



# **QUALIFICATION HANDBOOK**

## **SVQ in Construction Site Management (Construction) at SCQF Level 9**

***Qualification reference number: GN99 49***

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## **1. Introduction**

1.1 This qualification has been developed to seek to ensure that manage construction sites meet minimum requirements of technical competence and health and safety.

1.2 These requirements have been specified in the National Occupational Standards (NOS) developed by the Sector Skills Council (SSC) Construction Skills in liaison with employers and industry/ sector representatives. This qualification is based upon those NOS and incorporates the Qualification Structure approved by SQA Accreditation.

1.3 Successful completion of this qualification will allow candidates to show they have sufficient knowledge, understanding and skills to demonstrate competence in managing sites within a construction setting.

1.4 This Handbook provides the information required to assist approved centres in delivering the qualification and preparing candidates for assessment. This includes some template forms that may be used / adapted by centres. Note that you are able to create your own, or use existing forms for this purpose. Alternatively, QFI makes its E-Portfolio system available to its approved centres.

This document should be read in conjunction with QFI's policies and the Centre Handbook.

## **2. Qualification objective(s)**

2.1 The qualification is suitable for apprentices / those already in employment that wish to develop their knowledge and skills supervising in construction site management.

2.2 In order to do this, the qualification covers technical and health and safety standards, and supports roles relating to managing construction sites.

## **3. Progression**

3.1 This qualification is primarily designed to allow candidates to progress to employment in roles relating to construction site management. These roles may be in addition to other construction related roles. Successful completion of this qualification may therefore lead to additional employment opportunities relating to site management.

3.2 Candidates achieving this qualification may also wish to progress to higher level qualifications aimed at supervisory/ management roles.

3.3 Candidates may also choose to undertake qualifications in more generic subjects such as a health and safety in the workplace.

## Entry requirements

4.1 Candidates must be at least 18 years of age to be able to undertake this qualification.

4.2 Those that will be driving construction vehicles as part of their chosen pathway/ additional units must hold a full driving licence.

4.3 There are no other specific entry requirements, though the National Careers Service does recommend physical fitness.

4.4 Candidates taking this qualification must be made fully aware of what this entails. Centres must be satisfied that candidates have the experience and skills and will have sufficient assessment opportunities within their job role to provide evidence of competence for this qualification. Where this may not be the immediate case, candidates should check with their employer whether they are able to go out with departmental or immediate job role boundaries to gain the necessary assessment opportunities.

4.5 A sample induction checklist is included at Appendix 1.

## 4. Qualification structure

5.1 The structure for this qualification is set by the Sector Skills Council Construction Skills and approved by SQA Accreditation.

5.2 To achieve this qualification candidates must achieve:

- 8 mandatory units
- Plus the mandatory and (where required) optional units for their chosen route:
  - Building and Civil Engineering (total 19 units required)
  - Highways Maintenance and Repair (total 18 units required)
  - Residential Development (total 20 units required)
  - Conservation (total 19 units required)
  - Demolition (total 18 units required)

### Mandatory Units

**All candidates must complete the following eight units**

SSC code	Title of mandatory unit (must complete all eight units)	SCQF level	SCQF credits
VR210	Develop and maintain good working relationships	6	8
VR713	Allocate work and check people's performance	8	9
VR726	Establish, implement and maintain systems for managing health, safety and welfare	9	15
VR728	Evaluate and select work methods	9	11

VR730	Monitor project activities	9	10
VR735	Control project progress against agreed quality standards	9	10
VR737	Control project progress against agreed programmes	9	8
VR740	Manage your personal development	9	8

**Additional requirements for each route – choose one route.**

**Route: Building and Civil Engineering**

<b>SSC code</b>	<b>Mandatory units for this route (all required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR714	Enable learning opportunities	7	7
VR715	Contribute to the identification of a work team	7	8
VR727	Establish, control and monitor environmental factors and sustainability	9	15
VR729	Plan the preparation of the site for the project	9	11
VR731	Ensure that work activities and resources meet project work requirements	9	11
VR732	Identify, allocate and plan the deployment and use of plant, equipment or machinery	8	9
VR733	Organise, control and monitor supplies of materials	8	8
VR734	Establish and monitor communication systems and organisational procedures	9	11
VR736	Establish dimensional control criteria	9	10
VR738	Control project quantities and costs	9	12
VR739	Evaluate feedback information and recommend improvements	9	7
<b>SSC code</b>	<b>Additional units for this route (none required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR716	Plan highways maintenance or repair activities	9	12
VR719	Provide customer service in construction	8	9
VR720	Plan historical conservation/restoration activities	9	12
VR722	Plan demolition activities	9	12
VR741	Plan and schedule the maintenance or remedial activities of property, systems or services	9	15

VR742	Manage project handover	9	10
VR743	Plan tunnelling activities		

**Route: Highways Maintenance and Repair**

<b>SSC code</b>	<b>Mandatory units for this route (all required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR714	Enable learning opportunities	7	8
VR715	Contribute to the identification of a work team	9	12
VR716	Plan highways maintenance or repair activities	8	9
VR719	Provide customer service in construction	9	11
VR731	Ensure that work activities and resources meet project work requirements	8	9
VR732	Identify, allocate and plan the deployment and use of plant, equipment or machinery	8	8
VR733	Organise, control and monitor supplies of materials	9	12
VR738	Control project quantities and costs	7	8
<b>SSC code</b>	<b>Optional units for this route (two required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR727	Establish, control and monitor environmental factors and sustainability	9	15
VR729	Plan the preparation of the site for the project	9	11
VR734	Establish and monitor communication systems and organisational procedures	9	11
VR736	Establish dimensional control criteria	9	10
VR739	Evaluate feedback information and recommend improvements	9	7
VR742	Manage project handover	9	10
<b>SSC code</b>	<b>Additional units for this route (none required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR720	Plan historical conservation/restoration activities	9	12
VR722	Plan demolition activities	9	12
VR741	Plan and schedule the maintenance or remedial activities of property, systems or services	9	15
VR743	Plan tunnelling activities		

**Route: Residential Development**

<b>SSC code</b>	<b>Mandatory units for this route (must complete all 11)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR714	Enable learning opportunities	7	7
VR719	Provide customer service in construction	8	9
VR727	Establish, control and monitor environmental factors and sustainability	9	15
VR729	Plan the preparation of the site for the project	9	11
VR731	Ensure that work activities and resources meet project work requirements	9	11
VR733	Organise, control and monitor supplies of materials	8	8
VR734	Establish and monitor communication systems and organisational procedures	9	11
VR736	Establish dimensional control criteria	9	10
VR739	Evaluate feedback information and recommend improvements	9	7
VR741	Plan and schedule the maintenance or remedial activities of property, systems or services	9	15
VR742	Manage project handover	9	10
<b>SSC code</b>	<b>Optional units for this route (one required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR715	Contribute to the identification of a work team	7	8
VR732	Identify, allocate and plan the deployment and use of plant, equipment or machinery	8	9
VR738	Control project quantities and costs	9	12
<b>SSC code</b>	<b>Additional units for this route (none required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR716	Plan highways maintenance or repair activities	9	12
VR720	Plan historical conservation/restoration activities	9	12
VR722	Plan demolition activities	9	12
VR743	Plan tunnelling activities		

**Route: Conservation**

<b>SSC code</b>	<b>Mandatory units for this route (all required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR714	Enable learning opportunities	7	7
VR720	Plan historical conservation/restoration activities	9	12
VR731	Ensure that work activities and resources meet project work requirements	9	11
VR732	Identify, allocate and plan the deployment and use of plant, equipment or machinery	8	9
VR733	Organise, control and monitor supplies of materials	8	8
VR734	Establish and monitor communication systems and organisational procedures	9	11
VR736	Establish dimensional control criteria	9	10
VR738	Control project quantities and costs	9	12
VR741	Plan and schedule the maintenance or remedial activities of property, systems or services	9	15
<b>SSC code</b>	<b>Optional units for this route (two required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR715	Contribute to the identification of a work team	7	8
VR719	Provide customer service in construction	8	9
VR727	Establish, control and monitor environmental factors and sustainability	9	15
VR729	Plan the preparation of the site for the project	9	11
VR739	Evaluate feedback information and recommend improvements	9	7
VR742	Manage project handover	9	10
<b>SSC code</b>	<b>Additional units for this route (none required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR716	Plan highways maintenance or repair activities	9	12
VR722	Plan demolition activities	9	12
VR743	Plan tunnelling activities		



**Route: Demolition**

<b>SSC code</b>	<b>Mandatory units for this route (all required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR722	Plan demolition activities	9	12
VR727	Establish, control and monitor environmental factors and sustainability	9	15
VR729	Plan the preparation of the site for the project	9	11
VR731	Ensure that work activities and resources meet project work requirements	9	11
VR732	Identify, allocate and plan the deployment and use of plant, equipment or machinery	8	9
VR742	Manage project handover	9	10
<b>SSC code</b>	<b>Optional units for this route (four required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR714	Enable learning opportunities	7	7
VR715	Contribute to the identification of a work team	7	8
VR719	Provide customer service in construction	8	9
VR733	Organise, control and monitor supplies of materials	8	8
VR734	Establish and monitor communication systems and organisational procedures	9	11
VR738	Control project quantities and costs	9	12
<b>SSC code</b>	<b>Additional units for this route (none required)</b>	<b>SCQF level</b>	<b>SCQF credits</b>
VR716	Plan highways maintenance or repair activities	9	12
VR720	Plan historical conservation/restoration activities	9	12
VR736	Establish dimensional control criteria	9	10
VR739	Evaluate feedback information and recommend improvements	9	7
VR741	Plan and schedule the maintenance or remedial activities of property, systems or services	9	15
VR743	Plan tunnelling activities		

All units are included in Appendix 2 of to this document.

## 5. Assessment

### 6.1 Roles and responsibilities

There are a number of people involved in the assessment process and the role of each needs to be clearly understood by each.

- Candidates – must familiarise themselves with the content of the units that they are taking and how these are to be assessed. They should co-operate with the assessment process, looking for opportunities to evidence the elements and gathering evidence where this arises. Candidates must take on board feedback from their assessor and work with their assessor to develop realistic plans for assessment. An Assessment Plan and Review template is included at Appendix 3.
- Assessors - must familiarise themselves with the content of the units that they are assessing and how these are to be assessed. They must assist candidates in identifying assessment opportunities, gathering, and presenting evidence. Assessors must assess all elements and record these assessments. Templates for recording elements, and for unit achievement, are at Appendix 4. Assessors must feedback and work with candidates to identify any gaps and develop realistic plans for assessment. They must also work with the Internal Verifier and External Verifier to ensure a common standard of assessment.
- Internal Verifiers – sometimes known as Internal Quality Assurers (IQAs), their role is to ensure that the assessment process is appropriate, consistent, fair and transparent; that assessors receive on-going support and that they are assessing to a common standard; and that awards are valid, reliable and consistent. IVs must develop a strategy that includes standardisation activities such as reviewing samples of evidence from each assessor, and countersigning the decisions of unqualified assessors.
- External Verifiers - sometimes known as External Quality Assurers (EQAs), are appointed by QFI and are independent of the centre. Their role is to check that internal processes are in place to ensure robust, consistent assessment. This includes sampling assessment evidence.

## **6.2 SCQF level 6 descriptors**

This qualification is pitched at SCQF level 9. The following are descriptions of what a candidate should be able to do or demonstrate at SCQF level 9. These are for guidance only – it is not expected that every point will be covered.

### **Knowledge and understanding**

Demonstrate and/or work with: An understanding of the scope and defining features of a subject/discipline/sector, and an integrated knowledge of its main areas and boundaries; A critical understanding of a range of the principles, principal theories, concepts and terminology of the subject/discipline/sector; Knowledge of one or more specialisms that is informed by forefront developments

### **Practice: Applied knowledge, skills and understanding**

Apply knowledge, skills and understanding: In using a range of the principal professional skills, techniques, practices and/or materials associated with the subject/discipline/sector; In using a few skills, techniques, practices and/or materials that are specialised and/or advanced; In practising routine methods of enquiry and/or research; To practise in a range of professional level contexts that include a degree of unpredictability.

### **Generic cognitive skills**

Undertake critical analysis, evaluation and/or synthesis of ideas, concepts, information and issues in a subject/discipline/sector; Identify and analyse routine professional problems and issues; Draw on a range of sources in making judgements.

### **Communication, IT and numeracy skills**

Use a wide range of routine skills and some advanced and specialised skills in support of established practices in a subject/discipline/sector, for example: Present or convey, formally and informally, information on standard/mainstream topics in the subject/discipline/sector to a range of audiences; Use a range of ICT applications to support and enhance work; Interpret, use and evaluate numerical and graphical data to achieve goals/targets.

### **Autonomy, accountability and working with others**

Exercise autonomy and initiative in some activities at a professional level in practice or in a subject/discipline/sector: Exercise managerial responsibility for the work of others and for a range of resources; Practise in ways that show awareness of own and others' roles and responsibilities; Work, under guidance, with specialist practitioners; Seeking guidance where appropriate, manage ethical and professional issues in accordance with current professional and/or ethical codes or practices.

### **6.3 The assessment process**

Assessment for this qualification, and for individual units that comprise the qualification, must take place in accordance with '*Construction Skills Consolidated Assessment Strategy for Construction and the Built Environment: Craft, Supervisory, Technical, Managerial and Professional National Vocational Qualifications (NVQs) and Scottish Vocational Qualifications (SVQs)*' (published December 2016, approved by ACG February 2017).

This document translates the requirements of the assessment strategy and gives guidance to ensure that centres meet these.

Centres delivering the qualification must ensure that assessors and Internal Verifiers are aware of the assessment strategy and how to access this. External Verifiers may check this requirement during monitoring visits to centres.

Assessment involves the following key stages: planning; producing evidence; assessing evidence; recording. Each of these is considered in more detail below.

#### **6.3.1. Planning**

The assessor must create an Assessment Plan with each candidate that he/ she will be assessing. The Assessment Plan will need to be reviewed as the candidate progresses through the units. A template for assessment planning and review is at Appendix 3 of this document.

A wide range of assessment methods exist that can be used to assess knowledge and skills. Methods of assessment that are commonly used for assessing competence based qualifications such as N/SVQs include the following:

- Product evidence – this relates to the outcome of the candidate's work, and the actual product that is generated as a result of their work.
- Direct observation – where an assessor (or credible witness) will directly observe the candidate undertaking certain tasks/ creating products that occur as part of their role. Observations must be referenced to the elements covered
- Question/ answer – these will often supplement the methods above, for example the assessor may ask the candidate a number of questions whilst they are undertaking a task. Questioning is a useful way to establish knowledge and to generate evidence of this
- Witness testimony – credible witnesses may be identified who can for example testify that the candidate can successfully undertake certain tasks
- Personal statement – declaration made by the candidate that should be referenced to elements

Centres should ensure that their Assessors use the methods above to assess candidates for this qualification.

Template assessment documents including an Assessor Report can be found at Appendix 3.

### **6.3.2 Producing evidence**

The methods of assessment must generate evidence to demonstrate the candidates' competence. Evidence produced in the workplace is central to Construction Skills Consolidated Assessment Strategy. Workplace evidence is vital to ensuring that the candidate is competent to industry standards and a suitable way of recording this must be used.

The following indicates the type of evidence generated by the methods on the section above:

- Product evidence –Photographic or video evidence is often used to record this, or it may also be recorded via the method below. Labelled photographs and/or videos that clearly show the candidate are sources of evidence for this purpose.
- Direct observation –observations must be recorded via an Assessor or other report (e.g. witness statement)
- Question/ answer –both the questions and the candidate's responses to these must be recorded either in writing or via some audio or visual device (e.g. part of a video recording).
- Witness testimony – this may be written, audio or visual recordings
- Personal statement – the declaration made by the candidate must be recorded

All of the above must be referenced to the evidence that they cover. Templates that may be used for recording evidence are at Appendix 3.

Feedback should be given to the candidate on an on-going basis and where there are any gaps or shortfalls in evidence then these should be incorporated into the Assessment Plan.

Assessment must meet the requirements of the performance criteria, knowledge and understanding documented for each unit of assessment. Methods of assessment must ensure coverage of all elements, scope and range, and generate sufficient evidence to demonstrate competence. A holistic approach towards the collection of evidence is encouraged. The focus should be on assessing activities generated by the whole work experience rather than focusing on specific tasks. This would show how evidence requirements could be met across the qualification to make the most efficient use of evidence.

Direct evidence produced through normal performance in the workplace is the primary source for meeting these requirements. This includes naturally occurring evidence, direct observation of activities and witness testimony as relevant, all of which must be recorded.

Workplace evidence must be supported by the required evidence of knowledge and understanding. This evidence may be identified by:

- questioning the candidate
- recognised industry education and training programme assessment or professional interview assessment that has been matched to NOS requirements
- performance evidence/ completed work

All of which must be recorded and made available for verification purposes. Workplace evidence of skills cannot be simulated for this qualification.

### **6.3.3 Assessing evidence**

Evidence must be assessed against the units/ elements to establish whether the candidate is competent with regards to their performance and knowledge. In order to achieve the qualification candidates must achieve a 'pass'. The evidence must show that the candidate consistently (i.e. on more than one occasion) meets all of the elements across the scope/range of each unit.

If there is insufficient evidence to make this judgement then plans must be made as to how the candidate can produce further evidence in order to demonstrate competence.

Assessors must check that the evidence produced is sufficient in volume, relevant and current. They must also be confident that the evidence has been generated by the candidate. Assessors and candidates normally sign documentation to declare that the evidence produced is that of the candidate and no other.

### **6.3.4 Recording evidence**

Evidence (or reference to where certain evidence is located) is normally kept in a portfolio. This may be paper-based or electronic. All evidence contained within the portfolio must be clearly referenced to the units and elements. Candidates' progress can therefore be tracked. Note that certain pieces of evidence can be recorded across more than a single element. Tracking is important to show where this is that case.

It is helpful to give each piece of evidence a number so that this can be mapped across elements. See the template forms at Appendix 4. Assessment decisions made against the evidence must also be recorded so that an IV or an EV can see these. All evidence must be kept for internal and external verification.

## **6. Assessors**

7.1 The occupational competence of assessors is defined in '*Construction Skills Consolidated Assessment Strategy for Construction and the Built Environment: Craft, Supervisory, Technical, Managerial and Professional National Vocational Qualifications (NVQs) and Scottish Vocational Qualifications (SVQs)*' (published December 2016, approved by ACG February 2017).

7.2 The roles and responsibilities of assessors is outlined in the section above. Assessors must be competent to perform their role and either hold the qualifications needed to carry out assessment – or achieve within 18 months of commencing their role:

- D32 or D33
- A1
- Level 3 Award in Assessing Competence in the Work Environment
- Level 3 Award in Assessing Vocationally Related Achievement
- Level 3 Certificate in Assessing Vocational Achievement
- an appropriate Assessor qualification as identified by SQA Accreditation

Assessors must also:

- have a sound, in-depth knowledge of, and uphold the integrity of, the relevant NOS and Assessment Strategy to enable them to carry out assessment to the standards specified
- have the occupational expertise (craft/ trade specific) before commencing their role so they have up to date experience, knowledge and understanding of the particular aspects of work they are assessing
- only assess in their acknowledged area of occupational competence
- maintain the currency of this for the duration of their role
- know QFI's requirements for recording assessment decisions and maintaining assessment records

7.3 Holders of A1 and D32/33 must assess to the current National Occupational Standards (NOS) for Learning and Development.

