**PLANNING – CORE COMPETENCIES**

**April 2024 Relaunch**

**PLANNING CORE 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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| **CM Core 1 Planning**  | **Competency** | **Financial and commercial processes in civil engineering** |
|  | **Optimum** | **Activity Detail** | **Date of Assessment** |
| **Technical** | **Member** | **A** | **K** | **E** | **B** |
| A | **K** | **E** | Management of budgets for civil engineering works. Cost forecasting, management and control processes including the use of contract programmes. |  |  |  |  |
| B | **K** | **E** | Forecasts value / budget / cost comparisons and cash flow. |  |  |  |  |
| C | **K** | **E** | Value engineering techniques and their importance in achieving cost effective and safe design, construction and maintenance solutions. |  |  |  |  |
| D | **E** | **B** | Management 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. |  |  |  |  |
| E | **E** | **B** | Management of change and risk management for civil engineering works. |  |  |  |  |

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| **CM Core 2 Planning** | **Competency** | **Commercial management and contract administration on civil engineering projects** |
|  | **Optimum** | **Activity Detail** | **Date of Assessment** |
| **Technical** | **Member** | **A** | **K** | **E** | **B** |
| A | **K** | **E** | Supply chain procurement including selection of appropriate forms of contract and defined programme deliverables. |  |  |  |  |
| B | **K** | **E** | Administration of contracts and / or subcontracts including payment mechanisms and resolution of contentious issues, final accounts agreement and management. |  |  |  |  |
| C | **A** | **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** | **E** | 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** | **E** | Legislation and its applicability to civil engineering works (e.g. Working Rule Agreement / CDM / Environmental / HGCRA). |  |  |  |  |

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

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| **CM Core 4 Planning** | **Competency** | **The principles of contract law and their application within the context of civil engineering** |
|  | **Optimum** | **Activity Detail** | **Date of Assessment** |
| **Technical** | **Member** | **A** | **K** | **E** | **B** |
| A | **A** | **K** | Contract and other civil law principles applicable to the jurisdiction. |  |  |  |  |
| B | **A** | **K** | Statute law relevant to civil engineering works. |  |  |  |  |
| C | **A** | **K** | Advice on contractual matters and formulating contractual correspondence. |  |  |  |  |
| D | **K** | **E** | Dispute avoidance and resolution – processes available and procedures that apply. |  |  |  |  |

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| **CM Core 5 Planning** | **Competency** | **Planning and programming in the management of civil engineering works** |
|  | **Optimum** | **Activity Detail** | **Date of Assessment** |
| **Technical** | **Member** | **A** | **K** | **E** | **B** |
| A | **E** | **B** | Various types of contractual programmes used in civil engineering and their presentation to various project stake holders. |  |  |  |  |
| B | **E** | **B** | Use of robust project planning techniques for work delivery, managed and shared using programmes, for structured work sequence validation and progress verification. |  |  |  |  |
| C | **E** | **B** | Use of programmes for analysis and demonstration of change and disruption and mitigation for progress recovery / entitlement to extensions of time. |  |  |  |  |
| D | **K** | **B** | Use of programmes by project teams to deliver to budget with informed risk based decision making. |  |  |  |  |
| E | **E** | **B** | Use of process and procedures for capturing progress of the works and incorporation of data into the programme. |  |  |  |  |

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| **CM Core 6 Planning** | **Competency** | **Techniques and technologies employed in civil engineering works** |
|  | **Optimum** | **Activity Detail** | **Date of Assessment** |
| **Technical** | **Member** | **A** | **K** | **E** | **B** |
| A | **K** | **E** | Research of new techniques and technologies, their impact on sustainability, safe working practices with particular emphasis on stakeholder engagement. |  |  |  |  |
| B | **E** | **B** | Capture of resource levelling of labour, plant, equipment, materials and sub-contractors allocated in short term look ahead programmes and their reconciliation to that planned. |  |  |  |  |
| C | **A** | **A** | Building Information Modelling (BIM), including the implementation of information sharing with management tools and systems. |  |  |  |  |