



Regulated Qualifications Unit and Assessment Specification

Unit title	Prepare and Agree Contract Accounts and Entitlement in Construction Contracting Operations Management
Regulator unit code	T/616/7291
SQA unit code	H81J 84
SSC Ref	COSCCOMO18

History of changes

Publication date: August 2014

Version: 02 (July 2017)

Version number	Date	Description	Authorised by
02	July 2017	Unit Specification updated to reflect current Ofqual terminology	Qualifications Officer

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Regulated Qualifications Unit specification

Title	Prepare and Agree Contract Accounts and Entitlement in Construction Contracting Operations Management	
Level	6	
Credit value	14	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1 Be able to prepare and agree interim valuations and final accounts.	1.1	Value work in progress, and agree the calculations with valuers who are acting for the people involved in the contract.
	1.2	Price and reference the quantities used in valuations and accounts so that they meet contract provisions.
	1.3	Value variations and items which do not have an agreed contract rate by agreeing justifiable non-standard rates.
	1.4	Identify the liability for the cost of re-work and additional work, agree the liability with the people involved in the contract and record the estimates to meet administrative and contractual requirements.
	1.5	Prepare and submit accurate valuations and accounts which contain relevant background information and clarify and justify areas of potential disagreement.
	1.6	Record documents, back-up information and calculations accurately, reference them clearly and store them so that they can be easily referred to for audit and reference.
2 Understand how to prepare and agree interim valuations and final accounts.	2.1	Examine how to value work in progress.
	2.2	Evaluate how to agree the calculations with valuers who are acting for the people involved in the contract.
	2.3	Examine how to price the quantities used in valuations and accounts so that they meet contract provisions.

Learning Outcomes	Assessment Criteria
The learner will:	The learner can:
	<p>2.4 Explain how to reference the quantities used in valuations and accounts so that they meet contract provisions.</p> <p>2.5 Examine how to value variations and items which do not have an agreed contract rate by agreeing justifiable non-standard rates.</p> <p>2.6 Describe what to identify as the liability for the cost of re-work and additional work.</p> <p>2.7 Evaluate how to agree the liability with the people involved in the contract.</p> <p>2.8 Explain how to record the estimates to meet administrative and contractual requirements.</p> <p>2.9 Explain how to prepare and submit accurate valuations and accounts which contain relevant background information.</p> <p>2.10 Explain how to clarify areas of potential disagreement.</p> <p>2.11 Evaluate how to justify areas of potential disagreement.</p> <p>2.12 Explain how to record documents, back-up information and calculations accurately, reference them clearly and store them so that they can be easily referred to for audit and reference.</p>
<p>3 Be able to prepare and agree compensation events and entitlement for reimbursement for loss and expense.</p>	<p>3.1 Assess the basis of entitlement and criteria for recovery against the contract and relevant expert opinion, and progress valid entitlement which can be substantiated.</p> <p>3.2 Calculate entitlement accurately from relevant and verified information sources.</p>

Learning Outcomes The learner will:	Assessment Criteria The learner can:
	<p>3.3 Analyse the opposing grounds for the entitlement, structure the entitlement clearly and present them.</p> <p>3.4 Negotiate and agree amendments to the entitlement with the parties involved in the contract.</p> <p>3.5 Conduct negotiations with the parties involved in the contract in a manner which maintains their goodwill and trust.</p> <p>3.6 Record documents, back-up information and calculations accurately, reference them clearly and store them so that they can be easily referred to for audit and reference.</p>
<p>4 Understand how to prepare and agree compensation events and entitlement for reimbursement for loss and expense.</p>	<p>4.1 Examine how to assess the basis of entitlement and criteria for recovery against the contract and relevant expert opinion.</p> <p>4.2 Explain how to progress valid entitlement which can be substantiated.</p> <p>4.3 Explain how to calculate entitlement accurately from relevant and verified information sources.</p> <p>4.4 Examine how to analyse the opposing grounds for the entitlement.</p> <p>4.5 Explain how to structure the entitlement clearly.</p> <p>4.6 Explain how to present the entitlement.</p> <p>4.7 Propose how to negotiate amendments to the entitlement with the parties involved in the contract.</p> <p>4.8 Evaluate how to agree amendments to the entitlement with the parties involved in the contract.</p>

Learning Outcomes	Assessment Criteria
The learner will:	The learner can:
	<p>4.9 Explain how to conduct negotiations with the parties involved in the contract in a manner which maintains their goodwill and trust.</p> <p>4.10 Explain how to record documents, back-up information and calculations accurately, reference them clearly and store them so that they can be easily referred to for audit and reference.</p>