7.4 Assessors must be registered with QFI. The **Centre Handbook** provides details.

7.5 The assessment decisions of unqualified assessors must be countersigned by the IV.

## **7. Internal verification**

8.1 Centres' internal assessment processes and practices must be effective and support the integrity and consistency of the qualification. This is achieved through the internal quality assurance that is undertaken by the approved centre, and the external quality assurance that is undertaken by QFI. Centres must operate explicit, written internal quality assurance procedures to ensure:

- the accuracy and consistency of assessment decisions between assessors operating at the centre
- that assessors are consistent in their interpretation and application of the qualifications or unit(s) learning outcomes

8.2 Centres must appoint IVs who will be responsible for:

- regular sampling evidence of assessment decisions made by all assessors across all aspects of assessment for the qualification. Sampling must include direct observation of assessment practice
- maintaining up-to-date records of IV and sampling activity (what was evidence was sampled or assessors / IV observed where there is more than one) and ensuring that these are available for external quality assurance
- establishing procedures to ensure that all assessors interpret the learning outcomes in the same way

- monitoring and supporting the work of assessors
- facilitating appropriate staff development and training for assessors
- providing feedback to the EV on the effectiveness of assessment
- ensuring that any corrective action required by QFI is carried out within agreed timescales.

8.3 Centres must ensure that the decisions of unqualified IVs are checked, authenticated and countersigned by an IV who is appropriately qualified and occupationally expert. QFI will monitor a centre's compliance with these requirements through monitoring visits and certification claims.

8.4 The IV is also responsible and accountable for arranging the checking and countersigning process. IVs may verify only evidence that they did not assess themselves. Further guidance on internal quality assurance/verification is provided in the **Centre Handbook**. Appendix 5 of this document indicates suggested content for an IV strategy, and a template for sampling assessment evidence.

## 8. Internal verifiers

9.1 The occupational competence of IVs is defined in '*Construction Skills Consolidated Assessment Strategy for Construction and the Built Environment: Craft, Supervisory, Technical, Managerial and Professional National Vocational Qualifications (NVQs) and Scottish Vocational Qualifications (SVQs)*' (published December 2016, approved by ACG February 2017).

9.2 The roles and responsibilities of IVs is outlined above. IVs must competent to perform their role and either hold the qualifications needed to carry out internal verification – or achieve within 18 months of commencing their role:

- D34
- V1
- Level 4 Award in the Internal Quality Assurance of the Assessment Process and Practice
- Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Process and Practice
- an appropriate Internal Verifier qualification as identified by SQA Accreditation

9.3 It is strongly recommended that IVs also hold assessor qualifications (see section above).

9.4 Holders of V1/D34 must quality assure to the current National Occupational Standards (NOS) for Learning and Development.

9.5 IVs must be registered with QFI. The **Centre Handbook** provides details.



## 9. External verification

10.1 External verification of this qualification ensures that the requirements are met for the '*Construction Skills Consolidated Assessment Strategy for Construction and the Built Environment: Craft, Supervisory, Technical, Managerial and Professional National Vocational Qualifications (NVQs) and Scottish Vocational Qualifications (SVQs)*' (published December 2016, approved by ACG February 2017).

10.2 Centre visits will normally take place on an annual basis, though these could be more frequent if deemed necessary as a result of QFI's risk assessments. The **Centre Handbook** provides further details on external verification including to prepare for centre visits.

QFI's appointed External Verifiers meet the requirements of the assessment strategy.

## 10. Certification

11.1 Note that there is a lapsing period of two years for this qualification. This means that when the qualification expires, is withdrawn or replaced by a revised version, candidates registered have two years from the expiry date in which to complete the qualification. This will allow sufficient time for candidate's to compete and allow for currency of evidence.

## 11. Equality and diversity

12.1 This qualification must be assessed in English.

**12.2** Assessment must be inclusive and where appropriate reasonable adjustments made to ensure equality of access in line with QFI's Equality and Diversity Policy. Full details are included in the QFI Centre Handbook.

12.3 Special consideration is not normally given for competence based qualifications as it is necessary for candidates to demonstrate that they have the necessary skills and knowledge to achieve the qualification and operate safely in the workplace.

12.4 Equality data will be collected at the point of registration. This is for monitoring purposes only and will include age, gender, ethnicity, and disability.

## 12. Fees

13.1 The current fees for this qualification, and for individual units, are included in the QFI Fees and Invoicing document. This document also details what is/ is not included in fees.

13.2 Fees may be broken down to a reasonable level upon request to QFI.



## APPENDIX 1 - CANDIDATE TEMPLATE DOCUMENTS

### Sample Form Induction checklist

This document indicates what may be covered as part of a candidate's induction. This list is not exhaustive.

	Tick
Qualification information: <ul style="list-style-type: none"> <li>• Units</li> <li>• Structure</li> <li>• Summary of assessment</li> <li>• Awarding body</li> </ul>	
Roles and responsibilities: <ul style="list-style-type: none"> <li>• Candidate</li> <li>• Assessor</li> <li>• Internal Verifier</li> <li>• External Verifier</li> </ul>	
Training and assessment process: <ul style="list-style-type: none"> <li>• Planning</li> <li>• Collection of evidence (including methods)</li> <li>• Review of evidence</li> <li>• Feedback on evidence</li> <li>• Verification of evidence</li> <li>• Certification</li> </ul>	
Policies: <ul style="list-style-type: none"> <li>• Complaints</li> <li>• Appeals</li> <li>• Malpractice</li> <li>• Data protection</li> <li>• Health and safety</li> <li>• Equality (including reasonable adjustments/ additional support)</li> </ul>	
Forms: <ul style="list-style-type: none"> <li>• Enrolment</li> <li>• Other</li> </ul>	
I confirm that I have received this induction and the associated documents:  Candidate name: .....  Candidate signature: .....  Date: .....	

**UNITS**

**COSVR726**

**Establish, implement and maintain systems for managing health, safety and welfare**

**Overview**

This standard is about

- 1 encouraging a culture of health, safety and welfare awareness
- 2 ensuring that personnel are aware of their responsibilities
- 3 developing, implementing, monitoring and reviewing the site conditions to ensure a safe and healthy workplace that provides for the welfare of the workforce
- 4 ensuring hazards are identified and, where necessary, risk assessments completed
- 5 ensuring sufficient equipment and resources are available for safe and healthy working, and to maintain the welfare of the workforce

**Performance criteria**

You must be able to:

- P1 encourage a culture of health, safety and welfare on site, and identify and implement improvements
- P2 allocate health, safety and welfare responsibilities which comply with current legislation and ensure site inductions consistently inform people of those responsibilities
- P3 ensure accurate and appropriate notices and hazard warnings that conform to current legislation are maintained
- P4 ensure health, safety and welfare equipment and resources are available and sufficient to meet current legislation
- P5 implement systems which meet current legislation requirements to identify hazards, reduce risks and maintain the health, safety and welfare of people
- P6 ensure hazards are identified and obtain information on their significance
- P7 ensure the significant hazards are assessed to identify the residual risks, apply the principles of prevention to reduce the risks and provide information to appropriate people
- P8 monitor health, safety and welfare systems regularly for compliance with current legislation

**Knowledge and understanding**

You need to know and understand:

**Performance Criteria 1**

**Encourage and improve**

- K1 how to encourage **people** to promote a culture of health, safety and welfare
- K2 how to identify opportunities to improve health, safety and welfare and make appropriate recommendations

**Performance Criteria 2**

**Inform people**

- K3 how to allocate responsibilities for health, safety and welfare
- K4 how to carry out site **inductions**
- K5 how to ensure **inductions** consistently inform **people** of their responsibilities

**Performance Criteria 3**

**Notices**

- K6 how to ensure **notices** and hazard warnings comply with **current legislation**

K7 how to maintain accurate and appropriate **notices** and hazard warnings for the workforce, visitors and the public

K8 why you need to ensure accurate and appropriate **notices** are maintained

**Performance Criteria 4**

**Equipment and resources**

K9 how to ensure health, safety and welfare **equipment and resources** are available and sufficient for the project

K10 how to ensure health, safety and welfare **equipment and resources** comply with **current legislation**

**Performance Criteria 5**

**Implement systems**

K11 how to implement **systems** which meet **current legislation** requirements for identifying and reducing hazards

K12 how to implement **systems** for reporting and recording accidents, emergencies and near misses

K13 how to maintain the welfare of **people** in accordance with **current legislation** requirements

**Performance Criteria 6**

**Hazard identification**

K14 how to ensure **hazards** are identified

K15 how to obtain more information about **hazards**

K16 how to determine the significance of a **hazard**

**Performance Criteria 7**

**assessing risks**

K17 how to identify residual risks

K18 how to apply the **principles of prevention**

K19 How to reduce risk and provide information to appropriate **people**

**Performance Criteria 8**

**Monitor for compliance**

K20 how to monitor health, safety and welfare systems regularly for compliance with **current legislation**

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

1 records showing how workforce culture has been encouraged

2 records of improvements made to the work environment

Performance Criteria 2

3 records of responsibilities allocated

4 records of induction briefings given

Performance Criteria 3

5 records showing that notices and hazard warnings are maintained

Performance Criteria 4

6 records for the maintenance of health, safety and welfare protection equipment and resources

7 records showing that health, safety and welfare equipment and resources meet the project, organisational and statutory requirements

Performance Criteria 5

8 records of hazard identification and risk assessment or control methods adopted

9 records of the system used to deal with breaches in health, safety and welfare requirements

10 records of the system used to report accidents, emergencies and near misses

Performance Criteria 6

11 records of hazard identification methods

12 details of the method used to determine the significance of an identified hazard

Performance Criteria 7

13 records of dealing with hazards by application of the following

- 13.1 elimination
- 13.2 control at source
- 13.3 management
- 13.4 cumulative protection
- 13.5 personal protective equipment
- 14 records of the system used to provide information about hazard control to people
- Performance Criteria 8
- 15 records of regular checks carried out on health, safety and welfare systems
- 16 records of any special site conditions and situations which do not comply with regulations
- 17 records of action taken to prevent reoccurrence of breaches to the requirements of health, safety and welfare

**Scope/ range relating to knowledge and understanding**

Current legislation

- 1 construction specific health, safety and welfare regulations
- 2 general health, safety and welfare legislation

Equipment and resources

- 3 protective clothing
- 4 protective equipment
- 5 first aid facilities and arrangements
- 6 welfare facilities
- 7 storage and security of materials and equipment
- 8 accident and incident reporting
- 9 fire fighting equipment
- 10 provision of health, safety and welfare training

Hazards

- 11 potential to cause harm to people
- 12 potential to cause damage to property, resources or equipment

Inductions

- 13 health and safety responsibilities
- 14 site construction and installation operations
- 15 health, safety and welfare equipment and resources
- 16 risk control procedures
- 17 first aid arrangements
- 18 emergency plans
- 19 evacuation plans
- 20 traffic management

Notices

- 21 prescribed notices
- 22 certificates
- 23 certificate of insurance
- 24 site safety signs
- 25 information

People

- 26 workforce
- 27 sub-contractors
- 28 suppliers
- 29 consultants
- 30 visitors
- 31 non-English speaking personnel
- 32 the public

- Principles of prevention
- 33 eliminate
  - 34 control at source
  - 35 manage
  - 36 cumulative protection
  - 37 personal protective equipment
- Systems
- 38 hazard identification
  - 39 risk assessment
  - 40 prevention and protection

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 Legislation

## COSVR727

### Establish, control and monitor environmental factors and sustainability

#### Overview

This standard is about

- 1 identifying considerations for environmental management and methods that will support sustainability
- 2 delegating responsibilities and encouraging a culture of environmental awareness and support for sustainability
- 3 monitoring environmental factors and sustainability requirements as the project progresses

#### Performance criteria

You must be able to:

- P1 identify the environmental management considerations and establish methods of work that will support sustainability by examining project data
- P2 encourage a culture of environmental awareness and support for sustainability in the workforce
- P3 delegate duties for environmental management and monitoring sustainable work methods
- P4 assess the significance of environmental factors as they affect the project and take appropriate action
- P5 monitor project work against sustainability requirements and take appropriate action to ensure progress
- P6 record good practice in environmental management and sustainable methods of work and make recommendations to people responsible

#### Knowledge and understanding

You need to know and understand:

##### Performance Criteria 1

##### Considerations sustainability

- K1 how to examine **project data** to identify needs for environmental management
- K2 how to examine **project data** to identify and establish methods of work that will support **sustainability**
- K3 why you need to identify environmental management needs and **sustainable work methods**

##### Performance Criteria 2

##### Encourage and support

- K4 how to encourage a culture of environmental awareness and support for **sustainability** in the workforce
- K5 why you need to encourage a culture of environmental awareness and support for **sustainability** in the workforce
- Performance Criteria 3**  
**Delegation**
- K6 how to delegate duties for environmental management
- K7 how to delegate duties for monitoring **sustainable work methods**
- Performance Criteria 4**  
**Environmental factors**
- K8 how to assess the significance of **environmental factors** as they affect the project and take appropriate action
- Performance Criteria 5**  
**Monitor sustainability**
- K9 how to monitor project work against **sustainability** requirements and take appropriate action to ensure progress
- Performance Criteria 6**  
**Record good practice**
- K10 how to record good practice in environmental management and **sustainable work methods**
- K11 how to make recommendations of good practice to **people**

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

- 1 records of identified considerations for environmental management
- 2 records of identified methods that will support sustainability

Performance Criteria 2

- 3 records of the policies adopted for environmental management and sustainability
- 4 records showing how workforce culture has been encouraged

Performance Criteria 3

- 5 records of duties delegated for environmental management
- 6 records of duties delegated for monitoring sustainable work methods

Performance Criteria 4

- 7 records of consideration for at least four of the following environmental factors
  - 7.1 appearance
  - 7.2 ecological
  - 7.3 natural conservation
  - 7.4 historical conservation
  - 7.5 noise
  - 7.6 emissions to air, land and water
  - 7.7 sustainable, economic and social
  - 7.8 traffic management
  - 7.9 waste management and recycling

**Performance Criteria 5**

- 8 records of project tasks monitored against at least four of the following sustainability requirements
  - 8.1 reuse and recycled waste
  - 8.2 recycled or sustainable materials
  - 8.3 contact with neighbours
  - 8.4 health and safety
  - 8.5 protection of the natural environment, biodiversity and heritage
  - 8.6 new legislation, technologies and skills

- 8.7 pollution control
- 8.8 material acquisition, use and storage

**Performance Criteria 6**

- 9 records of recommendations made to at least three of the following people responsible
  - 9.1 the client, customer or their representative
  - 9.2 contractors
  - 9.3 consultants
  - 9.4 sub-contractors
  - 9.5 suppliers
  - 9.6 workforce
  - 9.7 internal management

**Scope/ range relating to knowledge and understanding**

Environmental factors

- 1 appearance
- 2 ecological
- 3 nature conservation
- 4 historical conservation
- 5 noise
- 6 emissions, air, land and water
- 7 sustainable, economic and social
- 8 traffic management
- 9 waste management and recycling

People responsible

- 10 the client, customer or their representative
- 11 contractors
- 12 consultants
- 13 sub-contractors
- 14 suppliers
- 15 workforce
- 16 internal management

Project data

- 17 conditions of contract
- 18 bills of quantities or methods of measurement
- 19 specifications
- 20 drawings
- 21 health, safety and environmental plans
- 22 programmes
- 23 organisational requirements
- 24 instructions and variations

Sustainable work methods

- 25 reuse and recycled waste
- 26 recycled or sustainable materials
- 27 contact with site neighbours
- 28 health and safety
- 29 protection of the natural environment, biodiversity and heritage
- 30 new legislation, technologies and skills
- 31 pollution control
- 32 material acquisition, use and storage

Sustainability

- 33 build to last



- 34 integration with surroundings
- 35 traffic management
- 36 meeting users needs
- 37 meeting community needs
- 38 insulation
- 39 efficient building services systems
- 40 efficient use of resources
- 41 efficient use of materials
- 42 waste recycling
- 43 use of recycled materials
- 44 acquiring materials from local sources
- 45 encouraging biodiversity
- 46 use of sustainable energy, thermal, solar, wind and wave
- 47 water demand
- 48 protection of archaeological and historically valuable resources

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## COSVR728

### Evaluate and select work methods

#### Overview

This standard is about

- 1 assessing and evaluating information
- 2 identifying safe and healthy work methods
- 3 identifying how materials and resources will be used
- 4 preparing, producing and agreeing method statements and/or risk assessments

#### Performance criteria

You must be able to:

- P1 assess and evaluate project data in order to identify work methods
- P2 obtain additional information from other sources in cases where the available project data is insufficient
- P3 identify work methods which will make the best use of resources and materials and which meet project and current legislation requirements
- P4 evaluate identified work methods against technical, environmental and project criteria and select the best one
- P5 ensure method statements are accurate, clear and concise and acceptable to all the people involved
- P6 recommend and promote the selected work method

#### Knowledge and understanding

You need to know and understand:

##### Performance Criteria 1

##### Assess an evaluate data

- K1 how to assess and evaluate available **project data**

- K2 how to identify construction work methods from the assessment and evaluation of **project data**
- K3 why you need to assess and evaluate available **project data**

**Performance Criteria 2**

**Obtain additional information**

- K4 how to obtain additional information from **other sources** in cases where the available **project data** is insufficient

**Performance Criteria 3**

**Identify work methods**

- K5 how to identify **work methods** from possible **information sources** which will make the best use of resources and materials
- K6 how to identify **work methods** which meet the project and the requirements of current legislation

**Performance Criteria 4**

**Evaluate and select work methods**

- K7 how to evaluate identified **work methods** against relevant **technical, environmental and project criteria** to select the best method

**Performance Criteria 5**

**Confirm method statements**

- K8 how to ensure the method statement and/or risk assessments derived from the selected **work methods** are accurate, clear and concise
- K9 how to ensure the method statement and/or risk assessments are acceptable to all the **people responsible**
- K10 why you need to ensure the selected **work methods**, method statement and/or risk assessments are acceptable to all the **people responsible**

**Performance Criteria 6**

**Recommend work methods**

- K11 how to recommend **work methods** to the **people responsible**
- K12 how to promote the selected **work methods** to the **people responsible**

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

- 1 records showing assessment and evaluation of at least five of the following types of project data
  - 1.1 conditions of contract
  - 1.2 bills of quantities or methods of measurement
  - 1.3 specifications
  - 1.4 drawings
  - 1.5 health, safety and environmental plans
  - 1.6 programmes and schedules
  - 1.7 organisational requirements
  - 1.8 instructions and variations
  - 1.9 information on materials
  - 1.10 survey reports
    - 1.11 design data
    - 1.12 statutory consents
    - 1.13 sub-contractor arrangements and attendance
    - 1.14 method statements and/or risk assessments
    - 1.15 safe systems of work

Performance Criteria 2

- 2 records of consultation with at least two of the following other sources
  - 2.1 the client, customer or their representative
  - 2.2 contractors

- 2.3 sub-contractors
- 2.4 suppliers
- 2.5 regulatory authorities
- 2.6 technical and trade literature
- 2.7 those affected by the project
- Performance Criteria 3
- 3 records of identified work methods from at least two of the following information sources
  - 3.1 current legislation, codes of practice and official guidance
  - 3.2 investigative research
  - 3.3 organisational procedures
  - 3.4 technical and trade literature
- Performance Criteria 4
- 4 records of evaluation showing consideration of at least six of the following technical, environmental or project criteria
  - 4.1 materials performance and availability
  - 4.2 health and safety
  - 4.3 fire protection
  - 4.4 access
  - 4.5 plant, equipment or machinery performance and availability
  - 4.6 traffic management
  - 4.7 environmental issues
  - 4.8 cost benefit
  - 4.9 current legislation, codes of practice and official guidance
  - 4.10 customer and user needs
  - 4.11 contract requirements in terms of time and quantity
  - 4.12 waste management
  - 4.13 sustainability
- 5 records of the work method(s) selected
- Performance Criteria 5
- 6 records of method statements and/or risk assessments checked and agreed
- Performance Criteria 6
- 7 records of presentation of the selected work method to, and acceptance by, at least two of the following people responsible
  - 7.1 the client, customer or their representative
  - 7.2 contractors
  - 7.3 consultants
  - 7.4 sub-contractors
  - 7.5 suppliers
  - 7.6 workforce
  - 7.7 internal management
- Scope/ range relating to knowledge and understanding**
- Information sources
  - 1 current legislation, codes of practice and official guidance
  - 2 investigative research
  - 3 organisational procedures
  - 4 technical and trade literature
- Other sources
  - 5 the client, customer or their representative
  - 6 contractors
  - 7 sub-contractors

