

COSCCOMO09 - SQA Unit Code FM7M 04

Specify and control production documents in construction contracting operations management



Overview

This unit is about developing a document production programme. It is also about preparing a specification document consistent with the current design; the identification of discrepancies and inconsistencies and making recommendations for changes to the brief; producing progress reports.

You will need to select controlling requirements for the project document programme; to specify the purpose and scope of information and documents; to develop a production programme which meets controlling requirements and specify resources to complete the information and document production programme. You will also need to set up registers, records and monitoring systems to control the production of information and documents.

You will need to select and agree evaluation criteria for the information and documents. You will also need to develop and agree systems for checking and approving documents; develop procedures for dealing with discrepancies, delays and revisions to project information and documents. You will then need to develop arrangements for reporting progress and also to manage information and document production problems.

You will need to select, check and collate a specification document suitable for the purpose and project stage and is based on current source information. You will then need to select, draft and amend technical clauses. You will need to update the specification when the design changes and obtain necessary checks and approvals for content and presentation.

You will need to identify and confirm protocols, data formats and standards for information exchange. You will need to obtain information and check it to see that it meets project and document requirements. You will need to ensure that information and documents are collated and evaluated against criteria. You will also need to resolve differences between specification and project information and documents. You will need to identify discrepancies inconsistencies and refer problems back to the originators for clarification and resolution. You will also need to produce progress reports and ensure that registers and records are maintained for quality auditing purposes.

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Performance criteria

You must be able to:

Specify production document requirements

- P1 select **controlling requirements** for the project **information and document** programme which are suitable for the **project stages** and the resources available
- P2 specify the **purpose** and **scope** of **information and documents** and the **controlling requirements** they need to meet and who will produce the **documents**
- P3 develop a production programme, which meets agreed **controlling requirements**, to produce all the required **information and documents** in a feasible sequence of production
- P4 specify enough resources and realistic individual targets to complete the **information and document** production programme
- P5 set up **registers, records** and systems for monitoring and controlling the production of **information and documents** which are capable of maintaining project compliance
- P6 specify individual production instructions which are accurate, clear and complete
- P7 select **criteria** for the evaluation of the project **information and documents**, agree the **criteria** with **decision makers** and circulate the **criteria** to the production team
- P8 develop and agree systems for checking, approving and integrating **information and documents**
- P9 develop and agree procedures, which are appropriate to the requirements of the project and the contract conditions, for dealing with **discrepancies and inconsistencies in information and documents**, and delays and revisions to project **information and documents**
- P10 develop arrangements and contingency plans for reporting progress in meeting the programme requirements and to manage **information and document** production problems

Prepare prescriptive specifications

You must be able to:

- P11 select a **type of specification** document which is suitable for the **purpose** and the **project stage**
- P12 check that the specification is consistent with the designs and related documents, where separate, and that it does not include duplicate and contradictory information
- P13 collate the sections in the **specification** so that they are based on elements of a type appropriate to the circumstances and requirements
- P14 confirm that the current **source information** is **valid** and obtain accurate and valid supplementary information
- P15 produce a **specification** which is based on identified, applicable, current

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source information

- P16 select, draft and amend technical clauses from standard sources, which define the quality, type and standard of the materials, components and finished work
- P17 check that the **specification** is consistent with the current design and other design documentation, and update it promptly when the design changes
- P18 obtain necessary **checks and approvals** for the content and presentation of **specifications**

Control and maintain project information

You must be able to:

- P19 confirm with the client the **information required for decision making** throughout the **project stages**
- P20 identify and confirm **protocols**, data formats and standards for information exchange between all relevant project stakeholders
- P21 obtain **information** about design parameters which may contribute to the development of design and preparation of **information and documents**
- P22 evaluate the information on design parameters to see whether it is adequate to meet the **requirements of the stakeholders** and **requirements for controlling information and document production**
- P23 assess the status of the information on design parameters and pass it on to people who need it for project **information and document** production, indicating any special considerations and limitations on its use
- P24 ensure that **information and documents** are collated when they have been produced and evaluate them against the agreed **criteria**
- P25 advise people who are producing **information and documents**, clarify **information** when they do not understand the instructions and refer outstanding queries to the people who produced the original **information**
- P26 identify any **discrepancies and inconsistencies** in the **information and documents** and refer any problems back to the originators for clarification and resolution
- P27 resolve differences between project **information and documents** and specification and circulate agreed amendments
- P28 obtain necessary checks and approvals when they are needed
- P29 produce up-to-date and accurate **information** on progress and issue it to the people who need the information to meet **project requirements**
- P30 ensure that accurate and complete **registers and records** are maintained which can be used for quality auditing

