and submission of estimates, bids and tenders in construction management

Performance criteria

You must be able to:

Evaluate estimate, bid and tender enquiry documentation

P1 check the tender details and tender requirements and confirm them with decision makers

P2 summarise the tender requirements accurately and pass them on for comment to decision makers

P3 identify any points of concern in the tender documents and refer them to decision makers for them to clarify and resolve

P4 evaluate the tender documents against the agreed criteria and assess whether the organisation is capable of meeting the tender requirements

P5 identify and assess any contractual and legal issues which might affect the project

P6 investigate the tender documents within budgets and tender time limits

P7 draw accurate conclusions about tender requirements within the limits of the tender information which is available, and which provide an objective basis for making a decision on whether to make a bid

P8 keep information about tender enquiries in confidence and only pass it on to people who have the authority to receive it

Assess the resource requirements and costs within an estimate, bid and tender

You must be able to:

P9 develop a proposed method statement and draft programme which meet the tender requirements

P10 ensure that the resources needed are calculated accurately from available sources, resource availability is investigated and the information is presented so that the requirements can be costed and planned

P11 ensure that resource costs are estimated by calculating an accurate cost for each item which is required

P12 ensure that the cost is modified to take into account any external factors which may affect the cost projections

P13 produce the overall estimate of costs and check that it is complete, accurate and in a form which is suitable for a judgement to be made

P14 explain and clarify the projected costs to support the calculations

P15 recommend payment schedules which will meet known cash flow requirements

Finalise and submit an estimate, bid and tender offer

You must be able to:

P16 identify and evaluate, realistically, the risks and opportunities involved in a successful tender offer

P17 identify and specify any alternatives and qualifications to the original tender requirements which may improve the organisation's ability to carry out the work

Performance criteria

P18 apply a profit margin and payment schedule which meets the objectives and strategy of the organisation

P19 check that the tender offer is complete and accurate and conforms to house style and make any necessary modifications

P20 present and support the tender offer in a manner which maximises its acceptability

P21 collate, arrange and submit the tender offer information in accordance with procurement requirements

P22 collect together all the tender offer information, record it, store it securely and only pass it on to people who have the authority to receive it

Knowledge and understanding

You need to know and understand:

Evaluate estimate, bid and tender enquiry documentation

K1 how to check the tender details and tender requirements (application)

K2 how to confirm the tender details and tender requirements with decision makers (application)

K3 how to summarise the tender requirements accurately (application)

K4 how to pass summaries of the tender requirements on for comment to decision makers (application)

K5 what to identify as any points of concern in the tender documents (understanding)

K6 how to refer any points of concern in the tender documents to decision makers for them to clarify and resolve (application)

K7 how and why to evaluate the tender documents against the agreed criteria (evaluation)

K8 how and why to assess whether the organisation is capable of meeting the tender requirements (analysis)

K9 what to identify as any contractual and legal issues which might affect the project (understanding)

K10 how and why to assess any contractual and legal issues which might affect the project (analysis)

K11 how and why to investigate the tender documents within budgets and tender time limits (analysis)

K12 how and why to draw accurate conclusions about tender requirements within the limits of the tender information which is available, and which provide an objective basis for making a decision on whether to make a bid (evaluation)

K13 how to keep information about tender enquiries in confidence (application)

K14 how to pass on information about tender enquiries on to people who have the authority to receive it (application)

Assess the resource requirements and costs within an estimate, bid and tender

You need to know and understand:

K15 how and why to develop a proposed method statement and draft programme which meet the tender requirements (evaluation)

K16 how to ensure that the resources needed are calculated accurately from available sources, resource availability is investigated and the information is presented so that the requirements can be costed and planned (application)

K17 how to ensure that resource costs are estimated by calculating an accurate cost for each item which is required (application)

K18 how to ensure that the cost is modified to take into account any external factors which may affect the cost projections (application)

K19 how to produce the overall estimate of costs (application)

Knowledge and understanding

K20 how to check that the overall estimate of costs is complete, accurate and in a form which is suitable for a judgement to be made (application)

K21 how to explain the projected costs to support the calculations (application)

K22 how to clarify the projected costs to support the calculations (application)

K23 how and why to recommend payment schedules which will meet known cash flow requirements (synthesis)

Finalise and submit an estimate, bid and tender offer

You need to know and understand:

K24 what to identify as the risks and opportunities involved in a successful tender offer (understanding)

K25 how and why to evaluate, realistically, the risks and opportunities involved in a successful tender offer (evaluation)

K26 what to identify as any alternatives and qualifications to the original tender requirements which may improve the organisation's ability to carry out the work (understanding)

K27 how and why to specify any alternatives and qualifications to the original tender requirements organisation's ability to carry out the work (evaluation)

K28 how to apply a profit margin and payment schedule which meets the objectives and strategy of the organisation (application)

K29 how to check that the tender offer is complete and accurate and conforms to house style (application)

K30 how to make any necessary modifications to the tender offer (application)

K31 how to present and support the tender offer in a manner which maximises its acceptability (application)

K32 how to collate the tender offer information in accordance with procurement requirements (application)

K33 how to arrange the tender offer information in accordance with procurement requirements (application)

K34 how to submit the tender offer information in accordance with procurement requirements (application)

K35 how to collect together all the tender offer information (application)

K36 how to record the tender offer information (application)

K37 how to store the tender offer information securely (application)

K38 how to pass the tender offer information on to people who have the authority to receive it (application)

Scope/range

Evaluate estimate, bid and tender enquiry documentation

1 Tender:
- 1.1 contractor
- 1.2 sub/works/trade contractor
- 1.3 supply
- 1.4 consultants

2 Tender requirements:
- 2.1 construction
- 2.2 installation and maintenance work
- 2.3 supply of goods and materials
- 2.4 consultancy services

3 Decision makers:
- 3.1 clients and their agents
- 3.2 colleagues
- 3.3 line managers and directors
- 3.4 specialists - internal or external to organisation

4 Points of concern:
- 4.1 inconsistent with the policy of the organisation
- 4.2 discrepancies within enquiry information
- 4.3 tender procedure requirements
- 4.4 quantitative requirements
- 4.5 qualitative requirements
- 4.6 contractual requirements

5 Tender documents:
- 5.1 invitation to tender
- 5.2 form of tender
- 5.3 returns procedure
- 5.4 survey reports
- 5.5 specifications
- 5.6 graphical and non-graphical electronic data files
- 5.7 drawing schedule and programme
- 5.8 bills of quantities
- 5.9 health, safety and welfare requirements

Scope/range

5.10 scope of services terms and
5.11 conditions schedule of rates
5.12 environmental requirements
5.13 procedures for submitting tenders
5.14 evaluation criteria and procedures
5.15

6 Agreed criteria:

6.1 change to organisational capability
6.2 financial
6.3 viability of tendering information
6.4 current workload
6.5 type of work competence of
6.6 people timescale (tender and
6.7 contract) social and political
6.8 policies environmental impact
6.9 location
6.10 potential completion
6.11

7 Legal issues:

7.1 planning
7.2 health and safety
7.3 environmental
7.4 ownership
7.5 common law rights
7.6 European Union requirements

Assess the resource requirements and costs within an estimate, bid and tender

8 Tender requirements:

8.1 construction
8.2 installation and maintenance work
8.3 supply of goods and materials
8.4 consultancy services
8.5 purchasing

Scope/range

- 8.6 low carbon and resource efficient procurement
- 8.7 invitation to tender
- 8.8 form of tender
- 8.9 technology required
- 8.10 procedures for submitting tenders

9 Resources:

- 9.1 people (in-house & external)
- 9.2 plant and equipment
- 9.3 materials
- 9.4 finance
- 9.5 time
- 9.6 supply options

10 Available sources:

- 10.1 client brief
- 10.2 tender enquiry documentation
- 10.3 site measurements/visits
- 10.4 survey reports
- 10.5 scaled drawings
- 10.6 schedules
- 10.7 method statements
- 10.8 programmes
- 10.9 specialist contractors and suppliers

11 Estimate:

- 11.1 cost based on a quotation
- 11.2 elemental cost data
- 11.3 unit cost built up from basic data
- 11.4 internal and historical cost data
- 11.5 published cost data

12 Calculate cost:

- 12.1 manual
- 12.2 electronic

13 External factors:

- 13.1 variations over time

Scope/range

13.2 location

13.3 statutory and contractual requirements

13.4 special working conditions and methods

13.5 resourcing conditions

13.6 competition

Finalise and submit an estimate, bid and tender offer

14 Risks and opportunities:

- 14.1 environmental and sustainability
- 14.2 social
- 14.3 financial and market fluctuations
- 14.4 political
- 14.5 technical
- 14.6 health and safety
- 14.7 reputation
- 14.8 competence of people