8	suppliers
9	regulatory authorities
10	technical and trade literature
11	people affected by the project
People responsible	
12	client, customer or their representative
13	contractors
14	consultants
15	sub-contractors
16	suppliers
17	workforce
18	internal management
Project data	
19	conditions of contract
20	bills of quantities or methods of measurement
21	specifications
22	drawings
23	health, safety and environmental plans
24	organisational requirements
25	instructions and variations
26	materials
27	programmes and schedules
28	survey reports
29	design data
30	statutory consents
31	sub-contractor arrangements and attendance
32	method statement and/or risk assessments
33	safe systems of work
Technical, environmental and project criteria	
34	materials performance and availability
35	health and safety
36	fire protection
37	access
38	plant, equipment or machinery performance and availability
39	traffic management
40	environmental issues
41	cost benefits
42	current legislation, codes of practice and official guidance
43	customer and user needs
44	contract requirements in terms of time and quantity
45	waste management
46	sustainability
Work methods	
47	sequencing and integration
48	organisation of resources
49	techniques
50	use of temporary works
51	prefabrication
52	preparatory systems
53	adoption of new materials
54	application of new skills

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## COSVR729

### Plan the preparation of the site for the project

#### Overview

This standard is about

- 1 pre-start and ongoing planning
- 2 implementation of arrangements for the project at the place of work
- 3 ensuring safe, healthy and secure site operations

#### Performance criteria

You must be able to:

- P1 assemble and review information used in the preparation of the project plan, clarify information which is not clear and update it for production planning purposes
- P2 identify factors for consideration, record them and pass them on to people who may be affected
- P3 identify access and egress points for the site and works which are safe, convenient and minimise disruption
- P4 organise the resources required for the preparation of site operations
- P5 give accurate details about the proposed work to the utility and emergency services
- P6 make arrangements for adequate site safety, welfare, environmental protection and security
- P7 plan the site layout for operational purposes and pass information about the plans to the people on the site
- P8 ensure notices to provide information that complies with current legislation, to people are placed and maintained

#### Knowledge and understanding

You need to know and understand:

##### Performance Criteria 1

##### Assemble and review information

- K1 how to assemble **information** used in the preparation of the project plan
- K2 how to clarify **information** that is not clear
- K3 how to keep **information** up to date
- K4 why you need to assemble and clarify **information** and keep it up to date

##### Performance Criteria 2

##### Identify factors

- K5 how to identify and record relevant **factors** for consideration when planning
- K6 how to pass on records of **factors** considered to people who will be affected
- K7 why you need to pass considered and recorded **factors** to people who will be affected

##### Performance Criteria 3

##### Identify access/egress points

- K8 how to identify **access and egress points** for the site and works which are the most convenient for works traffic and which minimise disruption
- K9 how to prepare a traffic management plan

##### Performance Criteria 4

##### Organise resources

- K10 how to organise **resources** for site preparation
- K11 how to assign **resources** for site preparation
- K12 how to utilise the **resources** used in site preparation into project work or tasks

**Performance Criteria 5**

**Passing information**

- K13 how to give details about **proposed work** to utility and emergency services
- K14 how to give details on site access, layout, evacuation and hazards to utility and emergency services

**Performance Criteria 6**

**Site safety and security**

- K15 how to ensure adequate site safety for **proposed work**
- K16 how to make consideration of relevant **factors** when arranging site safety, welfare, environmental protection and security
- K17 how to ensure adequate site security
- K18 how to ensure arrangements for health, safety and welfare are reviewed as work progresses

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

- 1 records of maintaining, verifying and updating the project plan with at least four of the following types of information
  - 1.1 survey reports
  - 1.2 design information
  - 1.3 contractual information
  - 1.4 statutory consents
  - 1.5 contracts pre-planning information
  - 1.6 health, safety and environmental plans
  - 1.7 risk assessments and method statements
  - 1.8 programmes and schedules
  - 1.9 about competent people
  - 1.10 sub-contractor arrangements and attendance

Performance Criteria 2

- 2 records of distributing information for at least four of the following considered factors
  - 2.1 occupiers
  - 2.2 near neighbours
  - 2.3 public access
  - 2.4 site conditions
  - 2.5 environment considerations
  - 2.6 vehicular access
  - 2.7 security and trespass
  - 2.8 public utilities
  - 2.9 heritage status
  - 2.10 sustainability

Performance Criteria 3

- 3 plan for traffic management showing chosen and agreed site and works access and egress points

Performance Criteria 4

- 4 records showing at least four of the following resources assigned for the preparation of the site
  - 4.1 people
  - 4.2 plant, equipment or machinery
  - 4.3 materials and components
  - 4.4 sub-contractors
  - 4.5 information

- 4.6 work area and facilities
- 4.7 waste management
- 4.8 utility providers
- Performance Criteria 5
- 5 records of information regarding site access, layout, evacuation and hazards passed to utility and emergency services
- Performance Criteria 6
- 6 records of site safety and welfare arrangements identified before work starts and reviewed as work progresses
- 7 records of environmental protection procedures
- 8 records of the site security arrangements
- Performance Criteria 7
- 9 records of site layout or plan
- 10 plans showing resources and materials delivery, storage and waste collection locations
- 11 arrangements for recycling
- 12 records of information passed to the people working on site
- Performance Criteria 8
- 13 records showing types and locations of notices
- 14 maintenance schedule for notices

**Scope/ range relating to knowledge and understanding**

Access and egress points

- 1 current legislation
- 2 local traffic
- 3 access and egress control
- 4 security
- 5 parking
- 6 visitors
- 7 site induction
- 8 occupiers
- 9 near neighbours
- 10 traffic management

Factors

- 11 occupiers
- 12 near neighbours
- 13 public access
- 14 site conditions
- 15 environment considerations
- 16 vehicular access
- 17 security and trespass
- 18 public utilities
- 19 heritage status
- 20 sustainability

Information

- 21 survey reports
- 22 design
- 23 contractual
- 24 statutory consents
- 25 contracts pre-planning information
- 26 health, safety and environmental plans
- 27 risk assessments and method statements

- 28 programmes
- 29 about competent people
- 30 sub-contractor arrangements and attendance

Proposed work

- 31 new build
- 32 infrastructure
- 33 demolition
- 34 extension
- 35 alteration
- 36 refurbishment
- 37 temporary works
- 38 installation
- 39 conservation

Resources

- 40 people
- 41 plant, equipment or machinery
- 42 materials and components
- 43 sub-contractors
- 44 information
- 45 work area and facilities
- 46 waste management
- 47 utility providers

Site layout

- 48 storage
- 49 temporary accommodation
- 50 work areas
- 51 plant
- 52 temporary services
- 53 access and egress
- 54 security
- 55 continuing use by occupiers
- 56 waste management
- 57 pollution control
- 58 provision for prefabricated components and systems
- 59 existing fabric

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## COSVR730

### Monitor project activities

#### Overview

This standard is about

- 1 providing information
- 2 providing personnel with details of their job responsibilities



3 planning, organising and controlling site and project resources to meet planned and unplanned situations

**Performance criteria**

You must be able to:

- P1 give adequate notice to all the people who will be affected about when work will start, how long it will take and when it will finish and confirm all dates in writing
- P2 communicate and agree a programme and method with people who will be doing the work that integrates operations
- P3 identify, record and obtain information requirements before work starts
- P4 organise attendance for sub-contractors in accordance with project and contractual agreements
- P5 plan and obtain sufficient resources of the appropriate type which will meet the project requirements and timescales
- P6 organise and control the site and resources so that conditions are safe, the site is tidy and creates a favourable image of the organisation, its products, its services and the project
- P7 develop contingency plans to meet special requirements to minimise disruption to those likely to be affected by the works programme

**Knowledge and understanding**

You need to know and understand:

**Performance Criteria 1**

**Notification**

- K1 how to give adequate notice to all the **people** who will be affected about
  - K1.1 when the work will start
  - K1.2 how long it will take
  - K1.3 when it will finish
- K2 how to confirm all dates in writing
- K3 why you need to confirm arrangements in writing

**Performance Criteria 2**

**Communicate and agree programme**

- K4 how to agree **programmes** and methods with the **people** who will be doing the work
- K5 why you need to agree **programmes** and methods with the **people** who will be doing the work
- K6 how to communicate **programmes** and methods to the **people** who will be doing the work

**Performance Criteria 3**

**Information**

- K7 How to identify, record and obtain **information** requirements before work starts

**Performance Criteria 4**

**Organise attendance**

- K8 how to organise **attendance** by contract or agreement for sub-contractors and attending workforce, in accordance with **project requirements** and contractual agreements
- K9 why you need to organise **attendance** by contract or agreement for sub-contractors in accordance with **project requirements** and contractual agreements

**Performance Criteria 5**

**Plan and obtain resources**

- K10 how to identify and plan the use of **resources**
- K11 why you need to plan the use of **resources**
- K12 how to ensure sufficient **resources** are obtained

**Performance Criteria 6**

**Organise and control the site**

- K13 how to organise and control the site and **resources** so that the following conditions are met
  - K13.1 the site is safe

- K13.2 the site is tidy
- K13.3 a favourable image of the organisation is created
- K13.4 a favourable image of the products in use and being produced is created
- K13.5 a favourable image of the services being provided is created
- K13.6 a favourable image of the project is created
- K14 why you need to organise and control the site and **resources**

**Performance Criteria 7**

**Contingency plans**

- K15 how to develop plans to meet **special requirements** and contingencies
- K16 why you need to develop plans to meet **special requirements** and contingencies

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

- 1 work schedules
- 2 records of written notification(s) given to people affected

Performance Criteria 2

- 3 programmes and method statements showing agreement with people doing the work
- 4 records showing integration of operations

Performance Criteria 3

- 5 records of information obtained prior to the start of work

Performance Criteria 4

- 6 records of attendance
- 7 records of meetings with sub-contractors to discuss project or contract and attendance

Performance Criteria 5

- 8 schedule of resource acquisition and use that includes at least three of the following

- 8.1 people
- 8.2 plant, equipment or machinery
- 8.3 materials and components
- 8.4 sub-contractors
- 8.5 information

Performance Criteria 6

- 9 plan of site showing storage and waste removal areas
- 10 records of site maintenance activities

Performance Criteria 7

- 11 records or plans showing how disruption has been minimised for special requirements and contingencies
- 12 records of delegated tasks to other team members

**Scope/ range relating to knowledge and understanding**

Attendance

- 1 facilities
- 2 welfare facilities
- 3 work specifications
- 4 security and fencing
- 5 utilities
- 6 traffic management
- 7 access and egress
- 8 off loading and loading
- 9 dimensional control
- 10 storage

11	health and safety
Information	
12	survey reports
13	design
14	contractual
15	statutory consents
16	contractor's pre-planning information
17	health safety and environmental plan
18	method statements
19	programmes
20	about competence of people
People	
21	client, customer or their representative
22	contractors
23	sub-contractors
24	third parties
25	public services
26	emergency services
27	suppliers
28	people working on site
29	statutory authorities
30	near neighbours
31	residents
Programmes	
32	bar charts
33	network analysis
34	critical path
35	action lists
36	method statements
Project requirement	
37	time
38	quality
39	cost
40	health and safety
41	regulations
42	sustainability
43	defects liability period
Resources	
44	people
45	plant, equipment or machinery
46	materials and components
47	sub-contractors
48	information
Special requirements	
49	sequencing
50	elimination of waste
51	regulations
52	heritage status
53	occupiers
54	environmental considerations
55	vehicular access

56	health and safety
57	hazards
58	trespass
59	near neighbours
60	public access
61	site conditions
62	statutory regulations and limitations
63	Codes of Practice

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## COSVR731

### Ensure that work activities and resources meet project work requirements

#### Overview

This standard is about

- 1 interpreting information
- 2 analysing information to identify resource requirements
- 3 ensuring the work activities are planned to meet project work requirements
- 4 developing, preparing, monitoring and modifying programmes and schedules

#### Performance criteria

You must be able to:

- P1 identify major activities, determine the resources needed from the information available and prepare draft work programmes and schedules
- P2 evaluate alternative methods, resources and systems in order to select the best solution to meet project requirements
- P3 obtain clarification and advice where the resources needed are not available
- P4 analyse the activities against project requirements and the requirements of external factors
- P5 determine how long each activity will take, identify activities which influence each other and sequence them logically and realistically so that they make the best use of the resources available
- P6 ensure the production of detailed programmes and schedules of planned activities which are consistent with the complexity of the project
- P7 develop a system to monitor the works programmes and schedules, implement it and use the results to improve production and planning
- P8 identify alterations to the works programmes and schedules to ensure they will meet changed circumstances

#### Knowledge and understanding

You need to know and understand:

##### Performance Criteria 1

##### Draft work programmes and schedules

- K1 how to identify major activities
- K2 how to determine the **resources** needed from the **information** available
- K3 how to prepare draft **programmes and schedules**

K4 why you need to prepare draft **programmes and schedules**

**Performance Criteria 2**

**Evaluate alternative methods**

K5 how to evaluate alternative methods, **resources** and systems

K6 how to select the best solution to meet **project requirements**

**Performance Criteria 3**

**Obtain clarification and advice**

K7 how to obtain **clarification and advice** where the **resources** needed are not available

**Performance Criteria 4**

**Analyse activities**

K8 how to **analyse** activities against **project requirements**

K9 how to identify and consider possible **external factors**

K10 how to **analyse** activities against **external factors**

**Performance Criteria 5**

**Identify and sequence activities**

K11 how to calculate the duration of activities for **programmes and schedules**

K12 how to identify activities that influence each other

K13 how to make best use of **resources** by sequencing activities logically and realistically

**Performance Criteria 6**

**Production of programmes and schedules**

K14 how to ensure the production of detailed **programmes and schedules**

K15 how to ensure detailed **programmes and schedules** of planned activities are consistent with the complexity of the project

**Performance Criteria 7**

**Develop a monitoring system**

K16 how to develop a system to monitor works **programmes and schedules**

K17 how to implement the system to monitor works **programmes and schedules** and use the results to improve production and planning

**Performance Criteria 8**

**Identify alterations**

K18 how to identify alterations to the works **programmes and schedules**

K19 how to ensure alterations to works **programmes and schedules** will meet changed circumstances

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

1 lists of major activities identified

2 lists of resources determined from available information

3 records of draft work programmes and schedules

Performance Criteria 2

4 records showing the assessment of alternative methods, resources and systems

5 records of evaluations that identify the best solution

Performance Criteria 3

6 records of consultation with at least two of the following

6.1 the client, customer or their representative

6.2 consultants

6.3 project team partners

6.4 workforce

6.5 technical and trade literature

Performance Criteria 4

7 records of considerations given to project requirements

- 8 records of considerations given to at least four of the following external factors
  - 8.1 supply lead times
  - 8.2 contingencies
  - 8.3 special working conditions
  - 8.4 weather conditions
  - 8.5 statutory limitations
  - 8.6 site conditions
  - 8.7 environmental considerations
  - 8.8 customers
- Performance Criteria 5
- 9 records used to determine the duration of activities
- 10 records of activities that influence each other
- 11 schedule(s) showing activities sequence
- Performance Criteria 6
- 12 detailed programmes and schedules consisting of at least two of the following
  - 12.1 bar charts
  - 12.2 network analysis
  - 12.3 critical activities
  - 12.4 action lists
  - 12.5 resource schedules
- Performance Criteria 7
- 13 records of system(s) developed and implemented to monitor works programmes and schedules
- 14 records of analysed results making recommendations to improve production and planning
- Performance Criteria 8
- 15 records of circumstances imposing changes to works programmes and schedules showing calculated cost and time benefits
- 16 records showing decision-maker's endorsement of changes to the works programmes and schedules

**Scope/ range relating to knowledge and understanding**

**Analyse**

- 1 method study
  - 2 work study
  - 3 production analysis
- Clarification and advice
- 4 the client, customer or their representative
  - 5 consultants
  - 6 project team
  - 7 workforce
  - 8 technical and trade literature

**External factors**

- 9 other related programmes
- 10 supply lead times
- 11 contingencies
- 12 special working conditions
- 13 weather conditions
- 14 statutory limitations
- 15 site conditions
- 16 environmental considerations
- 17 customers

**Information**

- 18 survey reports

19	design
20	contractual
21	statutory consents
22	contractor's pre-planning information
23	conditions of contract
24	health, safety and environmental plans
25	risk assessments and method statements
26	programmes and schedules
27	sub-contractor arrangements and attendance
Programmes and schedules	
28	bar charts
29	network analysis
30	critical activities
31	action lists
32	resources schedules
Project requirements	
33	contract conditions
34	contract programme stipulations
35	statutory consent
36	building control notification
37	third-party obligations
38	health and safety requirements
Resources	
39	people
40	plant, equipment or machinery
41	materials and components
42	sub-contractors
43	information
44	work area and facilities
45	waste management
46	utility providers

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## COSVR732

### Identify, allocate and plan the deployment and use of plant, equipment or machinery

#### Overview

This standard is about

- 1 specifying the plant, equipment or machinery for operation requirements
- 2 planning for and ensuring the safe use of plant, equipment or machinery
- 3 providing opportunities for improvements in the use of plant, equipment or machinery to be suggested

#### Performance criteria

You must be able to:

- P1 ensure that the specification of the selected plant, equipment or machinery meets the needs of the project before deployment
- P2 ensure that the plant, equipment or machinery to be deployed complies with current legislation and will be set up, operated and maintained by competent people
- P3 implement a system to update the deployment and allocation of plant, equipment or machinery, and operators, as the project progresses or changes occur
- P4 identify hazards and assess risks arising from the use of plant, equipment or machinery and implement measures that protect people and the environment
- P5 ensure that plant, equipment or machinery operations are planned, appropriately supervised and conducted in accordance with current legislation
- P6 ensure the appropriate storage, servicing and maintenance of plant, equipment or machinery to meet operational and statutory requirements
- P7 identify learning needs for supervisors, operators and users of plant, equipment or machinery that will or could support the project or future projects
- P8 encourage those involved or affected by plant, equipment or machinery operations to suggest improvements in safe operations
- P9 ensure that plant, equipment or machinery which is no longer needed is returned or removed

### **Knowledge and understanding**

You need to know and understand:

#### **Performance Criteria 1**

##### **Specification**

- K1 how to ensure the specification of the **plant, equipment or machinery** meets the needs of the project before deployment
- K2 why you need to ensure the specification meets the needs of the project

#### **Performance Criteria 2**

##### **Compliance with current legislation**

- K3 how to ensure **plant, equipment or machinery** complies with current legislation
- K4 how to check the competence of those that will set up, operate or maintain **plant, equipment or machinery**
- K5 why you need to ensure compliance and check competence

#### **Performance Criteria 3**

##### **System implementation**

- K6 how to implement a system that will update the deployment and allocation of **plant, equipment or machinery** as the project progresses
- K7 how to implement a system to update the deployment and allocation of **plant, equipment or machinery** as changes occur
- K8 why you need a system to update the deployment and allocation of **plant, equipment or machinery**
- K9 how to recommend alternative **plant, equipment or machinery** to decision-makers

#### **Performance Criteria 4**

##### **Identify hazards and assess risks**

- K10 how to identify hazards and assess risks arising from the use of **plant, equipment or machinery**
- K11 how to implement **measures** that protect **people** and the environment

#### **Performance Criteria 5**

##### **Planning, supervision and use**

- K12 how to ensure **plant, equipment or machinery** operations are supervised and conducted in accordance with current legislation
- K13 how to write and approve method statements for the use of **plant, equipment or machinery**
- K14 how to maintain records for the competence of supervisors, operators and users
- K15 how to pass information about the use of **plant, equipment or machinery** to **people**

#### **Performance Criteria 6**



### **Storage, service and maintenance**

K16 how to ensure **plant, equipment or machinery** is stored, serviced and maintained in accordance with **operational and statutory requirements**