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Knowledge and understanding

You need to know and understand:

Specify production document requirements

- K1 how and why to select **controlling requirements** for the project **information and document** programme which are suitable for the **project stages** and the resources available (evaluation)
- K2 how and why to specify the **purpose** and **scope** of **information and documents** and the **controlling requirements** they need to meet and who will produce the **documents** (synthesis)
- K3 how and why to develop a production programme, which meets agreed **controlling requirements**, to produce all the required **information and documents** in a feasible sequence of production (synthesis)
- K4 how and why to specify enough resources and realistic individual targets to complete the **information and document** production programme (evaluation)
- K5 how and why to set up **registers, records** and systems for monitoring and controlling the production of **information and documents** which are capable of maintaining project compliance (synthesis)
- K6 how and why to specify individual production instructions which are accurate, clear and complete (evaluation)
- K7 how and why to select **criteria** for the evaluation of the project **information and documents** (evaluation)
- K8 how and why to agree the **criteria** for the evaluation of the project **information and documents** with **decision makers** (evaluation)
- K9 how to circulate the **criteria** for the evaluation of the project **information and documents** to the production team (application)
- K10 how and why to develop systems for checking, approving and integrating **information and documents** (synthesis)
- K11 how and why to agree systems for checking, approving and integrating **information and documents** (evaluation)
- K12 how and why to develop procedures, which are appropriate to the requirements of the project and the contract conditions, for dealing with **discrepancies and inconsistencies in information and documents**, and delays and revisions to project **information and documents** (synthesis)
- K13 how and why to agree procedures, which are appropriate to the requirements of the project and the contract conditions, for dealing with **discrepancies and inconsistencies in information and documents**, and delays and revisions to project **information and documents**

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(evaluation)

- K14 how and why to develop arrangements and contingency plans for reporting progress in meeting the programme requirements and to manage **information and document** production problems (synthesis)

Prepare prescriptive specifications

You need to know and understand:

- K15 how and why to select a **type of specification** document which is suitable for the **purpose** and the **project stage** (evaluation)
- K16 how to check that the specification is consistent with the designs and related documents, where separate, and that it does not include duplicate and contradictory information (application)
- K17 how to collate the sections in the **specification** so that they are based on elements of a type appropriate to the circumstances and requirements (application)
- K18 how to confirm that the current **source information** is **valid** and obtain accurate and valid supplementary information (application)
- K19 how to produce a **specification** which is based on identified, applicable, current **source information** (application)
- K20 how and why to select technical clauses from standard sources, which define the quality, type and standard of the materials, components and finished work (evaluation)
- K21 how and why to draft technical clauses from standard sources, which define the quality, type and standard of the materials, components and finished work (synthesis)
- K22 how to amend technical clauses from standard sources, which define the quality, type and standard of the materials, components and finished work (application)
- K23 how to check that the **specification** is consistent with the current design and other design documentation (application)
- K24 how to update the specification promptly when the design changes (application)
- K25 how to obtain necessary **checks and approvals** for the content and presentation of **specifications** (application)

Control and maintain project information

You need to know and understand:

- K26 how to confirm with the client the **information required for decision making** throughout the **project stages** (application)
- K27 what to identify as **protocols**, data formats and standards for information

