

**NATIONAL  
COMPETENCY STANDARDS  
FOR  
QUANTITY SURVEYORS -  
CONSTRUCTION ECONOMISTS**



**THE AUSTRALIAN INSTITUTE OF  
QUANTITY SURVEYORS**



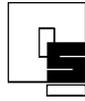
# NATIONAL COMPETENCY STANDARDS FOR QUANTITY SURVEYORS

## CONTENTS

Units	Page No.
<b>GENERAL</b>	
Introduction	1
Acknowledgments	4
Caveat	4
<b>BASIC ABILITIES</b>	5
<b>PROJECT COST MANAGEMENT COMPETENCIES</b>	
<b>Cost Management</b>	6
1. Strategic Planning (Core Unit)	8
2. Budgetary Reporting and Monitoring Procedures (Core Unit)	9
3. Cost Planning (Core Unit)	10
4. Cost Estimating (Core Unit)	11
<b>Contract Administration</b>	12
5. Account Management (Core Unit)	14
6. Change Management (Core Unit)	16
7. Claims & Dispute Resolution (Core Unit)	17
<b>Procurement</b>	18
8. General Procurement Advice (Core Unit)	20
9. Contract Documentation (Including Bills of Quantities) (Core Unit)	22
<b>Financial Audit</b>	24
10. Financial Audit (Core Unit)	26
<b>Resource Analysis</b>	27
11. Resource Analysis (Core Unit)	28
<b>ASSET FINANCIAL MANAGEMENT COMPETENCIES</b>	
<b>Feasibility Studies</b>	29
12. Feasibility Studies (Core Unit)	31
<b>Life Cycle Cost Analyses</b>	32
13. Life Cycle Cost Analyses (Core Unit)	33
<b>Tax Depreciation</b>	34
14. Tax Depreciation (Specialist Unit)	35
<b>Special Assessments</b>	36
15. Special Assessments (Specialist Unit)	38
a) Sales Tax	38
b) Stamp Duty	38
c) Land Tax	39
d) Capital Gains Tax	40
e) Local Authority Rates	41
f) Body Corporate Charges	42
g) Replacement Cost Estimates	42
h) Tenancy Reinstatement	43

<b>Units</b>	<b>Page No.</b>
<b>Audits</b>	44
16. Audits (Specialist Unit)	
a) Premises Audit	45
b) Energy and Maintenance Audit	46
c) Asset Registers	46
<b>Technical Due Diligence</b>	47
17. Technical Due Diligence (Specialist Unit)	49
<b>Compliance Issues</b>	50
18. Compliance Issues (Specialist Unit)	51
<b>SPECIALISED MANAGEMENT COMPETENCIES</b>	
<b>Project Value Management</b>	53
19. Project Value Management (Core Unit)	54
<b>Project Management</b>	55
20. Project Management (Specialist Unit)	55
<b>Project Risk Management</b>	56
21. Project Risk Management (Specialist Unit)	58
<b>Quality Assurance</b>	59
22. Quality Assurance (Specialist Unit)	60
<b>SUPPORT COMPETENCIES</b>	61
23. Computer Services (Core Unit)	62
24. Measurement (Core Unit)	63
25. Construction Technology (Core Unit)	63
26. Government Regulation and Law (Core Unit)	64
27. Arbitration (Specialist Unit)	65
28. Expert Witness/Evidence (Specialist Unit)	66
29. Business Management (Specialist Unit)	
a) Communication	67
b) Information Management	68
c) Ethics and Standards	68
d) Human Resources	69
e) Marketing	69
f) Accounting	70
g) Office Management	71
h) Public Relations	73
i) Education and Training	74
30. Research and Development (Specialist Unit)	74
31. Cost Information Database (Specialist Unit)	75





## NATIONAL COMPETENCY STANDARDS FOR QUANTITY SURVEYORS

### INTRODUCTION

The National Competency Standards for Quantity Surveyors October 1997, provides the basis for the development and evaluation of the level of competency of Quantity Surveyors throughout Australia.

The competencies described in this publication cover the broad range of expertise provided by the modern Quantity Surveyor and extend beyond some of the more traditional Quantity Surveying services.

Competency has been defined as the ability to perform the activities within an occupation to the standard expected for employment.

Certain competencies are essential and provide the core requirements of a competent Quantity Surveyor. These core requirements will change from time to time as the profession meets the demands for diversified new services. However, in order to clarify the current position, these Standards have been divided into *Core* (ie. essential) units and *Specialist* (ie. optional) units of competency.

Education bodies seeking accreditation for courses in Construction Economics and Quantity Surveying will be expected to provide an appropriate level of education that satisfies these core units of competency.

These Standards should also be read in conjunction with the National Competency Standards Policy and Guidelines published by the National Training Board.

The National Training Board Policy and Guidelines provide background information together with guidance on how to use the Standards.

The development of competency standards for the profession serves many purposes, but fundamentally provide the profession with the opportunity to:

- define the competencies (core and specialist) required by the industry
- evaluate the training programs available to those wishing to enter the profession
- review the skills of practitioners and organisations, and identify their training needs

They may also be used to identify skills which will be needed in the future, directions for professional development and registration requirements.

These Standards have been prepared under the auspices of The Australian Institute of Quantity Surveyors (AIQS), the regulatory body of the Quantity Surveying profession, whose mission is to:

<b>LEAD</b>	the development and promotion of the discipline of quantity surveying / construction economics;
<b>INFORM</b>	the community of the benefits of total construction cost management;
<b>DEVELOP</b>	and maintain standards of excellence and best practice in the profession;
<b>PROMOTE</b>	quantity surveying as indispensable to value-added services in the construction process;
<b>ENCOURAGE</b>	the efficient and sustainable use of all construction resources.

Membership of the Institute is restricted to those with appropriate educational qualifications and who have demonstrated the required level of professional competence after a required work experience period. Corporate membership is open to Quantity Surveyors, Building or Construction Economists, Cost Engineers and Cost Estimators. Students and other related professionals are eligible for non-corporate membership.

## INTRODUCTION (Continued)

Quantity Surveyors are key professionals in the construction industry and their clients include financiers, developers, government agencies, building proprietors, architects and contractors. They can be involved in cost planning, cost management, procurement, contract administration, feasibility studies and asset financial management and all activities related to making the financial operation of the property and construction industries as trouble-free and effective as possible.

Quantity Surveyors perform the role of cost management throughout the life of a project from the concept stage through acquisition and operation and finally to disposal. The Quantity Surveyor in the role of cost manager is a competent and experienced person who will safeguard the client's interests and endeavour to minimise contractual claims and unexpected financial pressures on the budget.

The following competency standards describe the skills required by Quantity Surveyors in providing professional services to the property and construction industries and are broken down into units of competency.

Each unit of competency describes in broad terms a particular element of a Quantity Surveyor's function in terms of performance criteria, range indicators and evidence guides.

Performance criteria specify the outcomes to demonstrate acceptable performance achieved for each element of competency.

Range indicators frame the boundaries within which the performance criteria apply.

Evidence guides give an indication of tangible results that confirm satisfactory demonstration of competence.

Entry or Graduate level Quantity Surveyors first demonstrate acquisition of these competencies by successful completion of their tertiary degree course. This enables them to proceed to Probationer level where these competencies are improved and expanded through supervised "on the job" training and experience over a minimum of two years. Their competencies are then reassessed by the Institute through a review process and attendance at an Assessment of Professional Competence interview, which they must pass before proceeding to Associate Level.

Associates and Fellows may acquire the additional competencies through further formal education (post graduate studies), continuing professional development or "in-house" training and work experience.

## ACKNOWLEDGMENTS

The Australian Institute of Quantity Surveyors wishes to acknowledge the contribution of a special task force established by the Institute in 1995 under the direction of the Institute's President, Professor Dennis Lenard, which resulted in a draft set of standards in August 1995.

These standards were then further researched, developed and edited by Dr Alan Bowen-James, Senior Research Scientist with the Faculty of Design, Architecture and Building, University of Technology, Sydney.

Final development and review was carried out by Martin Hinds a Life Fellow of the Institute.

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## CAVEAT

The many competencies described in this publication may be acquired by individual Quantity Surveyors over a lifetime of professional practice, education and training.

Most Quantity Surveyors should have attained the competencies listed as "core" or essential, either after graduation from their tertiary course and in their first five to ten years of on the job training in a Quantity Surveying practice.

A number of the other competencies are quite specialised and therefore optional and might only be acquired by Quantity Surveyors working in a specific area or on particular projects.

It is therefore unlikely that all these competencies will be found in any one Quantity Surveyor. However, in many Quantity Surveying practices the balance of these competencies is likely to be provided by pooling all the skills of the various staff.

The Australian Institute of Quantity Surveyors (AIQS) publishes a Members' Business Register which lists the services provided by members' practices. People seeking Quantity Surveying services should refer to that Register and ascertain directly that the members concerned are able to provide the skills or competencies required for a particular task.

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## BASIC ABILITIES

The basic characteristics of the abilities that lead to a competent Quantity Surveyor are:

- **Quantification/Measurement.** The ability to quantify and enumerate.
- **Analysis.** The ability to observe, assess, identify problems and find innovative solutions.
- **Appraisal/Evaluation.** The ability to assess value.
- **Communication.** The ability to impart knowledge, ideas and concepts through oral, written and visual means.
- **Interpersonal Skills.** The ability to effectively work with others and to be part of a team.
- **Leadership.** The ability to lead and motivate.
- **Self-Development.** The ability to set goals, display enthusiasm, self motivate and undertake research.
- **Management.** The ability to organise, monitor, control and plan the effective use of resources.
- **Documentation.** The ability to prepare written information in a format which clearly conveys meaning.
- **Synthesis.** The ability to combine fact or ideas into a complex whole.
- **Computer Literacy.** The ability to understand and apply basic computer skills.

These basic abilities form the platform from which a competent Quantity Surveyor can develop and are an integral part of the various units of competence.

# PROJECT COST MANAGEMENT COMPETENCIES

Project cost management involves various cost management and procurement procedures to ensure that the Client's budget is properly established and maintained.

## COST MANAGEMENT

Cost management of a project includes establishing the budget and then effectively monitoring and reporting against that budget on a regular basis, cost planning the evolving design, preparing appropriate contract documentation and advising on variations and claims during the progress of the project.

### Range Indicators

Competencies in cost management will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in project cost management including:

- strategies for gathering data and carrying out research on current construction costs and future predictions
- analysis of data relating to costing, budgeting and cashflows including financial implications of various options
- analysis of the financial implications of construction process
- use of appropriate analysis and evaluation techniques in reporting to the Client
- application of principles of cost management and elemental cost analysis
- construction and financial practices in the construction industry.
- life cycle implications where required
- appropriate recording and documentation of information including costings

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
  - the influence of inflation on construction costs
- principles of construction and the use of materials
- the legislative and regulatory requirements of the industry.