15 Tender offer:

- 15.1 contractor
- 15.2 sub/works/trade contractor
- 15.3 supply
- 15.4 consultancy
- 15.5 purchase

16 Alternatives and qualifications:

- 16.1 specifications and materials
- 16.2 methods of construction
- 16.3 services
- 16.4 time-scales supply
- 16.5 options price offer
- 16.6 options
- 16.7 whole life value

17 Tender requirements:

- 17.1 construction
- 17.2 installation and maintenance work

Scope/range

17.3 supply of goods and materials

17.4 consultancy services

17.5 delivery

18 Present:

18.1 orally

18.2 in writing

18.3 graphically

18.4 using computer models

18.5 electronically

COSCSMO12

Manage the preparation and submission of estimates, bids and tenders in construction management

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Relevant occupations	Managers in construction
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Keywords	Estimates; bids; tenders

COSCSMO13

Ensure that contracts are prepared, negotiated and agreed in construction management

Overview

This unit is about ensuring that contracts are prepared, negotiated and agreed. You will need to select appropriate forms of contract to suit the project. You will ensure that standard forms of contract are amended to suit the form of procurement. You will ensure that any necessary preliminaries to the form of contract are drafted. You will demonstrate that you have verified that the proposed contract satisfies all party’s interests and that you have negotiated agreements and any amendments with the concerned parties. You will ensure that the contract meets legal requirements to the point of signature.

Ensure that contracts are prepared, negotiated and agreed in construction management

Performance criteria

You must be able to:

Ensure that forms of contract are prepared

P1 select forms of contract, contract clauses and documents for the form of procurement proposed

P2 ensure that standard forms of contract are amended so that the clauses and documents are suitable for the form of procurement proposed

P3 ensure that particulars and preliminaries are drafted which accurately describe the needs of all the stakeholders in the form of contract

P4 ensure that contract clauses are checked and that appendices and amendments meet statutory requirements

P5 ensure that non-standard forms of contract, clauses and documents are drafted, which have legal precedent, where standard or modified standard forms are not suitable

P6 obtain legal advice on the implications of drafting non-standard clauses and forms of contract and explain why this is necessary to the stakeholders in the contract

P7 obtain necessary checks and approvals for the draft forms of contract

Ensure that the contract is negotiated and agreed

You must be able to:

P8 ensure that the obligations of the parties to the contract are identified and obtain valid, written proof that they are able to meet the obligations

P9 negotiate contracts using a style and manner which maintains good long term relationships with all the stakeholders

P10 negotiate and agree optimum contract terms, conditions and amendments

P11 record the results of negotiations accurately and pass the information on, promptly and in accordance with legal requirements, to all the stakeholders

P12 ensure that accurate copies of the final contract documents are prepared and checked to meet legal requirements and arrange for them to be signed

Knowledge and understanding

You need to know and understand:

Ensure that forms of contract are prepared

K1 how and why to select forms of contract, contract clauses and documents for the form of procurement proposed (evaluation)

K2 how to ensure that standard forms of contract are amended so that the clauses and documents are suitable for the form of procurement proposed (application)

K3 how to ensure that particulars and preliminaries are drafted which accurately describe the needs of all the stakeholders in the form of contract (application)

K4 how to ensure that contract clauses are checked and that appendices and amendments meet statutory requirements (application)

K5 how to ensure that non-standard forms of contract, clauses and documents are drafted, which have legal precedent, where standard or modified standard forms are not suitable (application)

K6 how to obtain legal advice on the implications of drafting non-standard clauses and forms of contract (application)

K7 how to explain why it is necessary to obtain legal advice on the implications of drafting non-standard clauses and forms of contract the stakeholders in the contract (application)

K8 how to obtain necessary checks and approvals for the draft forms of contract (application)

Ensure that the contract is negotiated and agreed

You need to know and understand:

K9 how to ensure that the obligations of the parties to the contract are identified (application)

K10 how to obtain valid, written proof that the parties to the contract are able to meet the obligations (application)

K11 how and why to negotiate contracts using a style and manner which maintains good long term relationships with all the stakeholders (synthesis)

K12 how and why to negotiate optimum contract terms, conditions and amendments (synthesis)

K13 how and why to agree optimum contract terms, conditions and amendments (synthesis)

K14 how to record the results of negotiations accurately (application)

K15 how to pass the information on, promptly and in accordance with legal requirements, to all the stakeholders (application)

K16 how to ensure that accurate copies of the final contract documents are prepared and checked to meet legal requirements (application)

K17 how to arrange for the final contract documents to be signed (application)

Scope/range

Ensure that forms of contract are prepared

1 Forms of contract:
- 1.1 standard
- 1.2 non standard

2 Form of procurement:
- 2.1 competitive tender
- 2.2 non-competitive

3 Drafted:
- 3.1 allocation of risks and responsibilities
- 3.2 structure of contract
- 3.3 key instructions
- 3.4 legal factors
- 3.5 business standing orders
- 3.6 fair and prompt payment arrangements

Ensure that the contract is negotiated and agreed

4 Obligations:
- 4.1 insurances
- 4.2 bonds
- 4.3 warranties
- 4.4 statutory
- 4.5 financial guarantees
- 4.6 competence of people
- 4.7 deliverables

5 Contracts - type:
- 5.1 standard
- 5.2 non-standard

6 Amendments:
- 6.1 allocation of risks and responsibilities
- 6.2 structure of contract
- 6.3 key instructions
- 6.4 legal factors

7 Contract documents:

Scope/range

7.1 invitation to tender

7.2 forms of tender

7.3 returns procedures

7.4 specifications

7.5 survey reports

7.6 drawings and schedules

7.7 bills of quantities/schedules of rates

7.8 health and safety plans

7.9 scope of services

7.10 terms and conditions

8 Legal requirements:

8.1 statutes

8.2 regulations

8.3 codes of practice and procedure

8.4 common law

COSCSMO13

Ensure that contracts are prepared, negotiated and agreed in construction management

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Manage project processes in construction management

Overview

This unit is about preparing a strategy for the project using the most appropriate team. The needs of the stakeholders will need to be identified along with the requirements of the brief and schedule.

You will need to review the project risks and opportunities and their effects upon the available resources. You will need to demonstrate project development, evaluation and monitoring skills.

You will need to encourage a culture of health, safety and welfare on the project. You will also need to develop, implement and maintain systems for health, safety and welfare which meet statutory requirements.

Manage project processes in construction management

Performance criteria

You must be able to:

Assess and manage project risks and opportunities

- P1 identify and review project information and processes relating to risks and opportunities
- P2 identify and assess the significance and ownership of the risks and opportunities
- P3 select the most effective risk management methods and procedures to manage residual risks that comply with all relevant regulations and guidelines
- P4 identify the activities and resources required to implement the risk management methods
- P5 specify clearly the procedures for implementing the risk management methods and procedures
- P6 implement and maintain the risk management methods and procedures and modify them to meet changed circumstances

Develop and maintain systems for managing health, safety and welfare

You must be able to:

- P7 encourage a culture of health, safety and welfare on the project and identify and recommend opportunities for improving the work environment
- P8 develop and maintain adequate health, safety and welfare policies and systems which meet organisational and statutory requirements
- P9 allocate health, safety and welfare responsibilities, equipment and resources to people which are consistent with organisational and statutory requirements, and the specific project requirements
- P10 develop and implement systems which meet statutory requirements for identifying and reducing hazards and reporting accidents and emergencies and preventing recurrence
- P11 ensure that health, safety and welfare systems are checked regularly, in accordance with organisational and statutory requirements, and identify and record any special site conditions and situations which do not comply with regulations

Establish and manage project team activities

You must be able to:

- P12 prepare a strategy for the project which makes the best use of the capabilities of all project team members
- P13 examine stakeholder needs and intentions from the brief, discuss and clarify them with stakeholders and resolve any issues
- P14 develop clear parameters which will enable the project to meet the requirements of the brief and schedules
- P15 set up arrangements to achieve communication and trust between stakeholders

Performance criteria

P16 set up and agree, with the project team members, appropriate and realistic methods for project development, evaluation, modification, monitoring and updating

P17 identify potential areas needing investigation and agree a realistic timescale and costs with the project team

P18 motivate, coach and involve project team members to maximise and integrate their contributions to the project development

P19 monitor the progress of the project team and provide members with feedback on timing, task completion and team processes

P20 coordinate feedback sessions in a manner which is suitable for the needs and capabilities of the project team and which allows each team member enough time to express their views

Implement project organisation and communication systems

You must be able to:

P21 identify the organisational and communication needs for the project

P22 implement systems which are compatible with those used by the client and supply chain and which enable clear and effective management, and administrative and operational controls