Additional information about the unit
Unit purpose and aim(s)
<p>This unit is about valuing work in progress, preparing and submitting accounts, assessing the basis of entitlement and progressing valid entitlement.</p> <p>You will need to value work in progress, price and reference quantities used in valuations and accounts, value variations by proposing and agreeing non-standard rates. You will also need to identify the liability for the cost of re-work and additional work. You will need to prepare and submit valuations, accounts and clarify any areas of disagreement. You will also need to record documents, back-up information and calculations for audit and reference.</p> <p>You will need to assess the basis of entitlement for the recovery of loss and expense against the contract seeking expert opinion where appropriate and progress valid entitlement. You will also need to calculate entitlement, analyse opposing grounds for the entitlement and negotiate and agree amendments with the parties involved. You will then need to record documents and back-up information for audit and reference purposes.</p>
Unit start date
01 August 2014
Details of the relationship between the unit and relevant national occupational standards (if appropriate)
The unit sets out the competence and knowledge specification for COSCCOM018 in Construction Contracting Operations Management
Details of the relationship between the unit and other standards or curricula (if appropriate)
N/A
Assessment requirements specified by a sector or regulatory body (if appropriate)
<p>The following ranges apply:</p> <p>Learning Outcomes 1 and 2</p> <ul style="list-style-type: none"> ◆ Value work in progress: <ul style="list-style-type: none"> — measure quantities — suppliers' and sub-contractors' accounts and variations — project records — inspection of works — agreed variations — by invoice ◆ Contract - type: <ul style="list-style-type: none"> — main contract — sub-contract

Additional information about the unit (cont)

Assessment requirements specified by a sector or regulatory body (if appropriate) (cont)

- ◆ Valuations and accounts:
 - interim payment
 - final accounts
- ◆ Variations:
 - costs
 - quantity
 - quality
 - programme

Learning Outcomes 3 and 4

- ◆ Entitlement - resulting from:
 - measurement
 - valuation of variations
 - liability for costs
 - loss and expense arising from breaches of contract
 - extensions of time
 - damages arising from extra-contractual consideration
- ◆ Contract - type:
 - main contractors
 - sub-contract
- ◆ Expert opinion:
 - legal
 - technical
- ◆ Information sources:
 - records of executed work
 - day work
 - records of meetings
 - contract documents, eg specifications, quantities, drawings
 - revised contract documents
 - variations issued
 - site records including photographs
 - agreed rates of payment
 - agreed method of calculation
 - legislative change, eg tax and NI payments, minimum wage, VAT
 - company accounts
- ◆ Analyse:
 - claimants' analysis
 - respondents' analysis

Additional information about the unit (cont)
Assessment requirements specified by a sector or regulatory body (if appropriate) (cont)
<p>This unit must be assessed in a work environment, in accordance with:</p> <ul style="list-style-type: none"> ◆ the Additional Requirements for Qualifications using the title NVQ in QCF ◆ the Construction Skills' Consolidated Assessment Strategy for Construction and the Built Environment. <p>Assessors for this unit must have verifiable, current industry experience and a sufficient depth of relevant occupational expertise and knowledge, and must use a combination of assessment methods as defined in the Consolidated Assessment Strategy.</p> <p>Workplace evidence of skills cannot be simulated.</p>
Endorsement of the unit by a sector or other appropriate body (if required)
CITB
Location of the unit within the subject/sector classification system
4.1 Engineering, 5.2 Building and Construction
Name of the organisation submitting the unit
CITB
Guided Learning Hours
50

Regulated Qualifications Assessment specification

Assessment (evidence) requirements

The evidence requirements for this unit are shown in the main body of the unit under the section titled 'Assessment requirements or guidance specified by a sector or regulatory body'.

Guidance on methods/instruments of assessment

Occupational skills (OS) unit

This unit is designed to assess the skills of learners in the workplace. Observation of learner performance can only be carried out on-the-job and should always be the primary and preferred source of evidence of competent performance.

Collection of supplementary evidence of performance can be used to further substantiate, support and expand the evidence base for competent performance where this is necessary. This may arise in situations where evidence from direct observation of the learners on-the-job is deemed insufficient to fully meet the required standards. Supplementary evidence may include:

- ◆ witness testimony
- ◆ questioning
- ◆ professional discussion
- ◆ product and photographic evidence
- ◆ relevant active documentation, reports, presentations
- ◆ other valid evidence which relates directly to learner performance on-the-job

SQA's Guide to Assessment is designed to provide support for everyone who assesses for SQA qualifications. It looks at the principles of assessment, and brings together information on assessment in general as well as on best practice in assessment. The Guide to Assessment can be downloaded free from SQA's website www.sqa.org.uk.