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

## PROJECT COST MANAGEMENT COMPETENCIES

### COST MANAGEMENT

#### Range Indicators (Continued)

##### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

##### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

##### **Fellow (or Expert)**

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

#### **Evidence Guide**

Evidence of successful achievement of this competency would be effective and efficient management of the cost management process and the setting up and application of appropriate systems for monitoring of activities.

# PROJECT COST MANAGEMENT COMPETENCIES

## COST MANAGEMENT

### COMPETENCY STANDARD UNIT 1

#### STRATEGIC PLANNING (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
1.1 Provide strategic advice on the costs and benefits of various courses of action on a construction project	1.1.1 Various techniques for value optimisation established and implemented 1.1.2 Advice on various courses of action provided
1.2 Conduct economic and financial analyses for the life of a construction project	1.2.1 Relevant financial and economic data collected 1.2.2 Financial and economic data analysed for life of project
1.3 Provide input into the development of the project brief	1.3.1 Relevant data collected 1.3.2 Input into project brief provided
1.4 Conduct compliance and management studies	1.4.1 Requirements of relevant government planning and environmental legislation and regulation researched 1.4.2 Strategy developed for compliance and management of the project in line with established requirements
1.5 Prepare cost benefit analyses	1.5.1 Data for cost benefit analyses accessed and evaluated 1.5.2 Cost benefit analyses prepared

# PROJECT COST MANAGEMENT COMPETENCIES

## COST MANAGEMENT

### COMPETENCY STANDARD UNIT 2

#### BUDGETARY REPORTING AND MONITORING PROCEDURES (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
2.1 Establish and maintain cost management and monitoring procedures	2.1.1 Control systems established 2.1.2 Cost administration procedures established 2.1.3 Cost reporting and forecasting systems established and maintained 2.1.4 Variation control systems established and maintained
2.2 Co-ordinate Client's cash flow	2.2.1 Required data collected 2.2.2 Appropriate procedures established for co-ordination of cash flow
2.3 Appraise Contractors cost reporting systems	2.3.1 Contractors cost reporting systems evaluated 2.3.2 Advice on required changes and adjustments given
2.4 Establish budget for project	2.4.1 Cost budgets for all contracts prepared and established 2.4.2 Work package scope established
2.5 Prepare cost reports	2.5.1 Format of cost reports established 2.5.2 Cost section of project progress report prepared based on appropriate data

# PROJECT COST MANAGEMENT COMPETENCIES

## COST MANAGEMENT

### COMPETENCY STANDARD UNIT 3

#### COST PLANNING (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
3.1 Establish project cost objectives and parameters	3.1.1 Project cost objectives clarified with Client, colleagues and other appropriate personnel 3.1.2 Project cost parameters and constraints identified and verified 3.1.3 Understanding of development processes involved in costing demonstrated
3.2 Access data to produce estimate/indicative costs	3.2.1 Appropriate data gathering structures and relevant schedules developed 3.2.2 Data for cost estimates/indicative costs collected and evaluated 3.2.3 Documentation inputs to estimates/indicative cost processes prepared
3.3 Analyse time related cost data	3.3.1 Time related cost data analysed
3.4 Undertake project cost estimate	3.4.1 Project cost estimate completed using time-related cost data
3.5 Analyse and advise on various alternative design solutions	3.5.1 Analyses of design construction details completed 3.5.2 Design solutions evaluated 3.5.3 Appropriate design solution developed, compared and selected
3.6 Prepare project implementation and procurement plan	3.6.1 Implementation and procurement plan clearly specified 3.6.2 Stages of the project identified with defined outcomes
3.7 Evaluate outcomes and analyse financial and non-financial return	3.7.1 Outcomes of the planning process evaluated 3.7.2 Implementation strategy analysed for financial and non financial return
3.8 Prepare cost plan	3.8.1 Documentation input into cost plan prepared based on sound principles and accepted practice 3.8.2 Cost plan developed based on information collected and understanding of life cycle costing and process models
3.9 Undertake scope audit	3.9.1 Scope audit undertaken based on sound principles and accepted practice
3.10 Provide advice to Clients on estimate, cost alternatives and cost plan	3.10.1 Involvement in on-going planning/review cycle maintained 3.10.2 Advice on cost plan provided to Client based on analysis of data 3.10.3 Time lines and deadlines met

# PROJECT COST MANAGEMENT COMPETENCIES

## COST MANAGEMENT

### COMPETENCY STANDARD UNIT 4

#### COST ESTIMATING (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
4.1 Prepare estimates	4.1.1 Scope of estimates researched and prepared 4.1.2 Detailed estimates prepared 4.1.3 Estimates for proposed changes and variations prepared 4.1.4 Cash flow prepared
4.2 Develop cost components	4.2.1 Cost factors researched and developed 4.2.2 Productivity factors developed 4.2.3 Unit rates developed
4.3 Assess and advise on the accuracy of cost estimates	4.3.1 Cost estimates reviewed and evaluated 4.3.2 Advice provided on accuracy of estimates
4.4 Prepare estimating procedures and conduct estimate reviews	4.4.1 Procedures for estimating researched and appropriate procedures prepared 4.4.2 Estimate reviews conducted according to sound principles and accepted professional practice

# PROJECT COST MANAGEMENT COMPETENCIES

## CONTRACT ADMINISTRATION

Contract administration involves effective cost management of the project during the construction phase including preparation of cost management documents, management of cashflow including progress payments and rise and fall calculations, negotiation of claims and scope changes, dispute resolution and progressive reporting to the Client.

### Range Indicators

Competencies in contract administration will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in project contract administration including:

- strategies for gathering data and carrying out research on current trends in contract administration
- analysis of data relating to contract performance and cashflows
- analysis of the financial implications of construction process, rise and fall calculations and outcomes of negotiations on variations and claims
- use of appropriate analysis and evaluation techniques in reporting to Client
- application of principles of contract administration
- construction and financial practices in the construction industry.
- life cycle implications where required
- appropriate recording and documentation of information

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
  - the influence of inflation on construction costs
- principles of construction and the use of materials
- the legislative and regulatory requirements of the industry.
- dispute resolution procedures

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

## **PROJECT COST MANAGEMENT COMPETENCIES**

### **CONTRACT ADMINISTRATION**

#### **Range Indicators (Continued)**

##### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

##### **Fellow (or Expert)**

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

#### **Evidence Guide**

Evidence of successful achievement of this competency would be effective and efficient management of the contract administration process and the setting up and application of appropriate systems for monitoring of activities.

# PROJECT COST MANAGEMENT COMPETENCIES

## CONTRACT ADMINISTRATION

### COMPETENCY STANDARD UNIT 5

#### ACCOUNT MANAGEMENT (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
5.1 Prepare construction cost management document	5.1.1 Cost management document prepared (priced bill of quantities or priced work breakdown structure) 5.1.2 Cost management document approved by contracting parties
5.2 Manage cash flow during construction	5.2.1 Parameters relating to cash flow established 5.2.2 Data accessed, processed and evaluated 5.2.3 Cash flow forecast progressively updated in light of current information 5.2.4 Outcomes communicated to Client and management team 5.2.5 Information transferred to project report
5.3 Recommend progress payments during construction phase	5.3.1 Procedures for handling progress payments developed and implemented 5.3.2 Reports from specialist consultants obtained and evaluated 5.3.3 Negotiations with contractors conducted and compliance with contract ensured 5.3.4 Value of work in progress certified and information transferred to project report
5.4 Clarify the extent of rise and fall costs and access data	5.4.1 Sound data gathering techniques employed 5.4.2 All required data accessed 5.4.3 All data analysed and evaluated using appropriate process and following accepted professional practice
5.5 Record outcomes of data gathering and analysis process	5.5.1 Information transferred to project report 5.5.2 Status confirmed
5.6 Conduct negotiations on adjustment of rise and fall costs	5.6.1 Negotiation carried out based on sound preparation and accurate data 5.6.2 Negotiation conducted in a professional manner to achieve acceptable outcomes

## PROJECT COST MANAGEMENT COMPETENCIES

### CONTRACT ADMINISTRATION

#### COMPETENCY STANDARD UNIT 5

#### ACCOUNT MANAGEMENT (CORE UNIT) (Continued)

5.7 Prepare progressive financial reports during construction phase	5.7.1 Format for progressive financial reports developed 5.7.2 Required financial information accessed and analysed 5.7.3 Report compiled and results conveyed to relevant personnel and Client
5.8 Arrange settlement of accounts during construction phase	5.8.1 Relevant data collected, analysed and evaluated 5.8.2 Report compiled and negotiation undertaken 5.8.3. Information transferred to the project report 5.8.4 Penalties/bonuses assessed 5.8.5 Relevant personnel kept informed at all stages of process
5.9 Communicate with Client	5.9.1 Client kept informed at all stages 5.9.2 Technically sound and factually accurate advice provided to Client 5.9.3 Client briefed on process and outcomes 5.9.4 Final outcome and rationale for outcome presented to Client

# PROJECT COST MANAGEMENT COMPETENCIES

## CONTRACT ADMINISTRATION

### COMPETENCY STANDARD UNIT 6

#### CHANGE MANAGEMENT (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
6.1 Establish extent of proposed and actual scope changes	6.1.1 Proposed and actual scope change clarified 6.1.2 Parameters and objectives clarified; 6.1.3 Contract status confirmed
6.2 Collect all data relevant to scope changes	6.2.1 Data gathering structure and schedules established 6.2.2 Data evaluated following accepted professional principles and practice
6.3 Conduct negotiation on scope changes	6.3.1 Negotiation carried out based on adequate preparation and following sound principles 6.3.2 Negotiation conducted in a professional manner to achieve acceptable outcomes
6.4 Manage cost claims during construction	6.4.1 Procedures for handling cost claims developed and implemented 6.4.2 Status confirmed 6.4.3 Relevant data collected and evaluated 6.4.4 Negotiations on cost claims undertaken based on data collected
6.5 Communicate with Client	6.5.1 Client kept informed at all stages 6.5.2 Technically sound and factually accurate advice provided to Client 6.5.3 Client briefed on process and outcomes 6.5.4 Final outcome and rationale for outcome explained to Client

# PROJECT COST MANAGEMENT COMPETENCIES

## CONTRACT ADMINISTRATION

### COMPETENCY STANDARD UNIT 7

#### CLAIMS AND DISPUTE RESOLUTION (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
7.1 Establish background and collect all data relevant to claim	7.1.1 Relevant data collected, analysed and evaluated 7.1.2 Status report compiled 7.1.3 Best/worst case scenario assessed
7.2 Conduct negotiation on claim settlement	7.2.1 Key issues for each party identified 7.2.2 Best/worst case scenarios for each party identified 7.2.3 Separate and combined meeting of parties conducted 7.2.4 Most beneficial result negotiated for Client
7.3 Prepare claim and resolution status report for Client	7.3.1 Client kept informed at all stages 7.3.2 Client briefed on best/worst case scenarios 7.3.3 Final results and rationale for outcome presented to Client

# PROJECT COST MANAGEMENT COMPETENCIES

## PROCUREMENT

Procurement involves the various processes by which a construction contract is achieved including the use of the appropriate project delivery system and standard form of contract, the method of tendering and contractor selection, the provision of bills of quantities and the subsequent acceptance of a tender.