K17 why you need to ensure **plant, equipment or machinery** is stored, serviced and maintained in accordance with **operational and statutory requirements**

### **Performance Criteria 7**

#### **Learning needs**

K18 how to identify learning needs for supervisors, operators and users of **plant, equipment or machinery**

K19 how to compare identified learning needs with the needs of the project and future projects

K20 how to obtain information on ranges of **learning activities**

K21 how to arrange development for supervisors, operators and users of **plant, equipment or machinery**

### **Performance Criteria 8**

#### **Suggestions for improvements**

K22 how to encourage **those involved or affected** by **plant, equipment or machinery** operations to suggest improvements in safe operations

K23 why you need to encourage **those involved or affected** by **plant, equipment or machinery** operations to suggest improvements in safe operations

### **Performance Criteria 9**

#### **Return or remove**

K24 how to return or remove **plant, equipment or machinery** which is no longer needed

K25 why you need to return or remove **plant, equipment or machinery** which is no longer needed

### **Additional information**

#### **Scope/ range relating to performance criteria**

##### **Performance Criteria 1**

1 records of the specifications for plant, machinery or equipment considered prior to selection

##### **Performance Criteria 2**

2 records of pre-use checks, inspections, thorough examinations and tests conducted on plant, equipment or machinery

3 records of checks conducted on the competence of the people that will set up, operate and maintain plant, equipment or machinery

##### **Performance Criteria 3**

4 records of a system that tracks the deployment, allocation and use of plant, equipment or machinery

5 records of the recommendations on the use of alternative types of plant, equipment or machinery made to decision-makers

##### **Performance Criteria 4**

6 protection of the workforce, the general public, visitors and the environment by the application of information relating to at least three of the following

6.1 methods of work

6.2 risk assessment

6.3 safe use and storage of tools

6.4 safe use and storage of materials

6.5 traffic management

##### **Performance Criteria 5**

7 records of method statement(s) written or approved for plant, equipment or machinery operations

8 records of the roles and responsibilities allocated to plant, equipment or machinery supervisors, operators and users

9 records of the information passed to people

**Performance Criteria 6**

- 10 records of arrangements for storage, servicing and maintenance of plant, equipment or machinery
- 11 records of checks made for serviceability and maintenance of plant, equipment or machinery as appropriate to at least three of the following operational or statutory requirements
  - 11.1 health, safety and welfare of the workforce and others
  - 11.2 operational efficiency
  - 11.3 security of resources
  - 11.4 obligations to third parties
  - 11.5 regulatory authorities
  - 11.6 contractual commitments

**Performance Criteria 7**

- 12 records of learning needs identified, and information obtained, for at least two of the following learning activities
  - 12.1 formal
  - 12.2 informal
  - 12.3 coached
  - 12.4 mentored
  - 12.5 vocationally qualifying

**Performance Criteria 8**

- 13 records of opportunities, given to at least four of the following, to suggest improvements in safe operations
  - 13.1 supervisors
  - 13.2 operators
  - 13.3 users
  - 13.4 other members of the workforce
  - 13.5 members of the public
  - 13.6 occupiers
  - 13.7 neighbours
  - 13.8 visitors
  - 13.9 organisational representatives
  - 13.10 hire firm(s), companies or agents

**Performance Criteria 9**

- 14 records of plant, equipment or machinery returned or removed, or specified to be removed

**Scope/ range relating to knowledge and understanding**

## Learning activities

- 1 formal
- 2 informal
- 3 coached
- 4 mentored
- 5 vocationally qualifying

## Operational and statutory requirements

- 6 health, safety and welfare of the workforce and others
- 7 operational efficiency
- 8 security of resources
- 9 obligations to third parties
- 10 regulatory authorities
- 11 contractual commitments

## People

- 12 workforce
- 13 other personnel on site

- 14 members of the public
- 15 occupiers
- 16 site visitors
- 17 people affected by on-site operations
- Plant, equipment or machinery
- 18 static
- 19 mobile
- 20 accessories
- 21 consumables
- 22 health and safety equipment
- 23 specialised hand tools
- 24 standard plant, equipment or machinery
- 25 non-standard plant, equipment or machinery
- Measures
- 26 methods of work
- 27 risk assessment
- 28 safe use of tools
- 29 safe use of materials
- 30 traffic management
- 31 emergency plans
- Those involved or affected
- 32 supervisors
- 33 operators
- 34 users
- 35 other members of the workforce
- 36 members of the public
- 37 occupiers
- 38 neighbours
- 39 visitors
- 40 organisational representatives
- 41 hire firm(s), companies or agents

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## **COSVR733**

### **Organise, control and monitor supplies of materials**

#### **Overview**

This standard is about

- 1 managing the supply of materials for the project
- 2 evaluating the performance of the supply chain
- 3 making improvements in the acquisition, storage and use of materials for the project

#### **Performance criteria**

You must be able to:

- P1 analyse operational plans and quantities to assess what supplies of materials will be required and calculate and develop a delivery schedule
- P2 identify opportunities to standardise supplies of materials
- P3 check with the delivery schedule and users to confirm what supplies of materials are needed and ensure appropriate orders are prepared
- P4 conduct negotiations and meetings with suppliers and users so that goodwill and trust is maintained and agreed supply requirements are ensured
- P5 implement systems, to monitor the delivery schedule and the performance of suppliers, which will identify supply improvements
- P6 identify problems with supply, record them and take action to resolve them
- P7 identify changes likely to result in over or under supply and modify the delivery schedule to minimise disruption to the programme

### **Knowledge and understanding**

You need to know and understand:

#### **Performance Criteria 1**

##### **Delivery schedule**

- K1 how to analyse operational plans and quantities to assess what **materials** will be required
- K2 how to calculate delivery and lead times for supplies of **materials**
- K3 why it is necessary to analyse operational plans and quantities to assess what
- K4 **materials** will be required and calculate delivery and lead times
- K5 how to develop a delivery schedule
- K6 why delivery schedules and traffic management are required

#### **Performance Criteria 2**

##### **Standardise supplies**

- K7 how to identify opportunities for standardisation of supplies of **materials**
- K8 how standardisation of **materials** can assist a project
- K9 why opportunities for standardisation should be considered

#### **Performance Criteria 3**

##### **Prepare orders**

- K10 how to check with the delivery schedule and **users** what **materials** are needed
- K11 how to ensure appropriate orders are prepared
- K12 why you need to make checks and ensure appropriate orders are prepared

#### **Performance Criteria 4**

##### **Conduct negotiations and meetings**

- K13 how to conduct negotiations and meetings with suppliers and **users** to ensure **supply requirements** are agreed
- K14 how to maintain **goodwill and trust**
- K15 how to conduct formal and informal meetings with suppliers and **users**

#### **Performance Criteria 5**

##### **Implement systems**

- K16 how to implement a system, that covers all necessary **factors** to monitor the delivery schedule
- K17 how to implement a system to monitor the performance of suppliers against the agreed **supply requirements**
- K18 how to record any identified improvements
- K19 why you need to monitor the delivery schedule and the performance of suppliers

#### **Performance Criteria 6**

##### **Identify problems**

- K20 how to identify problems with supply and **supply requirements**, record them and take action to resolve them

K21 why you need to identify problems with supply and **supply requirements**, record them and take action to resolve them

**Performance Criteria 7**

**Identify changes**

K22 how to identify changes likely to result in over or under supply

K23 how to modify the delivery schedule to minimise disruption to the programme by ensuring supplies of **materials** are available

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

1 records of analysis conducted on operational plans and quantities

2 calculations for delivery and lead times

3 records of delivery schedule and traffic management

Performance Criteria 2

4 records of standardisation to improve at least one of the following

4.1 economy of usage

4.2 cost

4.3 environmental impact

4.4 sustainability

Performance Criteria 3

5 records of checks with the delivery schedule and users

6 records of ensuring appropriate orders are prepared

Performance Criteria 4

7 records of formal and informal contacts with suppliers and users

8 records of agreed supply requirements

Performance Criteria 5

9 records of the system adopted to monitor the delivery schedule

10 records of the system adopted to monitor the performance of suppliers

11 records of at least three of the following factors used in materials control

11.1 quality

11.2 quantity

11.3 payment to suppliers

11.4 approval by client, customer or their representative

11.5 programming

12 records of any identified improvements

Performance Criteria 6

13 records of problems with supply and the action taken

Performance Criteria 7

14 records of identified changes to

14.1 project requirements

14.2 supply performance

15 records of modifications made to the delivery schedule

**Scope/ range relating to knowledge and understanding**

Factors

1 quality

2 quantity

3 payment to suppliers

4 approval by client, customer or their representative

5 programming

- 6 cost
- Goodwill and trust
- 7 keeping promises and undertakings
- 8 honest relationships
- 9 constructive relationships
- Materials
- 10 raw materials
- 11 manufactured materials
- 12 components
- 13 prefabricated systems
- Supply requirements
- 14 elimination or reduction of waste
- 15 recycling
- 16 price
- 17 quantity
- 18 quality
- 19 availability
- 20 lead time
- 21 life expectancy or deterioration
- 22 maintenance
- 23 storage and handling facilities
- 24 environmental issues
- 25 sustainability issues
- 26 health and safety issues
- 27 transportation
- 28 damage
- 29 loss or theft
- 30 after sales service
- 31 payment terms
- 32 cash flow
- Users
- 33 principal contractors
- 34 sub-contractors
- 35 direct labour
- 36 the client, customer or their representative

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## **COSVR734**

### **Establish and monitor communication systems and organisational procedures**

#### **Overview**

This standard is about

- 1 establishing communication systems and procedures that support the organisation of the project
- 2 establishing communication systems and managing meetings

3 monitoring communication systems and procedures

**Performance criteria**

You must be able to:

- P1 identify organisational and communication needs for the project
- P2 establish systems and procedures which are compatible with those used by the client, customer or their representative and the supply chain
- P3 produce project information and circulate it to people and organisations that have an interest
- P4 establish methods of communicating information between people and organisations that have an interest
- P5 monitor the communication and organisational methods for effectiveness, identify and investigate breakdowns and take action to restore effective communication and organisation
- P6 use information received to make improvements to the organisation of the project and communication systems
- P7 prepare for and manage meetings to meet objectives
- P8 complete actions following the meeting to meet objectives

**Knowledge and understanding**

You need to know and understand:

**Performance Criteria 1**

**Organisational and communication systems**

K1 how to identify **organisational and communication systems** for a project

**Performance Criteria 2**

**Develop and introduce systems**

K2 how to establish and introduce **systems** which are compatible with those used by the client, customer or their representative and supply chain

K3 how to establish **communication** and organisational **systems** that will enable clear effective management, administrative and operational controls

K4 why you need **communication** and organisational **systems** that will be compatible and provide control

**Performance Criteria 3**

**Produce project information**

K5 how to produce accurate and unambiguous information about people's **roles and responsibilities**, the project and the organisational structure

K6 how to circulate information about people's **roles and responsibilities**, and the project and organisational structure to **people and organisations** that have an interest

K7 why information on people's **roles and responsibilities** is important to **people and organisations** that have an interest

**Performance Criteria 4**

**Methods of communication**

K8 how to establish **methods of communicating**, reporting, recording and retrieving information between **people and organisations** who have an interest which are appropriate to the needs of the project

K9 why **methods of communicating**, reporting, recording and retrieving information between interested **people and organisations** should be established

**Performance Criteria 5**

**Monitor communication and organisational methods**

K10 how to monitor the **methods of communicating**, reporting, recording and retrieving information

K11 how to identify breakdowns in **communication** and organisational **systems**

K12 how to investigate breakdowns in **communication** and organisational **systems**

K13 why breakdowns in **communication** and organisational **systems** need to be investigated

K14 the actions that can be taken to restore effective **communication** and organisational **systems**

**Performance Criteria 6**

**Make improvements**

- K15 how to identify possible improvements to **methods of communicating** and organisational **systems**  
K16 why you should try to improve established **systems**

**Performance Criteria 7****Manage meetings**

- K17 how to manage **meetings** to ensure objectives are met

**Performance Criteria 8****Actions following meetings**

- K18 how to complete actions following **meetings** to ensure objectives are met  
K19 how to evaluate the effectiveness of **meetings**

**Additional information****Scope/ range relating to performance criteria**

## Performance Criteria 1

- 1 records of identified needs showing consideration of at least four of the following organisational and communication systems
- 1.1 roles and responsibilities
  - 1.2 site or head office interface
  - 1.3 project administration
  - 1.4 health, safety, welfare and environmental needs
  - 1.5 project team interfaces
  - 1.6 integration of data
  - 1.7 sharing of project data
  - 1.8 team working
  - 1.9 the client, customer or their representative

## Performance Criteria 2

- 2 records of the systems established showing compatibility with the client, customer or their representative and the supply chains systems
- 3 records that show clear and effective management, administrative and operational control

## Performance Criteria 3

- 4 records of at least one of the following circulated to people that have an interest
- 4.1 information on people's roles
  - 4.2 details on people's responsibilities
  - 4.3 details of the organisational structure

## Performance Criteria 4

- 5 records of establishing at least three of the following methods of communication for reporting, recording and retrieving information
- 5.1 oral
  - 5.2 written
  - 5.3 graphic
  - 5.4 electronic

## Performance Criteria 5

- 6 records of the system used to monitor the methods of communication and organisation for effectiveness
- 7 records of communication and organisation breakdowns
- 8 records of the action taken to restore effective communication and organisation

## Performance Criteria 6

- 9 records of possible improvements identified for the organisation of the project
- 10 records of possible improvements identified for the project communication system

## Performance Criteria 7

- 11 records of meetings with colleagues and stakeholders that include the following principles



- 11.1 prepare an agenda, arrange venue and contact attendees in good time
- 11.2 agreement of the objectives to be achieved during the meeting
- 11.3 acknowledgement of constructive contributions from the attendees during the meeting
- 11.4 encouraging a balanced and informed discussion on the agenda items
- 11.5 run the meeting on time
- 11.6 agreement that objectives have been achieved
- 11.7 agreement of actions and responsibilities following the meeting

Performance Criteria 8

- 12 records of post-meeting activities including
  - 12.1 minutes of the meeting drafted and circulated
  - 12.2 distribution of necessary information to relevant people
  - 12.3 monitoring of the completion of the agreed post-meeting actions

**Scope/ range relating to knowledge and understanding**

Communication

- 1 people
- 2 systems
- 3 media

Meetings

- 4 formal group
- 5 informal group
- 6 formal one-to-one
- 7 informal one-to-one
- 8 face-to-face
- 9 remote

Methods of communicating

- 10 oral
- 11 written
- 12 graphic
- 13 electronic

Organisational and communication systems

- 14 roles and responsibilities
- 15 site or head office interface
- 16 contract or project administration
- 17 health, safety, welfare and environmental needs
- 18 project team interfaces
- 19 integration of data
- 20 team working
- 21 client, customer or their representative

People and organisations

- 22 non-English language speakers
- 23 clients, customer or their representative
- 24 consultants
- 25 contractors
- 26 sub-contractors
- 27 third parties
- 28 public utility organisations
- 29 emergency services
- 30 people working on site
- 31 statutory authorities

Roles and responsibilities

32	individual job descriptions
33	organisation charts
34	contractual arrangements
35	team schedules
Systems	
36	manual
37	electronic

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## COSVR735

### Control project progress against agreed quality standards

#### Overview

This standard is about

- 1 implementing specified operational quality assurance
- 2 implementing control processes and procedures
- 3 making improvements as a result of monitoring and collecting feedback from others

#### Performance criteria

You must be able to:

- P1 identify and interpret quality standards from available information, and pass them to people responsible for their implementation before they start work
- P2 specify clearly and unambiguously the responsibilities which individuals have for maintaining quality standards
- P3 set up systems to inspect and control the quality of the work
- P4 regularly check that work conforms to the design requirements and the specified quality standards
- P5 identify work which fails to meet the requirements and specified quality standards and implement corrective action
- P6 inform decision-makers about significant variations of quality standards and recommend solutions they need to make and actions they need to take
- P7 identify conflicts between quality standards and refer them to decision-makers for resolution
- P8 identify improvements from feedback received and recommend them to decision-makers
- P9 agree amendments to the project quality standards and record them accurately

#### Knowledge and understanding

You need to know and understand:

##### Performance Criteria 1

##### Identify and interpret quality standards

- K1 how to identify and interpret **quality standards**
- K2 how to pass **quality standards** on to **people responsible** for implementing them before starting work on a contract

##### Performance Criteria 2

##### Specify responsibilities

- K3 how to specify the responsibilities which individuals have for maintaining **quality standards**

- K4 why you need to specify the responsibilities which individuals have for maintaining **quality standards**
- K5 how to produce a site quality plan or procedure in accordance with the **quality standards**
- Performance Criteria 3**
- Set up quality control systems**
- K6 how to set up **systems** for inspecting and controlling the quality of **work** and record the outcomes
- K7 why you need to set up **systems** for inspecting and controlling the quality of **work** and record the outcomes
- Performance Criteria 4**
- Check standards of work**
- K8 how to check that **work** conforms to design requirements and the specified **quality standards**
- Performance Criteria 5**
- Identify sub-standard work**
- K9 how to identify and record **work** that fails to meet the requirements and specified **quality standards**
- K10 how to implement corrective action where **work** fails to meet the requirements and specified **quality standards**
- Performance Criteria 6**
- Inform of variations**
- K11 how to inform decision-makers about significant variations in **quality standards** that may affect programme, safety implications and the finish to the product
- K12 how to recommend solutions which decision-makers need to make about significant variations in **quality standards** and advice on the actions they need to take
- K13 how to recommend improvements to decision-makers
- K14 why you need to recommend solutions and improvements
- Performance Criteria 7**
- Conflicts**
- K15 how to identify conflicts between **quality standards**
- K16 how to refer conflicting **quality standards** to decision-makers for resolution
- Performance Criteria 8**
- Identify improvements from feedback**
- K17 how to identify improvements in **quality standards** from feedback
- K18 how to recommend improvements to decision-makers
- Performance Criteria 9**
- Agree amendments**
- K19 how to agree amendments to the project **quality standards** with decision-makers
- K20 how to record amendments to project **quality standards** accurately

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

1 records of providing quality requirements to people prior to work starting

Performance Criteria 2

2 produce a site quality plan or procedure showing individual responsibilities in accordance with quality standards

Performance Criteria 3

3 records of the system adopted to inspect ongoing and completed work

Performance Criteria 4

4 records showing inspections of ongoing and completed work.

