Sector Led Group 10

Instruction Manual - Installation and Maintenance Competence Framework

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## Introduction

In her report, [Building a Safer Future](https://assets.publishing.service.gov.uk/media/5afc50c840f0b622e4844ab4/Building_a_Safer_Future_-_web.pdf), Dame Judith Hackitt spoke of the industry’s approach to competence as being “fragmented, encompassing a range of disciplines and different competence frameworks even within one discipline and without reference to other interacting disciplines”.

The [Building Safety Act 2022](https://www.gov.uk/guidance/the-building-safety-act), together with supporting secondary legislation, has introduced a new regulatory regime, which requires the engagement of everyone working in the built environment, not just those involved in [Higher-Risk Buildings](https://www.gov.uk/government/collections/guidance-on-the-criteria-for-being-a-higher-risk-building) (HRB).

Regulations define competence as having the appropriate **skills**, **knowledge**, **experience** and **behaviours (SKEB)**, and requires all individuals carrying out any design, construction or refurbishment work to be competent to undertake the role to which they are appointed.

Organisations must also demonstrate that they have the ‘organisational capability’, and it is a legal requirement for anyone appointing an individual or organisation to ensure that they meet the requirements.

In October 2024, the Industry Competence Steering Group (ICSG) was formally [launched](https://www.constructionleadershipcouncil.co.uk/wp-content/uploads/2024/12/ICSG-announcement-v7.pdf) as the updated structure to the Competence Steering Group. Made up of 15 different working groups, representing all of Construction and the Built Environment, with the agreed focus of creating competence frameworks. Sector Lead Group 10 in the Industry Competence Steering Group represents Installation and Maintenance and is nicknamed the Super Sector Programme.

This document provides a guide on the development of a sector-specific competence framework for individuals. It has been developed by Sector Lead Group 10: Installation and Maintenance (SLG10), specifically with individual installer competence frameworks in mind, and in line with [BSI 8670 Part 1](https://knowledge.bsigroup.com/products/competence-frameworks-for-building-safety-core-criteria-code-of-practice?version=standard). (It is recommended to continue to use [BSI Flex 8670](https://mace365.sharepoint.com/:b:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/DRAFT%20FOR%20JESS%20AND%20FAYE/Relevant%20Documentation/BSi_Flex_8670_V3.pdf?csf=1&web=1&e=ls3Cud) until BSI 8670 is made free to access.)

This guide supersedes the CSG’s Working Group 2 Key Principles for the Development of Sector Specific Frameworks for Installers document, issued in May 2021, however

## More Information

This document will detail the process for the creation of the competence framework with the relevant documentation.

For information on the Regulator, the Regulations, the Industry Competence Steering Group and Sector Lead Group 10, we suggest reviewing the Construction Leadership Council’s Competence Page: [www.constructionleadershipcouncil.co.uk](https://www.constructionleadershipcouncil.co.uk/workstream/people-and-skills/competence/)

## Competence Framework

The process for the development of a competence framework is detailed in this step-by-step guide. It is important that those creating competence frameworks have a good level of understanding to define the scope of their sector, define the sector’s current competence structure, identify the gaps in competence arrangements and then create a plan to fill those gaps.

Competence frameworks are developed using 4 key documents in 2 phases:

Phase 1 – the sector group develops the competence framework:

1. A **Strategy** – defining the scope of the competence framework and an overview of the roles covered, identifying and calling out the gaps in current competence and any identified steps required to develop and implement a fully functioning competence framework.
2. The **SKEB Statements** - outlining the skills, knowledge, experience and behaviours (SKEB) required to obtain competence in the role(s) covered by the framework.
3. A **Route to Competence** - showing the path (or paths) to obtaining initial competence, and then maintaining, individual competence in the occupation(s) over time.

Phase 2 – once the Strategy, SKEB Statement and R2C has been created, the Sector Group moves into an implementation group for the roll out of actions identified:

1. An **Implementation Plan** - identifying what practical steps are required (as well as a timeframe) to allow the review/development of training/ assessment requirements to be implemented. It also includes what individuals in scope to the competence framework will need to do to come into compliance with its requirements.

