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## Overview

This standard is about planning activities to traditional and heritage buildings and structures by prioritising and programming work activities for the repair, maintenance, conservation, alteration, adaptation, energy efficiency retrofit, installation or replacement of building services for traditional (pre 1919) and heritage buildings and structures and adopting safe, healthy and environmentally responsible work practices in accordance with current organisational requirements which are equal to or exceed current statutory and legislative requirements

This standard is for people working in the occupational area of construction site supervision which is defined as the supervision of multiple construction trades and disciplines and can be used by operatives, supervisors and managers

## Performance criteria

### *You must be able to:*

P1 confirm and record the project requirements for at least two of the following activities for traditional and heritage buildings against at least five of the following information sources:

<b>Activities</b>	1.1 repair	1.2 maintenance
1.3 conservation	1.4 alteration	1.5 adaption
1.6 energy efficiency retrofit	1.7 installation or replacement of building services*	<b>Information sources*</b>
1.8 survey reports, drawings, schedules, specifications and programmes	1.9 sub-contractor arrangements	1.10 records of industry certification, registration cards, competency schemes, qualifications and training of people
1.11 risk assessments and method statements, health, safety and environmental plans	1.12 asbestos surveys	1.13 statutory consents
1.14 manufacturers' technical information and product data sheets	1.15 hot works permit	1.16 legislation and official guidance relating to built conservation management plans
1.17 heritage impact statements	1.18 written scheme of investigation for archaeology (WSI)	1.19 specialist investigations

P2 identify, review and record the impacts on the planning of work activities from at least three of the following factors:

2.1 current organisational requirements	2.2 contractual requirements	2.3 statutory requirements	2.4 resource allocation
2.5 working requirements	2.6 working in and around occupied or tenanted buildings	2.7 environmental considerations	2.8 weather conditions
2.9 sustainability	2.10 sequencing of trades	2.11 temporary works	

P3 identify, review and record the impacts on the planning of work activities from at least three of the following heritage issues:

3.1 fire safety	3.2 hot works	3.3 archaeology
3.4 legislation and official guidance relating to built heritage	3.5 wildlife and ecology	3.6 condition of existing buildings and structures
3.7 specialist investigations	3.8 performance of traditional materials and construction methods	3.9 protection of heritage features

P4 identify, review and record information sourced from at least two of the following guidance materials:

4.1 owner's manuals	4.2 log books	4.3 maintenance schedules and manuals
4.4 practice guides and specifications	4.5 current legislation and official guidance	4.6 health and safety file

P5 prioritise and plan activities by assessing and accounting for a

range of heritage issues and record the outcomes

P6 review priorities, make recommendations and record the decisions made to take account of at least four of the following changing circumstances:

- 6.1 susceptibility to damage
- 6.2 safety requirements
- 6.3 condition of existing buildings and structures
- 6.4 compromised operational effectiveness
- 6.5 environmental conditions
- 6.6 use or change of use
- 6.7 meeting current legislation
- 6.8 resources
- 6.9 security threats
- 6.10 discovery of architectural or archaeological features during the works
- 6.11 wildlife and ecology
- 6.12 temporary works

P7 prepare and record the plans or programmes for traditional and heritage buildings and negotiate and agree them with stakeholders for at least two of the following activities:

- 7.1 repair
- 7.2 maintenance
- 7.3 conservation
- 7.4 alteration
- 7.5 adaption
- 7.6 energy efficiency retrofit
- 7.7 installation or replacement of building services

## Knowledge and understanding

*You need to know and understand:*

### **Performance Criteria 1 Confirm and record project requirements**

K1 how to confirm and record project requirements for traditional and heritage buildings for the following activities:

K1.1 repair K1.2 maintenance K1.3 conservation  
K1.4 alteration K1.5 adaption K1.6 energy efficiency retrofit K1.7 installation or replacement of building services

K2 how to identify and use a range of information sources for traditional and heritage building project requirements including but not limited to:

K2.1 survey reports, drawings, schedules, specifications and programmes K2.2 sub-contractor arrangements K2.3 records of industry certification, registration cards, competency schemes, qualifications and training of people K2.4 risk assessments and method statements, health, safety and environmental plans K2.5 asbestos surveys K2.6 statutory consents K2.7 manufacturers technical information and product data sheets K2.8 hot works permit K2.9 legislation and official guidance relating to built heritage (Listed Building Consent, Planning Permission, Scheduled Monument Consent, Conservation Area Consent, Ecclesiastical Exemption) K2.10 conservation management plans K2.11 heritage impact statements K2.12 written scheme of investigation for archaeology (WSI)