### Range Indicators

Competencies in procurement will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in procurement including:

- strategies for gathering data and carrying out research on project delivery systems, contractor selection and forms of contract
- analysis of data including financial implications of various options
- use of appropriate analysis and evaluation techniques in reporting to Client
- methods of construction and analysis of constructability
- appropriate recording and documentation of information including registration of interest, preparation of bills of quantities and work breakdown structures

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
  - the influence of inflation on construction costs
- principles of construction and the use of materials
- the legislative and regulatory requirement of the industry.
- dispute resolution procedures

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

# PROJECT COST MANAGEMENT COMPETENCIES

## PROCUREMENT

### Range Indicators (Continued)

#### **Fellow (or Expert)**

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

#### **Evidence Guide**

Evidence of successful achievement of this competency would be effective and efficient management of the procurement process and the setting up and application of appropriate systems for monitoring of activities.

# PROJECT COST MANAGEMENT COMPETENCIES

## PROCUREMENT

### COMPETENCY STANDARD UNIT 8

#### GENERAL PROCUREMENT ADVICE (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
8.1 Collect information required to specify procurement requirements	8.1.1 Clients objectives established and confirmed 8.1.2 Objectives of process specified 8.1.3 Market conditions evaluated and options reviewed
8.2 Evaluate project delivery systems	8.2.1 Project delivery systems reviewed 8.2.2 Forms of contract reviewed
8.3 Undertake constructability analyses	8.3.1 Forms of construction analysed 8.3.2 Forms of construction costed and optimised 8.3.3 Constructability recommendations made
8.4 Provide input into the development of the project brief	8.4.1 Relevant data collected 8.4.2 Input into project brief provided
8.5 Manage tendering process	8.5.1 Tender and contract documents prepared 8.5.2 Trends evaluated and analysed 8.5.3 Contracts negotiated 8.5.4 Changes evaluated and negotiated 8.5.5 Results of tendering process communicated to Client
8.6 Prepare documentation inputs to the tender	8.6.1 Advice on appropriate tender documentation provided 8.6.2 Bills of Quantities or work breakdown structures to aid tendering process prepared
8.7 Initiate tenderer selection process	8.7.1 Tenderer selection criteria determined 8.7.2 Tenderer data accessed 8.7.3 Documentation for registration of tenderer interest prepared and placed in appropriate publications

## PROJECT COST MANAGEMENT COMPETENCIES

### PROCUREMENT

#### COMPETENCY STANDARD UNIT 8

#### GENERAL PROCUREMENT ADVICE (CORE UNIT) (Continued)

<p>8.8 Advise on the selection of tenderers</p>	<p>8.8.1 Tenderers' proposals and credentials analysed against criteria</p> <p>8.8.2 Possible tenderers listed and validity confirmed</p> <p>8.8.3 Short list prepared</p> <p>8.8.4 Client advised</p>
<p>8.9 Evaluate and negotiate tenders</p>	<p>8.9.1 Data gathered using appropriate structures and procedures</p> <p>8.9.2 Project objectives and parameters established</p> <p>8.9.3 Tenders evaluated and negotiated</p> <p>8.9.4 Project implementation and procurement plan identified</p> <p>8.9.5 Analysis of financial and non-financial returns made</p>

# PROJECT COST MANAGEMENT COMPETENCIES

## PROCUREMENT

### COMPETENCY STANDARD UNIT 9

#### CONTRACT DOCUMENTATION (BILLS OF QUANTITIES) (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
<p>9.1 Establish Client requirements and advise on alternative contract document types</p>	<p>9.1.1 Client objectives, risk acceptance and other factors assessed</p> <p>9.1.2 Alternative contract document types explained to Client</p> <p>9.1.3 Client agreement on selected contract document obtained</p>
<p>9.2 Recommend and agree method of measurement and input document requirements</p>	<p>9.2.1 Alternative method of measurement types explained to Client</p> <p>9.2.2 Expected quality and timing of input documents assessed</p> <p>9.2.3 Client agreement on method of measurement obtained</p> <p>9.2.4 Input documents scheduled, time-tabled and prioritized</p>
<p>9.3 Develop management plan for resources and other requirements</p>	<p>9.3.1 Trade or other document breakdown determined</p> <p>9.3.2 Appropriate resource levels quantified and allocated</p>
<p>9.4 Access and distribute input documents</p>	<p>9.4.1 Input documents validated and registered</p> <p>9.4.2 Input documents distributed to Quantity Surveying team</p>
<p>9.5 Prepare Bill of Quantities</p>	<p>9.5.1 Measurement (software) system established and set up</p> <p>9.5.2 Items described, measured, signposted and quantified</p> <p>9.5.3 Items sorted in appropriate sequence</p> <p>9.5.4 Preliminaries, trade or other sections and subsection headings added</p> <p>9.5.5 "Rates to include" and other pricing and measurement preamble clauses added</p> <p>9.5.6 Item reference added</p> <p>9.5.7 Elemental or other analysis codes added</p>

## PROJECT COST MANAGEMENT COMPETENCIES

### PROCUREMENT

#### COMPETENCY STANDARD UNIT 9

#### CONTRACT DOCUMENTATION (BILLS OF QUANTITIES) (CORE UNIT) (Continued)

9.6 Undertake quantity and other checks	9.6.1 Input document discrepancies and/or omissions noted and queried during measurement 9.6.2 "To take" lists prepared during measurement 9.6.3 Final input documents checked for Bill completeness 9.6.4 Final output document checked for spelling, omissions, etc. 9.6.5 Cost significant items and quantities "bulk" checked
9.7 Prepare Addenda as required	9.7.1 Final Bill adjusted for corrections to input documents and errors and/or omissions

# PROJECT COST MANAGEMENT COMPETENCIES

## FINANCIAL AUDIT

Financial audit involves an independent assessment that risk is being effectively managed to the satisfaction of the Client or their financier.

The audit service provides a level of confidence for the Client/financier in terms of the containment of risk from both financial and management aspects.

Generally the fields encompassed within the financial audit are:

- design documentation control
- compliance issues incorporation
- project delivery control
- time control
- financial control

### **Range Indicators**

Competencies in financial audit will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in the production of financial audits

- strategies for gathering data and carrying out research on legal and financial issues
- analysis of data including risk implications
- use of appropriate analysis and evaluation techniques in reporting to Client
- the construction and financial practices of the industry
- life cycle implications where required
- appropriate recording and documentation of information

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
  - the influence of inflation on construction costs
- principles of construction and the use of materials
- the legislative and regulatory requirement of the industry.

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

# PROJECT COST MANAGEMENT COMPETENCIES

## FINANCIAL AUDIT

### Range Indicators (Continued)

#### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

#### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

#### **Fellow (or Expert)**

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

#### **Evidence Guide**

Evidence of successful achievement of this competency would be effective and efficient management of the financial audit process and the setting up and application of appropriate systems for monitoring of activities.

# PROJECT COST MANAGEMENT COMPETENCIES

## FINANCIAL AUDIT

### COMPETENCY STANDARD UNIT 10

#### FINANCIAL AUDIT (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
10.1 Establish project objectives and parameters	10.1.1 Project objectives clarified in discussion with Client or their financier  10.1.2 Project parameters and constraints identified and verified including: <ul style="list-style-type: none"><li>• design documentation control</li><li>• compliance issues incorporation</li><li>• project delivery control</li><li>• timing issues controlled</li><li>• financial control established</li></ul>
10.2 Access available data and information	10.2.1 Availability of data established and requirements needed to meet the brief confirmed
10.3 Confirm interface with consultants, contractors and other relevant data providers	10.3.1. Formal arrangements for interface with others arranged
10.4 Establish reporting details	10.4.1 Reporting format confirmed with the Client including level of supporting documentation
10.5 Implement financial audit	10.5.1 Initial financial audit completed in relation to design documentation, compliance issues and project delivery  10.5.2 Monthly financial audit carried out with all risk factors monitored

# PROJECT COST MANAGEMENT COMPETENCIES

## RESOURCE ANALYSIS

Resource analysis involves carrying out various studies in construction resource management including associated productivity estimates/forecasts and subsequent monitoring of performance.

### Range Indicators

Competencies in resource analysis will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in resource analysis

- strategies for gathering data and carrying out research on resource factors
- analysis of data including financial implications
- use of appropriate analysis and evaluation techniques in reporting to Client
- the construction and financial practices of the industry
- appropriate recording and documentation of information

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
- principles of construction and the use of materials
- the legislative and regulatory requirement of the industry.

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

### **Fellow (or Expert)**

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

# PROJECT COST MANAGEMENT COMPETENCIES

## RESOURCE ANALYSIS

### Range Indicators (Continued)

#### Evidence Guide

Evidence of successful achievement of this competency would be effective and efficient management of resource analysis and the setting up and application of appropriate systems for monitoring of activities.

#### COMPETENCY STANDARD UNIT 11

#### RESOURCE ANALYSIS (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
11.1 Undertake resource management and productivity studies including appropriate estimates and forecasts	11.1.1 Resource requirements identified 11.1.2 Productivity estimates prepared
11.2 Develop appropriate performance monitoring procedures	11.2.1 Appropriate performance monitoring procedures developed 11.2.2 Responsibility schedules prepared and tasks assigned
11.3 Prepare resource and productivity usage reports	11.3.1 Resource usage reports prepared 11.3.2 Productivity reports prepared
11.4 Prepare material order lists	11.4.1 Material requirements identified 11.4.2 Material order lists prepared
11.5 Develop and implement appropriate procedure for data gathering	11.5.1 Procedures for data gathering developed 11.5.2 Data gathering implemented

## ASSET FINANCIAL MANAGEMENT COMPETENCIES

Asset financial management involves independent advice on the cost of ownership of property particularly in the areas of feasibility, tax, audits, life cycle cost analysis and technical due diligence.

