

**Overview**

The Unit is about planning and monitoring resources and expenditure on transportation projects. You will need to demonstrate your competence to plan, monitor and manage resources for a particular project. It is also about your competence to assess the resource requirements, agree the budgets and manage a monitoring regime that allows the project to progress in a timely and efficient manner.

You will need to produce a proposal for the resources required to deliver a transportation project involving all personnel who are key to the project. The proposals must show the research, predictions and monitoring techniques used in forming the proposals and how the proposals meet the organisational objectives and strategies.

You will need to demonstrate the process undertaken in agreeing, with the relevant people, the budgets for a programme of work. You will also need to demonstrate your competence in detailing how you arrived at the final proposed budgets after considering accuracy of data, evaluation of risk and time scales for the given project. This will involve resolving problems and informing colleagues.

You will need to provide evidence of your ability to delegate the role of monitoring to team members whilst establishing and maintaining the overall control of the project. You will need to demonstrate your system's ability to identify significant variations and also the course of action taken by you or your team members in rectifying or developing a solution to each variation.

## Performance criteria

- You must be able to:*
- Make proposals for expenditure on programmes of work
  - P1 give opportunities to relevant people relevant people relevant people relevant people to help develop proposals for expenditure
  - P2 ensure that proposals take account of past expenditure
  - P3 ensure that proposals take account of trends, developments and other factors likely to affect future expenditure
  - P4 ensure that proposals clearly show how the programme contributes to organisational objectives and strategies
  - P5 ensure that proposals include targets, standards and monitoring methods
  - P6 ensure that proposals contain a financial justification and sufficient, valid information to allow your proposals to be evaluated realistically
  - P7 present proposals to relevant people relevant people relevant people relevant people in an appropriate format and at an appropriate time
  - Agree budgets for programmes of work
  - P8 give opportunities to relevant people relevant people relevant people relevant people to participate in negotiating and agree budgets for programmes of work
  - P9 ensure budget proposals are clear, concise and emphasise the benefits to your organisation
  - P10 present budget proposals in a way which reflects the commitment of those who will be responsible for the programmes of work
  - P11 ensure budget proposals are based on an accurate interpretation of valid data and a realistic evaluation of risk
  - P12 clarify and resolve any areas of uncertainty and disagreement over the proposed budget
  - P13 negotiate budgets in a way which maintains good relationships with the people involved
  - P14 complete your budget negotiations within agreed time scales
  - P15 providing relevant people relevant people relevant people relevant people with accurate information on budget decisions in a manner and at a time which is likely to ensure their co-operation and confidence
  - Control expenditure and activities against budgets
  - P16 give opportunities to team members to take individual responsibility for monitoring and controlling expenditure and activities against budgets
  - P17 ensure methods of monitoring expenditure monitoring expenditure

- monitoring expenditure monitoring expenditure and activities against budgets are reliable and comply with your organisation's requirements
- P18 monitor expenditure monitor expenditure monitor expenditure monitor expenditure and activities against agreed budgets at appropriate intervals
- P19 control expenditure in line with budgets and the requirements of your organisation
- P20 take prompt corrective action corrective action corrective action corrective action in response to actual or potential significant variations from budgets in line with your organisation's requirements
- P21 refer requests for expenditure outside your responsibility promptly to the appropriate people
- P22 ensure records of activities against budgets are complete, accurate and available to authorised people only

Determine the effective use of resources

## Knowledge and understanding

*You need to know and understand:* Make proposals for expenditure on programmes of work

K1 how to analyse expenditure on programmes of work in the past and use the results to improve future use how to carry out costs-benefit analyses in regard to expenditure how to decide on targets, standards and monitoring methods

K2 how to develop and argue an effective case for expenditure

K3 the kinds of trends and developments which might influence future expenditure how to collect and validate information required to evaluate a case for expenditure the types of information required to make decisions on expenditure.

K4 how to enable people to contribute to proposals

K5 the organisational objectives and strategies relevant to the programmes of work the procedures which need to be followed to make expenditure proposals.

K6 the importance of expenditure planning to organisational efficiency and your role and responsibility in relation to this; the principles which underpin effective expenditure planning

K7 Agree budgets for programmes of work Agree budgets for programmes of work Agree budgets for programmes of work Agree budgets for programmes of work

You need to know and understand:

how to analyse the possible risks to the organisation associated with proposed budgets

K8 the importance of clear and accurate budgets to the running of programmes of work and your role and responsibility in relation to this

K9 the principles of budgeting and how to apply them

K10 the importance of gaining agreement to budgets and how to carry out budget negotiations areas of uncertainty and disagreement which may occur when agreeing budgets and how to resolve these in a way which is satisfactory to those involved in the decision-making process

K11 how to present budgets in a way which is likely to gain the support of key decision makers

K12 how to communicate budget information effectively to relevant people Information handling

K13 the types of information required to develop budgets and how to validate these

K14 how to encourage and enable people to take part in the negotiation and agreement of budgets for programmes of work; how to gain the commitment of team members to proposed budgets

Control expenditure and activities against budgets

You need to know and understand:

K15 the importance of budgetary control to organisational efficiency and your role and responsibility in relation to this

K16 the principles which underpin effective budgetary control and how to apply them

K17 the variations from the planned budget which may occur; how to identify these and what forms of corrective action you should take in response to them

K18 the requests for expenditure outside your area of responsibility which may be required and the procedures to follow in response to these

K19 information handling the importance of accurate and comprehensive records of activities against budgets and how to ensure these are kept

K20 involvement and motivation how to encourage and enable team members to take responsibility for monitoring and controlling activities against budgets

K21 organisational context your organisation's requirements for budgetary monitoring and control.

Determine the effective use of resources

**Scope/range related  
to performance  
criteria**

- Make proposals for expenditure on programmes of work
  - 1 Types of relevant people:
    - 1.1 team member
    - 1.2 colleagues working at the same level
    - 1.3 higher-level managers or sponsors
    - 1.4 financial specialists
  - 2 Expenditure:
    - 2.1 supplies of services
    - 2.2 people
    - 2.3 capital equipment
    - 2.4 premises
  - 3 Types of proposals:
    - 3.1 medium term
    - 3.2 long term analytical techniques
  - Agree budgets for programmes of work
  - 4 Types of Budget
    - 4.1 for programmes of work within your area of responsibility
    - 4.2 for sharing of overhead charges with others
  - 5 Relevant people:
    - 5.1 team members
    - 5.2 colleagues working at the same level as yourself
    - 5.3 high-level managers or sponsors
    - 5.4 financial specialists
    - 5.5 people outside your organisation
  - 6 Control expenditure and activities against budgets:
    - 6.1 for programmes of work within your area of responsibility
    - 6.2 for sharing of overhead charges with others
  - 7 Types of monitoring:
    - 7.1 considering oral information from others
    - 7.2 examining written information from others
    - 7.3 examining financial information
  - 8 Types of expenditure:
    - 8.1 supplies of goods
    - 8.2 supplies of services
    - 8.3 people
    - 8.4 premises

Determine the effective use of resources

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9 Types of corrective action:

9.1 altering activities

9.2 rescheduling expenditure

9.3 altering budget allocations within limits of responsibility

9.4 renegotiate budgets

Determine the effective use of resources

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