A screenshot of a computer program

Description automatically generated

Image 1 – Example of Competence Framework

## Development of a Competence Framework

A requirement identified within Setting the Bar was to identify any SKEB needed for working within a Higher-Risk Building (HRB). Whilst developing the competence frameworks, the priority occupations noted that there is very little difference between work carried out in a non-HRB and an HRB; however, where there are differences, these have been identified within the competence frameworks.

The step-by-step guidance on the development of a competence framework is just that, a guide. We suggest following the steps below but also understand that sector groups may have several elements of the competence framework established already, so starting on a different section first might be easier. We have summarised the process below and our steps follow this process, but it is only a guide.

Suggested process to follow:

1. Set up Working Group
2. Fill in questionnaire and create existing Route to Competence
3. Create Strategy Document
4. Develop the SKEB Statement
5. Create an update Route to Competence
6. Create an Implementation Plan
7. Industry Consultation
8. Database, industry engagement, implementation

**PLEASE NOTE THIS IMPORTANT POINT:** When using the documents from these examples, it is best to save the entire document structure in a separate location and then make amendments. This stops the documents from being filled in and keeps them as templates.

### Step 1 – Set up Sector Group (SG)

Each installer sector needs to take responsibility for drawing up a competence framework for that sector, developed by a representative group of employers and other ‘built environment actors’ from the sector, together with other relevant stakeholders and interested parties.

The following list of potential participants is purely indicative and not necessarily exhaustive. For example, some stakeholders/interested parties may be invited to participate in some meetings and areas of work, but not others. SGs may also decide to establish sub-committees, task-and-finish groups, working parties, etc., as and when they see fit. Where possible, it is important to engage with individuals from across the 4 home nations (England, Wales, Scotland and Northern Ireland) at this stage. This allows the creation of one, central framework that all standards can be updated in line with. This will allow the Sector Groups to consider regional variations and training and assessment methods from across the nations.

If 4 home nation engagement is not possible at this stage it should be encouraged through wider consultation at a later stage in the process. This could be through soft consultations with federation/ association members as a first step as well as publicly, reaching a widely pool of employers across the industry. It is important to keep a list of those whom you have consulted with as part of this process (this can be done using the contact list in the [Toolkit](https://mace365.sharepoint.com/:x:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Step%201%20-%20Set%20up%20Sector%20Group/SG%20Toolkit.xlsx?d=wc76a37c516f54507a6ede401e7672d72&csf=1&web=1&e=8XZhX8)). To gain industry buy in later it is imperative that a wide enough group of industry experts have been consulted.

Built environment actors:

* Sector employers (reflecting different firm sizes, sub-disciplines and positions in the built asset life cycle) across the 4 home nations
* Member-led trade associations
* Trade union(s)
* Recognised sector skills bodies
* Professional institutions (where relevant)
* Manufacturers (as and where relevant)

Other stakeholders/interested parties:

* CSCS/partner card schemes (as appropriate)
* Relevant certification bodies
* Relevant awarding organisations
* Other recognised sector stakeholders (e.g., other relevant sector bodies, safety charities, bodies representing owners, users and/or occupiers of built assets)
* Representatives from Government acting as observers (e.g., BSR, DLUHC, DBT, DESNZ, DfE, IfATE, UK devolved administrations)

Once identified, the SG is to be set up with an SG chair, responsible for:

* Providing direction, leadership, and support to SG, including chairing meetings
* Securing timely progress in development of occupation competence framework
* Explore interfaces and collaboration with other occupation SGs
* Engage with and report on progress to the relevant Super Sector Forum (i.e. civil engineering, structures, envelope, interiors, or engineering services)

And an SG secretariat responsible for:

* Maintaining a list of contacts for the occupation
* Inviting attendees to meetings and finding a venue where meetings take place in person or online
* Setting the agenda for meetings
* Distributing the minutes of meetings
* Inputting into discussion a meetings
* Drafting the various elements of the competence framework itself and consulting on and securing buy-in from the SG.

To maintain progress, it is recommended that SGs meet together at least once a month as a group. As much as possible, work should also continue between meetings.