### FEASIBILITY STUDIES

Feasibility studies assess the viability of a project over its expected life and are a necessary prerequisite to any effective decision making process including obtaining finance.

#### Range Indicators

Competencies in feasibility studies will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in the carrying out of a feasibility study including:

- research and data gathering strategies related to the collection of predictive information
- analysis of data on property cycles
- the use of appropriate methodologies to analyse supply and demand statistics
- use of appropriate analysis and evaluation techniques including discounted cash flows and sensitivity analyses
- the construction and financial practices of the industry
- life cycle costing and planning
- appropriate recording and documentation practice particularly in relation to compilation of data on completed projects

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
  - the influence of inflation on construction costs
- principles of construction and the use of materials
- the legislative and regulatory requirements of the industry

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

#### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## FEASIBILITY STUDIES

### Range Indicators (Continued)

#### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

#### **Fellow (or Expert)**

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

#### **Evidence Guide**

Evidence of successful achievement of this competency would be effective and efficient management of the feasibility process and the setting up and application of appropriate systems for monitoring of activities.

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## FEASIBILITY STUDIES

### COMPETENCY STANDARD UNIT 12

#### FEASIBILITY STUDIES (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
12.1 Access information required for feasibility study	12.1.1 Project objectives and parameters established based on communication with Client 12.1.2 Data required for study accessed 12.1.3 Documentation inputs prepared including compilation of database of completed projects 12.1.4 Relevant information entered into database
12.2 Undertake analysis for feasibility study	12.2.1 Data evaluated and analysed 12.2.2 Implementation and procurement plan identified 12.2.3 Project stages and outcomes of each stage defined 12.2.4 Financial and non financial returns analysed
12.3 Show understanding of property economic issues	12.3.1 Property market cycles analysed 12.3.2 Supply and demand statistics analysed 12.3.3 Inflation projections made and analysed 12.3.4 Interest rate projections made and analysed
12.4 Communicate outcomes of study to Client	12.4.1 Client given accurate information and advice leading to acceptable functional and financial outcomes

## **ASSET FINANCIAL MANAGEMENT COMPETENCIES**

### **LIFE CYCLE COST ANALYSES**

Life Cycle Cost Analyses involves various considerations of the total cost of ownership over the whole life of a property asset.

#### **Range Indicators**

Competencies in life cycle cost analysis will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in the carrying out of life cycle cost analyses including:

- strategies for accessing data relating to life cycle and cost in use information and research
- analysis of data for preparation of life cycle costs
- use of appropriate analysis and evaluation techniques
- the life cycle cost practices of the industry
- appropriate recording and documentation practice particularly as applied to life cycle costs

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
  - the influence of inflation and consequent discounting of future costs of ownership
- principles of construction and the use of materials
- the legislative and regulatory requirements of the industry
- national and international trends in the use of Life Cycle Cost Analysis

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

#### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

#### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

## **ASSET FINANCIAL MANAGEMENT COMPETENCIES**

### **LIFE CYCLE COST ANALYSES**

#### **Range Indicators (Continued)**

## Fellow (or Expert)

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

## Evidence Guide

Evidence of successful achievement of this competency would be effective and efficient management of the life cycle cost analysis process and the setting up and application of appropriate systems for monitoring of activities.

### COMPETENCY STANDARD UNIT 13

#### LIFE CYCLE COST ANALYSES (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
13.1 Establish project objectives and parameters	13.1.1 Project objectives clarified in discussion with Client and other consultants 13.1.2 Project parameters and constraints identified and verified
13.2 Confirm data elements	13.2.1 Data elements affecting life cycle costs determined
13.3 Establish data projection information	13.3.1 Escalation and discounting factors established and financial projections confirmed
13.4 Establish time aspect over which analysis process is to be considered	13.4.1 Time aspect confirmed including importance or otherwise of short, medium and long term projections
13.5 Establish data sources and collection and confirmation process	13.5.1 Data sources and validity of data clarified
13.6 Confirm reporting format layout and presentation	13.6.1 Reporting requirements confirmed with the Client
13.7 Complete life cycle cost analysis	13.7.1 Life cycle cost analysis completed

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## TAX DEPRECIATION

Tax Depreciation involves the calculation of appropriate tax depreciation write offs of all eligible items.

### Range Indicators

Competencies in tax depreciation will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in the development of tax depreciation schedules including:

- research and data gathering strategies and structures as applied to information relating to tax depreciation including latest government tax rulings
- analysis of data and financial implications
- use of appropriate analysis and evaluation techniques in preparation of estimates of value of items and construction costs including appropriate fees, site charge, sales tax, import duties etc.
- the construction and financial practices of the industry.
- appropriate recording and documentation applied to preparation of schedules and reports

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
- principles of current taxation practices
- the legislative and regulatory requirements of taxation

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

### **Fellow (or Expert)**

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

## ASSET FINANCIAL MANAGEMENT COMPETENCIES

## TAX DEPRECIATION

### Range Indicators (Continued)

## Evidence Guide

Evidence of successful achievement of this competency would be effective and efficient production of tax depreciation schedules and the setting up and application of appropriate systems for monitoring of activities.

### COMPETENCY STANDARDS UNIT 14

#### TAX DEPRECIATION (SPECIALIST UNIT)

ELEMENT	PERFORMANCE CRITERIA
14.1 Extract depreciable items and non-depreciable items	14.1.1 Depreciable items estimated or extracted from bill of quantities where available 14.1.2 Non depreciable items estimated or extracted from bill of quantities where available 14.1.3 Building write-off allowances calculated
14.2 Identify and estimate depreciable items and non-depreciable items in the case of depreciation for subsequent owners	14.2.1 Estimate of construction costs prepared including appropriate allowances for builder's overheads and preliminaries 14.2.2 Value for depreciable and non-depreciable items calculated 14.2.3 Building write-off allowances calculated
14.3 Develop schedule and prepare report	14.3.1 Preliminaries and consultants fees apportioned 14.3.2 Relevant dates ascertained 14.3.3 Client's requirements for inclusion of other costs in the schedule determined 14.3.4 Schedule and report prepared in accordance with accepted professional practice 14.3.5 Schedule and report submitted to Client and/or relevant parties

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## SPECIAL ASSESSMENTS

Quantity Surveyors are involved in a number of special assessments including calculation of taxes, stamp duties, rates and charges associated with property as well as replacement cost estimates for insurance purposes and tenancy reinstatement estimates.

- Sales Tax Assessments involve calculation of the appropriate tax on the sale value of goods manufactured in Australia including flow on of appropriate exemption benefits.
- Stamp Duty Assessments involve calculation of the appropriate State imposed duty on the transfer of interest in land.
- Land Tax Assessments involve calculation of the appropriate State imposed tax based upon the unimproved value of all land owned by taxpayers including lodgement of objections to the relevant State body.
- Capital Gains Tax Assessments involve calculation of the appropriate tax on capital gains on property assets acquired after September 1985.
- Local Authority Rate Assessments involve calculation of the appropriate rates on property assets as levied by appropriate local governments based upon valuations established by the Valuer General in accordance with the relevant State Act.
- Body Corporate Charge Assessments involve calculation of the appropriate charge common to all unit holders as defined by the Body Corporate under the relevant State Act.
- Replacement Cost Estimates involve calculation of the appropriate building cost for insurance or valuation purposes including any specific exclusions and allowances for time related impacts.
- Tenancy Reinstatement Assessments involve estimating the approximate cost of reinstatement of premises on cessation of a lease in accordance with the terms of the lease including clearly defining work outside the scope of the lease.

### **Range Indicators**

Competencies in various special assessments will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in the carrying out of specialised assessments including:

- strategies for accessing data relating to regulations and legal requirements, research and data gathering
- analysis of data for preparation of estimates for tax and insurance purposes
- use of appropriate analysis and evaluation techniques
- the financial, insurance and tax practices of the industry
- life cycle costing and planning
- appropriate recording and documentation practice particularly as applied to taxation

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## SPECIAL ASSESSMENTS (Continued)

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
- principles of current taxation practices
- the legislative and regulatory requirements of taxation

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

### **Fellow (or Expert)**

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

### **Evidence Guide**

Evidence of successful achievement of this competency would be effective and efficient management of the Special Assessments and the setting up and application of appropriate systems for monitoring of activities.

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## SPECIAL ASSESSMENTS

### COMPETENCY STANDARD UNIT 14

#### SPECIAL ASSESSMENTS (SPECIALIST UNIT)

##### (a) SALES TAX ASSESSMENTS

ELEMENT	PERFORMANCE CRITERIA
15a.1 Confirm the service objectives and strategy	15a.1.1 Service objectives clarified in discussion with the Client and other appropriate personnel 15a.1.2 Sales tax exemption number from Tax Office confirmed 15a.1.3 Strategy to derive assessments identified and verified 15a.1.4 Contract documents considered as to whether they can include relevant documents which allow tenderers to include exemption benefits
15a.2 Confirm interface with contractor and sub-contractors	15a.2.1 Arrangements between Client and Contractors established and confirmed
15a.3 Establish reporting format	15a.3.1 Reporting format confirmed in line with Clients brief
15a.4 Complete sales tax assessment	15a.4.1 Sales tax assessment completed

##### (b) STAMP DUTY ASSESSMENTS

ELEMENT	PERFORMANCE CRITERIA
15b.1 Confirm the service objectives	15b.1.1 Service objectives determined with the Client and advisers
15b.2 Confirm purchases arrangements	15b.2.1 Land purchases, or land with improvements or existing company structure including property confirmed 15b.2.2 Potential to achieve stamp duty savings under the proposed purchase arrangement confirmed
15b.3 Establish reporting format	15b.3.1 Reporting format confirmed with the Client
15b.4 Complete stamp duty assessment	15b.4.1 Stamp duty assessment completed

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## SPECIAL ASSESSMENTS

### COMPETENCY STANDARD UNIT 15

#### SPECIAL ASSESSMENTS (SPECIALIST UNIT) (Continued)

#### (c) LAND TAX ASSESSMENTS

ELEMENT	PERFORMANCE CRITERIA
15c.1 Confirm the service objectives and strategy	15c.1.1 Service objectives determined with the Client and advisers 15c.1.2 Objection to the Authorities assessment lodged 15c.1.3 Comparison made with greenfield sites, and comparable properties or unique aspects that unfairly disadvantage the site in terms of the tax assessment identified 15c.1.4 Strategy to derive assessments identified and verified
15c.2 Confirm interface with other professional consultants	15c.2.1 Limitations of the service to be provided clearly defined including the interface with any conjunctional services to be provided by others
15c.3 Establish reporting details	15c.3.1 Reporting format confirmed in line with Clients brief
15c.4 Complete land tax assessment	15c.4.1 Land tax assessment completed

