

## Estimating specialism – core competencies

### CORE ESTIMATING COMPETENCIES 2021

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.

<b>A</b>	Appreciation	A general awareness of the activity is required. This could be acquired by reading a magazine article or attending a CPD event.
<b>K</b>	Knowledge	This standard requires a more detailed level of knowledge and understanding of the activity. This could be acquired by undertaking a training course or other type of study but not necessarily have put into practice. e.g. a subject area on a degree course.
<b>E</b>	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 the appreciation and knowledge in that subject area.
<b>B</b>	Ability	To be able, without supervision, to perform relevant activities 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.

#### Revisions 2021:

EST Core 01C: added: *'including transfer or acceptance of risk, design and performance obligations as a result'*

EST Core 02A: wording revised to *'Supply chain procurement including selection of appropriate forms of contract and management'*

EST Core 02B: removed *'change procedures'*

EST Core 02C: added: *'and liability'*

EST Core 03A: added *'contract selection'*

EST Core 03C: added *'Pricing Schedules'*

EST Core 03D: added *'and opportunities'*

EST Core 04C: removed *'legal'*

Revision April 2021

## Estimating specialism – core competencies

CM CORE 1 Estimating	Commercial Management Core Competency Estimating Specialism	<b>COMPETENCIES AND ASSESSMENT</b>  Financial and commercial processes in civil engineering				
Reference	Member – Optimum Standard	Activity Details	Date of Assessment			
			A	K	E	B
A	K	Management of budgets for civil engineering works. Cost forecasting, management and control processes including the use of contract programmes, change and risk registers				
B	E	Profitability forecasts, cost/budget/value comparisons and cash flow.				
C	E	Value engineering techniques and their importance in achieving cost effective and safe design, construction and maintenance solutions, including transfer or acceptance of risk, design and performance obligations as a result.				
D	B	Design / adaption and continual improvement of processes, procedures, and tools to enable the monitoring and management of key commercial drivers e.g. change, cost, risk, certification etc including a facility to check and audit.				

## Estimating specialism – core competencies

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Name of Supervisor	Name of Applicant
Supervisor's signature	Date
	CM CORE EST1

## Estimating specialism - core competencies

CM CORE 2 Estimating	Commercial Management Core Competency Estimating Specialism	<b>COMPETENCIES AND ASSESSMENT</b>				
		Commercial management and contract administration on civil engineering projects				
	Technical Member Optimum Standard – see covering sheet	Activity Details	Date of Assessment			
Reference	Member - Optimum Standard		A	K	E	B
A	K	Supply chain procurement including selection of appropriate forms of contract and management.				
B	K	Administration of contracts and / or subcontracts including payment mechanisms and resolution of contentious issues, final accounts agreement and management.				
C	K	The principles of insurance and liability. The common types of insurance available for usage on civil engineering projects, including professional indemnity insurance and warranties.				
D	K	Identification, recording, notification and negotiation of change in accordance with the contract. Evaluation of change through analysis of rates or compensation methods, and agreement of the effects of change.				
E	K	Employment legislation and its applicability to civil engineering works (e.g. Working Rule Agreement).				

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	CM CORE EST 2

# Estimating specialism – core competencies

CM CORE 3 Estimating	Commercial Management Core Competency Estimating Specialism	COMPETENCIES AND ASSESSMENT  Contract structure, documentation and the bid process in civil engineering				
Reference	Member - Optimum Standard	Activity Details	Date of Assessment			
			A	K	E	B
A	B	Standard forms of contract, contract selection, how they deal with key provisions including the rights and obligations of the Parties.				
B	B	Determination of the scope of the work through interpretation of the contract documents – contract provisions, specifications, drawing, schedules, technical etc.				
C	B	The purposes of and differences between Preambles, Pricing Schedules, Bills of Quantities, Activity Schedules and Schedules of Rates.				
D	E	Risk and opportunities identification, analysis and management.				
E	B	The preparation and interpretation of estimates and tender submissions.				

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	CM CORE EST 3

## Estimating specialism – core competencies

CM CORE 4 Estimating	Commercial Management Core Competency Estimating Specialism	<b>COMPETENCIES AND ASSESSMENT</b>  The principles of contract law and their application within the context of civil engineering					
Reference	Technical Member - Optimum Standard – see sheet  Member – Optimum Standard	Activity Details		Date of assessment			
				A	K	E	B
A	K	Contract and other civil law principles applicable to the jurisdiction.					
B	K	Statute law relevant to civil engineering works.					
C	K	Advice on contractual matters and formulating contractual correspondence.					
D	K	Dispute avoidance and resolution – processes available and procedures that apply.					

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	CM CORE EST 4

## Estimating specialism – core competencies

CM CORE 5 Estimating	Commercial Management Core Competency Estimating Specialism	COMPETENCIES AND ASSESSMENT  Planning and programme in the management of civil engineering works				
Reference	Technical Member – Optimum –Standard - see covering sheet  Member – Optimum Standard	Activity Details	Date of Assessment			
			A	K	E	B
A	E	Various types of programmes used in civil engineering.				
B	E	Use of the programmes for planning and monitoring the works.				
C	K	Use of programmes for analysis and demonstration of delay and disruption and entitlement to extensions of time.				
D	K	Use of programmes to support budgeting and risk management on a project.				

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	CM CORE EST 5

## Estimating specialism – core competencies

CM CORE 6 Estimating	Commercial Management Core Competency Estimating Specialism	COMPETENCIES AND ASSESSMENT  Techniques and technologies employed in civil engineering works				
Reference	Technical Member – Optimum –Standard - see covering sheet  Member – Optimum Standard	Activity Details	Date of Assessment			
			A	K	E	B
A	E	Techniques and technologies, their impact on sustainable, security minded and safe working practices with particular emphasis on stakeholder involvement in projects with which personally involved.				
B	K	The utilisation of labour, plant, equipment, materials and subcontractors.				
C	K	Building Information Modelling (BIM) including the security implication of this and similar management tools.				

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	CM CORE EST 6