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- exchange between all relevant project stakeholders (understanding)
- K28 how to confirm **protocols**, data formats and standards for information exchange between all relevant project stakeholders (application)
- K29 how to obtain **information** about design parameters which may contribute to the development of design and preparation of **information and documents** (application)
- K30 how and why to evaluate the information on design parameters to see whether it is adequate to meet the **requirements of the stakeholders** and **requirements for controlling information and document production** (evaluation)
- K31 how and why to assess the status of the **information** on design parameters (analysis)
- K32 how to pass status of the **information** on design parameters on to people who need it for project **information and document production** (application)
- K33 how to indicate any special considerations and limitations on its use (application)
- K34 how to ensure that **information and documents** are collated when they have been produced and evaluate them against the agreed **criteria** (application)
- K35 how and why to advise people who are producing **information and documents** (synthesis)
- K36 how to clarify **information** when people do not understand the instructions (application)
- K37 how to refer outstanding queries to the people who produced the original **information** (application)
- K38 what to identify as any **discrepancies and inconsistencies** in the **information and documents** (understanding)
- K39 how to refer any problems back to the originators for clarification and resolution (application)
- K40 how and why to resolve differences between project **information and documents** and specification and circulate agreed amendments (synthesis)
- K41 how to circulate agreed amendments to project **information and documents** and specification (application)
- K42 how to obtain necessary checks and approvals when they are needed (application)

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- K43 how to produce up-to-date **information** on progress to meet **project requirements** (application)
- K44 how to issue **information** on progress to the people who need it to meet **project requirements** (application)
- K45 how to ensure that accurate and complete **registers and records** are maintained which can be used for quality auditing (application)

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Scope/range

Specify production document requirements

- 1 Controlling requirements:
 - 1.1 cost
 - 1.2 monitoring time
 - 1.3 quality
 - 1.4 methods of production
 - 1.5 methods of coordination
 - 1.6 liaison requirements
 - 1.7 model templates, documents and standards
 - 1.8 integration of data
 - 1.9 Building Information Modelling
 - 1.10 status
 - 1.11 electronic data transfer
 - 1.12 Project Information Plan
 - 1.13 Model Delivery Plan
 - 1.14 scheduling of work
 - 1.15 methods of interdisciplinary working
 - 1.16 impact statement
 - 1.17 information management accountabilities
- 2 Information and documents:
 - 2.1 forms of contract
 - 2.2 specifications
 - 2.3 drawings
 - 2.4 operations and maintenance manuals
 - 2.5 bills of quantities
 - 2.6 schedules
 - 2.7 health and safety plans
 - 2.8 Building Information Modelling
 - 2.9 graphical and non-graphical data files

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- 2.10 proprietary file formats
- 2.11 accounts
- 2.12 claims
- 2.13 correspondence
- 2.14 minutes of meetings
- 3 Project stages:
 - 3.1 Stage 0 (Strategy)
 - 3.2 Stage 1 (Brief)
 - 3.3 Stage 2 (Concept)
 - 3.4 Stage 3 (Definition)
 - 3.5 Stage 4 (Design)
 - 3.6 Stage 5 (Build and Commission)
 - 3.7 Stage 6 (Handover and Closeout)
 - 3.8 Stage 7 (Operation and End of Use)
- 4 Purpose:
 - 4.1 to obtain consents
 - 4.2 procurement
 - 4.3 contract
 - 4.4 production
 - 4.5 operation and use
- 5 Scope:
 - 5.1 number
 - 5.2 type
 - 5.3 format
 - 5.4 size
- 6 Registers and records:
 - 6.1 incoming and outgoing drawing and document registers
 - 6.2 records of document approval and revision
- 7 Criteria, discrepancies and inconsistencies:

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- 7.1 format
- 7.2 presentation
- 7.3 accuracy
- 7.4 technical content
- 7.5 completeness
- 7.6 referencing
- 7.7 cross referencing and correlation with associated information and documents
- 7.8 conflict and clash detection
- 7.9 status
- 7.10 spelling, grammar and punctuation
- 8 Decision makers:
 - 8.1 the client
 - 8.2 statutory authorities
 - 8.3 CDM coordinator
 - 8.4 financial advisers
 - 8.5 consultants
 - 8.6 potential contractors
 - 8.7 potential sub-contractors and suppliers
 - 8.8 facilities/asset maintenance managers
 - 8.9 users

