

Estimate and agree costs with client

Overview

This standard is about estimating and agreeing with the client, the costs of identified repairs, replacements and improvements to Hard Facilities systems. The costs are estimated within individual's scope of responsibility. The standard includes establishing costs from internal sources as well as external suppliers and securing agreement from the client prior to commencing work, all within the contractual agreement and organisational procedures.

The standard is relevant to engineers and technicians who undertake maintenance, repair and modifications to Building Services Engineering Hard Facilities systems.

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Performance criteria

You must be able to:

1. Identify and agree the work to be estimated with relevant others
2. Identify the required **resources** from available sources
3. Check and verify resource availability
4. Calculate costs for each required item
5. Confirm that the resource costs are modified in accordance with any external **factors** which may affect the cost projections
6. Produce the overall estimate of costs and check that it is complete, and in a format agreed with the client
7. Explain and clarify the projected costs to support the calculations using the terminology associated with quoting and estimation
8. Confirm/obtain agreement with the client that the estimate is accurate
9. Confirm that all the estimate information is recorded and stored securely according to organisational requirements
10. Communicate the estimate information to **relevant others** complete the relevant documentation in accordance with organisational procedures
11. Complete relevant documentation in accordance with **organisational procedures**

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Knowledge and understanding

You need to know and understand:

1. The organisational procedures for identifying and agreeing the work to be estimated with clients
2. How to identify and understand the different types of contracts
3. The organisational policy with regards to costing
4. The sources from which to identify the required **resources** and develop the estimate
5. The terminology associated with quoting and estimation
6. How to gather information so that the requirements can be costed and planned
7. The organisational methods to estimate resource costs
8. The internal and external **factors** which may affect the cost projections
9. How to produce the overall estimate of costs
10. How to confirm that all the estimate information is recorded and stored securely
11. How to communicate the estimate information to **relevant others**
12. How to complete relevant documentation in accordance with **organisational procedures**

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Scope/range

****Resources**** * People (internal and external) * Plant and equipment * Materials * Finance * Contract information * Day rates * Time * Supply options ****Factors**** * Technical * Non-technical * Safety and access * Legal and regulatory * Environmental * Terms and conditions ****Organisational Procedures**** * information management * project management * quality management * risk assessment management * implementing and monitoring health and safety requirements and issues * implementing effective and efficient control measures * implementing and monitoring issues relating to the natural environment * customer service * accident reporting * emergencies * communication with relevant others ****Relevant others**** * customers/clients * client representatives * supervisors * site/contract manager * other contractors/trades/subcontractors * members of the public * work colleagues * suppliers * others

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