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## Overview

This unit is about the identification of material requirements and changes thereto, monitoring and recording the supply of materials, identifying and rectifying problems and liaising with suppliers.

You will need to analyse project information and develop a purchasing plan, identifying opportunities for improvement. You will need to prepare orders, develop monitoring systems, and evaluate and identify changes. You will need to keep records, checking for variations and identify and deal with problems.

You will need to monitor suppliers' performance, identify problems and identify changes which will improve performance. You will need to liaise with suppliers regarding improvement of supply.

### Performance criteria

#### Identify and monitor requirements for suppliers

*You must be able to:*

- P1 analyse operational plans, user feedback and quantities, and assess what materials supplies will be required and develop systems for monitoring and progress
- P2 develop an accurate purchasing plan by analysing design information, project information and projected supply requirements
- P3 identify what opportunities there are for standardising or identify equivalent alternative materials supplies to economise on usage, cost and environmental impact
- P4 check from the purchasing plan and users, what materials supplies are needed and prepare orders which meet the supply requirements
- P5 develop and introduce systems for monitoring and evaluating the purchasing plan which will identify significant circumstances in supply requirements
- P6 identify any circumstances which are likely to result in over or under supply and modify the purchasing plan to minimise disruption to the project programme after consultation with line manager

#### Maintain and record supplies of materials

*You must be able to:*

- P7 review records of deliveries, calculating the current delivery and stock position and pass the information on to line managers
- P8 check suppliers' progress for any variations from the agreed delivery position, investigate any variations found and discuss them with suppliers
- P9 provide line managers with an accurate assessment of any problems with suppliers and suggest possible action to restore the required delivery position
- P10 identify opportunities for improving the use of stock and stock turnover and recommend improvements to line managers
- P11 provide suppliers with prompt and accurate information on project changes which may affect supply requirements
- P12 obtain authorisation from line managers and arrange for alternative sources of supply, which meet supply requirements and minimise disruption to the operational plan, in instances where supplies are not available from contracted suppliers

**Contribute to improvements in supplier performance**

- You must be able to:*
- P13 monitor regularly the performance of suppliers against the supply requirements which have been agreed
  - P14 record any problems with supply requirements, and pass the information on to interested parties and discuss it with them
  - P15 identify changes which will improve supplier performance, discuss and agree changes with the interested parties and implement agreed actions to improve performance
  - P16 liaise with suppliers and provide them with information which will help them to meet supply requirements.
  - P17 conduct meetings with suppliers in a manner which maintains their good will and trust

### Knowledge and understanding

*You need to know and understand:*

#### Identify and monitor requirements for materials supply

- K1 how and why to analyse operational plans, user feedback and quantities (analysis)
- K2 how and why to assess what materials supplies will be required (analysis)
- K3 how and why to develop systems for monitoring their progress (synthesis)
- K4 how and why to develop an accurate purchasing plan by analysing design information, project information and projected supply requirements (analysis)
- K5 how and why to identify what opportunities there are for standardising or identify equivalent alternative materials supplies to economise on usage, cost and environmental impact (evaluation)
- K6 how to check from the purchasing plan and users, what materials supplies are needed (application)
- K7 how to prepare orders which meet the supply requirements (application)
- K8 how and why to develop and introduce systems for monitoring and evaluating the purchasing plan which will identify significant circumstances in supply requirements (synthesis)
- K9 what to identify as any circumstances which are likely to result in over or under supply (understanding)
- K10 how to modify the purchasing plan to minimise disruption to the project programme after consultation with line manager (application)

#### Maintain and record supplies of materials to meet project requirements

*You need to know and understand:*

- K11 how and why to review records of deliveries and calculate the current delivery and stock position (analysis)
- K12 how to pass the information on to line managers about delivery records, calculations of the current delivery and stock position (application)

- K13 how to check suppliers' progress for any variations from the agreed delivery position (application)
- K14 how and why to investigate any variations found (analysis)
- K15 how and why to discuss any variation in delivery position with suppliers (synthesis)
- K16 how to provide line managers with an accurate assessment of any problems with suppliers (application)
- K17 how and why to suggest possible action to restore the required delivery position (analysis)
- K18 what to identify as opportunities for improving the use of stock and stock turnover and recommend improvements to line managers (understanding)
- K19 how to provide suppliers with prompt and accurate information on project changes which may affect supply requirements (application)
- K20 how to obtain authorisation from line managers and arrange for alternative sources of supply, which meet supply requirements and minimise disruption to the operational plan, in instances where supplies are not available from contracted suppliers (application)