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## SPECIAL ASSESSMENTS

### COMPETENCY STANDARD UNIT 15

#### SPECIAL ASSESSMENTS (SPECIALIST UNIT) (Continued)

#### (d) CAPITAL GAINS TAX ASSESSMENTS

ELEMENT	PERFORMANCE CRITERIA
15d.1 Confirm the service objectives	15d.1.1 Service objectives determined with the Client and advisers
15d.2 Confirm the cost base of assets	15d.2.1 Cost base of assets confirmed based on purchase established at a given point in time, including all eligible purchasing costs such as stamp duty charges, legal costs, real estate costs and similar
15d.3 Confirm capital gains index	15d.3.1 Australian Bureau of Statistics indices to be adopted confirmed as forming the basis for their potential application to the assets to be assessed
15d.4 Confirm interface with other professional consultants	15d.4.1 Impact on the service provisions of any interface requirement confirmed with other professional consultants
15d.5 Establish reporting details	15d.5.1 Reporting format confirmed in line with Clients' brief
15d.6 Complete capital gains tax assessment	15d.6.1 Capital gains tax assessment completed

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## SPECIAL ASSESSMENTS

### COMPETENCY STANDARD UNIT 15

#### SPECIAL ASSESSMENTS (SPECIALIST UNIT) (Continued)

#### (e) LOCAL AUTHORITY RATES ASSESSMENTS

ELEMENT	PERFORMANCE CRITERIA
15e.1 Confirm the service objectives and strategy	15e.1.1 Service objectives determined with the Client and advisers  15e.1.2 Lodgement of objection to the Authorities rating assessment confirmed including the grounds for objection eg. NAV based on market rents of comparable properties does not align with Clients market research or NAV should be reduced by the sinking fund effect as determined based on the depreciation of plant and equipment for tax depreciation purposes  15e.1.3 Strategy to derive assessments identified and verified
15e.2 Confirm interface with other professional consultants	15e.2.1 Limitations of the service to be provided clearly defined including interface with any conjunctional service to be provided by others
15e.3 Establish reporting details	15e.3.1 Reporting format confirmed in line with Clients' brief
15e.4 Complete local authority rates assessment	15e.4.1 Local authority rates assessment completed

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## SPECIAL ASSESSMENTS

### COMPETENCY STANDARD UNIT 15

#### SPECIAL ASSESSMENTS (SPECIALIST UNIT) (Continued)

#### (f) BODY CORPORATE CHARGE ASSESSMENTS

ELEMENT	PERFORMANCE CRITERIA
15f.1 Confirm the service objectives	15f.1.1 Service objectives clarified with the Client
15f.2 Define common areas to be assessed	15f.2.1 Charges for operating and maintaining discreetly different common areas of the property defined, eg., exterior of buildings, external common areas, external services, carparking, entry foyer, lobby areas, plant rooms and similar
15f.3 Define common charges to be assessed	15f.3.1 Charges for operating and maintaining the common areas defined, eg., insurance, painting, cleaning, servicing, heating, cooling, lighting, sharing of installation costs and similar
15f.4 Establish reporting format	15f.4.1 Reporting format confirmed with the Client including level of detail required
15f.5 Complete body corporate charge assessment	15f.5.1 Body corporate charge assessment completed

#### (g) REPLACEMENT COST ESTIMATES

ELEMENT	PERFORMANCE CRITERIA
15g.1 Establish service objectives	15g.1.1 Service objectives clarified with the Client including any diversification from standard practice
15g.2 Confirm extent of service	15g.2.1 Extent of service confirmed including demolition of existing building, re-design documentation, re-construction including or excluding tenancy fit-outs. Note: Where buildings of historical significance are involved replacement with a contemporary equivalent may be proposed
15g.3 Confirm time frames	15g.3.1 Time frames relative to reporting confirmed with the Client
15g.4 Establish reporting format	15g.4.1 Reporting format confirmed with Client including level of required supporting documentation
15g.5 Complete replacement cost estimate	15g.5.1 Replacement cost estimate completed

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## SPECIAL ASSESSMENTS

### COMPETENCY STANDARD UNIT 15

#### SPECIAL ASSESSMENTS (SPECIALIST UNIT) (Continued)

#### (h) TENANCY REINSTATEMENT ASSESSMENTS

ELEMENT	PERFORMANCE CRITERIA
15h.1 Establish service objectives and scope of work	15h.1.1 Service objectives clarified with the Client including any interface with other consultants or advisers and scope of work established
15h.2 Confirm lease terms and requirements	15h.2.1 Implications of lease terms confirmed in respect to tenancy reinstatement, eg., reinstate to same condition as start of lease with part wear and tear, or no arrangement in lease
15h.3 Confirm extent of brief including defining work by others	15h.3.1 Confirm scope of works to be carried out by tenant, ie., remove furniture, business equipment etc.  15h.3.2 Confirm extent of works to be assessed, eg., replace floor coverings, repaint walls, repaint ceilings, relocate light fittings, sprinkler heads, air diffusers, remove partitions, compactus units, reception desks or similar
15h.4 Confirm appropriate investigation requirements	15h.4.1 Investigative requirements established including availability of relevant documentation
15h.5 Establish reporting format	15h.5.1 Reporting format confirmed with the Client including level of supporting documentation
15h.6 Complete tenancy reinstatement assessment	15h.6.1 Tenancy reinstatement assessment completed

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## AUDITS

Audits involve assessment of the current status of a number of assets including:

- providing a detailed condition statement on a property from which future management and financial directions may be determined, taking into account potential environmental and life cycle considerations
- identifying appropriate energy usage and maintenance characteristics of a property to assist future directions and strategies and minimise maintenance costs and energy usage.
- providing a defined listing of the component plant, equipment and general fabric that make up a property asset for use in various tax, maintenance management, stocktaking and general ownership decisions.

### Range Indicators

Competencies in audits will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in the carrying out of audits including:

- strategies for accessing data relating to regulations and legal requirements, research and data gathering
- analysis of data for preparation of audits
- use of appropriate analysis and evaluation techniques
- financial, insurance and tax practices of the industry.
- life cycle costing and planning
- appropriate recording and documentation practice particularly as applied to audits

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
- principles of construction and the use of materials
- the legislative and regulatory requirements of the industry

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## AUDITS

### Range Indicators (Continued)

#### Entry Graduate

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

#### Associate

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

#### Fellow (or Expert)

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

### Evidence Guide

Evidence of successful achievement of this competency would be effective and efficient management of the audit process and the setting up and application of appropriate systems for monitoring of activities.

### COMPETENCY STANDARD UNIT 16

#### AUDITS (SPECIALIST UNIT)

##### (a) PREMISES AUDIT

ELEMENT	PERFORMANCE CRITERIA
16a.1 Establish project objectives and parameters	16a.1.1 Project objectives clarified and discussed with Client and other consultants 16a.1.2 Project parameters and constraints identified and verified
16a.2 Confirm the basis and level of reporting	16a.2.1 Reporting level defined on either an overview or detailed basis and implications of the reports confirmed
16a.3 Co-ordinate the functions of the various consultants	16a.3.1 Functions of various consultants confirmed
16a.4 Confirm reporting format, layout presentation and level of detail required	16a.4.1 Reporting detail confirmed with the Client and consultant team.
16a.5 Complete premises audit	16a.5.1 Premises audit completed

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## AUDITS

### COMPETENCY STANDARD UNIT 16

#### AUDITS (SPECIALIST UNIT) (Continued)

#### (b) ENERGY AND MAINTENANCE AUDIT

ELEMENT	PERFORMANCE CRITERIA
16b.1 Establish project objectives and parameters	16b.1.1 Service objectives determined with the Client 16b.1.2 Energy usage and characteristics considered and reviewed. 16b.1.3 Maintenance characteristics considered and reviewed
16b.2 Access available data and information	16b.2.1 Availability of data established including its relevance and requirements to meet the brief
16b.3 Confirm audit timing	16b.3.1 Initial audit program established including timing of subsequent audits eg. annually or other
16b.4 Establish reporting details	16b.4.1 Reporting format confirmed in line with Client's brief. Reports should confirm that property is being maintained in accordance with the adopted program. Reports should highlight potential for minimising future maintenance or energy costs

#### (c) ASSET REGISTERS

ELEMENT	PERFORMANCE CRITERIA
16c.1 Confirm the service objectives	16c.1.1 Service objectives determined with the Client 16c.1.2 Clients perspective use of the asset registers short term and long term confirmed 16c.1.3 Level of detail required confirmed, eg., quantities to be included, bar coding required
16c.2 Confirm interface with other professional consultants	16c.2.1 Interface with Client's business manager, accountants or legal advisers confirmed 16c.2.2 Compliance in reporting determined with requirements of other professional consultants
16c.3 Establish reporting details	16c.3.1 Reporting format with the Client confirmed
16c.4 Complete asset register report	16c.4.1 Asset register completed

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## TECHNICAL DUE DILIGENCE

Technical Due Diligence involves reporting on the existing condition of a property highlighting any adverse factors from which future management and financial directions in relation to purchase or sale may be determined. Legal issues are normally the subject of a separate report carried out by professionals trained in law.

Generally the fields encompassed within the Technical Due Diligence Report are:

- **Financial Implications and Projections of Technical Reports**
- **Occupational Health & Safety**

Compliance Reports:

- Building Regulations
- Disability Discrimination Act

Environmental Reports:

- Asbestos and other Hazardous Building Materials
- Site Contamination

- *Condition Statement Reports*

- Building Structure
- Building Facade
- Building Services

- *Building Replacement Costs of Insurance Purposes*

- **Tax Depreciation Assessment**

- **Site and Area Assessment**

- Lettable Area Confirmation
- Site Identification Survey

- **Planning Issues**

### **Range Indicators**

Competencies in technical due diligence will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in the carrying out of technical due diligence including:

- strategies for accessing data relating to regulations and legal requirements, research and data gathering
- analysis of data for preparation of technical due diligence reports
- use of appropriate analysis and evaluation techniques
- the financial, insurance and tax practices of the industry.
- life cycle costing and planning
- appropriate recording and documentation practice particularly as applied to technical due diligence

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## TECHNICAL DUE DILIGENCE

### Range Indicators (Continued)

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
  - the influence of inflation on construction costs
- principles of construction and the use of materials
- the legislative and regulatory requirements of the industry

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

### **Fellow (or Expert)**

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

### **Evidence Guide**

Evidence of successful achievement of this competency would be effective and efficient management of the technical due diligence process and the setting up and application of appropriate systems for monitoring of activities.