5 records showing acceptance and rejection criteria

Performance Criteria 5

6 records of identified sub-standard work

- 7 records of the corrective action taken
- Performance Criteria 6
- 8 records of information about significant variations of quality standards and suggested actions passed to decision-makers for the following
  - 8.1 quality standards
  - 8.2 effects of quality on the programme
  - 8.3 effects of quality on safety
  - 8.4 effects of quality on finished product
- Performance Criteria 7
- 9 records of conflicts between quality standards passed to the decision-makers for resolution
- Performance Criteria 8
- 10 records of feedback analysis and recommendations made to decision-makers
- Performance Criteria 9
- 11 records of agreed changes to the project quality standards

**Scope/ range relating to knowledge and understanding**

People responsible

- 1 the client
- 2 contractors
- 3 consultants
- 4 sub-contractors
- 5 suppliers
- 6 workforce

Quality standards

- 7 current legislation
- 8 project specifications
- 9 British Standards
- 10 International standards
- 11 Codes of Practice
- 12 organisation standards
- 13 trade advisory guidance and best practice
- 14 benchmarking

Systems

- 15 visual inspection
- 16 comparison with design requirements
- 17 comparison with standard documentation
- 18 checking manufacturer's documentation
- 19 checking delivery notes
- 20 sampling and mock ups
- 21 testing
- 22 site inspection reports
- 23 contractor reports
- 24 site meetings

Work

- 25 materials and components, and their use
- 26 methods of construction



Relevant occupations: Production Managers and Directors in Construction  
Suite: Construction Site Management; Senior Crafts  
Key words: Progress; Quality; Standards; Feedback; Improvements

## COSVR736

### Establish dimensional control criteria

#### Overview

This standard is about

- 1 ensuring the project dimensional control information is in accordance with specified accuracy criteria
- 2 ensuring project dimensional controls are regularly and appropriately checked for operational and post-completion requirements

#### Performance criteria

You must be able to:

- P1 obtain relevant survey information, check that it is up to date and accurate, and resolve any problems
- P2 correlate and interpret information on project work which is relevant to dimensional control
- P3 ensure that variations are identified between the specified and the actual site dimensions, record them accurately and circulate them to decision-makers
- P4 ensure that reference points are suitably placed, accurate, clearly identified and protected from movement or removal
- P5 ensure a dimensional control monitoring system, which will make sure the specified accuracy criteria will be met, is established
- P6 ensure that measuring and recording equipment is maintained to meet the specified accuracy criteria
- P7 record any dimensional control information which may be of later use, and store it securely

#### Knowledge and understanding

You need to know and understand:

##### Performance Criteria 1

##### Obtain survey information

- K1 how to obtain relevant survey information
- K2 how to check that survey information is up to date and accurate
- K3 how to resolve **problems** with survey information
- K4 why you need to resolve **problems** with survey information

##### Performance Criteria 2

##### Correlate and interpret information

- K5 how to correlate information on project work which is relevant to **dimensional control information**
- K6 how to interpret information on project work which is relevant to **dimensional control information**
- K7 why you need to correlate and interpret information on project work which is relevant to

##### dimensional control information

##### Performance Criteria 3

##### Identify variations

- K8 how to identify **variations** between the specified and the actual site dimensions
- K9 how to record **variations** between the specified and the actual site dimensions

##### Performance Criteria 4

##### Set reference points

- K10 how to set accurate and clearly identifiable reference points from set **reference points** that are protected from movement and removal

##### Performance Criteria 5

##### Develop a monitoring system

- K11 how to develop a **monitoring system**
- K12 why you need to develop a **monitoring system**

**Performance Criteria 6**

**Maintain measuring and recording equipment**

- K13 how to maintain **measuring and recording equipment**
- K14 why specific **measuring and recording equipment** should be selected

**Performance Criteria 7**

**Record information**

- K15 how to record and store **dimensional control information** which may be of later use

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

- 1 collect, collate and analyse survey information and resolve at least two of the following problems
- 1.2 unclear information
- 1.3 missing information
- 1.4 inconsistencies between documents
- 1.5 errors

Performance Criteria 2

- 2 records showing that the appropriate dimensional control information, including calculations, for the project has been correlated and interpreted

Performance Criteria 3

- 3 records showing that variations have been circulated to the decision-makers

Performance Criteria 4

- 4 records of reference points set, showing that they are suitably placed, accurate, clearly identified and protected

Performance Criteria 5

- 5 records of the monitoring system used

Performance Criteria 6

- 6 records showing checks on the use and maintenance of measuring and recording equipment

Performance Criteria 7

- 7 records showing the secure storage of the following information
- 7.1 dimensions
- 7.2 locations
- 7.3 levels
- 7.4 deviations

**Scope/ range relating to knowledge and understanding**

Dimensional control information

- 1 lines
- 2 levels
- 3 angles
- 4 distances
- 5 curves
- 6 positions
- 7 setting out points

Measuring and recording equipment

- 8 mechanical
- 9 optical
- 10 electronic

Monitoring system

- 11 graphical
- 12 measured
- 13 instrumental
- Problems
- 14 unclear information
- 15 missing information
- 16 inconsistencies between documents
- 17 errors
- Reference points
- 18 ground stations
- 19 base lines
- 20 benchmarks
- 21 elevated target positions
- 22 global positioning systems (GPS)
- Variations
- 23 boundaries
- 24 levels
- 25 locations

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## **COSVR737**

### **Control project progress against agreed programmes**

#### **Overview**

This standard is about

- 1 controlling progress processes and procedures
- 2 making improvements as a result of monitoring
- 3 making improvements as a result of feedback from others

#### **Performance criteria**

You must be able to:

- P1 develop and implement systems to monitor and record the progress of the project against the agreed programme(s)
- P2 collect progress information regularly and summarise it for relevant people
- P3 identify inadequate or inappropriate resources, inform relevant people, and specify and obtain alternative resources
- P4 identify and quantify any deviations from planned progress which have occurred, or which may occur, that could disrupt the programme
- P5 investigate the circumstances of any deviations thoroughly and agree and implement appropriate corrective action
- P6 recommend options to relevant people that aim to maintain or improve cost and progress
- P7 inform relevant people about changes to the operational programme, resource needs and suggest the decisions and actions that need to be taken to maintain progress

P8 identify improvements to progress from feedback received and recommend them to relevant people

**Knowledge and understanding**

You need to know and understand:

**Performance Criteria 1**

**Develop and implement systems**

K1 how to develop **systems to monitor and record** the progress of the project against agreed **programme(s)**

K2 why you need to develop **systems to monitor and record** the progress of the project against the agreed **programme(s)**

**Performance Criteria 2**

**Collect information**

K3 how to collect progress information regularly

K4 how to accurately summarise progress information for **relevant people**

**Performance Criteria 3**

**Identify inadequate or inappropriate resources**

K5 how to identify inadequate and inappropriate resources

K6 how to inform **relevant people** about inadequate and inappropriate resources

K7 how to inform **relevant people**, and specify, and obtain alternative **resources**

**Performance Criteria 4**

**Identify and quantify deviations**

K8 how to identify **deviations** from planned progress which has occurred and which may occur

K9 how to identify **deviations** from the planned progress which may disrupt the **programme**

K10 how to **quantify deviations** from planned progress

K11 why you need to identify and **quantify deviations** from planned progress

**Performance Criteria 5**

**Investigate deviations**

K12 how to investigate the circumstances of **deviations** from planned progress

K13 how to agree **corrective action** for **deviations** from planned progress with **relevant people**

K14 how to implement agreed **corrective action** for **deviations** from planned progress

K15 why you need to agree **corrective action(s)**

**Performance Criteria 6**

**Recommend options**

K16 how to recommend options to **relevant people** that will minimise increases in cost and time

K17 how to recommend options that will help the project progress

K18 why you need to make recommendations that will minimise increases in cost and time and help the project progress

**Performance Criteria 7**

**Inform relevant people**

K19 how to regularly inform **relevant people** about changes to operational **programme(s)** and demands on **resources**

K20 how to suggest the decisions and actions that need to be taken to maintain progress

**Performance Criteria 8**

**Identify improvements from feedback**

K21 how to identify improvements to progress from feedback received

K22 how to recommend improvements in progress to **relevant people**

K23 why you need to recommend improvements in progress to **relevant people**

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1



- 1 written, graphical and electronic records of actual work against programmed work
  - 2 records showing the use of at least four of the following systems to monitor and record the progress of the project against the agreed programme(s)
    - 2.1 visual inspection(s)
    - 2.2 resource records
    - 2.3 site inspection reports
    - 2.4 contractor's report
    - 2.5 certified payments
    - 2.6 site meetings
    - 2.7 organisational procedures
    - 2.8 management reports
    - 2.9 benchmarks
    - 2.10 comparison with project requirements
- Performance Criteria 2
- 3 records of progress information collected and summarised for relevant people
- Performance Criteria 3
- 4 records showing the identification of inadequate or inappropriate resources
  - 5 details of information regarding inadequate and inappropriate resources passed to relevant people
  - 6 records of alternative resources obtained
- Performance Criteria 4
- 7 records showing identified deviations from planned progress that have occurred or which may occur
  - 8 details that quantify current, or predicted, deviations from planned progress that could disrupt the agreed programme
- Performance Criteria 5
- 9 records of investigations completed to identify the circumstances of any deviations
  - 10 details of the agreed and implemented corrective action
- Performance Criteria 6
- 11 details of the recommended options passed to relevant people
- Performance Criteria 7
- 12 records of progress and change information provided to relevant people
  - 13 details of suggested decisions and actions that need to be taken to maintain progress
- Performance Criteria 8
- 14 records of improvements identified from feedback
  - 15 a record of recommendations made to relevant people

**Scope/ range relating to knowledge and understanding**

**Corrective action**

- 1 restore progress in accordance with agreed programme
- 2 agree new completion dates
- 3 initiate contract claim
- 4 secure additional resources
- 5 altering planned work

**Deviations**

- 6 resources shortages
- 7 design problems
- 8 design constraints
- 9 industrial disputes
- 10 lack of essential construction information
- 11 construction errors
- 12 inclement weather
- 13 physical site constraints

- 14 legal
- Programme(s)**
- 15 bar charts
- 16 network analysis
- 17 critical path
- 18 line balance
- 19 action lists
- 20 method statements
- 21 project expenditure forecasts
- Quantify
- 22 method study
- 23 work study
- 24 production analysis
- Relevant people
- 25 the client, customer or their representative
- 26 contractors
- 27 consultants
- 28 suppliers
- Resources
- 29 people
- 30 plant equipment or machinery
- 31 materials and components
- 32 finance
- 33 time
- 34 specialist services
- 35 public utility services
- 36 information
- Systems to monitor and record
- 37 visual inspection
- 38 resources records
- 39 site inspection reports
- 40 contractor's reports
- 41 certified payments
- 42 written, graphical and electronic records of actual work against programmed work
- 43 site meetings
- 44 organisational procedures
- 45 management reports
- 46 benchmarks
- 47 comparison with project requirements

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## **COSVR738**

**Control project quantities and costs**

**Overview**

This standard is about

- 1 implementing quantity and cost control systems
- 2 identifying variances in quantities and costs
- 3 recommending cost savings in the execution of projects

**Performance criteria**

You must be able to:

- P1 implement appropriate quantities and cost control systems which are able to provide early warning of problems
- P2 ensure that quantity and cost data is regularly collected, record it and pass it on to the appropriate people responsible in time for them to be able to use it
- P3 ensure that work values, quantities and cost data are prepared
- P4 ensure that accurate quantities and cost data are prepared and presented in a format which will help the people responsible to make decisions
- P5 ensure that variations and trends in quantities and cost data are identified, quantified and costed
- P6 ensure that any variations are investigated and agree and implement appropriate corrective action with people responsible
- P7 identify opportunities for cost savings and recommend them to people responsible

**Knowledge and understanding**

You need to know and understand:

**Performance Criteria 1**

**Implement systems**

- K1 how to implement appropriate **project quantities and cost control systems** which will provide early warnings of problems

**Performance Criteria 2**

**Collect quantity and cost data**

- K2 how to ensure that **quantities and cost data** is collected and recorded for the project and **resources** used
- K3 how to ensure data passed on to the **people responsible** in time for them to use it

**Performance Criteria 3**

**Prepare data**

- K4 how to ensure the correct work values, **quantities and cost data** are prepared

**Performance Criteria 4**

**Present data**

- K5 how to ensure that accurate **quantities and cost data** is presented in a format which will help **people responsible** to make decisions

**Performance Criteria 5**

**Identify variations and trends**

- K6 how to ensure variations and trends in **quantities and cost data** are identified, quantified and costed
- K7 why you need to quantify the cost trends in **quantities and cost data**

**Performance Criteria 6**

**Investigate variations and implement corrective action**

- K8 how to ensure variations in cost data are investigated
- K9 why you need to investigate variations in cost data
- K10 how to agree and implement appropriate **corrective action** with **people responsible** which will restore costs and expenditure to budget
- K11 why you need to agree and implement appropriate **corrective action** with **people responsible** in order to restore costs and expenditure to budget

## Performance Criteria 7

### Identify cost savings

- K12 how to identify **opportunities for cost savings**
- K13 how to develop and recommend to **people responsible** systems and processes that will assist in the identification of **opportunities for cost savings**
- K14 why you need to develop and recommend to **people responsible** systems and processes to identify **opportunities for cost savings**
- K15 how to recommend **opportunities for cost savings** to **people responsible**

### Additional information

#### Scope/ range relating to performance criteria

##### Performance Criteria 1

- 1 records of implementing at least one of the following quantities and cost control systems
- 1.1 contractual procedures and meetings
- 1.2 operational procedures and meetings
- 1.3 electronic records

##### Performance Criteria 2

- 2 data regularly passed on to people responsible for quantities and cost of at least four of the following resources
- 2.1 people
- 2.2 plant, equipment or machinery
- 2.3 materials and components
- 2.4 sub-contractors
- 2.5 information
- 2.6 work area and facilities
- 2.7 waste management
- 2.8 utility providers
- 2.9 records of valuations of work completed

##### Performance Criteria 3

- 3 records of cost calculations
- 4 records of quantities

##### Performance Criteria 4

- 5 records of quantity and cost information presented to the people responsible
- 6 records of decisions on quantities and costs agreed with people responsible

##### Performance Criteria 5

- 7 records of variations and trends identified
- 8 records of any costs created by the identified variations or trends

##### Performance Criteria 6

- 9 records of investigations of variations and the implementation of at least one of the following corrective actions taken
- 9.1 restore progress in accordance with agreed programme
- 9.2 agree new completion dates
- 9.3 initiate contract claim
- 9.4 secure additional resources
- 9.5 alter planned work

##### Performance Criteria 7

- 10 records of at least two of the following opportunities for cost savings
- 10.1 waste reduction
- 10.2 resource management and logistics
- 10.3 applications of new technologies and materials
- 10.4 energy and utility management

- 10.5 recyclable and recoverable materials
- 10.6 alternative sources and types of materials
- 10.7 variations in quality
- 10.8 standardisation
- 10.9 revenue generation

**Scope/ range relating to knowledge and understanding**

Corrective action

- 1 restore progress in accordance with agreed programme
- 2 agree new completion dates
- 3 initiate contract claim
- 4 secure additional resources
- 5 altering planned work

Opportunities for cost savings

- 6 waste reduction
- 7 resource management and logistics
- 8 applications of new technologies and materials
- 9 energy and utility management
- 10 recyclable and recoverable materials
- 11 alternative sources and types of materials
- 12 variations in quality
- 13 standardisation
- 14 revenue generation

People responsible

- 15 the client, customer or their representative
- 16 contractors
- 17 consultants
- 18 sub-contractors
- 19 suppliers
- 20 workforce
- 21 internal management

Project quantities and cost control systems

- 22 contractual procedures and meetings
- 23 operational procedures and meetings
- 24 electronic recording

Quantities and cost data

- 25 materials
- 26 plant
- 27 people
- 28 sub-contractors
- 29 day works
- 30 periodic variations
- 31 retention sums
- 32 forecasts of expenditures
- 33 performance information
- 34 project programme and progress

Resources

- 35 people
- 36 plant equipment or machinery
- 37 materials and components
- 38 sub-contractors

- 39 information
- 40 work area and facilities
- 41 waste management
- 42 utility providers
- 43 records of valuations of work completed

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## COSVR739

### Evaluate feedback information and recommend improvements

#### Overview

This standard is about

- 1 obtaining feedback information from operational activities
- 2 investigating and evaluating feedback information
- 3 recommending improvements

#### Performance criteria

You must be able to:

- P1 promote the value of making improvements from feedback and encourage the collection of feedback
- P2 ensure feedback information from relevant methods or sources is obtained, investigated and assessed
- P3 recommend improvements from feedback received and justify the recommendations to relevant people
- P4 summarise changes and improvements from feedback which have been agreed and promote them for adoption and use

#### Knowledge and understanding

You need to know and understand:

##### Performance Criteria 1

##### Promote and encourage

- K1 how to promote the value of making improvements from feedback received from **information sources**
- K2 how to encourage the collection of feedback from **information sources**
- K3 why you need to encourage the collection of feedback from **information sources**

##### Performance Criteria 2

##### Obtain, investigate and assess feedback

- K4 how to ensure feedback from **information sources** is obtained using various **methods and other sources**
- K5 how to investigate and assess feedback from **information sources** using various **methods and other sources**
- K6 why you need to investigate and assess feedback from **information sources**

##### Performance Criteria 3

##### Recommend improvements

- K7 how to recommend **improvements from feedback** received
- K8 how to justify recommendations for **improvements from feedback** to decision-makers

K9 why you need to make and justify recommendations for **improvements from feedback** to decision-makers

**Performance Criteria 4**

**Summarise and promote improvements**

K10 how to summarise changes and **improvements from feedback** received

K11 how to promote the adoption of changes and **improvements from feedback**

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

1 records of encouragement given to promote the collection of feedback from at least six of the following information sources

- 1.1 approved suppliers
- 1.2 approved sub-contractors
- 1.3 contract documentation
- 1.4 project documentation
- 1.5 organisational documentation
- 1.6 standard details
- 1.7 specifications
- 1.8 product information
- 1.9 government and statutory publications
- 1.10 research and advisory data
- 1.11 periodicals and abstracts

Performance Criteria 2

2 records of feedback collected and evaluated from at least three of the following methods or sources

- 2.1 project records and documentation
- 2.2 site inspections
- 2.3 scientific research and data
- 2.4 studies of performance in use
- 2.5 meetings
- 2.6 questionnaires
- 2.7 reports

Performance Criteria 3

3 records of improvements identified by the evaluation of feedback that have been recommended to relevant people

Performance Criteria 4

4 records of action taken to promote the adoption and use of improvements identified from feedback

**Scope/ range relating to knowledge and understanding**

Information sources

- 1 approved suppliers
- 2 approved sub-contractors
- 3 contract documentation
- 4 project documentation
- 5 organisational documentation
- 6 standard details
- 7 specifications
- 8 product information
- 9 government and statutory publications
- 10 research and advisory data
- 11 periodicals and abstracts

Improvements from feedback

- 12 management procedures
- 13 client, design and production team performance
- 14 working arrangements
- 15 formal and informal communications
- 16 quality control
- 17 design and technical appraisal
- 18 performance in use
- 19 benchmarking
- 20 post-project review

Methods and other sources

- 21 project records and documentation
- 22 site inspections
- 23 scientific research and data
- 24 studies of performance in use
- 25 meetings
- 26 questionnaires
- 27 reports

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 Key words: Improvements; Feedback; Recommending

**COSVR740**

**Manage your personal development**

**Overview**

**This standard is about**

- 1 improving the development of yourself through personal planning, action and review
- 2 measuring and recording achievement against identified standards

**Performance criteria**

You must be able to:

- P1 define your personal aims and objectives for undertaking development
- P2 contact sources of support and guidance to identify recognised standards for you to manage your personal development
- P3 analyse the current level of your knowledge and performance and develop a profile of your development needs
- P4 prepare a development plan for achieving identified development needs
- P5 undertake development activities aimed at achieving identified development needs, reviewing and recording progress and the effectiveness of the activities
- P6 measure achievement of identified development needs and record evidence of knowledge and competence gained against recognised standards
- P7 review the cycle of personal development aims and objectives to revise and update aims and objectives to suit changing circumstances

**Knowledge and understanding**



You need to know and understand:

### **Performance Criteria 1**

#### **Aims and objectives**

- K1 how to define your **aims and objectives** for undertaking development
- K2 why you need to define **aims and objectives**

### **Performance Criteria 2**

#### **Support and guidance**

- K3 how to contact **sources of support and guidance** to identify **recognised standards**
- K4 why you need to identify **recognised standards** for you to undertake personal development

### **Performance Criteria 3**

#### **Analyse performance**

- K5 how to analyse your current level of knowledge and performance against selected and **recognised standards**
- K6 how to develop a profile of your **personal development** needs
- K7 why you need to develop a profile of your **personal development** needs

### **Performance Criteria 4**

#### **Development plan**

- K8 how to prepare a **personal development** plan
- K9 why you need to prepare a **personal development** plan

### **Performance Criteria 5**

#### **Development activities**

- K10 how to undertake development activities to achieve **personal development** needs
- K11 how to review and record progress and evaluate the effectiveness of the activities

### **Performance Criteria 6**

#### **Measure achievement**

- K12 how to measure achievement of identified **personal development** needs
- K13 how to record evidence of your knowledge and competence against identified **recognised standards**