### **Contribute to improvements in supplier performance**

*You need to know and understand:*

- K21 how and why to monitor regularly the performance of suppliers against the supply requirements which have been agreed (analysis)
- K22 how to record any problems with supply requirements and pass the information on to interested parties (application)
- K23 discuss with interested parties any problems with supply requirements (synthesis)
- K24 what to identify as changes which will improve supplier performance (understanding)
- K25 how and why to discuss changes with the interested parties (synthesis)
- K26 how and why to agree changes with the interested parties and implement agreed actions to improve performance (evaluation)
- K27 how to liaise with suppliers and provide them with information which will help them to meet supply requirements (application)
- K28 how to conduct meetings with suppliers in a manner which maintains their good will and trust (application)

## Additional Information

### Scope/range

#### Identify and monitor requirements for suppliers

##### 1. Users:

- 1.1. principal contractors
- 1.2. sub/works/trade contractors
- 1.3. direct labour organisations
- 1.4. clients
- 1.5. own colleagues
- 1.6. facilities/asset manager

##### 2. Materials supplies:

- 2.1. raw materials
- 2.2. manufactured materials
- 2.3. components
- 2.4. systems
- 2.5. prefabricated components

##### 3. Project information:

- 3.1. information (including models, documents, drawings, electronic, graphical and non-graphical data files)
- 3.2. labour, plant and equipment, materials
- 3.3. employer's information requirements
- 3.4. services
- 3.5. finance including cash flow

##### 4. Supply requirements:

- 4.1. specification
- 4.2. price
- 4.3. quantity
- 4.4. availability and lead time
- 4.5. delivery
- 4.6. maintenance, servicing
- 4.7. storage and handling facilities
- 4.8. environmental issues (including sustainability)
- 4.9. health and safety issues
- 4.10. transportation
- 4.11. deterioration and damage

- 4.12. loss and theft
- 4.13. after sales-service
- 4.14. payment terms
- 4.15. cash flow
- 4.16. waste management
- 4.17. off-site manufacture and assembly

### **Maintain and record supplies of materials**

#### **5. Delivery position:**

- 5.1. time
- 5.2. quantity
- 5.3. quality
- 5.4. location

#### **6. Problems with supply:**

- 6.1. communications
- 6.2. specification
- 6.3. price
- 6.4. quantity
- 6.5. availability and lead time
- 6.6. delivery
- 6.7. maintenance & servicing
- 6.8. storage and handling facilities
- 6.9. environmental issues (including sustainability)
- 6.10. health and safety issues
- 6.11. transportation
- 6.12. deterioration and damage
- 6.13. loss and theft
- 6.14. after sales-service
- 6.15. payment terms
- 6.16. cash flow
- 6.17. waste management
- 6.18. off-site manufacture and assembly

**7. Suppliers of:**

- 7.1. raw materials
- 7.2. manufactured materials
- 7.3. components
- 7.4. systems
- 7.5. prefabricated components

**Contribute to improvements in supplier performance**

**8. Suppliers of:**

- 8.1. raw materials
- 8.2. manufactured materials
- 8.3. components
- 8.4. systems
- 8.5. prefabricated components

**9. Supply requirements:**

- 9.1. specification
- 9.2. price
- 9.3. quantity
- 9.4. availability and lead time
- 9.5. delivery
- 9.6. maintenance & servicing
- 9.7. storage and handling facilities
- 9.8. environmental issues (including sustainability)
- 9.9. health and safety issues
- 9.10. transportation
- 9.11. deterioration and damage
- 9.12. loss and theft
- 9.13. after sales-service
- 9.14. payment terms
- 9.15. cash flow
- 9.16. waste management
- 9.17. off-site manufacture and assembly

**10. Interested Parties:**

- 10.1. line managers
- 10.2. contract/site management
- 10.3. suppliers



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## Monitor, maintain and improve supplies of materials in construction

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**Relevant occupations** Building and civil engineering technicians; managers in construction; estimators; valuers and assessors managers; quantity surveyors

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**Suite** Construction Contracting Operations

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