

Overview

This Unit is about obtaining, confirming, recording, storing, using and presenting information. You will need to identify the information you require and ensure that it is accurate, reliable and effective and that it also meets organisational and legal requirements.

You will need to ensure that systems and procedures are suitable, comply with organisational and legal requirements and allow authorised access. You will need to identify possible improvements, either personally or with team members, and make recommendations for improvement.

You will need to identify and agree project requirements. You will need to identify unrealistic project requirements, decide on alternatives, and summarise and present the project requirements. You will need to produce detailed accurate schedules, allowing for anticipated contingencies in an appropriate agreed format.

Performance criteria

You must be able to:

Obtain the information needed to take critical decisions

- P1 identify the **types of information** you need to make the required **decisions**
- P2 ensure that your **sources of information** are reliable and sufficiently wide-ranging to meet your information needs
- P3 ensure that your **methods of obtaining information** are reliable, effective and make efficient use of resources
- P4 ensure that your **methods of obtaining information** are consistent with organisational values, policies and legal requirements
- P5 ensure that the **information** you obtain is accurate, relevant and sufficient to allow you to take **decisions**
- P6 ensure that where **information** is inadequate, contradictory or ambiguous, you take prompt and effective action to deal with this

Confirm project requirements

You must be able to:

- P7 confirm with decision makers their immediate **goals and objectives of project stakeholders**
- P8 identify the function and performance requirements for the project
- P9 **clarify the project stakeholders' requirements**, the options available and the **constraints and risks** which might apply to the project
- P10 identify project requirements and **stakeholders' requirements** which do not appear to be realistic and identify valid options
- P11 summarise the project requirements in order to prepare a work schedule

Prepare a work schedule

You must be able to:

- P12 produce detailed schedules of work which are accurate, and contain a statement of the **scope of work** and the **services** needed
- P13 estimate and obtain the work content and time duration accurately in consultation with others
- P14 plan the schedules of work so that they are achievable with the resources available
- P15 calculate appropriate and realistic allowances to meet anticipated contingencies
- P16 draft the schedules of work in a format which is appropriate to the type and **scope of the work**
- P17 **present** information clearly and accurately and reaching agreement using a style and approach which maintains goodwill and trust

Knowledge and understanding

You need to know and understand:

Obtain the information needed to take critical decisions

- K1 how to identify the **information** you need to make the required **decisions** (understanding)
- K2 how to ensure that your **sources of information** are reliable and sufficiently wide-ranging to meet your information needs (application)
- K3 how to ensure that your **methods of obtaining information** are reliable, effective and make efficient use of resources (application)
- K4 how to ensure that your **methods of obtaining information** are consistent with organisational values, policies and legal and ethical requirements (application)
- K5 how to ensure that the **information** you obtain is accurate, relevant and sufficient to allow you to take **decisions** (application)
- K6 how to ensure that where **information** is inadequate, contradictory or ambiguous that you take prompt and and effective action to deal with this (application)

Confirm project requirements

You need to know and understand:

- K7 how to confirm with decision makers their immediate **goals and objectives of project stakeholders** (application)
- K8 what to identify as the function and performance requirements for the project (understanding)
- K9 how to **clarify** the **project stakeholders'** requirements, the options available and the **constraints and risks** which might apply to the project (application)
- K10 what to identify as project requirements and **stakeholders' requirements** which do not appear to be realistic and valid options (understanding)
- K11 how to summarise the project requirements in order to prepare a work schedule (application)

Prepare a work schedule

You need to know and understand:

- K12 how to produce schedules of work containing the **scope of the work** and the **services** (application)
- K13 how and why to estimate and obtain the work content and time duration (analysis)
- K14 how and why to plan the schedules of work (analysis)
- K15 how to calculate allowances to meet anticipated contingencies (application)
- K16 how and why to draft the schedules of work (synthesis)
- K17 how to **present** information (application)
- K18 how and why to reach agreement (evaluation)

Scope/range

Obtain the information needed to take critical decisions

- 1 Sources of information:
 - 1.1 people within your organisation
 - 1.2 people outside your organisation
 - 1.3 internal information systems
 - 1.4 published media
 - 1.5 specially commissioned research
 - 1.6 valid personal experience
- 2 Types of information:
 - 2.1 quantitative
 - 2.2 qualitative
- 3 Methods of obtaining information:
 - 3.1 listening and watching
 - 3.2 reading
 - 3.3 spoken questioning
 - 3.4 written questioning
 - 3.5 formal research conducted personally
 - 3.6 formal research conducted by third parties
- 4 Decisions:
 - 4.1 affecting operational performance
 - 4.2 affecting organisational policy

Confirm project requirements

- 5 Project Stakeholders:
 - 5.1 the client
 - 5.2 design consultants
 - 5.3 line management
 - 5.4 potential contractors
 - 5.5 potential subcontractors and suppliers
 - 5.6 independent client advisers
 - 5.7 user groups
 - 5.8 funding agencies
 - 5.9 special interest groups

Scope/range

- 5.10 local community
- 6 Goals and Objectives
 - 6.1 quantity
 - 6.2 design quality
 - 6.3 build quality
 - 6.4 cost
 - 6.5 time
 - 6.6 development
 - 6.7 improvement
 - 6.8 fitness for purpose
 - 6.9 whole life costs
 - 6.10 use/adaptability
 - 6.11 whole life costs
 - 6.12 health, safety and welfare
 - 6.13 economic impacts
 - 6.14 community impacts
 - 6.15 environmental impact
 - 6.16 security
 - 6.17 conservation impact
- 7 Clarify the project stakeholders' requirements by:
 - 7.1 reference to standard documentation
 - 7.2 checklists
 - 7.3 client consultation
 - 7.4 questionnaires
 - 7.5 comparative field research
 - 7.6 market research
 - 7.7 technical requirements
 - 7.8 client requirements
 - 7.9 insurance risk impact
 - 7.10 project management plan
- 8 Constraints and risks
 - 8.1 cost
 - 8.2 time

Scope/range

- 8.3 resources
- 8.4 health and safety
- 8.5 the environment
- 8.6 technical

Prepare a work schedule

- 9 Scope of work:
 - 9.1 time
 - 9.2 cost
 - 9.3 quality objectives
- 10 Services:
 - 10.1 design (including management services)
 - 10.2 materials
 - 10.3 construction (e.g. buildings, roads, motorways, railways and all infrastructure projects)
 - 10.4 plant and equipment
 - 10.5 people
 - 10.6 manufacture
- 11 Present:
 - 11.1 orally
 - 11.2 in writing
 - 11.3 graphically
 - 11.4 electronically

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Prepare programmes and schedules of work in
construction



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