K2.13 specialist surveys and investigations to understand the existing buildings and structures and inform proposed works including but not limited to:

(a) heritage issues and significance (b) construction materials and methods (c) condition and behaviour (d) the range of diagnostic investigations

K3 who to consult to confirm project requirements for traditional and heritage buildings

K4 why you need to use information from a range of sources for traditional and heritage building project requirements

### **Performance Criteria 2 Identify, review and record the impacts on the planning of work activities from a range of factors**

K5 how to identify, review and record the impacts of a range of factors on the planning of work activities including but not limited to: K5.1

current organisational requirements K5.2 contractual requirements K5.3 statutory requirements K5.4 resource allocation K5.5 working requirements K5.6 working in and around occupied and tenanted buildings K5.7 environmental considerations K5.8 weather conditions K5.9 sustainability K5.10 sequencing of trades K5.11 temporary works

K6 why you need to identify, review and record the impacts on the planning of work activities from a range of factors

**Performance Criteria 3** *Identify, review and record the impacts of heritage issues on the planning of work activities* K7 how to identify, review and record the impacts of heritage issues on the planning of work activities, including but not limited to: K7.1 sustainability K7.2 fire safety K7.3 hot works K7.4 archaeology K7.5 wildlife and ecology K7.6 condition of existing buildings and structures K7.7 performance of traditional materials and construction methods K7.8 sequencing of trades K7.9 protection of heritage features K7.10 temporary works K7.11 conservation management plans K7.12 heritage impact statements K7.13 legislation and official guidance relating to built heritage K7.14 specialist surveys and investigations to understand the existing buildings and structures and inform proposed works including but not limited to: (a) heritage issues and significance (b) construction materials and methods (c) condition and behaviour (d) the range of diagnostic investigations

K8 why you need to identify, review and record the impacts of heritage issues on the planning of work activities

K9 how to apply the key terms and concepts including but not limited to: K9.1 heritage values K9.2 significance K9.3 principles of conservation K9.4 sustainable development and management

K10 the difference in performance characteristics between traditional and modern materials and construction methods

K11 how to identify when specialist skills and knowledge are required and report accordingly

**Performance Criteria 4** *Identify, review and record information sourced from guidance materials* K12 how to identify, review and

record information sourced from the following guidance materials:

K12.1 owner's manuals	K12.2 log books
K12.3 maintenance schedules and manuals	K12.4 practice guides and specifications
K12.5 current legislation and official guidance	K12.6 health and safety file

K13 why you need to identify, review and record influencing factors against information sourced from guidance materials

**Performance Criteria 5** **Prioritise activities** K14 how to assess and account for a range of heritage issues in order to prioritise and plan activities and record outcomes

K15 why you need to prioritise and plan activities for traditional and heritage buildings and structures

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**Performance Criteria 6** **Review priorities, make recommendations and record the decisions** K16 how to review priorities, make recommendations and record the decisions made to take account of the following changing circumstances:

K16.1 susceptibility to damage	K16.2 safety requirements
K16.3 condition of existing buildings and structures	K16.4 compromised operational effectiveness
K16.5 environmental conditions	K16.6 use or change of use
K16.7 meeting current legislation	K16.8 resources
K16.9 security threats	K16.10 discovery of architectural or archaeological features
K16.11 wildlife and ecology	K16.12 temporary works

K17 why you need to review priorities, make recommendations and record the decisions made to take account of changing circumstances

**Performance Criteria 7** **Prepare and record plans or programmes** K18 how to prepare and record plans or programmes for traditional and heritage buildings for the following activities:

K18.1 repair	K18.2 maintenance	K18.3 conservation
K18.4 alteration	K18.5 adaption	K18.6 energy efficiency retrofit
K18.7 installation or replacement of building services		

K19 how to negotiate and agree plans and programmes for traditional and heritage buildings with stakeholders

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<b>Developed by</b>	Construction Skills
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<b>Originating Organisation</b>	CITB
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<b>Relevant Occupations</b>	Building Trades, Construction Supervisor
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<b>Suite</b>	Construction Site Management, Construction Site Supervision
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<b>Keywords</b>	Plan; Implementing; Historical; Conservation; Restoration; Lead; Archaeology; Heritage; Traditional; Repair; Maintenance; Retrofit
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