P23 produce information about people's roles and responsibilities, the project, and the organisational structure, and circulate the information to stakeholders

P24 introduce methods of communicating, reporting, recording and retrieving information between stakeholders which are appropriate to the needs of the project and monitor the methods regularly for effectiveness

P25 set up systems for recording and providing feedback on the ways in which resources are allocated and used

P26 audit health, safety and welfare systems regularly, in accordance with organisational and statutory requirements, and identify and record any special site conditions and situations which do not comply with regulations and if necessary take responsibility for restoring compliance

Obtain and evaluate project feedback information and make improvements

You must be able to:

P27 promote the value of making improvements from feedback throughout the project and encourage stakeholders to collaborate and deliver feedback information

P28 identify and agree the areas to focus on for making improvements from feedback

P29 identify and agree valid and reliable methods and sources for obtaining feedback information on projects and for assessing and recommending improvements from feedback

P30 obtain, investigate and review the feedback information, match it against the original requirements and objectives and summarise both positive and negative factors

Performance criteria

P31 recommend improvements from feedback received and justify the recommendations to decision makers

P32 classify improvements from feedback which have been agreed and incorporate them accurately into updated procedures and databases

Knowledge and understanding

You need to know and understand:

Assess and manage project risks and opportunities

K1 what to identify as the project information and processes relating to risks and opportunities (understanding)

K2 how and why to review project information and processes relating to risks and opportunities (analysis)

K3 what to identify as the significance and ownership of the risks and opportunities (understanding)

K4 how and why to assess the significance and ownership of the risks and opportunities (analysis)

K5 how and why to select the most effective risk management methods and procedures to manage residual risks that comply with all relevant regulations and guidelines (evaluation)

K6 what to identify as the activities and resources required to implement the risk management methods (understanding)

K7 how and why to specify clearly the procedures for implementing the risk management methods and procedures (evaluation)

K8 how to implement the risk management methods and procedures (application)

K9 how to maintain the risk management methods and procedures (application)

K10 how to modify the risk management methods and procedures to meet changed circumstances (application)

Develop and maintain systems for managing health, safety and welfare

You need to know and understand:

K11 how and why to encourage a culture of health, safety and welfare on the project (application)

K12 what to identify as opportunities for improving the work environment (understanding)

K13 how and why to recommend opportunities for improving the work environment (synthesis)

K14 how and why to develop adequate health, safety and welfare policies and systems which meet organisational and statutory requirements (synthesis)

K15 how to maintain adequate health, safety and welfare policies and systems which meet organisational and statutory requirements (application)

K16 how to allocate health, safety and welfare responsibilities, equipment and resources to people which are consistent with organisational and statutory requirements, and the specific project requirements (application)

K17 how and why to develop systems which meet statutory requirements for identifying and reducing hazards and reporting accidents and emergencies and preventing recurrence (synthesis)

Knowledge and understanding

K18 how to implement systems which meet statutory requirements for identifying and reducing hazards and reporting accidents and emergencies and preventing recurrence (application)

K19 how to ensure that health, safety and welfare systems are checked regularly, in accordance with organisational and statutory requirements, (application)

K20 what to identify as any special site conditions and situations which do not comply with regulations (understanding)

K21 how to record any special site conditions and situations which do not comply with regulations (application)

Establish and manage project team activities

You need to know and understand:

K22 how and why to prepare a strategy for the project which makes the best use of the capabilities of all project team members (evaluation)

K23 how and why to examine stakeholder needs and intentions from the brief (analysis)

K24 how to discuss stakeholder needs and intentions from the brief (synthesis)

K25 how to clarify stakeholder needs and intentions and resolve any issues (application)

K26 how and why to develop clear parameters which will enable the project to meet the requirements of the brief and schedules (synthesis)

K27 how and why to set up arrangements to achieve communication and trust between stakeholders (synthesis)

K28 how and why to set up with the project team members, appropriate and realistic methods for project development, evaluation, modification, monitoring and updating (synthesis)

K29 how and why to agree with the project team members, appropriate and realistic methods for project development, evaluation, modification, monitoring and updating (evaluation)

K30 what to identify as potential areas needing investigation (understanding)

K31 how and why to agree a realistic timescale and costs with the project team (evaluation)

K32 how and why to motivate project team members to maximise and integrate their contributions to the project development (synthesis)

K33 how and why to coach project team members to maximise and integrate their contributions to the project development (synthesis)

K34 how to involve project team members to maximise and integrate their contributions to the project development (application)

K35 how and why to monitor the progress of the project team (analysis)

Knowledge and understanding

K36 how to provide members with feedback on timing, task completion and team processes (application)

K37 how and why to coordinate feedback sessions in a manner which is suitable for the needs and capabilities of the project team and which allows each team member enough time to express their views (synthesis)

Implement project organisation and communication systems

You need to know and understand:

K38 what to identify as the organisational and communication needs for the project (understanding)

K39 how to implement systems which are compatible with those used by the client and supply chain and which enable clear and effective management, and administrative and operational controls (application)

K40 how to produce information about people's roles and responsibilities, the project, and the organisational structure (application)

K41 how to circulate the information about people's roles and responsibilities, the project, and the organisational structure to stakeholders (application)

K42 how to introduce methods of communicating, reporting, recording and retrieving information between stakeholders which are appropriate to the needs of the project (synthesis)

K43 how and why to monitor the methods of communicating, reporting, recording and retrieving information between stakeholders regularly for effectiveness (analysis)

K44 how and why to set up systems for recording and providing feedback on the ways in which resources are allocated and used (synthesis)

K45 how and why to audit health, safety and welfare systems regularly, in accordance with organisational and statutory requirements (analysis)

K46 what to identify as any special site conditions and situations which do not comply with regulations (understanding)

K47 how to record any special site conditions and situations (application)

K48 how and why to take responsibility for restoring compliance with regulations where necessary (evaluation)

Obtain and evaluate project feedback information and make improvements

You need to know and understand:

K49 how to promote the value of making improvements from feedback throughout the project (synthesis)

K50 how to encourage stakeholders to collaborate and deliver feedback information (application)

K51 what to identify as the areas to focus on for making improvements from feedback (understanding)

Knowledge and understanding

K52 how and why to agree the areas to focus on for making improvements from feedback (evaluation)

K53 what to identify as valid and reliable methods and sources for obtaining feedback information on projects and for assessing and recommending improvements from feedback (understanding)

K54 how and why to agree valid and reliable methods and sources for obtaining feedback information on projects and for assessing and recommending improvements from feedback (evaluation)

K55 how to obtain the feedback information (application)

K56 how and why to investigate the feedback information (analysis)

K57 how and why to review the feedback information (analysis)

K58 how and why to match feedback information against the original requirements and objectives (synthesis)

K59 how to summarise both positive and negative factors from feedback information (application)

K60 how and why to recommend improvements from feedback received (synthesis)

K61 how and why to justify the recommended improvements from feedback to decision makers (evaluation)

K62 how to classify improvements from feedback which have been agreed (application)

K63 how to incorporate improvements from feedback accurately into updated procedures and databases (application)

Scope/range

Assess and manage project risks and opportunities

1 Project information:

- 1.1 environmental
- 1.2 statutory and legal requirements
- 1.3 client, user and community requirements
- 1.4 construction and technical requirements
- 1.5 site constraints
- 1.6 finance, procurement and contract
- 1.7 quality
- 1.8 cost
- 1.9 programme

2 Risks:

- 2.1 health, safety and welfare
- 2.2 site environment
- 2.3 management and workforce experience
- 2.4 information management and project stage decision making
- 2.5 complexity and scope
- 2.6 consents
- 2.7 team composition
- 2.8 project costs
- 2.9 impact on business
- 2.10 technical considerations
- 2.11 programme
- 2.12 contract form
- 2.13 availability of resources
- 2.14 maintenance and communication of information
- 2.15 innovation
- 2.16 poor quality
- 2.17 impact on natural and built environment
- 2.18 impact of users; public and third parties
- 2.19 impact on community
- 2.20 impact of political risk
- 2.21 resource scarcity

Scope/range

3 Opportunities:

- 3.1 impact on the natural and built environment
- 3.2 impact on users, public and third parties
- 3.3 improved quality
- 3.4 improved procurement
- 3.5 programme reduction
- 3.6 specification change
- 3.7 business benefit
- 3.8 profitability
- 3.9 scope reduction
- 3.10 sustainable development

4 Risk management methods and procedures:

- 4.1 risk identification
- 4.2 risk assessment
- 4.3 prevention, reduction and protection
- 4.4 risk register

5 Resources:

- 5.1 people
- 5.2 materials, plant and equipment
- 5.3 finance
- 5.4 time
- 5.5 specialist services
- 5.6 utility services
- 5.7 information

