

Commercial Management Training Guidelines

In order to become a Corporate Member of the Institution of Civil Engineering Surveyors, candidates must be able to demonstrate that they have suitable qualifications and experience to gain this professional qualification.

There are four main requirements:

- Qualification
- Training / Experience
- Submission of a Professional Report or Detailed CV
- Corporate Review interview

This booklet outlines the requirements for the training and experience element.

The Institution has produced a set of core training objectives and candidates applying for upgrade to Member must demonstrate that they have achieved the required standard in these core objectives in order to be eligible to apply for an upgrade of their membership. These core training objectives will also form the basis for all Approved Company Training Schemes.

The Core Objectives have been developed in order to accommodate the various professional areas where Probationer, Graduate and Associate members of the Institution are employed.

Many large organisations already have formal training schemes and programmes in place and these guidelines have been produced to ensure that such existing schemes can, if necessary, be adjusted to incorporate essential core objectives. Where no such scheme presently exists, these guidelines can provide a basic model form to aid the structuring of any scheme or programme which may be under consideration. It should be noted that all training schemes must retain the Core Objective numbering set out in this booklet.

All training schemes, whether already in place or at a conceptual stage, must be validated by the Institution. This validation will be carried out by the Institution's Education, Training and Membership Committee.

Employers may, if they wish, incorporate additional company specific training objectives to supplement the Core Objectives.

These guidelines have been arranged to allow the candidate to provide brief details of the experience gained in respect of each Core Objective and to demonstrate ability to apply knowledge, understanding and skills in performing to the standards required by the Institution.

Within each Core Objective is a range of areas that the candidate should have covered. The levels of achievement for each of the elements of the range have not been set by the Institution, in order to allow candidates flexibility in their experience.

However, candidates are required to achieve a certain proportion of elements at each of the four set levels, as indicated below:

A	APPRECIATION	20%	A general understanding of the objective is required.
K	KNOWLEDGE	20%	This standard requires knowing how the objective should be carried out in addition to any general understanding and appreciation.
E	EXPERIENCE	30%	To reach this standard the objective must have been performed independently or under supervision. Experience of the relevant techniques and functions must be in addition to showing appreciation and knowledge.
B	ABILITY	30%	Trainees will be able, without supervision, to perform relevant functions and will be able to supervise other less experienced staff.
	TOTAL	100%	

Achievement of the Core Objectives will not in itself create a Member of the Institution but should ensure a sound and broad base upon which you can build the professional and managerial competence which is required.

Where the candidate has an Appointed Supervisor, they will establish the levels of achievement for their trainees. Actual levels of achievement will be monitored and recorded at each annual review. The supervisor, at the review, should sign off each objective.

All candidates applying for upgrade to Member must have the Core Objectives signed off by a Supervisor or Mentor, who would preferably be a Corporate Member of the ICES, in a one-to-one meeting. Ideally, objectives would be signed off on an ongoing basis (particularly if the member is working for a company with an approved training scheme), otherwise, candidates should meet with their Mentors to go through all the objectives when they are ready to upgrade.

This meeting to sign off the objectives is known as a Training Objectives Review. The Mentor would ideally be someone that the candidate knows or works with - possibly within the same company but not necessarily. Otherwise the Institution will assign someone to be the Mentor. The Mentor must have been identified and approved prior to the Training Objectives Review taking place.

Having signed off all the objectives, the candidate will then write a summary report of approximately 1500 words demonstrating how they have achieved the objectives. They will be required to submit the Training Objectives Report, which will consist of the signed-off objectives and the 1500 word summary. The candidate must have a minimum of 3 years experience, but the main factor will be that they must have achieved all the objectives and have gained sufficient overall experience.

The Institution believes that, where practical, employers of trainees in the Commercial Management specialisms should encourage their employees in the acquisition of the necessary training, guidance and work experience to satisfy the Institution's criteria for Corporate Membership. By providing a structured training scheme they can assist their employees to achieve this goal as soon as practicable.

In support of this policy, the Institution provides training courses held at various locations throughout the year at reasonable cost. Details of the courses can be obtained from the Training Officer at the Institution's headquarters.

Appointed Supervisor

Details of the Appointed Supervisor who has endorsed the entries against each Core Objective

Full name (in capitals)	Job Title	Company	All academic and professional qualifications	Dates of supervision

CM1	TRAINING OBJECTIVES AND RANGE OF ELEMENTS				
Objective	Demonstrate a knowledge and understanding of the financial control procedures encountered within the industry				
Range		Date of Assessment			
		A	K	E	B
	• Analysis of tenders • Cost data information and forecasts • Internal accounting procedures				
Please continue on a separate sheet if necessary					Signature of Appointed Supervisor

CM2	TRAINING OBJECTIVES AND RANGE OF ELEMENTS				
Objective	Demonstrate a knowledge and understanding of Measurement, Record and Valuations				
Range		Date of Assessment			
		A	K	E	B
	• Bills of Quantities • Admeasured Quantities • Dayworks • Interim and Final Accounts • Records • Claims				
Please continue on a separate sheet if necessary					Signature of Appointed Supervisor

CM3	TRAINING OBJECTIVES AND RANGE OF ELEMENTS				
Objective	Demonstrate a knowledge and understanding of the structure of construction contracts and documentation				
Range		Date of Assessment			
		A	K	E	B
	• Estimates • Specifications • Preambles • Risk analysis • Drawings and technical reports • Conditions of contract				
Please continue on a separate sheet if necessary					Signature of Appointed Supervisor

CM4	TRAINING OBJECTIVES AND RANGE OF ELEMENTS				
Objective	Demonstrate a knowledge and understanding of civil law in the context of construction				
Range		Date of Assessment			
		A	K	E	B
	• Construction and contract law • Contractual matters and formulating correspondence • Dispute resolution				
Please continue on a separate sheet if necessary					Signature of Appointed Supervisor

CM5	TRAINING OBJECTIVES AND RANGE OF ELEMENTS				
Objective	Demonstrate a knowledge and understanding of planning and programming				
Range		Date of Assessment			
		A	K	E	B
	• Planning techniques • Types of construction programme • Requirements of the programme • Use of the programme				
Please continue on a separate sheet if necessary					Signature of Appointed Supervisor

CM6	TRAINING OBJECTIVES AND RANGE OF ELEMENTS				
Objective	Identify construction techniques and use of technology				
Range		Date of Assessment			
		A	K	E	B
	• Personal knowledge of construction techniques • Plant, Equipment and Materials • Economics				
Please continue on a separate sheet if necessary				Signature of Appointed Supervisor	

CM7	TRAINING OBJECTIVES AND RANGE OF ELEMENTS				
Objective	Demonstrate a knowledge and understanding of the structure of commercial management and administration				
Range		Date of Assessment			
		A	K	E	B
	• Preparation of reports • General administration • Analysis of rates and prices • Variations • Management and financial control of contracts • Settlement of disputes • Attendance at meetings • Quality assurance • Insurance • Health and safety • Accounting, buying, production and surveying functions • Labour costs, employment legislation and working rule agreements				
				Signature of Appointed Supervisor	
Please continue on a separate sheet if necessary					

CM8	TRAINING OBJECTIVES AND RANGE OF ELEMENTS				
Objective	Demonstrate a knowledge and understanding of communication and negotiation				
Range		Date of Assessment			
		A	K	E	B
	• Contractual and financial correspondence • Management liaison • Negotiating skills • Communication skills • Computer systems				
Please continue on a separate sheet if necessary					Signature of Appointed Supervisor