Prepare prescriptive specifications

- 9 Type of specification:
 - 9.1 original document
 - 9.2 National Building Specification
 - 9.3 industry/practice standards
 - 9.4 elements, trade, building
 - 9.5 phase
- 10 Purpose:
 - 10.1 to obtain consents

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- 10.2 facilitate procurement
- 10.3 award a contract
- 10.4 authorise production and installation
- 11 Project stage:
 - 11.1 Stage 4 (Design)
 - 11.2 Stage 5 (Build and Commission)
- 12 Source information:
 - 12.1 design information (digital models, documents, drawings, graphical and non-graphical electronic data files)
 - 12.2 statutory regulations
 - 12.3 British Standards
 - 12.4 codes of practice
 - 12.5 technical literature
- 13 Valid:
 - 13.1 format
 - 13.2 presentation
 - 13.3 accuracy
 - 13.4 technical content
 - 13.5 completeness
 - 13.6 referencing
 - 13.7 cross-referencing and correlation with associated documents
 - 13.8 status
 - 13.9 being up to date
 - 13.10 applied principles
- 14 Checks and approvals:
 - 14.1 format
 - 14.2 presentation
 - 14.3 accuracy
 - 14.4 technical content
 - 14.5 completeness

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- 14.6 referencing
- 14.7 cross-referencing and correlation with associated documents
- 14.8 conflict and clash detection
- 14.9 status
- 14.10 spelling, grammar and punctuation

Control and maintain project information

- 15 Information required for decision making:
 - 15.1 design brief
 - 15.2 design information from earlier stages and current stage
 - 15.3 surveys
 - 15.4 reports
 - 15.5 statutory approvals and requirements
 - 15.6 cost estimates
 - 15.7 standards and codes of practice
 - 15.8 technical literature
 - 15.9 environmental assessment objectives
- 16 Project stages:
 - 16.1 Stage 0 (Strategy)
 - 16.2 Stage 1 (Brief)
 - 16.3 Stage 2 (Concept)
 - 16.4 Stage 3 (Definition)
 - 16.5 Stage 4 (Design)
 - 16.6 Stage 5 (Build and Commission)
 - 16.7 Stage 6 (Handover and Closeout)
- 17 Protocols:
 - 17.1 Project Information Plan
 - 17.2 Model Delivery Plan
- 18 Information and documents:
 - 18.1 forms of contract

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- 18.2 specifications
- 18.3 drawings
- 18.4 bills of quantities
- 18.5 schedules
- 18.6 health and safety plans
- 18.7 Building Information Model
- 18.8 graphical and non-graphical data files
- 18.9 proprietary file formats
- 18.10 accounts
- 18.11 claims
- 18.12 correspondence
- 18.13 minutes of meetings
- 19 Requirements of the stakeholders:
 - 19.1 to obtain consents
 - 19.2 facilitate procurement
 - 19.3 award a contract
 - 19.4 authorise production
- 20 Requirements for controlling information and document production:
 - 20.1 cost
 - 20.2 monitoring time
 - 20.3 quality
 - 20.4 methods of production
 - 20.5 methods of coordination
 - 20.6 liaison requirements
 - 20.7 model templates, documents and standards
 - 20.8 integration of data
 - 20.9 Building Information Modelling
 - 20.10 status
 - 20.11 electronic data transfer

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- 20.12 Project Information Plan
- 20.13 Model Delivery Plan
- 20.14 scheduling of work
- 20.15 methods of interdisciplinary working
- 20.16 impact statement
- 20.17 information management accountabilities
- 21 Discrepancies and inconsistencies:
 - 21.1 format
 - 21.2 presentation
 - 21.3 accuracy
 - 21.4 technical content
 - 21.5 completeness
 - 21.6 referencing
 - 21.7 cross referencing and correlation with associated documents
 - 21.8 conflict and clash detection
 - 21.9 status
 - 21.10 spelling, grammar and punctuation
- 22 Registers and records:
 - 22.1 incoming and outgoing information and document registers
 - 22.2 records of information and document approval and revision

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