Develop and maintain systems for managing health, safety and welfare

6 Culture of health, safety & welfare:

- 6.1 personal values, attitudes and behaviours
- 6.2 communicating and passing on information
- 6.3 accident and incident reporting
- 6.4 giving and receiving feedback
- 6.5 situational awareness
- 6.6 recognising and responding to potential changes

Scope/range

6.7 materials, plant and equipment and their constraints and failure points

7 Organisation and statutory requirements:

- 7.1 construction specific health, safety and welfare regulations
- 7.2 general health, safety and welfare legislation
- 7.3 recognised industry codes of practice
- 7.4 organisational procedures
- 7.5 safety audit
- 7.6 health and safety plans

8 Equipment and resources:

- 8.1 protective clothing
- 8.2 protective equipment
- 8.3 first aid facilities
- 8.4 welfare facilities
- 8.5 storage and security of materials and equipment
- 8.6 waste management
- 8.7 fire fighting equipment
- 8.8 provision of health, safety and welfare training
- 8.9 hazard warnings

9 Specific project requirements:

- 9.1 contract
- 9.2 organisational policy
- 9.3 site, construction, induction and installation operations
- 9.4 risk assessments
- 9.5 demolition
- 9.6 control of nuisance (e.g. noise, dust, transport and waste management)
- 9.7 language
- 9.8 first-aid arrangements
- 9.9 statutory notices
- 9.10 accident and incident reporting

Establish and manage project team activities

10 Project team:

- 10.1 client

Scope/range

10.2 design and development consultants

10.3 potential contractors

10.4 potential subcontractors and suppliers

10.5 partners in the development programme

10.6 facilities/asset managers

11 Stakeholders:

11.1 the client

11.2 prospective occupiers/owners

11.3 local community

11.4 regulatory authorities

11.5 government agencies

11.6 facilities/asset managers

12 Requirements of the development brief and schedule:

12.1 key decision stages

12.2 objectives and targets

12.3 scheduling and timetabling

12.4 statutory deadlines

12.5 team meetings

12.6 procurement

12.7 concurrent design and construction

12.8 levels of design refinement at key decision stages

12.9 level of risk/confidence

13 Communication:

13.1 orally written

13.2 electronically

13.3

14 Methods for project development, evaluation, modification, monitoring and updating:

14.1 responsibilities

14.2 format

14.3 content

14.4 indexing

14.5 distribution

Scope/range

14.6 reviewing
14.7 resolving conflicts
14.8 revising
14.9 quality control/assurance
14.10 storage
14.11 security
14.12 retrieval
14.13 statutory approval
14.14 integration of data
14.15 Building Information Modelling

15 Investigation:
15.1 documentary search
15.2 investigative research
15.3 site investigation
15.4 consultation with stakeholders
15.5 physical/virtual models
15.6 insurance risk/opportunities associated with new technology
15.7 adaptation and mitigation

Implement project organisation and communication systems

16 Organisational and communication needs:
16.1 site management
16.2 site/head office interface
16.3 contract administration
16.4 health, safety, and welfare
16.5 environmental strategy
16.6 Common Data Environment (CDE)
16.7 team working
16.8 design information management
16.9 Building Information Modelling

17 Information about people’s roles and responsibilities:
17.1 individual job descriptions, responsibilities and competence
17.2 organisation charts

Scope/range

17.3 contractual arrangements

17.4 team

17.5 skills, training and development

18 Stakeholders:

18.1 clients

18.2 consultants

18.3 contractors

18.4 sub-contractors

18.5 third parties including public

18.6 utility providers

18.7 emergency services

18.8 people working on site

18.9 site visitors

18.10 statutory authorities

18.11 off-site manufacturing/suppliers

18.12 facility/asset managers

19 Methods of communicating, reporting, recording and retrieving:

19.1 oral

19.2 written

19.3 graphic

19.4 electronic

20 Resources:

20.1 people

20.2 plant and equipment

20.3 materials and components

20.4 sub-contractors

20.5 information (digital models, drawings, graphical & non-graphical electronic data files)

20.6 work area and facilities

Obtain and evaluate project feedback information and make improvements

21 Improvements from feedback:

21.1 management procedures

21.2 client, design and construction team performance

Scope/range

21.3 working arrangements

21.4 formal and informal communications

21.5 quality assurance and control

21.6 design and technical appraisal

21.7 operational appraisal

21.8 performance in use

21.9 energy use

21.10 benchmarking

21.11 sustainability

21.12 post project review

22 Stakeholders:

22.1 the design team

22.2 CDM co-ordinator (or recognised body under the CDM code of practice)

22.3 specialist consultants

22.4 the client

22.5 contractors

22.6 site inspectorate

22.7 users

22.8 managing agents

22.9 stakeholders

22.10 facility/asset managers

23 Feedback information:

23.1 contract documentation project

23.2 documentation organisational

23.3 documentation standard

23.4 communication details user

23.5 feedback

23.6 specification amendments

23.7 product information

23.8 government and statutory publications

23.9 research and advisory data

23.10 periodicals and abstracts

24 Methods and sources:

Scope/range

24.1 project records and documentation
24.2 Building Information Modelling
24.3 application and methodology
24.4 open book accounting
24.5 site inspections
24.6 scientific research and data
24.7 studies of performance in use
24.8 meetings
24.9 questionnaires
24.10 reports
24.11 warranty claims
24.12 Post Construction Evaluation (PCE)
24.13 Post Occupancy Evaluation (POE)

25 Databases:

25.1 manual files
25.2 Building Information Model Object library
25.3 model templates
25.4 standard drawings
25.5 specifications
25.6 pro-forma
25.7 on-line
25.8 quality management system

COSCSMO14

Manage project processes in construction management

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Control projects in construction management

Overview

This unit is about controlling projects. You will identify quality standards and pass them to the project team. You will set up systems for recording the quality of work against these standards, and require any unacceptable quality standards to be corrected. You will provide evidence of how the project team are kept informed on quality issues and identify how improvements are implemented.

You will identify the current legal and contractual requirements and how they are briefed to the project team. You will need to ensure that consents are obtained. You will need to take responsibility for rectifying any situations of non-compliance. You will identify any changes in requirements and, in particular, how these changes are briefed to the project team.

You will need to demonstrate the production of a project programme, with particular reference to the resources available, deviations from the agreed programme, and how deviations are identified and quantified. You will need to demonstrate a knowledge of the corrective actions required to restore progress in accordance with agreed programmes.

You will develop appropriate project value and cost control systems. You will ensure that the required value and cost data is collected and recorded. You will need to ensure that any variations are investigated thoroughly, corrective action is taken and final accounts are agreed. You will ensure that realistic opportunities for cost savings are identified and costed correctly, and recommended to the project team.

Performance criteria

You must be able to:

Control projects against quality standards

P1 identify and interpret quality standards from available information and pass them to the project team for their implementation, before they start work

P2 set up systems for inspecting, controlling and recording the quality of work against specified quality standards

P3 require the non-compliance of quality standards to be addressed and notify the project team if this is not done within a reasonable time

P4 inform the project team regularly about significant variations in complying with quality standards, programme and safety and suggest the decisions which they need to make and actions they need to take

P5 identify improvements from feedback received and recommend them to the project team

P6 agree and record amendments to the contract quality requirements and specifications

Ensure project compliance with legal and contractual requirements

You must be able to:

P7 identify and interpret legal, contractual and industry standards requirements from available information and clarify them where there is uncertainty

P8 ensure that required legal, contractual and industry standards requirements consents are obtained

P9 brief the project team about their legal, contractual and industry standards requirements responsibilities to those responsible for implementing them before they start work on the contract

P10 develop and implement monitoring systems, collect information regularly and summarise it

P11 identify situations which do not comply with legal, contractual and industry standards requirements, investigate the circumstances thoroughly and take responsibility for corrective action

P12 identify any changes in legal, contractual and industry standards requirements which may have an impact on the project, summarise the important details and pass this on to the project team

P13 complete statutory submissions accurately and on time

Control project progress against agreed programme

You must be able to:

P14 develop and implement systems to monitor and record information on the progress of the project against the agreed programme

P15 collect and analyse information regularly and summarise it

P16 identify inadequately and inappropriately specified resources, inform project team and specify and obtain alternative resources

Performance criteria

P17 ensure that any progress deviations are identified and quantified

P18 investigate the circumstances of any deviations thoroughly and agree and implement corrective action

P19 recommend options which are most likely to minimise increases in time and help the project progress, and pass these on to the project team

P20 regularly inform the project team and stakeholders about progress, changes to the programme, resource needs, and suggest the decisions and actions that need to be taken

