

Estimating – specialist competencies

SPECIALIST ESTIMATING COMPETENCIES 2015

The estimating competencies are split into core and specialist competencies.

OPTIMUM STANDARDS

Each of the activities under the competencies must be signed-off to a specific standard, indicated by one of the letters A, K, E or B. The definitions of these are given below.

A	Appreciation	A general awareness of the activity or subject is required. This could be acquired by reading a magazine article or attending a CPD event.
K	Knowledge	This standard requires a more detailed level of knowledge understanding of the activity. This could be acquired by undertaking a training courses or other type of study but not necessarily have put into practice. e.g. a subject area on a degree course.
E	Experience	To reach this standard the activity must have been performed independently or under supervision. This may be achieved by undertaking the activity in a work context over a period of time. Experience of the activity or subject should follow on and be additional to appreciation and knowledge in that subject area.
B	Ability	To be able, without supervision, to perform relevant functions and be able to supervise other less experienced staff. This may be evidenced by the undertaking of management roles or experience gained over a period of time.

Technical Member level - the applicant must achieve a minimum average standard K across all core and specialism activities. In addition, **a minimum of 5 activities must be assessed at level E**, and **up to 5 activities may be assessed at level A**. There are no restrictions within this as to the particular choice of activities.

Member level – the optimum standard is given against each activity statement.

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EST 1	Estimating Specialist Competencies	COMPETENCIES AND ASSESSMENT					
July 2014		Estimating, Cost planning and pre-contract cost control					
	Technical Member Optimum Standard – see requirements on covering sheet	Activity Details		Date of Assessment			
Reference	Member – Optimum Standard			A	K	E	B
A	B	Identify the elements required in a project budget at pre-contract phase.					
B	B	Development of a tender make up book, or cost plan and spread of a tender budget along with identification of cost drivers for civil engineering works.					
C	E	Understand various civil engineering design options covering Employer/Consultant design, novation and Contractor design and construct.					
D	B	Analyse and compare contract and subcontract tenders and tender budget information.					
E	B	Use of various methodologies for pricing of work including the use of first principles, analogous rates, published price books and the like.					

Estimating – specialist competencies

Name of Supervisor	Name of Applicant
Supervisor's signature	Date CM / EST 1

Estimating – specialist competencies

EST 2 July 2014	Estimating Specialist Competencies	COMPETENCIES AND ASSESSMENT Project/Commercial Management Reporting, internal accounts and company accounts					
Reference	Technical Member Optimum Standard – see requirements on covering sheet Member - Optimum Standard	Activity Details		Date of Assessment			
				A	K	E	B
A	K	Assessment of financial performance through applying the quantity of work completed to arrive at cost and value reconciliation reporting.					
B	K	Understanding of the production of project trading accounts/reports illustrating profit/loss, overhead cost recovery, and financial outturn forecasts for management purposes and their impact on company objectives.					
C	K	Understand the basics of company accounts, including turnover, profit/loss, work in hand and cashflow.					
D	E	Identify and interpret Key Performance and Result Measures.					

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Supervisor's signature	Date CM / EST 2

Estimating – specialist competencies

EST 3	Estimating Specialist Competencies	COMPETENCIES AND ASSESSMENT						
July 2014		Recording works progress and determining/evaluating the effects of delay, prolongation and disruption						
	Technical Member - Optimum Standard – see requirements on covering sheet	Activity Details			Date of Assessment			
Reference	Member - Optimum Standard				A	K	E	B
A	K	Ability to devise, maintain and audit suitable contemporary records of work progress.						
B	K	Evaluation of recorded work through applying relevant financial assessment methods.						
C	K	Understand the causes of delay and their critical and non-critical effects on project completion and entitlement to extensions of time.						
D	K	Understand the effects of disruption on resources and progress, and methods of demonstrating disruption effects.						
E	K	Apply a range of valuation techniques to items of change, and understand the relative strengths and weaknesses of those techniques.						

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Estimating – specialist competencies

EST 4	Estimating Specialist Competencies	COMPETENCIES AND ASSESSMENT			
July 2014		Bills of Quantities, Schedules of Rates and Activity Schedules			
	Technical Member - Optimum Standard – see requirements on covering sheet	Activity Details		Date of assessment	
Reference	Member – Optimum Standard	A	K	E	B
A	B	Understand the various uses of Bills of Quantities, Schedules of Quantities, Schedules of Rates, and Activity Schedules and their preparation in accordance with standard methods of measurement.			
B	B	Understand the different risks associated of works carried out under re-measurement contracts, lump sum contracts, target cost/cost reimbursable contracts, and design and construct contracts and the differing approach to measurement and pricing required for each.			
C	E	Bills and Schedules of Quantities, their structure and the varying approach to pricing with particular reference to quantity related and time related items and method related charges.			
D	E	The Principles of pricing using Activity Schedules (including scope coverage) and how to deal with the evaluation of change under this type of contract.			

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Estimating - specialist competencies

EST 5 July 2014	Estimating Specialist Competencies	COMPETENCIES AND ASSESSMENT Management of Estimating and Bidding processes				
Reference	Technical Member – Optimum – Standard - see requirements on covering sheet Member – Optimum Standard	Activity Details	Date of Assessment			
			A	K	E	B
A	K	Contractual and statutory provisions relating to applications for payment including Contractor and Employer/Project Manager assessments and certificates in the pre-works phase.				
B	B	Collation and preparation of documents to form the tender/bid submission in accordance with Bid requirements and their presentation for internal tender review and sign off, and/or as part of the Client tender assessment process.				
C	K	Understanding the requirements of audits under cost reimbursable or open book arrangements.				
D	B	Management and evaluation of tender and post-tender amendments and their impact on the Project's risk profile; handover to the Implementation Team.				

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Name of Supervisor	Name of Applicant
Supervisor's signature	Date
	CM / EST 5