### **Performance Criteria 7**

#### **Review, revise and update**

- K14 how to review the cycle of **personal development** and **aims and objectives**
- K15 how to revise and update **aims and objectives** to suit changing circumstances
- K16 why you need to review, revise and update your **personal development** plan

### **Additional information**

#### **Scope/ range relating to performance criteria**

##### **Performance Criteria 1**

- 1 records of personal aims and objectives

##### **Performance Criteria 2**

- 2 records of contact with at least three of the following sources of support and guidance and the standards identified

2.1 national bodies

2.2 industry bodies

2.3 professional institutions

2.4 further education organisations

2.5 training providers

2.6 in-house resources

2.7 line manager

2.8 colleagues

2.9 trade periodicals and journals

2.10 electronic sources

##### **Performance Criteria 3**

- 3 records of the current level of your performance compared against selected and recognised standards
- 4 profile of present competence and personal development needs
- Performance Criteria 4
- 5 records of a personal development plan
- Performance Criteria 5
- 6 records of development activities undertaken
- 7 records of the process used to review and record progress and effectiveness
- Performance Criteria 6
- 8 records of achievement
- 9 records of comparing achievement with selected standards of competence
- Performance Criteria 7
- 10 records of reviews conducted on personal aims and objectives
- 11 records of updates made to personal development plan

**Scope/ range relating to knowledge and understanding**

Aims and objectives

- 1 preparation for new job
- 2 intellectual challenge
- 3 need for updating
- 4 professional competence
- 5 compliance with employer
- 6 professional body membership requirements
- 7 promotion
- 8 job change
- 9 awareness of shortcomings

Personal development

- 10 maintenance of existing competence
- 11 improvements to existing skills
- 12 improvements to existing knowledge
- 13 improvements to existing competence
- 14 development of new competence
- 15 commitment to professional excellence

Sources of support and guidance

- 16 national bodies
- 17 industrial bodies
- 18 professional institutions
- 19 further education organisations
- 20 training providers
- 21 in house

Recognised standards

- 22 job descriptions
- 23 professional institution requirements
- 24 national occupational standards
- 25 industry recognised standards

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## COSVR741

### Plan and schedule the maintenance or remedial activities of property, systems or services

#### Overview

This standard is about

- 1 producing work programmes and specifications for maintenance or remedial activities
- 2 sequencing resources for the maintenance or remedial activities
- 3 ensuring maintenance or remedial activities are completed within the agreed budget, to the agreed quality and within the agreed time

#### Performance criteria

You must be able to:

- P1 implement regular inspections to confirm the project requirements for the maintenance or remedial activities for property, systems or services
- P2 identify and review influencing factors and guidance material about the property, system or service
- P3 prioritise maintenance or remedial activities to take account of influencing factors whilst maintaining consistency
- P4 ensure maintenance or remedial activity records of actions carried out and data collected are current
- P5 identify, assess and maintain the necessary resources for maintenance or remedial activities
- P6 prepare plans and schedules of maintenance or remedial activities and negotiate and agree them with decision-makers

#### Knowledge and understanding

You need to know and understand:

##### Performance Criteria 1

##### Project requirements

- K1 how to confirm project requirements for the **maintenance or remedial work of property, systems or services**
- K2 who to consult to confirm project requirement

##### Performance Criteria 2

##### Identify and review

- K3 how to identify and review **influencing factors**
- K4 how to identify and review **guidance materials**
- K5 why you need to identify and review **influencing factors** against **guidance materials**

##### Performance Criteria 3

##### Prioritise activities

- K6 how to assess and account for **influencing factors**
- K7 how to prioritise **maintenance or remedial activities**
- K8 why you need to assess and account for **influencing factors** and prioritise **maintenance or remedial activities**
- K9 how to account for **changing circumstances**
- K10 how to amend priorities when reviewing **influencing factors**

##### Performance Criteria 4

##### Recording systems

- K11 why records of **activities and data**, carried out and collected, for **maintenance or remedial activities/work** need to be current

K12 how to ensure that records of **activities and data** are current

**Performance Criteria 5**

**Resources**

K13 how to identify the necessary **resources** for **maintenance or remedial activities**

K14 how to assess the quantity and quality of **resources** for **maintenance or remedial activities**

K15 how to maintain the necessary **resources** for the **maintenance or remedial work** of **property, systems or services**

**Performance Criteria 6**

**Plans and schedules**

K16 how to prepare plans and schedules for **maintenance or remedial activities**

K17 how to negotiate and agree plans and schedules with decision-makers

K18 why you need plans and schedules for **maintenance or remedial activities**

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

1 records of regular inspections to confirm and monitor project requirements for at least three of the following maintenance or remedial activities on at least two of the following properties, systems or services

1.1 maintenance/remedial activities: scheduled; unscheduled; preventative; corrective; emergency

1.2 property, systems or services: highways; traffic controls; structures; external structure; internal structure; historical or preservation interests; internal fabric; external fabric services; utilities and services; landscaping

Performance Criteria 2

2 records of consideration for at least four of the following influencing factors

2.1 organisational requirements

2.2 project requirements

2.3 current legislation

2.4 resource allocation

2.5 working requirements

2.6 environmental considerations

2.7 near neighbours

2.8 weather conditions

2.9 ground or site conditions

2.10 sustainability

2.11 client, customer or their representative

3 records of consultation of at least three of the following guidance materials

3.1 plans, drawings or diagrams

3.2 owner's manuals

3.3 log books

3.4 maintenance schedules and manuals

3.5 practice guides and specifications

3.6 current legislation and official guidance

3.7 historical data

3.8 existing records

Performance Criteria 3

4 records of prioritising activities with consideration for identified influencing factors

5 records of amended priorities, taking account of at least four of the following changing circumstances

5.1 susceptibility to damage

5.2 safety requirements

5.3 need to inhibit, and respond to deterioration

- 5.4 weather conditions
- 5.5 ground or site conditions
- 5.6 environmental conditions
- 5.7 use or change of use
- 5.8 changing circumstances
- 5.9 current legislation
- 5.10 resources
- 5.11 security threats
- 5.12 client, customer or their representative

Performance Criteria 4

- 6 maintenance or remedial activity for four of the following activities and data
  - 6.1 inspections
  - 5.2 faults or problems
  - 6.3 corrective actions
  - 6.4 costs
  - 6.5 resources
  - 6.6 complaints
  - 6.7 delays

Performance Criteria 5

- 7 records of the acquisition and maintenance for at least two of the following resources
  - 7.1 people
  - 7.2 plant, equipment or machinery
  - 7.3 materials and components
  - 7.4 sub-contractors
  - 7.5 information
- 76.6 work area and facilities
- 7.7 waste management
- 7.8 utility providers

Performance Criteria 6

- 8 records of plans and schedules for at least three of the following maintenance or remedial activities
  - 8.1 planned maintenance or remedial activities
  - 8.2 tendered works
  - 8.3 responsive works
  - 8.4 preventative maintenance or remedial work
  - 8.5 cost estimated works
  - 8.6 seasonal maintenance
  - 8.7 traffic maintenance (signs, lights and guards)
  - 8.8 emergency works
  - 8.9 contingency plans

**Scope/ range relating to knowledge and understanding**

Activities and data

- 1 inspections
- 2 faults or problems
- 3 corrective actions
- 4 costs
- 5 resources
- 6 complaints
- 7 delays

Changing circumstances

- 8 susceptibility to damage

9	safety requirements
10	need to inhibit, and respond to deterioration
11	weather conditions
12	ground or site conditions
13	environmental conditions
14	use or change of use
15	current legislation
16	resources
17	security threats
18	client, customer or their representative
Guidance materials	
19	plans, drawings or diagrams
20	owner's manuals
21	log books
22	maintenance schedules and manuals
23	practice guides and specifications
24	current legislation and official guidance
25	historical data
26	existing records
Influencing factors	
27	organisational requirements
28	project requirements
29	current legislation
30	resource allocation
31	working requirements
32	environmental considerations
33	near neighbours
34	weather conditions
35	ground or site conditions
36	sustainability
37	client, customer or their representative
Maintenance or remedial work	
38	scheduled
39	unscheduled
40	preventative
41	corrective
42	emergency
Maintenance or remedial activities	
43	planned maintenance or remedial work
44	tendered works
45	responsive works
46	preventative maintenance or remedial work
47	cost estimated work
48	seasonal maintenance
49	traffic maintenance (signing, lighting and guarding)
50	emergency works
51	contingency plans
Property, systems or services	
52	highways
53	traffic controls
54	structures

- 55 external structure
- 56 internal structure
- 57 historical or preservation interests
- 58 internal fabric
- 59 external fabric
- 60 utilities and services
- 61 landscaping
- Resources
- 62 people
- 63 plant, equipment or machinery
- 64 materials and components
- 65 sub-contractors
- 66 information
- 67 work area and facilities
- 68 waste management
- 69 utility providers

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 Originating organisation: ConstructionSkills Original URN: VR741  
 Relevant occupations: Production Managers and Directors in Construction  
 Suite: Construction site management  
 Key words: Maintenance; Remedial; Property; Services; Unscheduled; Preventative; Emergency

## COSVR742

### Manage project handover

#### Overview

This standard is about

- 1 confirming the project requirements meet the stakeholders' expectations
- 2 developing, agreeing and following a project handover programme
- 3 identifying, agreeing and arranging for the completion of outstanding work
- 4 handing over responsibilities and documentation for the project

#### Performance criteria

You must be able to:

- P1 confirm project requirements and consult with stakeholders and develop and agree a handover programme
- P2 check that project requirements have been met, or record outstanding work in order to agree and arrange a satisfactory completion
- P3 carry out handover inspections and appropriate tests ensuring they are witnessed by stakeholders and certificated in accordance with current legislation
- P4 record stakeholder concerns during inspection and agree any required actions
- P5 ensure that stakeholders' respective responsibilities are accepted and adopted
- P6 assemble and hand over appropriate documentation in accordance with the project

#### Knowledge and understanding

You need to know and understand:

##### Performance Criteria 1

##### Handover programme

- K1 how to confirm **project requirements** to develop a handover programme
- K2 how to consult with **stakeholders** to develop and agree a handover programme
- K3 why you need a handover programme
- Performance Criteria 2**
- Project requirements/outstanding work**
- K4 how to check **project requirements** have been met
- K5 how to record outstanding work in order to agree and arrange a satisfactory completion
- Performance Criteria 3**
- Handover inspections/tests**
- K6 how to carry out handover inspections and appropriate tests
- K7 how to ensure appropriate tests are witnessed by **stakeholders**
- K8 how to ensure appropriate certification is acquired
- K9 why you need handover inspections and certificates
- Performance Criteria 4**
- Stakeholder concerns**
- K10 how to record **stakeholders'** concerns during inspections
- K11 how to agree appropriate actions during inspections with **stakeholders**
- K12 why **stakeholders'** concerns need to be addressed
- Performance Criteria 5**
- Stakeholder responsibilities**
- K13 how to ensure **stakeholders** accept and adopt **responsibilities** on handover
- K14 why you need to ensure **stakeholders** accept their **responsibilities**
- Performance Criteria 6**
- Documentation**
- K15 how to assemble appropriate **documentation** in accordance with the project
- K16 how to hand over appropriate **documentation** in accordance with the project
- K17 why you need to assemble and hand over appropriate **documentation** for the project

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

1 records of agreed handover programme

Performance Criteria 2

2 records of agreed completion programme

3 records of any outstanding work, including any remedial activities or defects

Performance Criteria 3

4 records of handover inspections and witnessed tests

5 records of commissioning activities undertaken

6 records of certificates issued

Performance Criteria 4

7 records of stakeholders' concerns

8 records of agreed actions

Performance Criteria 5

9 records of at least three of the following accepted responsibilities

9.1 insurance

9.2 security

9.3 operations

9.4 health and safety

9.5 utility supply

9.6 environment

9.7 sustainability



Performance Criteria 6

- 10 records of handover documentation for at least one of the following
- 10.1 systems
- 10.2 services
- 10.3 equipment

**Scope/ range relating to knowledge and understanding**

Documentation

- 1 manuals and guidance materials
- 2 plans
- 3 health and safety file
- 4 operating equipment
- 5 security information and equipment
- 6 certificates
- 7 services
- 8 systems

Project requirements

- 9 time
- 10 quality
- 11 cost
- 12 health and safety
- 13 current legislation
- 14 sustainability
- 15 defects liability period
- 16 warranties

Responsibilities

- 17 insurance
- 18 security
- 19 operations
- 20 health and safety
- 21 utility supply
- 22 environmental
- 23 sustainability

Stakeholders

- 24 client, customer or their representative
- 25 users
- 26 consultants
- 27 contractors
- 28 regulatory authorities

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Originating organisation: ConstructionSkills Original URN: VR742  
Relevant occupations: Production Managers and Directors in Construction  
Suite: Construction site management  
Key words: Project; Handover

## Plan tunnelling activities

### Overview

This standard is about

- 1 implementing tunnelling requirements
- 2 prioritising tunnelling activities
- 3 identifying and scheduling tunnelling requirements with decision-makers

### Performance criteria

You must be able to:

- P1 confirm the work requirements against the information supplied
- P2 identify and review influencing factors and guidance material about the work environment
- P3 prioritise activities by assessing and accounting for all the influencing factors
- P4 amend priorities to take account of changing circumstances whilst maintaining consistency with the influencing factors
- P5 prepare plans or schedules and negotiate and agree them with decision-makers

### Knowledge and understanding

You need to know and understand:

#### Performance Criteria 1

##### Confirm work requirements

- K1 how to confirm work requirements for tunnelling **activities** against **information sources**
- K2 who to consult to confirm work requirements

#### Performance Criteria 2

##### Identify and review influencing factors and guidance material

- K3 how to identify and review **influencing factors**
- K4 how to identify and review **guidance materials**
- K5 why you need to review **influencing factors** against **guidance materials**

#### Performance Criteria 3

##### Prioritise activities

- K6 how to assess and account for **influencing factors**
- K7 how to prioritise tunnelling **activities**
- K8 why you need to prioritise tunnelling **activities**

#### Performance Criteria 4

##### Amend priorities

- K9 how to take account of **changing circumstances**
- K10 how to amend priorities when reviewing **influencing factors**

#### Performance Criteria 5

##### Prepare plans and schedules

- K11 how to prepare plans and schedules for tunnelling **activities**
- K12 how to negotiate and agree plans and schedules with decision-makers

### Additional information

#### Scope/ range relating to performance criteria

Performance Criteria 1

- 1 records of confirming at least two of the following tunnelling activities against at least five of the following information sources
  - 1.1 activity: mobile plant and machinery operations; back up services installation, maintenance or removal; spoil removal; access equipment erection, maintenance or removal; pipejacking operations; micro tunnelling operations; excavation and installation of supports; shaft and tunnel construction; tunnel transport; spraying concrete lining; operating separation plant; temporary works; lifting loads

1.2 information sources: survey reports; site investigations; drawings, schedules and specifications; contractual; statutory consents; risk assessments and method statements; programmes; records about the competence of people; sub-contractor arrangements; health, safety and environmental plan; material suppliers; tunnelling plans

Performance Criteria 2

2 records of consideration for at least three of the following influencing factors

2.1 organisational requirements

2.2 contractual requirements

2.3 statutory requirements

2.4 resource allocation

2.5 working requirements

2.6 environmental considerations

2.7 weather conditions

2.8 ground conditions

3 records of consultation of at least two of the following guidance materials

3.1 owner's manuals

3.2 log books

3.3 maintenance schedules and manuals

3.4 practice guides and specifications

3.5 current legislation and official guidance

3.6 organisational procedures

3.7 historical data

Performance Criteria 3

4 records of prioritising activities with consideration for influencing factors

Performance Criteria 4

5 records of amended priorities taking account of at least four of the following changing circumstances

5.1 susceptibility to damage

5.2 safety requirements

5.3 need to inhibit and respond to deterioration

5.4 compromised operational effectiveness

5.5 weather conditions

5.6 unidentified obstructions

5.7 meeting current legislation

5.8 resources

5.9 security threats

5.10 ground conditions

Performance Criteria 6

6 records of programmes, plans or schedules for at least three of the following activities

6.1 mobile plant and machinery operations

6.2 back up services installation, operations, maintenance or removal

6.3 spoil removal

6.4 access equipment erection, maintenance or removal

6.5 pipejacking operations

6.6 micro tunnelling operations

6.7 excavation and/or installation of supports

6.8 shaft and tunnel construction

6.9 tunnel transport

6.10 spraying concrete lining

6.11 operating separation plant

6.12 temporary works

6.13 lifting loads

**Scope/ range relating to knowledge and understanding**

Activities

- 1 mobile plant and machinery operations
- 2 back up services installation, operations, maintenance or removal
- 3 spoil removal
- 4 access equipment erection, maintenance or removal
- 5 pipejacking operations
- 6 micro tunnelling operations
- 7 excavation and installation of supports
- 8 shaft and tunnel construction
- 9 tunnel transport
- 10 spraying concrete lining
- 11 operating separation plant
- 12 temporary works
- 13 lifting loads

Changing circumstances

- 14 susceptibility to damage
- 15 safety requirements
- 16 need to inhibit, and respond to deterioration
- 17 compromised operational effectiveness
- 18 weather conditions
- 19 unidentified obstructions
- 20 meeting current legislation
- 21 resources
- 22 security threats
- 23 ground conditions

Guidance materials

- 24 owner's manuals
- 25 log books
- 26 maintenance schedules and manuals
- 27 practice guides and specifications
- 28 current legislation and official guidance
- 29 organisational procedures
- 30 historical data

Influencing factors

- 31 organisational requirements
- 32 contractual requirements
- 33 statutory requirements
- 34 resource allocation
- 35 working requirements
- 36 environmental considerations
- 37 weather conditions
- 38 ground conditions

Information sources

- 39 survey reports
- 40 site investigations
- 41 drawings, schedules and specifications
- 42 contractual
- 43 statutory consents

- 44 risk assessments and method statements
- 45 programmes
- 46 records about the competence of people
- 47 sub-contractor arrangements
- 48 health, safety and environmental plan
- 49 material suppliers
- 50 tunnelling plans

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 Originating organisation: ConstructionSkills Original URN: VR743  
 Relevant occupations: Production Managers and Directors in Construction  
 Suite: Construction site management  
 Key words: Dimensional; Control; Measurements; Accuracy; Locations; Lines; Levels; Angles; Distances; Curves; Positions

## COSVR210 Develop and maintain good working relationships

### Overview

This standard, in the context of your occupation and work environment, is about

- 1 interpreting information
- 2 adopting safe and healthy working practices
- 3 working with, informing and supporting people
- 4 developing and maintaining good occupational working relationships

### Performance criteria

You must be able to:

- P1 develop, maintain and encourage working relationships to promote goodwill and trust
- P2 inform relevant people about work activities in an appropriate level of detail and with an appropriate degree of urgency
- P3 offer advice and help to relevant people about work activities and encourage questions, requests for clarification and comments
- P4 clarify the proposals with the relevant people and discuss alternative suggestions
- P5 resolve differences of opinion in ways that minimise offence and maintain goodwill, trust and respect

### Knowledge and understanding

You need to know and understand:

Performance Criteria 1

Working relationships

K1 how to maintain and encourage working relationships to promote goodwill and trust with relevant people

K2 how to develop working relationships to promote goodwill and trust

K3 how to apply the principles of equality and diversity

Performance Criteria 2

Inform people

K4 how to inform relevant people about work activities in an appropriate level of detail and with an appropriate degree of urgency

Performance Criteria 3

Offer advice

K5 how to encourage questions, requests for clarification and comments

K6 how to offer advice and help to people about work activities

Performance Criteria 4

Deal with alternative proposals

K7 how to clarify alternative proposals with the relevant people

K8 how to suggest alternative proposals

Performance Criteria 5

Resolve conflicts

K9 how to resolve differences of opinion in ways which minimise offence and maintain goodwill, trust and respect

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

1 record(s) of information on advice provided about occupational work activities and/or associated occupations

2 apply the principles of equality and diversity

Performance Criteria 2

3 record(s) of information and advice given about carrying out the work activities 3.1 appropriate timescales

3.2 health and safety requirements 3.3 co-ordination of work procedures

Performance Criteria 3

4 record(s) of information and advice given about methods of occupational work activities to achieve the required outcome

Performance Criteria 4

5 outline notes of discussions relating to the occupational work activity and/or other occupations involved

Performance Criteria 5

6 outline notes of agreed activities that satisfy those involved, to meet the required outcome of the proposed method of work

**Scope/ range relating to knowledge and understanding**

Equality and diversity

1 show consideration for the needs of individuals by applying the principles of equality and diversity

Goodwill and trust

2 keeping promises and undertakings 3 honest relationships 4 constructive relationships 5 co-operation and dialogue

Inform/Offer advice

6 orally 7 in writing 8 using drawings/sketches

People

9 colleagues 10 employers 11 customers 12 contractors 13 suppliers of products and services 14 those affected by the work/project

Work activities

15 progress 16 results 17 Achievements 18 occupational problems 19 occupational opportunities 20 health and safety requirements 21 co-ordinated work

Working relationships

22 formal 23 informal

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Date approved: March 2011. Indicative review date: February 2016.