P21 identify improvements from feedback received and recommend them to project team and stakeholders

Control project value and costs

You must be able to:

P22 ensure that appropriate project cost control systems are developed and implemented which are able to provide early warning of problems

P23 ensure that value and cost data is collected regularly, recorded correctly and passed on to the people who need it in time for them to be able to use it

P24 ensure that the correct work value and cost data are calculated from measurement of work quantity and payment rates

P25 ensure that accurate value and cost data is prepared and presented in a format which will help people to make decisions

P26 ensure that variations and trends in value and cost data are identified and quantify and cost them

P27 ensure that any variations are investigated thoroughly and appropriate corrective action or amendment is agreed and implemented with the project team which will restore costs and expenditure to budget

P28 ensure that systems and processes are developed and implemented for identifying opportunities for cost savings and recommend them to the project team

P29 ensure that realistic opportunities for cost savings are identified and costed correctly and recommend them to the project team

Knowledge and understanding

You need to know and understand:

Control projects against quality standards

K1 what to identify as quality standards from available information (understanding)

K2 how and why to interpret quality standards from available information (analysis)

K3 how to pass quality standards to the project team for implementation before they start work (application)

K4 how and why to set up systems for inspecting, controlling and recording the quality of work against specified quality standards (synthesis)

K5 how and why to require the non-compliance of quality standards to be addressed (synthesis)

K6 how to notify the project team if the non-compliance of quality standards is not addressed within a reasonable time (application)

K7 how to inform the project team regularly about significant variations in complying with quality standards, programme and safety (application)

K8 how and why to suggest the decisions which they need to make and actions they need to take (synthesis)

K9 what to identify as improvements from feedback received (understanding)

K10 how and why to recommend improvements from feedback received to the project team (synthesis)

K11 how and why to agree amendments to the contract quality requirements and specifications (evaluation)

K12 how to record amendments to the contract quality requirements and specifications (application)

Ensure project compliance with legal and contractual requirements

You need to know and understand:

K13 what to identify as legal, contractual and industry standards requirements from available information (understanding)

K14 how and why to interpret legal, contractual and industry standards requirements from available information (analysis)

K15 how to clarify legal, contractual and industry standards requirements where there is uncertainty (application)

K16 how to ensure that required legal, contractual and industry standards requirements consents are obtained (application)

K17 how to brief the project team about their legal, contractual and industry standards requirements responsibilities to those responsible for implementing them before they start work on the contract (application)

K18 how and why to develop monitoring systems (synthesis)

K19 how to implement monitoring systems (application)

K20 how to collect information regularly from monitoring systems (application)

Knowledge and understanding

K21 how to summarise information collected from monitoring systems (application)

K22 what to identify as situations which do not comply with legal, contractual and industry standards requirements (understanding)

K23 how and why to investigate the circumstances of situations which do not comply with legal, contractual and industry standards requirements (analysis)

K24 how to take responsibility for corrective action in situations which do not comply with legal, contractual and industry standards requirements (application)

K25 what to identify as any changes in legal, contractual and industry standards requirements which may have an impact on the project (understanding)

K26 how to summarise the important details of any legal, contractual and industry standards requirements (application)

K27 how to pass the important details of any changes in legal, contractual and industry standards requirements on to the project team (application)

K28 how to complete statutory submissions accurately and on time (application)

Control project progress against agreed programme

You need to know and understand:

K29 how and why to develop systems to monitor and record information on the progress of the project against the agreed programme (synthesis)

K30 how to implement systems to monitor and record information on the progress of the project against the agreed programme (application)

K31 how to collect information regularly (application)

K32 how and why to analyse information regularly (analysis)

K33 how to summarise information regularly (application)

K34 what to identify as inadequately and inappropriately specified resources (understanding)

K35 how to inform project team about inadequately and inappropriately specified resources (application)

K36 how and why to specify alternative resources (evaluation)

K37 how to obtain alternative resources (application)

K38 how to ensure that any progress deviations are identified and quantified (application)

K39 how and why to investigate the circumstances of any deviations thoroughly (analysis)

K40 how and why to agree corrective action (evaluation)

K41 how to implement corrective action (application)

K42 how and why to recommend options which are most likely to minimise increases in time and help the project progress (synthesis)

Knowledge and understanding

K43 how to pass your recommended options on to the project team (application)

K44 how to inform the project team and stakeholders regularly about progress, changes to the programme, resource needs (application)

K45 how to suggest the decisions and actions that need to be taken to the project team and stakeholders (synthesis)

K46 what to identify as improvements from feedback received (understanding)

K47 how and why to recommend improvements from feedback received to project team and stakeholders (synthesis)

Control project value and costs

You need to know and understand:

K48 how to ensure that appropriate project cost control systems are developed and implemented which are able to provide early warning of problems (application)

K49 how to ensure that value and cost data is collected regularly, recorded correctly and passed on to the people who need it in time for them to be able to use it (application)

K50 how to ensure that the correct work value and cost data is calculated from measurement of work quantity and payment rates (application)

K51 how to ensure that accurate value and cost data is prepared and presented in a format which will help people to make decisions (application)

K52 how to ensure that variations and trends in value and cost data are identified (application)

K53 how and why to quantify variations and trends in value and cost data (analysis)

K54 how and why to cost any variations and trends in value and cost data (analysis)

K55 how to ensure that any variations are investigated thoroughly and appropriate corrective action or amendment is agreed and implemented with the project team which will restore costs and expenditure to budget (application)

K56 how to ensure that systems and processes are developed and implemented for identifying opportunities for cost savings and (application)

K57 how and why to recommend systems and processes for identifying opportunities for cost savings to the project team (synthesis)

K58 how to ensure that realistic opportunities for cost savings are identified and costed correctly (application)

K59 how and why to recommend realistic opportunities for cost savings to the project team (synthesis)

Scope/range

Control projects against quality standards

1 Quality standards:

- 1.1 statutory requirements
- 1.2 project specifications
- 1.3 British Standards
- 1.4 International Standards
- 1.5 Codes of Practice
- 1.6 organisation standards
- 1.7 trade advisory guidance and best practice
- 1.8 setting out information
- 1.9 benchmarks
- 1.10 dimensional control checks
- 1.11 certification and accreditation of products, systems and personnel

2 Project team:

- 2.1 client
- 2.2 workforce
- 2.3 contractors
- 2.4 consultants
- 2.5 subcontractors and suppliers
- 2.6 partners in the programme

3 Systems:

- 3.1 inspection and test plans
- 3.2 implementing corrective action
- 3.3 records
- 3.4 comparison with standard documentation
- 3.5 comparison with manufacturer's documentation
- 3.6 meetings
- 3.7 contractors' reports
- 3.8 site inspection reports
- 3.9 dimension checks
- 3.10 supply chain management
- 3.11 audits

Scope/range

Ensure project compliance with legal and contractual requirements

4 Legal, contractual and industry standards requirements and responsibilities for:
   - 4.1 planning approvals and conditions
   - 4.2 building regulation
   - 4.3 environmental health
   - 4.4 health, safety and welfare
   - 4.5 environment (e.g. noise, dust, transport, emissions, waste management)
   - 4.6 compliance for new products & technologies
   - 4.7 certificates & accreditation on products, systems and personnel
   - 4.8 fire
   - 4.9 utilities
   - 4.10 highways
   - 4.11 heritage and conservation
   - 4.12 ecology
   - 4.13 development licenses and building permits
   - 4.14 employment practice
   - 4.15 community benefits
   - 4.16 bylaws
   - 4.17 non-statutory guidelines
   - 4.18 energy use
   - 4.19 insurance
   - 4.20 warranties
   - 4.21 project activities
   - 4.22 security

5 Project team:
   - 5.1 client
   - 5.2 workforce
   - 5.3 consultants
   - 5.4 contractors
   - 5.5 subcontractors and suppliers
   - 5.6 partners in the programme

6 Monitoring systems:
   - 6.1 inspection and test plans

Scope/range

6.2 implementing corrective action
6.3 records
6.4 audits
6.5 comparison with design requirements
6.6 comparison with standard documentation
6.7 checking manufacturers' documentation
6.8 checking delivery notes
6.9 sampling
6.10 testing
6.11 site inspection reports
6.12 contractors' reports
6.13 meetings
6.14 dimension checks
6.15 supply chain management

7 Corrective action:

7.1 instigate contingency action
7.2 restore compliance
7.3 agree waiver

Control project progress against agreed programme

8 Information:

8.1 inspection and testing
8.2 resource records
8.3 site inspection reports
8.4 contractors' reports
8.5 certified payments
8.6 written, graphical and electronic records of actual work against programmed work
8.7 photographs
8.8 meetings
8.9 organisational procedures
8.10 management reports
8.11 benchmarks
8.12 comparison with project requirements