## ASSET FINANCIAL MANAGEMENT COMPETENCIES

### TECHNICAL DUE DILIGENCE

#### COMPETENCY STANDARD UNIT 17

#### TECHNICAL DUE DILIGENCE (SPECIALIST UNIT)

ELEMENT	PERFORMANCE CRITERIA
17.1 Establish project objectives and parameters and format of Report	17.1.1 Project objectives clarified in discussion with Client, colleagues and other appropriate personnel 17.1.2 Project parameters and constraints identified and verified
17.2 Access available data and information	17.2.1 Appropriate data gathering structures and relevant schedules developed
17.3 Activate consultant team	17.3.1 Consultant team instructed according to the Clients' requirements
17.4 Carry out appropriate investigation and prepare initial condition statement including any adverse factors	17.4.1 Clients' requirements reflected in brief
17.5 Provide advice to Clients which outlines potential cost of ownership after analysis of results	17.5.1 Advice provided to Client based on analysis of data to determine future direction in line with short, medium and long term management strategies 17.5.2 Advice given which is timely, appropriately evidenced and relevant 17.5.3 Time lines and deadlines met

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## COMPLIANCE ISSUES

As part of overall asset financial management certain legislated compliance issues have to be addressed.

### Range Indicators

Competencies in compliance issues will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in current government compliance issues

- strategies for accessing data relating to regulations and legal requirements, research and data gathering
- analysis of appropriate data
- use of appropriate analysis and evaluation techniques
- life cycle costing and planning
- appropriate recording and documentation practice particularly as applied to compliance issues

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
- the legislative and regulatory requirements of the industry

Communication skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

### **Fellow (or Expert)**

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

# ASSET FINANCIAL MANAGEMENT COMPETENCIES

## COMPLIANCE ISSUES

### Range Indicators (Continued)

#### Evidence Guide

Evidence of successful achievement of this competency would be effective and efficient management of compliance issues.

#### COMPETENCY STANDARD UNIT 18

#### COMPLIANCE ISSUES (SPECIALIST UNIT)

ELEMENT	PERFORMANCE CRITERIA
18.1 Ensure compliance of project with legislative requirements including environmental issues	18.1.1 Legislative requirements of government identified 18.1.2 Compliance with legislative requirements ensured
18.2 Ensure compliance of project with planning approval requirements	18.2.1 Planning approval requirements identified 18.2.2 Compliance with planning requirements ensured

# SPECIALISED MANAGEMENT COMPETENCIES

## PROJECT VALUE MANAGEMENT

Project value management involves the identification of best value design solutions having regard to the Clients' project objectives. Project value management includes life cycle cost analysis techniques as well as proactive participation in workgroup focus sessions.

### Range Indicators

Competencies in project value management will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in the carrying out of project value management including:

- strategies for identification of project objectives in terms of cost, time and quality
- use of cost planning techniques to establish realistic capital costs and identification of project component costs
- use of life cycle costing techniques in evaluating best value alternatives
- participation in value management focus groups
- techniques that manage outcomes from focus groups

Practitioners would demonstrate a thorough understanding of:

- factors affecting the industry
  - micro and macro economic factors
  - technological factors
  - the influence of inflation on construction costs
- factors affecting total life cycle cost
- principles of design and construction and their relevance to best values solutions
- construction industry techniques and efficiencies
- the legislative and regulatory requirements of the industry

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

# **SPECIALISED MANAGEMENT COMPETENCIES**

## **PROJECT VALUE MANAGEMENT**

### **Range Indicators (Continued)**

#### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

#### **Fellow (or Expert)**

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

#### **Evidence Guide**

Evidence of successful achievement of this competency would be effective and efficient management of the project value management process and the setting up and application of appropriate systems for monitoring of activities.

## SPECIALISED MANAGEMENT COMPETENCIES

### PROJECT VALUE MANAGEMENT

#### COMPETENCY STANDARD UNIT 19

#### PROJECT VALUE MANAGEMENT (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
19.1 Identify project objectives	19.1.1 Scope of works and life cycle clearly identified 19.1.2 Client cost, quality and time targets clearly identified 19.1.3 Risk allocation objectives clearly identified
19.2 Prepare cost plan and breakdown costs	19.2.1 Cost planning techniques used to establish total cost 19.2.2 Detailed costs broken down to assist value management 19.2.3 End costs for major components established
19.3 Carry out life cycle cost analysis of alternatives	19.3.1 Alternative solutions to project components identified 19.3.2 Life cycle costing of each alternative carried out 19.3.3 Techniques in expressing the costing and communicating results to Client and team members carried out
19.4 Instigate value management focus sessions	19.4.1 Proactive participation in value management focus sessions carried out 19.4.2 Proposed alternatives with appropriate costings carried out
19.5 Adopt value management session outcomes	19.5.1 Techniques in consolidating selected alternatives and expressing resultant adjustments to project cost, time and quality carried out 19.5.2 Design development and documentation for concurrence with adopted outcomes monitored

# **SPECIALISED MANAGEMENT COMPETENCIES**

## **PROJECT MANAGEMENT**

### **COMPETENCY STANDARD UNIT 20**

#### **PROJECT MANAGEMENT (SPECIALIST UNIT)**

Quantity Surveyors, as with many of the professionals in the construction industry, are capable of carrying out the role of Project Manager. However, project management is a separate profession and reference should be made to appropriate competency standards including the National Competency Standards for Project Management.

# SPECIALISED MANAGEMENT COMPETENCIES

## PROJECT RISK MANAGEMENT

Project risk management involves a structured approach to the identification, analysis and treatment of events that might have an adverse impact on achieving a project's objectives.

Project risk management involves:

- analysis of a project's objectives and its relationship to the strategic objectives of the Client organisation
- determination of a structure by which project risks can be analysed
- identification of events (risks) that might adversely affect the project
- quantification of risks using appropriate methods to enable the prioritisation of those risks
- identification and implementation of strategies to effectively manage those risks
- ongoing monitoring of changing risk situations and reviewing the effectiveness of risk management strategies

### Range Indicators

Competencies in project risk management will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in the carrying out of project risk management including:

- development of appropriate structures for a project risk management study
- strategies for accessing data relating to regulations and legal requirements, research and data gathering
- use of appropriate techniques for identification of project risks
- analysis of appropriate data
- use of appropriate risk analysis and evaluation techniques
- use of appropriate techniques for controlling and minimising project risks
- the financial, insurance and tax practices of the industry
- life cycle costing and planning
- appropriate recording and documentation practice particularly as applied to project risk management

Practitioners would demonstrate a thorough understanding of:

- sources of risk in the construction industry
- cause and effect relationships
- probability theory, particularly as applied to cost and schedule uncertainty in construction projects

# **SPECIALISED MANAGEMENT COMPETENCIES**

## **PROJECT RISK MANAGEMENT**

### **Range Indicators (Continued)**

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

#### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

#### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

#### **Fellow (or Expert)**

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

#### **Evidence Guide**

Evidence of successful achievement of this competency would be effective and efficient management of the project risk management process and the setting up and application of appropriate systems for monitoring risk situations at all phases of a construction project.

## SPECIALISED MANAGEMENT COMPETENCIES

### PROJECT RISK MANAGEMENT

#### COMPETENCY STANDARD UNIT 21

#### PROJECT RISK MANAGEMENT (SPECIALIST UNIT)

ELEMENT	PERFORMANCE CRITERIA
21.1 Analyse project objectives and develop a structure in which to undertake a project risk management study	21.1.1 Project objectives identified and listed 21.1.2 Project risk management study structure developed
21.2 Use various techniques to identify project risks including brainstorming, interviews, checklists, etc.	21.2.1 Risk identification session facilitated using brainstorming techniques 21.2.2 Risk management identification checklist identified for a standard project
21.3 Use techniques to analyse and quantify project risks including quantitative and qualitative analysis of risk likelihood and consequences, sensitivity analysis, probability calculations and "monte-carlo" simulations.	21.3.1 Probability that a project's objectives (eg. budget) will be met determined using sensitivity analysis or "monte-carlo" simulations 21.3.2 Prioritised list of project risks developed using either qualitative or quantitative techniques to assess risk levels
21.4 Identify suitable techniques to effectively manage project risks including likelihood reduction, impact mitigation, risk transfer and risk financing strategies	21.4.1 Risks that can be managed by the project team listed 21.4.2 Risks that are suitable for transfer to the contractor listed 21.4.3 Project insurance requirements identified 21.4.4 Appropriate project time and cost contingencies recommended 21.4.5 Structure of the ongoing management and monitoring of project risks recommended

# SPECIALISED MANAGEMENT COMPETENCIES

## QUALITY ASSURANCE

Quality assurance involves the systematic approach to carrying out services by the Quantity Surveyor to ensure their outcomes meet the expectation of the Client. Quality assurance includes establishment of clear procedures, work instructions and quality records that quantitatively demonstrate correctness and compliance with the Client's and Quantity Surveyor's service objectives.

### Range Indicators

Competencies in quality assurance will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in the carrying out of quality assurance including:

- establishment of a corporate quality policy and its structure and content that complies with Australian or International Standards
- establishment of procedures that clearly describe required processes, outcomes and verification requirements
- undertaking of internal audits of the application of these procedures
- continuous identification of improvements to procedures, outcomes and verification techniques that increase quality, efficiency and certainty
- provision of verification evidence to Clients to demonstrate the assurance of service quality

Practitioners would demonstrate a thorough understanding of:

- requirements of ISO 9000 series and AS 9000 series of standards
- quantity Surveyor's practices and procedures
- auditing techniques

Communication and computing skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

# SPECIALISED MANAGEMENT COMPETENCIES

## QUALITY ASSURANCE

### Range Indicators (Continued)

#### Evidence Guide

Evidence of successful achievement of this competency would be effective and efficient management of the quality assurance process and the setting up and application of appropriate systems for monitoring of activities.

#### COMPETENCY STANDARD UNIT 22

#### QUALITY ASSURANCE (SPECIALIST UNIT)

ELEMENT	PERFORMANCE CRITERIA
22.1 Develop corporate quality policy	22.1.1 Corporate objectives in relation to quality of service and service outcomes established 22.1.2 Practice policies established 22.1.3 Service policies established
22.2 Develop procedures	22.2.1 Appropriate procedures for each relevant service established 22.2.2 Verification criteria formulated 22.2.3 Standard forms and control documentation developed
22.3 Undertake internal audits	22.3.1 Audit program established 22.3.2 Internal audit carried out 22.3.3 Correction of non-conformance ensured 22.3.4 Procedure inadequacies identified
22.4 Continuously improve	22.4.1 Changes required to procedures identified to reflect changing requirements 22.4.2 Changes to improve efficiency or better assure outcomes identified 22.4.3 Policy and procedure documentation regularly amended
22.5 Ensure application of quality assurance	22.5.1 Techniques of procedure outcomes to provide tangible evidence of compliance ensured 22.5.2 Techniques directed at areas of service that have high impact ensured 22.5.3 Techniques of achievement of quality in service outcomes communicated to Client

## SUPPORT COMPETENCIES

Support competencies involve numerous skills that are necessary to be acquired in order to effectively practice the various services of a Quantity Surveyor, including measuring techniques, design and construction methodologies, environmental issues identification, quasi legal matters, general business management, service back up in computer software and hardware, research and development and an effective cost database.