Validity: Current Status: Original

Originating organisation: ConstructionSkills Original URN: VR210

Relevant occupations: Construction and Building Trades

Suite: Occupational Work Supervision (Construction); Accessing Operations and Rigging (Construction);

Cladding Occupations (Construction); Controlling Lifting Operations (Construction); Construction Site



Supervision; Construction Site Management; Decorative Finishing and Industrial Painting Operations (Construction); Floorcovering Occupations (Construction); Formwork (Construction); Heritage Skills (Construction); Interior Systems (Construction); Mastic Asphaltting (Construction); Plastering (Construction); Roofing Occupations (Construction); Senior Crafts (Construction); Specialist Installation Occupations (Construction); Stonemasonry (Construction); Substructure Work Occupations (Construction); Trowel Occupations (Construction); Wall and Floor Tiling (Construction); Wood Machining (Construction/Sawmilling Extrusion/Furniture); Wood Occupations (Construction); Building Maintenance Multi-trade Repair and Refurbishment Operations

Key words: Discussions; Advice; Outcomes; Goodwill; Trust; Equality; Diversity

## COSVR713 Allocate work and check people's performance

### Overview

This standard is about

- 1 ensuring that the work required is planned, and effectively allocated
- 2 checking on the progress and quality of the work
- 3 ensuring team members, the people you are responsible for, are meeting the required standard

### Performance criteria

You must be able to:

- P1 confirm the programmes and schedules, identify priorities and critical activities, and plan how the work will be undertaken
- P2 allocate work to team members, taking account of their current circumstances, and brief them on the quality standards or level expected
- P3 monitor the progress and quality of the work and provide prompt and constructive feedback
- P4 motivate team members to complete the work they have been allocated and provide, where requested and possible, any additional support and/or resources
- P5 identify unacceptable or poor performance, discuss the cause(s) and agree ways of improving performance with team members
- P6 recognise successful completion of significant pieces of work, or work activities, by team/team members and advise responsible people

### Knowledge and understanding

You need to know and understand:

- Performance Criteria 1 Confirm work required and plan
- K1 how to confirm programmes and schedules
  - K2 how to identify priorities and critical activities in programmes and schedules
  - K3 how to plan how work will be undertaken
- Performance Criteria 2 Allocate work
- K4 how to allocate work fairly to team members
  - K5 how to take account of team member's current circumstances
  - K6 how to brief team members on the quality standards or level expected
- Performance Criteria 3 Check progress and quality
- K7 how to check the progress of work against programmes and schedules
  - K8 how to check work against required quality standards
  - K9 how to provide constructive feedback
- Performance Criteria 4 Motivate team members to complete work
- K10 how to motivate team members
  - K11 how to provide, where requested and available, additional support and/or resources
  - K12 how to get feedback on additional support provided from team members

Performance Criteria 5 Identify unacceptable or poor performance  
K13 how to identify unacceptable or poor performance  
K14 how to discuss the causes of poor performance with team members  
K15 how to agree ways of improving performance with team members  
Performance Criteria 6 Recognise success  
K16 how to recognise successful completion of significant pieces of work, or work activities  
K17 how to advise the people responsible of team/team member's successes

#### **Additional information**

##### **Scope/ range relating to performance criteria**

###### Performance Criteria 1

1 records of priorities and critical activities identified in programmes and schedules, and a plan of how the work will be undertaken

###### Performance Criteria 2

2 records of the work allocated and briefings given to team members, taking account of the following current circumstances 2.1 skills 2.2 knowledge 2.3 experience 2.4 workload

###### Performance Criteria 3

3 records of progress checks undertaken 4 records of quality checks undertaken 5 records of feedback given to team members

###### Performance Criteria 4

6 records of requests for additional support and/or resources 7 records of feedback from team members

###### Performance Criteria 5

8 records of unacceptable or poor performance 9 records of agreed ways of improving performance

###### Performance Criteria 6

10 records of praise and recognition for success 11 records of advice on success given to responsible people

##### **Scope/ range relating to knowledge and understanding**

###### Causes of poor performance

1 external factors 2 internal factors 3 social factors 4 personal circumstances 5 skills and knowledge deficiencies 6 lack of support 7 lack of resources

###### Current circumstances

8 skills 9 knowledge 10 experience 11 work load

###### Feedback

12 formal appraisal 13 interim appraisal 14 verbal report 15 written report 16 reference 17 report

###### Motivate

18 inspire 19 stimulate 20 prompt 21 encourage 22 induce 23 cause 24 provoke

###### People responsible

25 the client, customer or their representative 26 contractors 27 consultants 28 sub-contractors 29 suppliers 30 workforce 31 internal management

###### Programmes and schedules

32 bar charts 33 critical activities 34 action lists 35 method statements

###### Quality standards

36 statutory requirements 37 project specifications 38 British Standards 39 International Standards 40 Codes of Practice 41 organisational standards 42 trade advisory guidance and best practice 43 benchmarks or key performance indicators

###### Resources

44 people 45 plant, equipment or machinery 46 materials and components 47 sub-contractors 48 information 49 work area and facilities 50 waste management 51 utility providers





Validity: Current Status: Original

Originating organisation: ConstructionSkills Original URN: VR713

Relevant occupations: Construction and Building Trades Supervisors

Suite: Construction Site Supervision; Construction Site Management; Controlling Lifting Operations  
(Construction)

Key words: Planned; Allocate; Team; Check; Performance; Standards; Activities

## COSVR714 Enable learning opportunities

### Overview

This standard is about

- 1 identifying learning activities for the team
- 2 encouraging the team, the people you are responsible for, to be accountable for their own learning
- 3 providing opportunities to address learning needs

### Performance criteria

You must be able to:

- P1 promote the benefits of learning by giving fair, regular and useful feedback on work performance
- P2 work with the team to identify and prioritise learning needs and identify and obtain information on a range of possible learning activities
- P3 discuss development needs with team members
- P4 support team members in undertaking learning activities by making efforts to remove any obstacles to learning
- P5 evaluate the learning activity undertaken with team members to ensure the desired outcomes have been achieved
- P6 update development plans with team members

### Knowledge and understanding

You need to know and understand:

- Performance Criteria 1 Promote the benefits of learning
  - K1 how to promote the benefits of learning
  - K2 how to give fair, regular and useful feedback
- Performance Criteria 2 Identify learning needs
  - K3 how to work with your team to identify and prioritise learning needs
  - K4 how to obtain information on ranges of learning activities
- Performance Criteria 3 Development, learning plans and learning activities
  - K5 how to discuss and agree development needs with team members
- Performance Criteria 4 Support team members
  - K6 how to support team members in undertaking learning activities
  - K7 how to identify and remove obstacles to learning
- Performance Criteria 5 Evaluate the learning activities
  - K8 how to evaluate with team members learning activities undertaken
  - K9 how to ensure desired outcomes from learning activities have been achieved
- Performance Criteria 5 Update learning plans
  - K10 how to update team member's development needs

### Additional information

#### Scope/ range relating to performance criteria

- Performance Criteria 1
  - 1 records of feedback given, promoting the benefits of learning

**Performance Criteria 2**

2 records of learning needs identified, and information obtained, for at least two of the following learning activities 2.1 formal 2.2 informal 2.3 coached 2.4 mentored 2.5 vocationally qualifying 2.6 continuous professional development 2.7 professional membership

**Performance Criteria 3**

3 development needs for team members comprising of the following 3.1 current skills and knowledge 3.2 learning activities undertaken 3.3 learning objectives to be achieved 3.4 resource requirements for development 3.5 timescales

**Performance Criteria 4**

4 records of support provided to team members 5 records of identified obstacles to learning and actions taken to remove them

**Performance Criteria 5**

6 records of evaluations of the learning activity after completion by team members

**Performance Criteria 6**

7 records of development plans updated with team members

**Scope/ range relating to knowledge and understanding**

Development needs

1 current skills and knowledge 2 learning activities undertaken 3 learning objectives to be achieved 4 resource requirements for development 5 timescales

Feedback

6 formal appraisal 7 interim appraisal 8 verbal report 9 written report 10 reference 11 report

Learning activities

12 formal 13 informal 14 coached 15 mentored 16 vocationally qualifying 17 continuous professional development 18 professional membership

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Validity: Current Status: Original

Originating organisation: ConstructionSkills Original URN: VR714

Relevant occupations: Construction and Building Trades Supervisors

Suite: Construction Site Supervision; Construction Site Management

Key words: Learning; team; Opportunities; Encouraging; Development; Evaluate; Support

**COSVR715 Contribute to the identification of a work team**

**Overview**

This standard is about

- 1 identifying and evaluating capabilities of team members
- 2 ensuring team members are equipped to meet programme requirements

**Performance criteria**

You must be able to:

- P1 identify any significant factors which will affect the number, type and availability of people and services
- P2 evaluate and record the quality and potential reliability of people or services, and circulate the results to decision-makers
- P3 negotiate and agree proposals which are likely to produce an effective team
- P4 follow the rules and formalities for obtaining people and services

**Knowledge and understanding**

You need to know and understand:

Performance Criteria 1 Identify significant factors

K1 what are significant factors involved in the identification of work teams

K2 how to identify significant factors which will affect numbers, types and availability of people or services

Performance Criteria 2 Evaluate and record quality and potential reliability

K3 how to evaluate and record the quality of people or services

K4 how to evaluate and record the potential reliability of people or services

K5 how to circulate results from evaluations of quality and potential reliability to decision-makers

Performance Criteria 3 Negotiate and agree proposals

K6 how to make proposals for team membership

K7 how to negotiate to get appropriate people or services for your team

Performance Criteria 4 Follow rules and formalities

K8 how to work within the current rules and formalities governing the identification of teams

K9 why you need to work within the current rules and formalities for the identification of teams

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

1 records of at least three of the following significant factors 1.1 location 1.2 cost 1.3 time 1.4 skills, experience and knowledge required and available 1.5 training and development requirements 1.6 current legislation

Performance Criteria 2

2 records of evaluation for at least two of the following people or services 2.1 technical staff 2.2 sub-contractors 2.3 specialist services 2.4 operatives

Performance Criteria 3

3 records of negotiation of proposals for effective team membership 4 records of agreed proposals

Performance Criteria 4

5 records of consideration for at least two of the following rules and formalities 5.1 contractual 5.2 current legislation 5.3 codes of practice 5.4 organisational procedures 5.5 certification of competence

**Scope/ range relating to knowledge and understanding**

People or services

1 technical staff 2 sub-contractors 3 specialist services 4 operatives

Rules and formalities

5 contractual 6 current legislation 7 Codes of Practice 8 organisational procedures 9 certification of competence

Significant factors

10 location 11 cost 12 time 13 skills, experience and knowledge required and available 14 training and development requirements 15 current legislation

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Validity: Current Status: Original

Originating organisation: ConstructionSkills Original URN: VR715

Relevant occupations: Construction and Building Trades Supervisors

Suite: Construction Site Supervision; Construction Site Supervision

Key words: Capabilities; Team; Identification; Reliability; Work

**COSVR716 Plan highways maintenance or repair activities**

**Overview**

This standard is about

- 1 implementing highways maintenance or repair requirements
- 2 prioritising maintenance or repair activities
- 3 identifying and scheduling further maintenance and repair requirements with decision-makers

**Performance criteria**

You must be able to:

- P1 confirm the work requirements
- P2 identify and review influencing factors and guidance material about the work environment
- P3 prioritise maintenance activities by assessing and accounting for all the influencing factors
- P4 amend priorities to take account of changing circumstances whilst maintaining consistency with the influencing factors
- P5 prepare plans or schedules of maintenance activities and negotiate and agree them with decision makers

**Knowledge and understanding**

You need to know and understand:

- Performance Criteria 1 Confirm work requirements
  - K1 how to confirm work requirements for highways and its maintenance or repair
  - K2 who to consult to confirm work requirements
- Performance Criteria 2 Identify and review influencing factors and guidance materials
  - K3 how to identify and review influencing factors
  - K4 how to identify and review guidance materials
- Performance Criteria 3 Prioritise maintenance activities
  - K5 how to assess and account for influencing factors
  - K6 how to prioritise maintenance activities
- Performance Criteria 4 Amend priorities for changing circumstances
  - K7 how to account for changing circumstances
  - K8 how to amend priorities when reviewing influencing factors
- Performance Criteria 5 Prepare plans or schedules
  - K9 how to prepare plans or schedules for maintenance activities
  - K10 how to negotiate and agree plans and schedules with decision-makers

**Additional information**

**Scope/ range relating to performance criteria**

Performance Criteria 1

1 records of confirming at least two of the following maintenance activities and at least five of the following repair activities on at least one of the following highways  
 1.1 maintenance activities: scheduled and preventative; unscheduled and corrective; emergency  
 1.2 repair activities: structure; surface; materials; markings; fittings; power and light; drainage; telecommunications; special services and equipment; landscaping; traffic controls; fencing  
 1.3 highways: dual carriageway; single carriageway; carriageway with footway; motorway; cycle way; carriageway with hard shoulder

Performance Criteria 2

2 records of consideration for at least three of the following influencing factors  
 2.1 organisational requirements  
 2.2 contractual requirements  
 2.3 statutory requirements  
 2.4 resource allocation  
 2.5 working requirements  
 2.6 environmental considerations  
 2.7 weather conditions  
 3 records of consultation of at least two of the following guidance materials  
 3.1 owner’s manuals  
 3.2 log books  
 3.3 maintenance schedules and manuals  
 3.4 practice guides and specifications  
 3.5 current legislation and official guidance

Performance Criteria 3

4 records of prioritising activities with consideration for influencing factors

Performance Criteria 4

5 records of amended priorities, taking account of at least four of the following changing circumstances 5.1 susceptibility to damage 5.2 safety requirements 5.3 need to inhibit, and respond to deterioration 5.4 compromised operational effectiveness 5.5 weather conditions 5.6 use or change of use 5.7 current legislation 5.8 resources 5.9 security threats

**Performance Criteria 5**

6 records of plans or schedules for at least three of the following maintenance activities 6.1 regular programmes 6.2 tendered works 6.3 responsive works 6.4 cost estimated works 6.5 winter maintenance 6.6 traffic maintenance (signing, lighting and guarding)

**Scope/ range relating to knowledge and understanding**

**Changing circumstances**

1 susceptibility to damage 2 safety requirements 3 need to inhibit and respond to deterioration 4 compromised operational effectiveness 5 weather conditions 6 use or change of use 7 current legislation 8 resources 9 security threats

**Guidance materials**

10 owner’s manuals 11 log books 12 maintenance schedules and manuals 13 practice guides and specifications 14 current legislation and official guidance

**Highways**

15 dual carriageway 16 single carriageway 17 carriageway with footway 18 motorway 19 cycle way 20 carriageway with hard shoulder

**Influencing factors**

22 organisational requirements 22 contractual requirements 23 statutory requirements 24 resource allocation 25 working requirements 26 environmental considerations 27 weather conditions

**Maintenance**

28 scheduled and preventative 29 unscheduled and corrective 30 emergency

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Originating organisation: ConstructionSkills Original URN: VR716

Relevant occupations: Construction and Building Trades Supervisors

Suite: Construction Site Supervision; Construction Site Management

Key words: Highways; Maintenance; Repair; Plan; Prioritise; Scheduled; Preventative; Unscheduled; Corrective; Emergency; Dual; Carriageway; Footway; Motorway; Traffic

**COSVR719 Provide customer service in construction**

**Overview**

This standard is about

- 1 contributing to customer service systems
- 2 delivering reliable customer service
- 3 monitoring customer service

**Performance criteria**

You must be able to:

- P1 identify and use current legislation and official guidance to implement systems or procedures that will deliver and improve customer service
- P2 prepare to deal with customers in order to give consistent and reliable service
- P3 work with others to resolve customer problems, communicate with customers and check that they are satisfied with the actions taken

- P4 solve problems within existing systems or procedures that may affect customers before the customer becomes aware of them
- P5 confirm that the service given meets the customer's needs and expectations
- P6 inform the people responsible about changes to customer service systems or procedures that will reduce the chance of problems being repeated
- P7 share information with people responsible to maintain and improve standards of service delivery

### **Knowledge and understanding**

You need to know and understand:

Performance Criteria 1 Identify and use legislation and guidance

K1 how to identify current legislation and official guidance relevant to customer service

K2 how to use identified information to implement systems or procedures for customer service

K3 how to deliver and improve customer service

Performance Criteria 2 Prepare to deal with customers

K4 how to give consistent customer service

K5 how to use systems or procedures to give reliable customer service

Performance Criteria 3 Work with others to resolve customer problems

K6 how to work with others to resolve customer service problems

K7 how to communicate with customers

K8 how to check that the customer is satisfied with the action taken

Performance Criteria 4 Solve problems within systems and procedures

K9 how to identify problems within existing systems or procedures that may affect customers

K10 how to ensure problems in systems or procedures are solved before the customer becomes aware of them

Performance Criteria 5 Confirm the service meets customer needs

K11 how to communicate with customers to confirm that the service given meets the customer's needs and expectations

Performance Criteria 6 Inform people of changes

K12 how to identify repeat problems in customer service

K13 how to change customer service systems or procedures to reduce the chance of problems being repeated

K14 how to inform the people responsible about changes to customer service

Performance Criteria 7 Share information

K15 how to maintain standards of service delivery

K16 how to improve standards of service delivery

K17 how to share information with people responsible in order to maintain and improve standards of service delivery

### **Additional information**

#### **Scope/ range relating to performance criteria**

Performance Criteria 1

1 records of implementation for at least four of the following systems or procedures that will deliver and improve customer service 1.1 current legislation 1.2 official guidance 1.3 organisational procedures 1.4 specifications 1.5 drawing 1.6 instructions and variations 1.7 feedback processes

Performance Criteria 2

2 records of consistent customer service 3 records of reliable service that promotes customer's confidence

Performance Criteria 3

4 records of customer problems resolved using at least two of the following forms of communication 4.1 electronic 4.2 verbal 4.3 written 4.4 via a second person 4.5 feedback documents 4.6 feedback documents 5 records of checks to ensure that the customer is satisfied with at least two of following actions taken 5.1 corrective 5.2 referral 5.3 investigative 5.4 reactive 5.5 proactive

Performance Criteria 4

6 records of how problems would be dealt with within existing customer service systems or procedures

**Performance Criteria 5**

7 records showing that the service given has met the customer's needs and expectations

**Performance Criteria 6**

8 records of changes to systems or procedures that will reduce the chance of problems being repeated, passed to at least two of the following people responsible 8.1 the client, customer or their representative 8.2 contractors 8.3 consultants 8.4 sub-contractors 8.5 suppliers 8.6 workforce 8.7 internal management

**Performance Criteria 7**

9 records of information that will maintain and improve standards of service delivery shared with people responsible