Scope/range

8.13 programmes

8.14 schedule of deliverables

8.15 supply chain management

9 Programmes:

9.1 digital timeline model

9.2 bar charts

9.3 flow charts

9.4 network analysis

9.5 critical path

9.6 line of balance

9.7 time chainage

9.8 action lists

9.9 method statements

9.10 check costs

9.11 control systems

9.12 as built programme

9.13 project expenditure forecasts

10 Resources:

10.1 people

10.2 plant and equipment

10.3 materials and components

10.4 finance

10.5 time

10.6 specialist services

10.7 public utility services

10.8 information

11 Project team:

11.1 client

11.2 workforce

11.3 consultants

11.4 contractors

11.5 subcontractors and suppliers

11.6 partners in the programme

Scope/range

11.7 facilities/asset manager

12 Deviations:

12.1 resource shortages
12.2 design problems and constraints
12.3 industrial disputes
12.4 lack of essential construction information
12.5 construction errors and rework
12.6 weather conditions
12.7 physical constraints
12.8 legal
12.9 environmental
12.10 poor scope definition
12.11 contract variation
12.12 force majeure

13 Quantify:

13.1 method study work
13.2 study production
13.3 analysis cost
13.4 implication

14 Corrective action:

14.1 restore progress in accordance with agreed programme
14.2 agree new completion dates
14.3 secure additional resources
14.4 alter planned work

15 Stakeholders:

15.1 the client
15.2 prospective occupiers/owners
15.3 prospective users
15.4 regulatory authorities
15.5 government agencies
15.6 public interest organisations
15.7 public utilities

Scope/range

Control project value and costs

16 Project cost control systems:

16.1 contractual procedures and meetings

16.2 operational procedures and meetings

16.3 open book accounting

16.4 electronic recording

17 Value and cost data:

17.1 materials and quantities

17.2 plant and equipment

17.3 people

17.4 sub-contractors

17.5 dayworks

17.6 periodic valuations

17.7 final accounts

17.8 retention sums

17.9 forecasts of expenditure

17.10 performance information

17.11 indirect costs

17.12 variations

17.13 contract programme and progress

18 Corrective action:

18.1 contract programme and progress

18.2 control expenditure to conform with budgets

18.3 agree additional costs

18.4 make a contract claim

18.5 mitigation strategy

19 Project team:

19.1 client

19.2 consultants

19.3 contractors

19.4 subcontractors and suppliers

19.5 partners in the programme

20 Opportunities for cost saving:

Scope/range

20.1 increase productivity
20.2 waste reduction and management
20.3 modify project management systems
20.4 resource management and logistics
20.5 applications of new technologies and materials
20.6 energy management
20.7 water
20.8 recycling/materials
20.9 alternative sources and types of materials
20.10 reduce plant and labour resource
20.11 variations in quality
20.12 standardisation
20.13 value engineering
20.14 apply lean construction principles
20.15 design out waste
20.16 lean manufacturing principles
20.17 offsite construction

COSCSMO15

Control projects in construction management

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Control budgets and contract entitlement in construction management

Overview

This unit is about identifying responsibilities for the control of budgets and expenditure, and providing the necessary guidance and training in the agreed procedures and format.

A clear line of communication should be organised in order that there is no duplication and/or ambiguity for those with the financial responsibility.

You will need to establish a recording process in order that all relevant parties have access to and are able to interpret the information.

You will need the authority to authorise or amend procedures to overcome unexpected variances or problems. You will need to identify a contingency plan to cover for the unexpected occurrence. You will require the ability to assess and counter unsubstantiated entitlement for reimbursement against your organisation for additional monies. You will also be able to develop and prepare a robust document to support your own claims for additional monies.

You will need to demonstrate that you have negotiated with all parties in a professional manner.

You will need to be able to record and document any decisions taken which will need to stand up to scrutiny by others.

Control budgets and contract entitlement in construction management

Performance criteria

You must be able to:

Allocate budgets

P1 identify responsibilities for budgetary control and allocations under the budget headings of financial plans

P2 identify an appropriate method of maintaining overall control of the budget, produce guidance documents and circulate the information to those responsible

P3 identify appropriate methods for presenting financial information to responsible personnel

P4 issue allocations under budget headings and cash flow calculations and report requirements to those with financial responsibilities

P5 authorise expenditure and changes to budgets and issue the information to those responsible

P6 identify and agree appropriate methods and timescales for reporting contingencies and variances

P7 resolve queries and discrepancies over allocated budgets

Prepare and agree entitlement for reimbursement for loss and expense

You must be able to:

P8 assess the basis of entitlement and criteria for recovery against the contract and relevant expert opinion, and progress and structure valid entitlement which can be substantiated

P9 calculate entitlement accurately from relevant and verified information sources

P10 identify the liability for the cost and inform the parties involved in the contract

P11 analyse the opposing grounds for the entitlement, structure the entitlement clearly and present them

P12 conduct negotiations with the parties involved in the contract in a professional manner

P13 negotiate, agree and finalise amendments to the entitlement with the parties involved in the contract

P14 record and store documents, back-up information and calculations so that they can be easily accessed for reference and auditing purposes

Control budgets and contract entitlement in construction management

Knowledge and understanding

You need to know and understand:

Allocate budgets

K1 what to identify as responsibilities for budgetary control and allocations under the budget headings of financial plans (understanding)

K2 what to identify as an appropriate method of maintaining overall control of the budget (understanding)

K3 how to produce guidance documents on the method for maintaining budget control (application)

K4 how to circulate the information and guidance documents to those responsible for maintaining overall control of the budget (application)

K5 what to identify as appropriate methods for presenting, financial information to responsible personnel (understanding)

K6 how to issue allocations under budget headings and cash flow calculations (application)

K7 how to report requirements to those with financial responsibilities (application)

K8 how and why to authorise expenditure and changes to budgets (evaluation)

K9 how to issue information on changes to budgets to those responsible (application)

K10 what to identify as appropriate methods and timescales for reporting contingencies and variances (understanding)

K11 how and why to agree appropriate methods and timescales for reporting contingencies and variances (evaluation)

K12 how and why to resolve queries and discrepancies over allocated budgets (synthesis)

Prepare and agree entitlement for reimbursement for loss and expense

You need to know and understand:

K13 how and why to assess the basis of entitlement and criteria for recovery against the contract and relevant expert opinion (analysis)

K14 how to progress valid entitlement which can be substantiated (application)

K15 how to structure valid entitlement which can be substantiated (application)

K16 how to calculate entitlement accurately from relevant and verified information sources (application)

K17 what to identify as the liability for the cost (understanding)

K18 how to inform the parties involved in the contract about the liability for the cost (application)

K19 how and why to analyse the opposing grounds for the entitlement (analysis)

K20 how and why to structure the entitlement clearly (synthesis)

K21 how to present the opposing grounds for the entitlement (application)

Knowledge and understanding

K22 how to conduct negotiations with the parties involved in the contract in a professional manner (application)

K23 how and why to negotiate amendments to the entitlement with the parties involved in the contract (synthesis)

K24 how and why to agree amendments to the entitlement with the parties involved in the contract (evaluation)

K25 how and why to finalise amendments to the entitlement with the parties involved in the contract (evaluation)

K26 how to record documents, back-up information and calculations so that they can be easily accessed for reference and auditing purposes (application)

K27 how to store documents, back-up information and calculations so that they can be easily accessed for reference and auditing purposes (application)

Scope/range

Allocate budgets

1 Budget headings:
- 1.1 income
- 1.2 employment costs
- 1.3 capital plant and equipment
- 1.4 materials
- 1.5 liabilities
- 1.6 subcontract costs
- 1.7 consumables

2 Financial plans:
- 2.1 forecasts
- 2.2 budgets
- 2.3 cash flow

3 Cash flow calculations:
- 3.1 income receivable
- 3.2 expenditure

4 Contingencies:
- 4.1 delays in receivables
- 4.2 project and contract delays
- 4.3 interruptions
- 4.4 risk

5 Variances:
- 5.1 overspend
- 5.2 underspend

Prepare and agree entitlement for reimbursement for loss and expense

6 Entitlement - resulting from:
- 6.1 measurement
- 6.2 valuation of variations
- 6.3 liability for costs
- 6.4 loss and expense arising from breaches of contract
- 6.5 extensions of time
- 6.6 damages arising from extra-contractual consideration

Scope/range

7 Expert opinion:

- 7.1 legal
- 7.2 technical
- 7.3 financial

8 Information sources:

- 8.1 contract provisions
- 8.2 contract claims for payment
- 8.3 dimensions and approximations from latest revisions of contract drawings
- 8.4 records of executed work
- 8.5 inspections of work in progress
- 8.6 contract documents
- 8.7 day work
- 8.8 agreed contract quantities
- 8.9 agreed contract rates of payment
- 8.10 agreed methods of calculation
- 8.11 variations issued
- 8.12 contract records
- 8.13 site records including photographs
- 8.14 company accounts

9 Costs:

- 9.1 re-work additional work
- 9.2 programme implications
- 9.3 increased complexity
- 9.4 logistical implications
- 9.5

10 Analyse:

- 10.1 claimant's analysis
- 10.2 respondent's analysis

COSCSMO16

Control budgets and contract entitlement in construction management

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Evaluate and progress the resolution of contractual disputes in construction management

Overview

This unit is about having the experience and ability to assess the background and basis of a contractual dispute. In this process, you will need to identify the strengths and weaknesses of the case being made.