### Range Indicators

Competence in support competencies will be demonstrated in the execution of typical work undertaken as a professional Quantity Surveyor. The work in question will call for the application of extensive knowledge appropriate to the discipline. Such knowledge will normally be acquired through a structured program of education to degree level incorporating training and work experience.

This activity would be based on a clear understanding of the processes involved in the carrying out of associated competencies including:

- strategies for acquiring knowledge relating to regulations and legal requirements, research and data gathering
- analysis of associated data
- methods of measurement
- business management techniques
- use of appropriate analysis and evaluation techniques
- appropriate recording and documentation practice

Practitioners would demonstrate a thorough understanding of:

- factors affecting the construction industry
  - micro and macro economic factors
  - technological factors
- the legislative and regulatory requirements of the industry
- changes in business management practice

Communication skills would also be applied in conjunction with competencies in this area.

Discrimination between the application of this unit at the levels of Entry Graduate, Associate and Fellow (or Expert) is chiefly in terms of the level of autonomy or supervision of the work required and the degree of leadership exercised. The type of projects on which the practitioner has worked and the range of experience would also be taken into account.

### **Entry Graduate**

The Entry Graduate would demonstrate these competencies in work undertaken under the supervision of a more senior practitioner. The Entry Graduate would be able to work effectively and develop through experience and added responsibility the ability to work under general guidance on the accepted range of work carried out by a professional Quantity Surveyor.

### **Associate**

The Associate would demonstrate these competencies in the course of work associated with the application of appropriate knowledge to recognised tasks either self managed or expert practitioner supervised activities. The Associate would have had varied experience and worked on a range of projects.

## SUPPORT COMPETENCIES

### Fellow (or Expert)

Competencies would be demonstrated in the course of undertaking tasks associated with the self managed application of appropriate knowledge to recognised tasks and leadership of others in the performance of the professional activities. The Fellow (or Expert) would be expected to have had considerable experience and demonstrated competency over a wide range of projects.

### Evidence Guide

Evidence of successful achievement of this competency would be effective and efficient management of the support competencies process and the setting up and application of appropriate systems for monitoring of activities.

### COMPETENCY STANDARD UNIT 23

#### COMPUTER SERVICES (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
23.1 Use computers to input and access information relating to the full range of Quantity Surveying applications	23.1.1 General skills in the use and care of computing hardware and software demonstrated 23.1.2 Computers used to access, enter and process information 23.1.3 Data exchange between participants in construction activities promoted
23.2. Use standard application packages in the management and presentation of information relating to construction economics activities	23.2.1 Word processing programs used to produce professional quality reports 23.2.2 Electronic spreadsheets used to prepare schedules. 23.2.3 Statistical packages use to manage and process statistical data
23.3 Use computer packages for specific construction economics applications	23.3.1 Computer software for cost planning and cost management used to achieve the most beneficial and professional outcomes for the Client

## SUPPORT COMPETENCIES

### COMPETENCY STANDARD UNIT 24

#### MEASUREMENT (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
24.1 Measure and describe construction components	24.1.1 Standard terminology understood 24.1.2 Method of measurement understood and applied 24.1.3 Construction components measured and described
24.2 Use statistical analysis techniques	24.2.1 Appropriate statistical techniques selected 24.2.2 Statistical techniques used in construction economic assessments 24.2.3 Statistical data interpreted and formatted for use in reports, documentation and databases
24.3 Apply knowledge of macro and micro economics to construction economics assessments	24.3.1 Knowledge of macro and micro economics applied to construction economics assessments 24.3.2 Accurate evaluation of economic trends applied in carrying out professional activities

### COMPETENCY STANDARD UNIT 25

#### CONSTRUCTION TECHNOLOGY (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
25.1 Acquire knowledge of construction processes, technologies and associated building materials	25.1.1 Knowledge of construction processes and technologies as applied to construction activities and sequencing of activities acquired 25.1.2 Knowledge of source and use of building materials applied in construction activities acquired include testing and assessing techniques 25.1.3 Knowledge of design and installation of building services acquired
25.2 Acquire knowledge of the principals of the science of construction	25.2.1 Knowledge of principles of building science demonstrated, in respect of heat, light and sound 25.2.2 Knowledge of principles of building science in relation to structures demonstrated including analysis, design and stability
25.3 Acquire knowledge of the principles of construction	25.3.1 Knowledge of principles of construction demonstrated including demolition methods, formwork design, erection techniques, plant and equipment and site surveys
25.4 Interpret building documentation	25.4.1 Building plans, specifications, construction codes and regulations interpreted

## SUPPORT COMPETENCIES

### COMPETENCY STANDARD UNIT 26

#### GOVERNMENT REGULATION AND LAW (CORE UNIT)

ELEMENT	PERFORMANCE CRITERIA
26.1 Acquire knowledge of appropriate Government legislation, standards and codes relating to a business practice	26.1.1 Knowledge of appropriate forms of business associations acquired 26.1.2 Knowledge of legislation relating to employment and professional liability acquired 26.1.3 Knowledge of law relating to occupational health and safety acquired 26.1.4 Knowledge of legislation for conserving the environment acquired 26.1.5 Relevant Australian Standards understood
26.2 Acquire knowledge of law relating to building practice	26.2.1 Knowledge of contract law relevant to construction industry acquired 26.2.2 Knowledge of various forms of building contract acquired

## SUPPORT COMPETENCIES

### COMPETENCY STANDARD UNIT 27

#### ARBITRATION (SPECIALIST UNIT)

ELEMENT	PERFORMANCE CRITERIA
27.1 Understand legal principles involved in arbitration proceedings	27.1.1 Knowledge of previous arbitration case histories demonstrated 27.1.2 Successful previous arbitration history or participation under supervision in previous successful arbitration demonstrated
27.2 Manage the preliminary conference based on knowledge of arbitration process and legal principles	27.2.1 Agreement to refer the dispute to arbitration documented 27.2.2 Nature of proceedings and running costs negotiated 27.2.3 Legal representation of parties decided 27.2.4 Procedures to streamline the hearing agreed 27.2.5 Venue and date of the hearing determined
26.3 Prepare material for the hearing	27.3.1 Timetable for hearing of dispute prepared 27.3.2 Points of claim and defence listed 27.3.3 Details of claim and counter claim identified 27.3.4 Documents pertaining to the dispute discovered and inspected
27.4 Conduct the hearing	27.4.1 Proceedings of the hearing conducted in accordance with legal principles and knowledge of the arbitration process 27.4.2 Arguments of both parties heard and recorded in accordance with the rules of evidence 27.4.3 Effective channels of communication with all parties maintained 27.4.4 Technically correct and factually sound advice provided
27.5 Achieve agreement on processes for viewing	27.5.1 Agreement of parties to inspections negotiated 27.5.2 Purpose and rules of viewing defined
27.6 Prepare award	27.6.1 Award written in accordance with accepted principles based on the stated case 27.6.2 Comprehensive details of the argument and reasons for award included 27.6.3 Time-scale for the award determined
27.7 Determine costs	27.7.1 Costs determined based on knowledge of contracting methods and business finance 27.7.2 Acceptance of determination of costs by all parties achieved

# SUPPORT COMPETENCIES

## COMPETENCY STANDARD UNIT 28

### EXPERT WITNESS / EVIDENCE (SPECIALIST UNIT)

ELEMENT	PERFORMANCE CRITERIA
28.1 Demonstrate knowledge of business and commercial law	28.1.1 Professional activities based on knowledge and understanding of business and commercial law
28.2 Prepare to give evidence	28.2.1 Basis of claim researched 28.2.2 Documentation necessary to prepare evidence identified and obtained 28.2.3 Information evaluated 28.2.4 Evidence and supporting documentation prepared 28.2.5 Possible weaknesses, discrepancies, ambiguities and errors identified 28.2.6 Proof of evidence verified 28.2.7 Clients advised on strength of case 28.2.8 Curriculum vitae prepared for presentation to court
28.3 Brief counsel and solicitors	28.3.1 Basis of evidence and methodology explained 28.3.2 Technical terms clarified 28.3.3 Full understanding of implications and technical compilation of evidence verified 28.3.4 Additional documentation provided where necessary
28.4 Give evidence	28.4.1 Concise and clear presentation given, based on complete and thorough knowledge of the matter 28.4.2 Time to prepare answers to questions which go beyond existing evidence requested if necessary 28.4.3 Information provided only within the parameters of expertise

# SUPPORT COMPETENCIES

## COMPETENCY STANDARD UNIT 29

### BUSINESS MANAGEMENT (SPECIALIST UNIT)

#### (a) COMMUNICATION

ELEMENT	PERFORMANCE CRITERIA
29a.1 Communicate effectively with colleagues, Clients, suppliers and contractors	29a.1.1 Technical information clearly and accurately communicated  29a.1.2 Appropriate means of communication selected for a variety of situations, instructions given and received accurately
29a.2 Access, organise and analyse information to provide the basis for written reports and presentations	29a.2.1 Research undertaken to access information of a technical and financial nature  29a.2.2 Information for reports and presentations organised in a coherent and logical way for oral or written presentation  29a.2.3 Information analysed for appropriateness and evaluated for quality and relevance
29a.3 Give presentations to Clients, arbitration hearings and in litigation	29a.3.1 Professional presentations given to Clients  29a.3.2 Evidence presented in a professional manner in hearings and litigation  29a.3.3 Technically sound and correct information presented
29a.4 Write reports	29a.4.1 Material logically organised for inclusion in a report  29a.4.2 Reports written on technical material relating to the profession
29a.5 Take part in formal and informal meetings	29a.5.1 Formal meeting procedure adhered to when appropriate  29a.5.2 Opinions clearly and logically stated  29a.5.3 Active listening undertaken to elicit others opinions (Clients, suppliers, contractors, others)  29a.5.4 Contribution made to effective outcomes
29a.6 Negotiate with a range of people (Clients, suppliers, colleagues, and construction and property industry personnel generally)	29a.6.1 Purpose of negotiation clarified  29a.6.2 Negotiation prepared for and relevant information collected  29a.6.3 Active listening techniques used to clarify positions  29a.6.4 Outcomes of negotiation summarised

