



PLANNING SPECIALIST COMPETENCIES 2017

The planning 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 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 course or other type of study but not necessarily 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 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.

Name of Supervisor	Name of Applicant
Supervisor's signature	Date

Planning Specialism 01	Competency		Producing the Programme				
	Optimum		Activity Detail	Date of Assessment			
	Technical	Member		A	K	E	B
A	K	B	Analyse project/program documentation and other requirements, identify all deliverables and produce programme including a programme narrative				
B	K	E	Identify any client and/or third party deliverables and establish connectivity and/or limitations on scheme delivery in order to provide a fully integrated programme				
C	K	E	Identify any supply chain deliverables and establish connectivity and limitations on scheme delivery. Review and analyse subcontract programmes.				
D	K	B	Produce a programme which provides a robust representation of the activities required and their interrelationship, which secures all deliverables and meets the requirements of the Work Information/project/program requirements.				
E	K	E	Use of various Planning/Programming software to produce the Programme, and advise on the most appropriate package for the project/program, Identification of the following; Time Risk allowances, terminal, free and total float, Critical and sub-critical paths				

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Planning Specialism 02	Competency		Resource and Cost Loaded Programmes				
			Determine the impact of any resource constraints on a programme and use this to produce resource and cost loaded profiles				
	Optimum		Activity Detail	Date of Assessment			
Technical	Member	A		K	E	B	
A	K	B	Identify and evaluate any resource constraints on the programme, and incorporate into its structure. Produce a resource profile, and a resource budget.				
B	K	B	Review robust nature of the main programme and supply chain programmes using confidence level review on activity outputs				

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Planning Specialism 03	Competency		Project Controls				
	Optimum		Activity Detail	Date of Assessment			
	Technical	Member		A	K	E	B
A	K	E	Establish procedures/processes to record and monitor progress against the programme including procedures for short term planning				
B	K	E	Analyse elemental progress against the programme and highlight any areas of concern. Identify reasons for failures to meet progress expectations and propose mitigation action if appropriate.				
C	K	B	Analyse the critical path, and sub-critical paths to determine the overall progress against the programme and identify and highlight any variance and areas of concern. Identify reasons for failures to meet progress expectations and evaluate the overall impact on delivery. Propose mitigation action if appropriate				
D	K	K	Establish and produce an Earned Value (EV) strategy and assessment for the project/program a regular intervals and use it to evaluate and report on overall progress.				
E	K	B	Prepare regular progress updates and reports to meet the project/program management requirements.				
F	K	E	Identify and evaluate the impact of progress on the resource profile. Evaluate and highlight any variance to the established budget, and identify any potential impact on overall resource requirements.				

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G	K	K	Identify and evaluate the impact of progress on the cost profile. Evaluate and highlight any variance to the established budget, and prepare a revised cost forecast, and Monitor against project/programme Key Performance Indicators e.g. CPI, SPI, S curve etc.				
H	K	E	Identify and report on programme integrity and risk and opportunity reduction/increase as a result of progress.				

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Planning Specialism 04	Competency		Change Identification and Management The identification of change in the project/program requirements and the evaluation of potential/actual impact on the programme	Date of Assessment				
	Optimum			Activity Detail	A	K	E	B
	Technical	Member						
A	K	E	Identification, and notification of change in respect of the following: a) Contractual changes to the project/program requirements or works information b) Design and/or specification changes arising from a Value Engineering or Optioneering exercise in accordance with the contractual requirements, or governance guidelines in relation to the programme.					
B	K	E	Evaluation of the potential impact of change on the elements of programme in accordance with contractual provisions, or governance guidelines.					
C	K	E	Recording, evidencing and evaluation the actual impact of change on the elements within a programme in accordance with contractual provisions or governance guidelines					
D	K	B	Identification and evaluation of the impact of change on the Critical or Sub-critical paths of a programme, and the demonstration of this by quantitative means.					
E	K	E	Identification and evaluation of the impact of change on the risk, resource or cost profile of a programme, and the demonstration of this by quantitative means.					
F	K	E	Application of delay analysis techniques to identify the potential impact of one or more changes on a programme completion date and / or key dates.					

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Planning Specialism 04	Competency		Change Identification and Management The identification of change in the project/program requirements and the evaluation of potential/actual impact on the programme	Date of Assessment					
	Optimum							Activity Detail	A
	Technical	Member	G	K	B	Analysis of the programme architecture and logic linkage in the context of a change in order to identify alterations, additions, or omissions in the programme activities that may permit mitigation to its potential impact, and advise on the impact on resources and cost of likely scenarios.			

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