**ESTIMATING – SPECIALIST COMPETENCIES**

**June 2024**

**ESTIMATING SPECIALIST COMPETENCIES 2024**

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 blow.

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| **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.

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| **Estimating Specialism****01** | **Competency** | **Preconstruction and tender strategy** |
|  | **Optimum** | **Activity Detail** | **Date of Assessment** |
| **Technical** | **Member** | **A** | **K** | **E** | **B** |
| A |  | **K** | Understanding of key factors to be taken into account (by clients / main contractors) when deciding appropriate procurement methods and forms of contract for construction projects and services. |  |  |  |  |
| B |  | **K** | Understanding of the stages of the preconstruction process from the perspectives of both clients and contractors. |  |  |  |  |
| C |  | **K** | Understanding of factors that influence contractors' work winning / tender strategy. |  |  |  |  |

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| **Estimating Specialism****02** | **Competency** | **Project/commercial management reporting, internal accounts and company accounts** |
|  | **Optimum** | **Activity Detail** | **Date of Assessment** |
| **Technical** | **Member** | **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 |  | **K** | Identify and interpret Key Performance and Result Measures. |  |  |  |  |

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| **Estimating Specialism****03** | **Competency** | **Estimating, cost planning and pre-contract cost control** |
|  | **Optimum** | **Activity Detail** | **Date of Assessment** |
| **Technical** | **Member** | **A** | **K** | **E** | **B** |
| A |  | **E** | Identify the elements required in a project budget at pre-contract phase |  |  |  |  |
| B |  | **B** | Development of a tender make up book, or cost plan |  |  |  |  |
| 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, supply chain quotes, historic rates, benchmark data, published price books |  |  |  |  |

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| **Estimating Specialism 04** | **Competency** | **Change Identification and Management**  *Reviewing / validating estimates and determining /evaluating the effects of delay, prolongation and disruption* |
|  | **Optimum** | **Activity Detail** | **Date of Assessment** |
| **Technical** | **Member** | **A** | **K** | **E** | **B** |
| A |  | **E** | Review / validate the basis used for estimates by interrogating work types, construction methodologies, production outputs and material wastages / densities. |  |  |  |  |
| B |  | **E** | Use of benchmarking data and market testing to review / validate estimates. |  |  |  |  |
| C |  | **E** | Understand the potential risks and opportunities associated with a project, and evaluate their associated effects (time and cost) in the estimate and any assumptions / qualifications. |  |  |  |  |
| D |  | **E** | Understand contractual risk ownership allocation (Client, Contractor, etc), and the consequential implications on entitlement to Extensions of Time and/or additional payments (e.g. through Compensation Events / Claims) ; and how to take account of this in the estimate and any assumptions / qualifications. |  |  |  |  |

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| **Estimating Specialism 05** | **Competency** | **Bills of quantities, schedules of rates, and activity schedules** |
|  | **Optimum** | **Activity Detail** | **Date of Assessment** |
| **Technical** | **Member** | **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 |  | **B** | Be fully conversant with the use of 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 |  | **B** | 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 Specialism 06** | **Competency** | **Change Identification and Management**  ***Management of Estimating and bidding processes*** |
|  | **Optimum** | **Activity Detail** | **Date of Assessment** |
| **Technical** | **Member** | **A** | **K** | **E** | **B** |
| A |  | **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. |  |  |  |  |
| B |  | **K** | **Understanding the requirements of audits under cost reimbursable or other open book arrangements.** |  |  |  |  |
| C |  | **B** | Management and evaluation of tender and post-tender amendments and their impact on the Project’s risk profile; handover to the Implementation Team. |  |  |  |  |