You will need to assess and evaluate the documentation and supporting evidence in a logical and methodical manner which can be recorded and interpreted by others.

You will need to assess your own limitations and recommend, as necessary the support and guidance from legal advisors. You will need to identify and quantify the potential outcomes and risks in both the long and short term. You should be familiar with the various options available and be able to make a considered judgement on the correct course of action, taking all contingencies into account.

You will need to be able to supervise the preparation of the necessary submission documentation in a clear and concise manner with no ambiguities or anomalies. In doing this you should check the robustness of the arguments being tabled to check if they will stand up to scrutiny.

You will need to be able to produce contractual binding correspondence and keep all relevant parties advised of the progress and outcome on the dispute.

Performance criteria

You must be able to:

Evaluate potential implications for the resolution of disputes

P1 evaluate all the information which is relevant to the dispute, identify information which will support the case and summarise and justify it in a reasoned argument

P2 assess the strengths and weaknesses of the case and make a judgement about the potential outcomes

P3 identify what expertise and support will be needed at different stages of the dispute

P4 consult with experts, and provide them with a clear, valid and accurate summary, in cases where expert interpretation and judgement is required

P5 assess the arguments and the advice received from experts, produce justifiable conclusions and recommendations for further action and pass these to the parties involved in the dispute

P6 assess the implications of proceeding with the case

P7 identify potential options for settling the dispute which are based on relevant information and accurate assessments

P8 identify potential responses to the options for settling the dispute and assess the risk involved

P9 recommend a process for settling the dispute which is likely to be most acceptable to all the parties involved and which meets legal requirements

P10 specify, clearly, the process for settling the dispute which has been agreed and prepare written terms and conditions

Negotiate and progress the resolution of disputes

You must be able to:

P11 prepare documents about the dispute which have a clear rationale, and which include valid supporting information

P12 keep regular contact with the parties involved in the dispute and investigate and propose options and processes for settling the dispute, which are likely to be acceptable to them

P13 review reactions and proposals from opposite parties and recommend a response

P14 ask questions to test the consistency and resilience of the opposite parties' position and to probe for possible movement

P15 summarise and record points of agreement and disagreement

P16 recommend acceptance of offers which are judged to be the best available

P17 draft formal acceptance letters accurately and in a suitable style, and send them promptly to all parties

P18 suggest realistic options and processes for settling the dispute when offers are not acceptable and assess the advantages and disadvantages of each alternative

Evaluate and progress the resolution of contractual disputes in construction management

NATIONAL OCCUPATIONAL STANDARDS

Knowledge and understanding

You need to know and understand:

Evaluate potential implications for the resolution of disputes

K1 how and why to evaluate all the information which is relevant to the dispute (evaluation)

K2 what to identify as information which will support the case (understanding)

K3 how to summarise information which will support the case (application)

K4 how and why to justify information which will support the case in a reasoned argument (evaluation)

K5 how and why to assess the strengths and weaknesses of the case and make a judgement about the potential outcomes (analysis)

K6 what to identify as the expertise and support which will be needed at different stages of the dispute (understanding)

K7 how to consult with experts in cases where expert interpretation and judgement is required (application)

K8 how and why to provide experts with a clear, valid and accurate summary (synthesis)

K9 how and why to assess the arguments and the advice received from experts (analysis)

K10 how to produce justifiable conclusions and recommendations for further action (application)

K11 how to pass justifiable conclusions and recommendations to the parties involved in the dispute (application)

K12 how and why to assess the implications of proceeding with the case (analysis)

K13 what to identify as potential options for settling the dispute which are based on relevant information and accurate assessments (understanding)

K14 what to identify as potential responses to the options for settling the dispute (understanding)

K15 how and why to assess the risk involved in the potential responses to the options for settling the dispute (analysis)

K16 how and why to recommend a process for settling the dispute which is likely to be most acceptable to all the parties involved and which meets legal requirements (synthesis)

K17 how and why to specify, clearly, the process for settling the dispute which has been agreed (synthesis)

K18 how to prepare written terms and conditions for settling the dispute (application)

Negotiate and progress the resolution of disputes

You need to know and understand:

K19 how to prepare documents about the dispute which have a clear rationale, and which include valid supporting information (application)

Knowledge and understanding

K20 how to keep regular contact with the parties involved in the dispute (application)

K21 how and why to investigate options and processes for settling the dispute, which are likely to be acceptable to the parties involved in the dispute (analysis)

K22 how and why to propose options and processes for settling the dispute, which are likely to be acceptable to the parties involved in the dispute (synthesis)

K23 how and why to review reactions and proposals from opposite parties (analysis)

K24 how and why to recommend a response to opposite parties (synthesis)

K25 how to ask questions to test the consistency and resilience of the opposite parties' position (application)

K26 how and why to probe for possible movement in the opposite parties' position (analysis)

K27 how to summarise and record points of agreement and disagreement (application)

K28 how and why to recommend acceptance of offers which are judged to be the best available (synthesis)

K29 how and why to draft formal acceptance letters accurately and in a suitable style, and send them promptly to all parties (synthesis)

K30 how and why to suggest realistic options and processes for settling the dispute when offers are not acceptable (synthesis)

K31 how and why to assess the advantages and disadvantages of each of the alternative options and processes for settling the dispute (analysis)

Scope/range

Evaluate potential implications for the resolution of disputes

1 Dispute - types:
- 1.1 land
- 1.2 property
- 1.3 construction
- 1.4 contracts
- 1.5 agreements
- 1.6 third party claims

2 Information which is relevant to the dispute:
- 2.1 contract documents
- 2.2 correspondence
- 2.3 instructions
- 2.4 contract records
- 2.5 technical reports
- 2.6 witness testimony
- 2.7 other evidential material
- 2.8 expert opinion

3 Expertise and support in:
- 3.1 legal
- 3.2 technical
- 3.3 financial

4 Options and processes for settling the dispute:
- 4.1 re-negotiation
- 4.2 negotiations at higher levels of authority
- 4.3 mediation, adjudication and arbitration
- 4.4 formal dispute resolution
- 4.5 legal action

Negotiate and progress the resolution of disputes

5 Dispute - types:
- 5.1 land
- 5.2 property
- 5.3 construction

Scope/range

- 5.4 contracts
- 5.5 agreements
- 5.6 third party claims

6 Options and processes for settling the dispute:

- 6.1 re-negotiation
- 6.2 negotiations at higher levels of authority
- 6.3 mediation, adjudication and arbitration
- 6.4 formal dispute resolution
- 6.5 legal action

7 Reactions and proposals:

- 7.1 positive
- 7.2 negative

8 Responses:

- 8.1 accepting
- 8.2 rejecting
- 8.3 clarifying
- 8.4 providing additional information

COSCSMO17

Evaluate and progress the resolution of contractual disputes in construction management

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Manage marketing and customer service in construction management

Overview

This unit is about establishing and managing the marketing and customer service process to meet organisational and business objectives. You will need to develop and implement a marketing process that helps promote new business and opportunities to improve branding, corporate image and market share.

You will also need to demonstrate how you have selected new products or services and how these have been established to meet market needs and business objectives. Managing the customer service strategy is a key role at this level; you will need to demonstrate how you have developed a client customer service policy to meet customer expectations and improve customer satisfaction.