**Scope/ range relating to knowledge and understanding**

Action taken

1 corrective 2 referral 3 investigative 4 reactive 5 proactive

Communicate with customers

6 electronic 7 verbal 8 written 9 via a second person 10 via a second person 11 group meetings

People responsible

12 the client, customer or their representative 13 contractors 14 consultants 15 sub-contractors 16 sub-contractors 17 workforce 18 internal management

System or procedures

19 current legislation 20 official guidance 21 organisational procedures 22 specifications 23 drawing 24 instructions and variations 25 feedback processes

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 Relevant occupations: Construction and Building Trades Supervisors  
 Suite: Construction Site Supervision Construction Site Management; Building Maintenance Multi-trade Repair and Refurbishment Operations  
 Key words: Customer; Contributing; Delivering; Monitoring; Service; Construction

**COSVR720 Plan historical conservation/restoration activities**

**Overview**

This standard is about

- 1 implementing historical conservation/restoration requirements
- 2 prioritising historical conservation/restoration activities
- 3 identifying and scheduling further historical conservation/restoration requirements with decision-makers

**Performance criteria**

You must be able to:

- P1 confirm the work requirements against the information supplied
- P2 identify and review influencing factors and guidance material about the work environment
- P3 prioritise activities by assessing and accounting for all the influencing factors
- P4 amend priorities to take account of changing circumstances whilst maintaining consistency with the influencing factors
- P5 prepare plans or schedules and negotiate and agree them with decision makers

**Knowledge and understanding**

You need to know and understand:

- Performance Criteria 1 Confirm work requirements  
 K1 how to confirm work requirements for historical conservation/restoration activities against information sources  
 K2 who to consult to confirm work requirements  
 Performance Criteria 2 Identify and review influencing factors and guidance materials  
 K3 how to identify and review influencing factors  
 K4 how to identify and review guidance materials  
 K5 why you need to review influencing factors against guidance materials  
 Performance Criteria 3 Prioritise activities  
 K6 how to assess and account for influencing factors  
 K7 how to prioritise historical conservation/restoration activities  
 K8 why you need to prioritise historical conservation/restoration activities  
 Performance Criteria 4 Amend priorities  
 K9 how to take account of changing circumstances  
 K10 how to amend priorities when reviewing influencing factors  
 Performance Criteria 5 Prepare plans and schedules  
 K11 how to prepare plans and schedules for historical conservation/restoration activities  
 K12 how to negotiate and agree plans and schedules with decision-makers

**Additional information**

**Scope/ range relating to performance criteria**

- Performance Criteria 1  
 1 records of confirming at least two of the following historical conservation/restoration activities against at least five of the following information sources  
 1.1 activities: roofing; lead work; bricklaying and craft masonry; earth walling; stonemasonry; decoration; plastering; wall and floor tiling; carpentry and joinery; specialist heritage activities  
 1.2 information sources: survey reports; drawings, schedules and specifications; contractual; statutory consents; risk assessments and method statements; programmes; records about the competence of people; sub-contractor arrangements; health, safety and environmental plan; archaeological watching brief; material suppliers; historical conservation plans  
 Performance Criteria 2  
 2 records of consideration for at least three of the following influencing factors 2.1 organisational requirements 2.2 contractual requirements 2.3 statutory requirements 2.4 resource allocation 2.5 working requirements 2.6 environmental considerations 2.7 weather conditions  
 3 records of consultation of at least two of the following guidance materials 3.1 owner's manuals 3.2 log books 3.3 maintenance schedules and manuals 3.4 practice guides and specifications 3.5 current legislation and official guidance  
 Performance Criteria 3 4 records of prioritising activities with consideration for influencing factors  
 Performance Criteria 4  
 5 records of amended priorities taking account of at least four of the following changing circumstances 5.1 susceptibility to damage 5.2 safety requirements 5.3 need to inhibit and respond to deterioration 5.4 compromised operationaleffectiveness 5.5 weather conditions 5.6 use or change of use 5.7 meeting current legislation 5.8 resources 5.9 security threats  
 Performance Criteria 5  
 6 records of plans or schedules for at least three of the following historical conservation/restoration activities 6.1 roofing 6.2 lead work 6.3 bricklaying and craft masonry 6.4 earth walling 6.5 stonemasonry 6.6 decoration 6.7 plastering 6.8 wall and floor tiling 6.9 carpentry and joinery 6.10 specialist heritage activities

**Scope/ range relating to knowledge and understanding**

Activities



1 roofing 2 lead work 3 bricklaying and craft masonry 4 earth walling 5 stonemasonry 6 decoration 7 plastering  
 8 wall and floor tiling 9 carpentry and joinery 10 specialist heritage activities

Changing circumstances  
 11 susceptibility to damage 12 safety requirements 13 need to inhibit, and respond to deterioration 14  
 compromised operational effectiveness 15 weather conditions 16 use or change of use 17 meeting current  
 legislation 18 resources

Guidance materials  
 19 owner's manuals 20 log books 21 maintenance schedules and manuals 22 practice guides and specifications  
 23 current legislation and official guidance

Influencing factors  
 24 organisational requirements 25 contractual requirements 26 statutory requirements 27 resource allocation  
 28 working requirements 29 environmental considerations 30 weather conditions

Information sources 31 survey reports 32 drawing, schedules and specifications 33 contractual 34 statutory  
 consents 35 risk assessments and method statements 36 programmes 37 records about the competence of  
 people 38 sub-contractor arrangements 39 health, safety and environmental plan 40 archaeological watching  
 brief 41 material suppliers 42 historical conservation/restoration plans

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Suite: Construction Site Supervision; Construction Site Management

Key words: Plan; Implementing; Historical; Conservation; Restoration; Lead; Archaeological; Heritage

## COSVR722 Plan demolition activities

### Overview

This standard is about

- 1 implementing demolition requirements
- 2 prioritising demolition activities
- 3 identifying and scheduling further demolition requirements with decisionmakers

### Performance criteria

You must be able to:

- P1 confirm the work requirements against the information supplied
- P2 identify and review influencing factors and guidance material about the work environment
- P3 prioritise activities by assessing and accounting for all the influencing factors
- P4 amend priorities to take account of changing circumstances whilst maintaining consistency with the influencing factors
- P5 prepare plans or schedules and negotiate and agree them with decision makers

### Knowledge and understanding

You need to know and understand:

- Performance Criteria 1 Confirm work requirements
- K1 how to confirm work requirements for demolition activities against information sources
  - K2 who to consult to confirm work requirements
- Performance Criteria 2 Identify and review factors and guidance materials
- K3 how to identify and review influencing factors
  - K4 how to identify and review guidance material

K5 why you need to review influencing factors against guidance material

Performance Criteria 3 Prioritise activities

K6 how to assess and account for influencing factors

K7 how to prioritise demolition activities

K8 why you need to prioritise demolition activities

Performance Criteria 4 Amend priorities

K9 how to take account of changing circumstances

K10 how to amend priorities when reviewing influencing factors

Performance Criteria 5 Prepare plans

K11 how to prepare plans and schedules for demolition activities and schedules

K12 how to negotiate and agree plans and schedules with decision-makers

### **Additional information**

#### **Scope/ range relating to performance criteria**

Performance Criteria 1

1 records of confirming at least two of the following demolition activities against at least five of the following information sources 1.1 demolition activities: soft strip; mechanical demolition; remote mechanical demolition; explosive demolition; selective demolition 1.2 information sources: survey reports; design; contractual; statutory consents; risk assessments and method statements; programmes; records about the competence of people; sub-contractor arrangements; health, safety and environmental plan; Type 3 asbestos survey; service disconnection certificates; utilities survey report

Performance Criteria 2

2 records of consideration for at least three of the following influencing factors 2.1 organisational requirements 2.2 contractual requirements 2.3 statutory requirements 2.4 resource allocation 2.5 working requirements 2.6 environmental considerations 2.7 weather conditions 3 records of consultation of at least two of the following guidance materials 3.1 owner's manuals 3.2 log books 3.3 maintenance schedules and manuals 3.4 practice guides and specifications 3.5 current legislation and official guidance

Performance Criteria 3

4 records of prioritising activities with consideration for influencing factors

Performance Criteria 4

5 records of amended priorities taking account of at least four of the following changing circumstances 5.1 susceptibility to damage 5.2 safety requirements 5.3 need to inhibit and respond to deterioration 5.4 compromised operational effectiveness 5.5 weather conditions 5.6 use or change of use 5.7 meeting current legislation 5.8 resources 5.9 security threats

Performance Criteria 5

6 records of plans or schedules for at least three of the following demolition activities 6.1 soft strip 6.2 mechanical demolition 6.3 remote mechanical demolition 6.4 explosive demolition 6.5 selective demolition

#### **Scope/ range relating to knowledge and understanding**

Activities

1 soft strip 2 mechanical demolition 3 remote mechanical demolition 4 explosive demolition 5 selective demolition

Changing circumstances

6 susceptibility to damage 7 safety requirements 8 need to inhibit and respond to deterioration 9 compromised operational effectiveness 10 weather conditions 11 use or change of use 12 meeting current legislation 13 resources 14 security threats

Influencing factors

15 organisational requirements 16 contractual requirements 17 statutory requirements 18 resource allocation 19 working requirements 20 environmental considerations 21 weather conditions

Information sources



22 survey reports 23 design 24 contractual 25 statutory consents 26 risk assessments and method statements  
27 programmes 28 records about the competence of people 29 sub-contractor arrangements 30 health, safety  
and environmental plan 31 Type 3 asbestos survey 32 service disconnection certificates 33 utilities survey  
report

Guidance materials

34 owner's manuals 35 log books 36 maintenance schedules and manuals 37 practice guides and specifications

38 current legislation and official guidance

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Relevant occupations: Construction and Building Trades Supervisors

Suite: Construction Site Supervision; Construction Site Management

Key words: Demolition; Implementing; Prioritising; Scheduling; Strip; Mechanical; Explosive; Selective

## APPENDIX 3 - ASSESSMENT TEMPLATE DOCUMENTS

### 3A: Sample Form

#### Assessment plan and review

Candidate name:	
Employer/location:	Date:
Qualification:	
Unit(s):	
Elements:	
Assessor:	
Period of Review: <small>(should not normally exceed 12 weeks)</small>	Proposed Date for next review:

**Part 1 – Activities / Tasks / Learning / Training** undertaken since last review:

**Part 2a – Progress to date** specifying units/elements/modules achieved to date (the progress recorded **must** tie in with the associated **'Summary of Achievement Record'**):

**Part 2b** – Identified **barriers** to progress (please detail here any issues relating to the programme delivery, which have impacted negatively on progress e.g. attendance times, learning difficulties, suitability of training/learning materials, physical barriers to participation, health issues, attitude etc):

\*

**Part 2c** – Solutions proposed to address the above barriers:

**Part 3** – Agreed **'assessment planning'** & action required for the next review (proposed methods of evidence collection must be recorded & proposed assessment methods must be selected):

***N.B.*** *Methods of evidence collection may include: either hard copy records or electronic records such as audio recordings, scanned documents, photographs etc.*

Element:

Proposed Assessment Methods/Sources of Evidence:

CrossRef	RPL	OBS	Questioning	PS	WR	D	WT

<p align="center"><b>Key: Assessment Methods/Sources of Evidence</b></p> <p><b>CrossRef</b> = Cross Referencing    <b>RPL</b>= Recognition of Prior Learning  <b>OBS</b> = Observation                    <b>PS</b> = Personal Statement  <b>WR</b> = Work Record                    <b>D</b> = Discussion  <b>WT</b>= Witness Testimony</p>								

**Part 4** – Additional comments / issues (e.g. health & safety issues):

**Part 5** – Candidate comments/feedback/evaluation:

**Part 6** – Employer comments on progression and achievement noted in **Part 2a**:



**Part 7** – Assessor Feedback/Assessment Judgements/Decisions/Outcome

Empty box for Assessor Feedback/Assessment Judgements/Decisions/Outcome

Candidate Signature: ..... Date: .....

Assessor Signature: ..... Date: .....

Employer Signature (where present): ..... Date: .....

Employer Name and position: .....

<b>3B: Sample Form</b>	
<b>Assessor report</b>	
<b>Qualification:</b>	
<b>Candidate:</b>	
<b>Assessor:</b>	
<b>Date:</b>	
<b>Unit/ element:</b>	
<b>Location/ circumstance:</b>	
<b>Details of observation/ question/ answers/ discussion</b>	<b>Ref</b>
<b>Details of observation/ question/ answers/ discussion</b>	<b>Ref</b>
<b>Details of observation/ question/ answers/ discussion</b>	<b>Ref</b>
<b>Assessors comments</b> (state whether candidate is competent)	
<b>Assessor signature</b>	
<b>Candidate signature</b>	



**3C: Sample Form  
Witness testimony**

Qualification: .....

Unit: .....

Element(s): .....

Candidate Name: .....

Witness Name: .....

Witness Contact Details: .....

.....

Describe your construction and any assessment qualifications/ experience:

.....

.....

.....

Describe your relationship with the candidate:

.....

.....

Date of evidence: .....

**Testimony and comment on candidate's performance**

.....

.....

.....

.....

.....

.....

.....

Witness Signature & Date: .....

Candidate Signature & Date: .....

Assessor Signature & Date: .....

**3D: Sample Form**  
**Candidate personal statement**

**Qualification:**

**Candidate name:**

<b>Element(s)</b>	<b>Date</b>	<b>Statement / evidence</b>

Candidate's signature:

Assessor's signature:

Date:

## APPENDIX 4 - ASSESSOR TEMPLATE DOCUMENTS

<b>4A: Sample Form</b>										
<b>Element achievement record</b>										
<b>Candidate name:</b>										
<b>Qualification:</b>										
<b>Unit title:</b>										
<b>Element(s):</b>										
<b>Assessor:</b>										
Evidence ref:	Evidence description *	Location **	Performance criteria				Knowledge and understanding			

**\*Key: Assessment Methods/Sources of Evidence**

**CrossRef** = Cross Referencing      **RPL**= Recognition of Prior Learning      **OBS**= Observation  
**Q&A**= Questioning    **PS**= Personal Statement      **WR** = Work Record      **D**= Discussion  
**WT**= Witness Testimony

*\*\*Should refer to whether the evidence can be found in the portfolio ('PF') or elsewhere, if so state location of evidence*

4B: Sample Form Unit progress record		
Qualification:		
Unit title:		
I confirm that the candidate has been assessed as competent for this unit		
Assessor name	Assessor signature	Date
I confirm that I have been assessed as competent and that the evidence produced is from work that is all mine		
Candidate name	Candidate signature	Date
I confirm that I have internally verified this unit and confirm that the candidate is competent (this section must be completed where the assessor is unqualified)		
IV name	IV signature	Date

## **APPENDIX 5 - INTERNAL VERIFIER TEMPLATE DOCUMENTS**

### **5A: Sample Internal verification Strategy**

This document indicates what may be covered as part of an internal verifier's strategy. An effective internal verification strategy ensures:

- A forum for discussion of borderline cases
- Assessor networking and sharing of good practice
- Valid, reliable and consistent training and/or assessment
- Recorded assessment decisions which are appropriate, consistent, fair, transparent and equitable
- Clarity for candidates about assessment requirements
- Effective preparation and presentation for external verification
- Reduction in level of direct external verification scrutiny

To underpin the IV/ verification process a plan of internal activity should be developed indicating

- what will happen
- when it will happen
- who will be involved

New instructors/assessors must:

- a) be supplied with assessment and materials
- b) clearly understand assessment requirements and procedures

All assessors must:

- a) know the name of the person who will manage the IV process and the name of the IV
- b) know how IV/ verification will happen, when it will happen and who will be involved
- c) be informed about issues raised through previous internal and external quality assurance

#### **On Course Monitoring**

The IV should:

- a) Sample assessments to ensure that:
  - feedback to candidates is clear and constructive
  - teaching and assessment activities are standard and appropriate
  - assessment decisions are fair and consistent
  - teaching and assessment records are clear

- b) Undertake standardisation activities
- c) Ensure candidates understand assessment requirements
- d) Provide advice and support for Assessors and share good practice
- e) Identify good assessment practice
- f) Record internal verification activities and findings, list action points and report to instructors/assessors and the EV
- g) Liaise with the EV as necessary

### **End of Course Checking**

The IV should:

- a) monitor progress against previous action points
- b) ensure assessment records are complete and accurate
- c) ensure evidence of achievement is appropriate and standardised
- d) record internal verification activities and findings, list action points, and report these to assessors and the EV

### **Guidance on Sampling and Record Keeping**

#### **What do IVs/IVs sample and why?**

IVs are responsible for monitoring the quality of assessment, hence the need for them to sample assessment practices and decisions. It is not usually possible or necessary to verify every aspect of assessment at each internal verification. A properly selected representative sample should identify any issues with assessment practices and decisions.

#### **Selecting a sample**

To select a representative sample, IVs must take account of factors which may impact on the quality of assessment. These factors are used to define a sampling strategy that determines the size of the sample and enables judgements to be made.

Key factors to consider are:

- Sites of delivery
- Number and experience of Assessors
- Number of courses/assessments
- Previous IV actions/recommendations
- Assessment methods
- Special arrangements
- EV recommendations
- Borderline cases
- Anything else that you think might impact on assessment decisions



The sample should include an element of random selection by the IV. It is not necessary to sample across every aspect of the programme at each event but the plan should seek to cover everything over a period of time, e.g. 3 years.

**Which records should be kept?**

Records of internal quality assurance/ verification must be kept and made available to the EV during monitoring visits. These should demonstrate that the internal verification procedures have been carried out. IVs should record two sets of information:

1. The sample taken by the IV
2. The comments and feedback to the Assessor following the sampling exercise, showing any recommendations or action required and how this was resolved.

There is a sample form shown below that you may use or adapt to suit your own requirement.

**5B: Sample Form**  
**Internal verification - sampling assessment decisions**

**Unit/qualification:**

**Location:**

**Assessor name:**

Candidate Name	Sampling element <sup>1</sup>	Was the assessment method appropriate?	Is there sufficient evidence that outcomes have been met?	Is the evidence appropriate for the level?	Comments
<b>Comments</b>					

**Signed:** (IV) **Date:**

**Signed:** (Assessor) **Date:**

<sup>1</sup>Was this a learning outcome across candidates, or a whole unit or one method of assessment?



### 5C: Sample Form

#### Internal verification – observation of assessors

Internal Verifier's Name: .....

Assessor's Name: .....

Candidate's Name: .....

Qualification Title: .....

Unit Assessed: .....

Element Assessed: .....

Date of Observation: .....

Location of Assessment: .....

Prior to the assessment had the Assessor:	Yes	No	Comments:
Developed a written Assessment Plan for the candidate			
Checked that the facilities, resources and information required for the assessment were available and ready for use			
Briefed the candidate on how the assessment would take			

place and what would be assessed			
<b>During the assessment did the Assessor:</b>	<b>Yes</b>	<b>No</b>	<b>Comments:</b>
Conduct the assessment unobtrusively without interfering with the candidate's performance			
Encourage the candidate to satisfy the specified Assessment Criteria			
Ask questions clearly in an encouraging tone and manner without leading the candidate			
Ensure that sufficient questions were asked and that they were justifiable and relevant to the Unit assessed			

<b>During the assessment did the Assessor (continued):</b>	<b>Yes</b>	<b>No</b>	<b>Comments:</b>
Ensure that the atmosphere created during the assessment was pleasant and conducive			
Clarify and resolve any concerns that the candidate had during the assessment			
Clearly inform the candidate of the assessment decision i.e. 'achieved' or 'requires further practice'			

	Yes	No	Comments:
<b>After the assessment did the Assessor:</b>			
Provide feedback that was clear, constructive, met the candidate's needs and was appropriate to his/her level of confidence			
Encourage the candidate to comment on the assessment decision and how he/she was assessed			
Complete the Unit assessment documentation and ensure it was fully signed and dated			

**Overall feedback to Assessor:**

**Assessor's comments on the IV's feedback:**

Assessor's Signature: .....

Date:.....



Internal Verifier's Signature: .....

Date:.....