**PLANNING – SPECIALIST COMPETENCIES**

**JULY 2024 Relaunch**

**PLANNING SPECIALIST COMPETENCIES 2024**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 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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| **Planning Specialism**  **01** | **Competency** | | **Producing the Programme**  **Determine the requirements of the project/programme by analytical means and produce a robust programme to reflect these requirements** | | | | |
|  | **Optimum** | | **Activity Detail** | **Date of Assessment** | | | |
| **Technical** | **Member** | **A** | **K** | **E** | **B** |
| A | **E** | **B** | Analyse project documentation and other requirements, understand scope, identify all deliverables and their constraints. |  |  |  |  |
| B | **E** | **B** | Identify any client and/or third party input and establish connectivity and/or limitations on scheme delivery to provide a fully integrated programme. |  |  |  |  |
| C | **K** | **E** | Identify supplier’s deliverables. Review and understand constraints of their programmes and establish agreed delivery commitments, commercially and in project programmes. |  |  |  |  |
| D | **K** | **B** | Produce a compliant programme which provides a robust representation of the activities required and the application of programme integrity checks. |  |  |  |  |
| E | **E** | **B** | Identification of key programme components i.e. Time Risk allowances, terminal, free and total float, Critical and near-critical paths, resources and production outputs. |  |  |  |  |

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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** | **E** | Integration of planned resources and / or costs for tasks in the programme, or other control systems, including the management of impact upon the time and resource. |  |  |  |  |
| B | **E** | **B** | Identify and evaluate resource constraints in a programme, and its incorporation into the logic network. Produce resource profile(s), and compare with budgeted resource allocation. |  |  |  |  |
| C | **K** | **E** | Manage robust nature of stakeholder interface and supply chain programmes using activity outputs and confidence level for delivery. |  |  |  |  |

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| **Planning Specialism**  **03** | **Competency** | | **Planning & Programme Controls**  **Monitor and record progress to satisfy project/programme management and reporting requirements** | | | | |
|  | **Optimum** | | **Activity Detail** | **Date of Assessment** | | | |
| **Technical** | **Member** | **A** | **K** | **E** | **B** |
| A | **K** | **E** | Understand and implement procedures / processes to record and monitor progress against the programme including procedures for short term planning, including supplementing with specific project requirements. |  |  |  |  |
| B | **K** | **E** | Analyse elemental progress against the programme and highlight any areas of concern. Identify reasons for variance to the plan and recommend appropriate action. |  |  |  |  |
| C | **K** | **B** | Analyse any changes in critical path, and sub-critical paths to determine the variance to the plan in accordance with contractual obligations. Identify reasons for variance to the plan and recommend appropriate action. |  |  |  |  |
| D | **K** | **K** | Understand procedures for Earned Value (EV) strategy and assessment of the project/programme at regular intervals and its use to inform on overall project performance. |  |  |  |  |
| E | **K** | **B** | Articulation of project performance in a written narrative for contractual requirements and/or management procedures in a project life cycle. |  |  |  |  |
| F | **K** | **E** | Identify and evaluate the impact of progress on the resource profile. Evaluate and highlight any variance to the base line allocation, and identify any potential impact on overall resource requirements. Make recommendations appropriate action. |  |  |  |  |
| G | **A** | **K** | Understand correlation of progress on the actual and allowed cost profile for project delivery. Methods for identifying variance to the established budget, cost forecast and Key Performance Indicators. |  |  |  |  |
| H | **K** | **E** | Identify and analyse change in risk and opportunity in the project working programme taking into account any change in sequence and additional activity. |  |  |  |  |

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| **Planning Specialism 04** | **Competency** | | **Change Identification and Management**  **The identification of change in the project/programme requirements and the evaluation of potential/actual impact on the programme** | | | | |
|  | **Optimum** | | **Activity Detail** | **Date of Assessment** | | | |
| **Technical** | **Member** | **A** | **K** | **E** | **B** |
| A | **K** | **E** | Identify cause of any change event that may potentially have impact on the progress of the works and compliance for notification within the contract. |  |  |  |  |
| B | **E** | **B** | Analyse and quantify the impact of change on the programme and contribute to its management under the project contract requirements. |  |  |  |  |
| C | **K** | **E** | Analyse and quantify the impact of change on the programme and contribute to its management under the project contract requirements. |  |  |  |  |
| D | **K** | **E** | Analyse and quantify the impact of change on the risk, resource or cost profile of a programme, and contribute to its management under the project contract requirements. |  |  |  |  |
| E | **K** | **E** | Application of appropriate methods to identify the potential impact of multiple changes in a programme on completion date and / or key dates. |  |  |  |  |