## SUPPORT COMPETENCIES

### COMPETENCY STANDARD UNIT 29

#### BUSINESS MANAGEMENT (SPECIALIST UNIT) (Continued)

##### (b) INFORMATION MANAGEMENT

ELEMENT	PERFORMANCE CRITERIA
29b.1 Establish and maintain information systems	29b.1.1 Data collected from empirical observations, other bodies, technical and scientific literature and existing buildings for storage and retrieval 29b.1.2 Information used for business competitive advantage 29b.1.3 Future requirements determined from knowledge of current and planned position 29b.1.4 Software systems continually evaluated

##### (c) ETHICS AND STANDARDS

ELEMENT	PERFORMANCE CRITERIA
29c.1 Implement accepted professional ethics and principles	29c.1.1 Institute's Code of Ethics applied 29c.1.2 Duties not performed outside or beyond the scope of qualifications or experience
29c.2 Recognise trade practice issues	29c.2.1 Government policy requirements identified 29c.2.2 Professional construction and property industry issues identified
29c.3 Assume professional responsibility for own actions	29c.3.1 Potential professional risks and liabilities recognised

## SUPPORT COMPETENCIES

### COMPETENCY STANDARD UNIT 29

#### BUSINESS MANAGEMENT (SPECIALIST UNIT) (Continued)

##### (d) HUMAN RESOURCES

ELEMENT	PERFORMANCE CRITERIA
29d.1 Manage human resources effectively	29d.1.1 Performance appraisal systems implemented 29d.1.2 Principal of equal opportunity applied 29d.1.3 Occupational health and safety standards recognised and applied
29d.2 Plan and implement training programs	29d.2.1 Training needs of staff determined 29d.2.2 Training manual produced and regularly updated
29d.3 Understand and apply principle of industrial law and industrial relations	29d.3.1 Principle of law of employee / employer relationship understood and applied 29d.3.2 Effective resolution of staff disputes carried out

##### (e) MARKETING

ELEMENT	PERFORMANCE CRITERIA
29e.1 Prepare market plan and implement effectively	29e.1.1 Marketing needs assessed and marketing strategy reviewed 29e.1.2 Marketing plan prepared in association with business plan 29e.1.3 Future earning capacity established and cash flow budget determined

## SUPPORT COMPETENCIES

### COMPETENCY STANDARD UNIT 29

#### BUSINESS MANAGEMENT (SPECIALIST UNIT) (Continued)

##### (f) ACCOUNTING

ELEMENT	PERFORMANCE CRITERIA
29f.1 Understand principles of accounting including taxation	29f.1.1 Terminology used in accounting understood 29f.1.2 Procedures used to classify and process accounting transactions understood 29f.1.3 Accounting publications and reports assessed and absorbed 29f.1.4 Principles of job costing understood 29f.1.5 Accounting techniques understood sufficient to make both long and short term business decisions 29f.1.6 Taxation implications identified and understood
29f.2 Understand sources of finance	29f.2.1 Source of finance identified and understood

## SUPPORT COMPETENCIES

### COMPETENCY STANDARD UNIT 29

#### BUSINESS MANAGEMENT (SPECIALIST UNIT) (Continued)

##### (g) OFFICE MANAGEMENT

ELEMENT	PERFORMANCE CRITERIA
29g.1 Manage self	29g.1.1 Stable performance maintained under pressure 29g.1.2 Difficult situations concluded positively 29g.1.3 Effectiveness maintained in varying environments 29g.1.4 Mental and physical fitness sustained at a level which enable work performance requirements to be met
29g.2 Negotiate, plan and organise personal work priorities	29g.2.1 Competing demands assessed and organised to achieve individual team and organisation priorities 29g.2.2 Events managed to accomplish individual, team and organisation's goals and objectives and project requirements 29g.2.3 Technology used to improve efficiency and effectiveness in managing work priorities and commitments
29g.3 Develop and maintain personal competence	29g.3.1 Personal strengths and weaknesses assessed to determine personal development priorities 29g.3.2 Feedback on performance used to identify and develop ways to improve knowledge and skills 29g.3.3 Professional competence assessed against performance plans, job responsibilities and career options 29g.3.4 Continuing professional development undertaken
29g.4 Access and share relevant information	29g.4.1 Sources of data identified and accessed to ensure that relevant information is available to work groups 29g.4.2 Legislation, codes of practice and organisational policies and practices assessed to identify the provisions relevant to the workplace 29g.4.3 Consultative processes used to upgrade and re-evaluate the work environment 29g.4.4 Implications of an unsafe and unfair work environment understood

## SUPPORT COMPETENCIES

### COMPETENCY STANDARD UNIT 29

#### BUSINESS MANAGEMENT (SPECIALIST UNIT) (Continued)

##### (g) OFFICE MANAGEMENT (Continued)

<p>29g.5 Plan and introduce processes to implement workplace requirement</p>	<p>29g.5.1 Requirements and guidelines discussed with colleagues to establish procedures appropriate to the work group</p> <p>29g.5.2 Responsibilities of individuals and work groups in developing a safe and fair workplace agreed and understood</p> <p>29g.5.3 Support provided to colleagues to ensure that they understand and implement their rights and responsibilities</p> <p>29g.5.4 Rehabilitation options identified assessed and used to assist employees</p>
<p>29g.6 Understand employment law and statutory industrial issues</p>	<p>29g.6.1 Legislation, codes of practice and organisational policies and practices assessed to identify the provisions relevant to the workplace</p>
<p>29g.7 Promote continuous improvement</p>	<p>29g.7.1 Responsibilities of individuals and work groups in developing a safe and fair workplace understood</p>
<p>29g.8 Monitor and adjust performance</p>	<p>29g.8.1 Work performed in a safe and fair environment</p> <p>29g.8.2 Potential and actual problems identified and rectified promptly and decisively</p> <p>29g.8.3 Hazards managed so that their presence is minimised</p> <p>29g.8.4 Recommendations to achieve compliance with and improve standard procedures and practices submitted to designated persons /groups</p> <p>29g.8.5 Systems, records and reporting procedures maintained as required by legislation and by the organisation</p>
<p>29g.9 Investigate non conformance</p>	<p>29g.9.1 Accidents and incidents investigated and dealt with according to agreed procedures and processes</p> <p>29g.9.2 Coaching and mentoring support provided to ensure that colleagues develop competencies to prevent the recurrence of accidents and incidents</p> <p>29g.9.3 Procedures and practices reviewed to assess whether they need to be up-dated to ensure conformance to workplace requirements</p>

# SUPPORT COMPETENCIES

## COMPETENCY STANDARD UNIT 29

### BUSINESS MANAGEMENT (SPECIALIST UNIT) (Continued)

#### (h) PUBLIC RELATIONS

ELEMENT	PERFORMANCE CRITERIA
29h.1 Convey and receive information and ideas	29h.1.1 Ideas presented and expressed in individual and group situations, using appropriate communication techniques 29h.1.2 Communication demonstrated knowledge of, and sensitivity to, social and cultural diversity 29h.1.3 Client requirements identified and negotiated to achieve agreed outcomes /outputs 29h.1.4 Input sought and valued in developing and refining proposals and approaches
29h.2 Develop trust and confidence	29h.2.1 People treated with integrity, respect and empathy 29h.2.2 High personal, ethical and organisational standards demonstrated and promoted 29h.2.3 Dealings with others conducted with integrity 29h.2.4 Trust and confidence of Clients gained and maintained through competent performance
29h.3 Project a professional image	29h.3.1 High personal, ethical and organisational standards demonstrated and promoted
29h.4 Build and maintain networks and relationships	29h.4.1 Networking used in internal and external environments to identify and build relationships 29h.4.2 Networking and other work relationships maintained and used to provide identifiable benefits for the team, organisation and Client
29h.5 Negotiate positive outcomes to rectify difficulties	29h.5.1 Problems identified and analysed, and action taken to rectify the situation with minimal disruption to performance 29h.5.2 Industrial relations issues handled within the organisations processes and procedures 29h.5.3 Conflict addressed and resolved constructively 29h.5.4 Difficult situations negotiated with integrity to achieve results which are acceptable to the participants and which meet organisation and legislative requirements

## SUPPORT COMPETENCIES

### COMPETENCY STANDARD UNIT 29

#### BUSINESS MANAGEMENT (SPECIALIST UNIT) (Continued)

##### (i) EDUCATION AND TRAINING

ELEMENT	PERFORMANCE CRITERIA
29i.1 Assist in development of education and training programs	29i.1.1 Education and training needs determined 29i.1.2 Support and assistance given to the development of curriculum and support material for education programs 29i.1.3 Study, research, practice or other activities made to the development of education and training programs in specific areas of construction economics
29i.2 Participate in the development of practical experience programs	29i.2.1 Practical experience programs planned 29i.2.2 Assistance given in the organising of practical experience activities 29i.2.3 Practical experience programs evaluated

### COMPETENCY STANDARD UNIT 30

#### RESEARCH AND DEVELOPMENT (SPECIALIST UNIT)

ELEMENT	PERFORMANCE CRITERIA
30.1 Participate in research	30.1.1 Requirements for research and development identified 30.1.2 Fundamental and applied research activities supported and facilitated 30.1.3 Application of innovative techniques and strategies supported and facilitated
30.2 Formulate concepts for development	30.2.1 Promising concepts examined and evaluated 30.2.2 Requirements for development identified 30.2.3 Funds for development sought by a variety of methods and from a variety of sources
30.3 Commercialise research outcomes	30.3.1 Economic evaluation of outcomes of research undertaken 30.3.2 Mechanisms for marketing of services developed

## SUPPORT COMPETENCIES

### COMPETENCY STANDARD UNIT 31

#### COST INFORMATION DATABASE (SPECIALIST UNIT)

ELEMENT	PERFORMANCE CRITERIA
31.1 Clarify requirements of a cost information data base	31.1.1 Relevant experts and literature consulted 31.1.2 Scope of information to be included in database specified and validated 31.1.3 Existing database technologies and methodologies evaluated 31.1.4 Strategy for information input and retrieval established
31.2 Access relevant information	31.2.1 Sources of relevant information identified 31.2.2 Information accessed and evaluated
31.3 Set up database	31.3.1 Database selected to satisfy cost information requirements 31.3.2 Database customised to satisfy cost information requirements, where relevant 31.3.3 Information formatted and entered into database
31.4 Maintain database	31.4.1 Currency of database monitored 31.4.2 Information up-dated as required 31.4.3 Policy for database maintenance developed and implemented

# AMENDMENTS

Record all amendments here:

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