ASTATT8

Initiate and progress contracts with clients to carry out air tightness testing

Overview

This standard is for contract managers, estimators and sole traders who initiate and progress contracts with clients for the conduct of air tightness testing of buildings - both dwellings and buildings other than dwellings of any size or complexity. It covers those activities involved in the liaison with clients to arrive at a contract for air tightness testing and the internal resourcing of the work.

You are required to respond to prospective client requests, clarify their requirements and produce a full quotation for the air testing activity as well as agreeing a contract. You must identify the information required to develop a full test specification and quantify the resources and personnel required to deliver the specification.

You are also required to monitor the progress of the contract and deal with any queries or issues during the conduct of the air tightness test and the subsequent validation of data and issuing of a test report.

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Performance criteria

You must be able to:

P1 respond to initial enquiries from prospective clients regarding air tightness testing

P2 record details of prospective clients and the nature of their enquiry

P3 establish and clarify prospective client requirements and expectations regarding the air tightness testing process and your organisation's services in this area

P4 obtain initial information on the nature of the air tightness test required and the building structure from the prospective client including:

P4.1 the location and size of the building

P4.2 plans and drawings of the building

P4.3 area of the building envelope (where possible)

P4.4 the air tightness target of the building

P4.5 any additional building fabric and energy efficiency information

P4.6 specific health and safety requirements and on-site procedures

P4.7 the scope of the work

P4.8 timescales for conduct of work

P4.9 relevant standard to be used in the test

P5 establish client requirements for certification

P6 review prospective client requirements and building structure against internal resources, personnel and relevant legislative/regulatory requirements

P7 quantify the personnel, equipment and time required to carry out the air tightness testing

P8 estimate the costs of time, personnel and equipment usage following prescribed organisational procedures and codes

P9 prepare a fully costed quotation which:

P9.1 defines the scope of the work

P9.2 describes the methodology and activities to be carried out

P9.3 specifies the equipment and personnel to be used

P9.4 specifies the outcomes of the work and the nature of the final report

P9.5 identifies timescales

P9.6 specifies information required and preparatory activities to be carried out prior to the conduct of the test including access requirements

P9.7 clarifies terms and conditions of performing the work including costs, method of payment and cancellation procedures and costs

P9.8 states disclaimers relating to the conduct of the test and the content of the final report

P10 obtain internal approval of the quotation and authorisation for its issue

P11 liaise with prospective clients to clarify the details of the quotation and make and agree revisions as required

P12 finalise the draft contract with the client based on the original or revised
quotation and draw up a formal contract

P13 obtain internal approval of the draft contract and authorisation for its issue

P14 ensure a valid order or other instruction is received from the client before
committing resources

P15 produce a detailed test instruction following receipt of signed contract from
the client which:

P15.1 identifies the standard to be used

P15.2 defines the methodology to be used

P15.3 provides building area calculation to be verified by on site measurement

P15.4 provides target air tightness result

P15.5 contains a full equipment list for the defined methodology

P15.6 contains full details of the client and location of the building

P15.7 the timescale for the conduct of the test and date

P16 order or allocate personnel and resources required to carry out the agreed
air tightness test

P17 book the work activity into the operational schedule

P18 provide the tester with the full instruction and all related documentation
relevant to the conduct of the air testing methodology

P19 monitor progress and outcome of the work activity based on the contract
and test instruction

P20 liaise with the client and tester as required in order to manage queries and
issues before, during and after the conduct of the test including any variations

P21 ensure that test results have been checked and conduct any further
internal verification

P22 check the final test report and the accuracy of its content and presentation
before release to the client

P23 issue a valid test certificate with the test report as required

P24 deal with any queries or concerns by the client after the issue of the report
including any recommendations made in the report

P25 explain to the client the reasons for the failure of a building to pass the test
and remedial action that can be taken

P26 seek feedback from the client as part of the ongoing quality assurance
process

P27 identify and progress any potential business opportunities arising from the
air tightness testing activity

P28 ensure invoice is raised for the air tightness test and that payment is
monitored via organisation's accounting system

P29 ensure the company's collection of bad debts procedures are complied
with

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Knowledge and understanding

You need to know and understand:

K1 the relevant and current test standards and regulations to be applied

K2 ways of establishing and clarifying prospective client requirements and expectations regarding the air tightness testing process and your organisation's services in this area

K3 the initial information on the nature of the building required in order to prepare a quotation including:

K3.1 the location and size of the building

K3.2 plans and drawings of the building

K3.3. area of the building envelope (where possible)

K3.4 the target air tightness of the building

K3.5 any additional building fabric and energy efficiency information

K3.6 specific health and safety requirements and on-site procedures

K3.7 the scope of the work

K3.8 timescales for conduct of work

K4 how to match client requirements and the building structure with internal resources, personnel and relevant legislative/regulatory requirements

K5 ways of estimating and quantifying the personnel, equipment and time required to carry out the air tightness testing

K6 organisational procedures and rates for estimating the costs of time, personnel and equipment usage

K7 how to prepare a fully costed quotation which:

K7.1 defines the scope of the work

K7.2 describes the standard to be used

K7.3 defines the methodology and activities to be carried

K7.4 specifies the equipment and personnel to be used

K7.5 specifies the outcomes of the work and the nature of the final report

K7.6 identifies timescales

K7.7 specifies information required and preparatory activities to be carried out prior to the conduct of the test including access requirements

K7.8 clarifies terms and conditions of performing the work including costs and method of payment

K7.9 states disclaimers relating to the conduct of the test and the content of the final report

K8 internal quotation approval and authorisation procedures

K9 how to clarify the details of the quotation and make and agree revisions as required

K10 how to finalise the draft contract with the client based on the original or

revised quotation and draw up a formal contract

K11 internal contract approval and authorisation procedures

K12 the structure and content of a detailed test instruction including:

K12.1 methodology to be used

K12.2 building area calculation

K12.3 design air tightness value

K12.4 full equipment list for the defined methodology

K12.5 full details of the client and location of the building

K12.6 timescale for the conduct of the test and date

K13 organisational procedure for the ordering or allocation of personnel and resources required to carry out the agreed air tightness test

K14 organisational procedure for booking the work activity into the operational schedule

K15 ways of monitoring progress and outcomes of the work activity based on the contract and test specification

K16 ways of liaising with the client and tester as required in order to manage queries and issues before, during and after the conduct of the test

K17 organisational procedures for checking test results and carrying out any further internal verification

K18 organisational procedures for checking the final test report and the accuracy of its content and presentation before release to the client

K19 conditions under which test Certificates are issued with the test report

K20 commonly occurring queries or concerns by the client after the issue of the report including any recommendations made in the report

K21 how to explain to the client the reasons for the failure of a building to pass the test and the implications for any remedial action that can be taken

K22 organisational procedures for obtaining feedback from the client as part and how to use this as part of the of the ongoing quality assurance process

K23 how to identify and progress any potential business opportunities arising from the air tightness testing activity

K24 organisational procedures for ensuring that an invoice is raised for the air tightness test and that payment is monitored via the organisation's accounting system including the collection of bad debts

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Developed by	Asset Skills
Version Number	1
Date Approved	November 2014
Indicative Review Date	November 2019
Validity	Current
Status	Original
Originating Organisation	Asset Skills
Original URN	ASTATT8
Relevant Occupations	Air Tightness Tester
Suite	Air Tightness Testing
Keywords	air tightness testing; liaison with clients

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