Manage marketing and customer service in construction management

Performance criteria

Identify and resource the development of new products and services to meet market needs

You must be able to:

P1 review the organisation's operations and evaluate its strengths and weaknesses to compete in potential markets

P2 identify appropriate and realistic market areas for the organisation and summarise the information accurately

P3 analyse the demand for and type of new products and services within the identified market areas

P4 identify opportunities to use new marketing technologies, materials and techniques to meet identified market needs

P5 ensure that the resources needed are calculated accurately and that sufficient resources are allocated for the development of new products and services

P6 negotiate additional resources in cases where existing resources are insufficient to meet development costs

P7 select new and innovative products and services for development which are based on an accurate evaluation of the organisation's business policy

Develop and implement a marketing strategy

You must be able to:

P8 evaluate the present image and reputation of the organisation with the target audience and identify the potential client base

P9 develop an information gathering system to support the development of marketing and promotion strategies

P10 identify and agree potential new business opportunities

P11 evaluate marketing and promotion options and develop a clear and relevant strategy which is capable of making a significant impact on the target audience

P12 choose methods, media and techniques for the marketing and promotion of the organisation which are consistent with the corporate image

P13 negotiate, agree and implement a programme and budget to deliver the agreed marketing and promotion strategy

P14 monitor the marketing and promotion strategy regularly, review the impact and make modifications which will improve market presence and penetration

Develop and maintain a policy to maximise client and customer satisfaction

You must be able to:

P15 analyse market research to determine realistically the type and quality of services clients and customers will need

P16 develop a clear and realistic client and customer service policy and agree it with decision makers

P17 develop a policy for client and customer service which summarises the organisation's agreed policy and circulate it to all the workforce

Performance criteria

P18 develop and introduce an appropriate client and customer service system, which will meet the service needs

P19 develop and introduce systems for obtaining client and customer feedback and monitor them regularly for both positive and negative feedback

P20 summarise positive client and customer feedback and circulate it to decision makers

P21 investigate and respond to negative client and customer feedback and individual complaints promptly and resolve cases

P22 produce regular summaries of client and customer complaints and compliments, the action taken and recommendations for future action and circulate the summaries to decision makers

Knowledge and understanding

Identify and resource the development of new products and services to meet market needs

You need to know and understand:

K1 how and why to review the organisation's operations (analysis)

K2 how and why to evaluate the organisation's strengths and weaknesses to compete in potential markets (evaluation)

K3 what to identify as appropriate and realistic market areas for the organisation (understanding)

K4 how to summarise the information on realistic market areas for the organisation (application)

K5 how and why to analyse the demand for and type of new products and services within the identified market areas (analysis)

K6 what to identify as opportunities to use new marketing technologies, materials and techniques to meet identified market needs (understanding)

K7 how and why to ensure that the resources needed are calculated accurately and that sufficient resources are allocated for the development of new products and services (application)

K8 how and why to negotiate additional resources in cases where existing resources are insufficient to meet development costs (synthesis)

K9 how and why to select new and innovative products and services for development which are based on an accurate evaluation of the organisation's business policy (evaluation)

Develop and implement a marketing strategy

You need to know and understand:

K10 how and why to evaluate the present image and reputation of the organisation with the target audience (evaluation)

K11 what to identify as the potential client base (understanding)

K12 how and why to develop an information gathering system to support the development of marketing and promotion strategies (synthesis)

K13 what to identify as potential new business opportunities (understanding)

K14 how and why to agree potential new business opportunities (evaluation)

K15 how and why to evaluate marketing and promotion options (evaluation)

K16 how and why to develop a clear and relevant strategy which is capable of making a significant impact on the target audience (evaluation)

K17 how and why to choose methods, media and techniques for the marketing and promotion of the organisation which are consistent with the corporate image (evaluation)

K18 how and why to negotiate a programme and budget to deliver the agreed marketing and promotion strategy (synthesis)

Knowledge and understanding

K19 how and why to agree a programme and budget to deliver the agreed marketing and promotion strategy (evaluation)

K20 how to implement a programme and budget to deliver the agreed marketing and promotion strategy (application)

K21 how and why to monitor the marketing and promotion strategy regularly (analysis)

K22 how and why to review the impact and make modifications which will improve market presence and penetration (analysis)

Develop and maintain a policy to maximise client and customer satisfaction

You need to know and understand:

K23 how and why to analyse market research to determine realistically the type and quality of services clients and customers will need (analysis)

K24 how and why to develop a clear and realistic client and customer service policy (evaluation)

K25 how and why to agree a realistic client and customer service policy with decision makers (evaluation)

K26 how and why to develop a policy for client and customer service which summarises the organisation's agreed policy (evaluation)

K27 how to circulate the agreed policy for client and customer service to all the workforce (application)

K28 how and why to develop an appropriate client and customer service system, which will meet the service needs (evaluation)

K29 how and why to introduce an appropriate client and customer service system, which will meet the service needs (synthesis)

K30 how and why to develop systems for obtaining client and customer feedback (evaluation)

K31 how and why to introduce systems for obtaining client and customer feedback (synthesis)

K32 how and why to monitor systems for obtaining client and customer feedback regularly for both positive and negative feedback (analysis)

K33 how to summarise positive client and customer feedback (application)

K34 how to circulate positive client and customer feedback to decision makers (application)

K35 how and why to investigate negative client and customer feedback and individual complaints promptly (analysis)

K36 how to respond to negative client and customer feedback and individual complaints promptly (application)

K37 how to resolve cases of negative client and customer feedback and individual complaints promptly (synthesis)

Knowledge and understanding

K38 how and why to produce regular summaries of client and customer complaints and compliments, the action taken and recommendations for future action (application)

K39 how to circulate the summaries of client and customer complaints and compliments, the action taken and recommendations for future action to decision makers (application)

Scope/range

Identify and resource the development of new products and services to meet market needs

1 The organisation’s operations:

- 1.1 new and innovative services, products and processes (benefits and features)
- 1.2 information management systems
- 1.3 customer requirements
- 1.4 communications with potential customers and partners
- 1.5 legal requirements and statutory legislation
- 1.6 past and future negotiations
- 1.7 specifications
- 1.8 pricing strategy
- 1.9 recording systems
- 1.10 time schedules
- 1.11 quality
- 1.12 identification of competitors
- 1.13 target markets
- 1.14 training

2 Strengths and weaknesses:

- 2.1 market share
- 2.2 scope of products and services
- 2.3 availability of resources
- 2.4 working practices
- 2.5 productivity
- 2.6 profitability and cost factors
- 2.7 corporate values
- 2.8 environmental impact
- 2.9 energy performance
- 2.10 socio-economic factors
- 2.11 ability to innovate
- 2.12 efficiency of systems (including information technology)
- 2.13 product life-cycle
- 2.14 understanding of client's needs

Scope/range

- 2.15 standardisation
- 2.16 competence of staff

3 Analysis - methods:

- 3.1 feasibility studies
- 3.2 SWOT (strengths, weaknesses, opportunities and threats) analyses
- 3.3 feedback

4 Products and services:

- 4.1 design
- 4.2 finance
- 4.3 build
- 4.4 operate
- 4.5 research, development and innovation
- 4.6 technological
- 4.7 consultation
- 4.8 advisory
- 4.9 project management

5 Resources:

- 5.1 people (knowledge, training, competence)
- 5.2 plant and equipment
- 5.3 materials
- 5.4 sub-contractors and suppliers
- 5.5 partners
- 5.6 external services
- 5.7 financial resources
- 5.8 accommodation

Develop and implement a marketing strategy

6 Present image and reputation of the organisation:

- 6.1 market share
- 6.2 scope of products and services
- 6.3 availability of resources
- 6.4 working practices
- 6.5 productivity

Scope/range

- 6.6 profitability and cost factors
- 6.7 corporate values
- 6.8 environmental impact
- 6.9 socio-economic factors

7 Information gathering system:

- 7.1 organisation sources
- 7.2 external sources
- 7.3 customer feedback
- 7.4 specialists
- 7.5 market research

8 Marketing and promotion:

- 8.1 branding corporate
- 8.2 image professional
- 8.3 networks sponsorship
- 8.4 publications
- 8.5 samples
- 8.6 relation with press and media
- 8.7 advertising policies
- 8.8 direct and indirect client and customer relations
- 8.9 presentations
- 8.10 e-commerce
- 8.11 delivery
- 8.12

9 Potential new business opportunities:

- 9.1 products and services
- 9.2 developments and projects
- 9.3 customers and markets

10 Monitoring:

- 10.1 market share
- 10.2 levels of resource allocation
- 10.3 profitability
- 10.4 reputation
- 10.5 image

Scope/range

Develop and maintain a policy to maximise client and customer satisfaction

11 Clients and customers:

- 11.1 individuals
- 11.2 external organisations
- 11.3 departments or teams

12 Client and customer service:

- 12.1 quality
- 12.2 timescales
- 12.3 cost
- 12.4 communication and involvement in decision making
- 12.5 conduct
- 12.6 pre-contract
- 12.7 post-contract
- 12.8 after care

13 Policy:

- 13.1 relationships with clients
- 13.2 statutory rights and the organisational response
- 13.3 operational expectations and performance
- 13.4 policy regarding adherence to current norms of business ethics and practice
- 13.5 environmental concerns

COSCSMO18

Manage marketing and customer service in construction management

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