An SG management [Toolkit](https://mace365.sharepoint.com/:x:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Step%201%20-%20Set%20up%20Sector%20Group/SG%20Toolkit.xlsx?d=wc76a37c516f54507a6ede401e7672d72&csf=1&web=1&e=8XZhX8) has been created to help the chair and secretariat set up and run SGs. This toolkit includes:

* A contact list to provide details of SG members
* A ‘drumbeat’ to track reporting and meeting dates
* A milestone schedule
* An action tracker
* A decision tracker
* An implementation plan for roll out of competence frameworks

A template [Terms of Reference](https://mace365.sharepoint.com/:w:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Step%201%20-%20Set%20up%20Sector%20Group/Template%20TOR%20v4.docx?d=w4c7b9c2c429b4b28a05510019b802845&csf=1&web=1&e=SS1wS1) has been created to set out purpose and working arrangements.

### Step 2 – Fill in the Questionnaire

This will be the first pen-to-paper activity, and the information gathered here will inform nearly all of the competence framework documentation.

The [Questionnaire](https://mace365.sharepoint.com/:w:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Step%202%20-%20Fill%20in%20questionnaire/Questionnaire.docx?d=wbd049cf3e41e4c699fbd88efd8fbfbb2&csf=1&web=1&e=gjnVC2) should be filled in and validated by the working group members.

This questionnaire will help to inform the SG’s strategy and, along with the Route to Competence and SKEB Statements, will help establish what competence does and should look like for the sector, help identify potential training and assessment gaps and look to how they can be addressed.

Consider how most people in the sector enter the sector, and how they currently reach industries measures of competence.

Discuss the [Fire Safety in Buildings training (FSiB)](https://ecourses.citb.co.uk/learningprograms/viewprogram/id,23) as per the recommendations on page 2 of this document. Do the roles within your sector’s competence framework require this training? Is the training robust enough for the sector (is a formal assessment also required)? Does the training go far enough (is there any further training identified by the sector group for the occupation that is required)? If your organisation would like the SCORM files (technical specification for eLearning modules), please contact [darren.street@citb.co.uk](mailto:darren.street@citb.co.uk) confirming your Super Sector and Sector name.

It is recommended that, when filling in the Questionnaire, a RAG (red, amber, green) status is given to each section.

For example: if there is no apprenticeship in place but it has been identified that one is required, mark this as red. If there is an NVQ but work is needed to bring it up to the required standard, mark this as amber. Or, if an Experienced Worker route is in place and no work is required, mark this as green.

Considerations to be aware of that might help identify your current RAG status:

* CITB Short Training Standards: <https://www.citb.co.uk/standards-and-delivering-training/training-standards/short-training-standards-search/>
* Mandatory Technical Competence Requirements: <https://www.gov.uk/government/publications/competent-person-scheme-minimum-technical-competence-requirements>
* Any English apprenticeship standard review: <https://www.instituteforapprenticeships.org/reviews-and-consultations/route-reviews/>
* Any Scottish TEG review: [Technical Expert Groups - Apprenticeship Development (apprenticeships.scot)](https://www.apprenticeships.scot/about/apprenticeship-development/technical-expert-group/)
* Any Welsh Apprenticeship: [Qualifications | Skills for Wales](https://www.skillsforwales.wales/qualifications)
* Any other training, including manufacturers training that should be included.

This will help the SG identify potential gaps, define next steps and will form part of the Strategy document as Appendix A.

A key lesson learnt from the creation of competence frameworks under the Super Sector programme has been that the Questionnaire may be difficult to fill in, with some information difficult to gather. Please note:

* This step is not mandatory but is there to help you identify competence gaps
* Some of this information can be obtained through CITB, CSCS, IfATE, SDS or mandatory awarding body reporting data.
* Some information you gather may not even be relevant and it may be more important to focus on the future of your competence programme. In this instance, move on from the question.
* Your Super Sector Chair, Programme Director, Programme Manager and Function Leads are all here to help you so please do reach out for assistance.

### Step 3 – Create a current Route to Competence diagram

Using the information identified above, draft a current [Route to Competence](https://mace365.sharepoint.com/:p:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Step%203%20-%20Create%20current%20R2C/DRAFT%20Route%20to%20Competence.pptx?d=w817fdf59ead049c697dc8d56b2c059d5&csf=1&web=1&e=67IKfn): a diagrammatic description of how an individual currently enters the sector and what is required in order to reach baseline competence.

Some sector groups have found that creating this Route to Competence diagram first can support in understanding which standards need to be considered during step 1.

### Step 4 – Create your Strategy Document

Taking the information from the questionnaire and current route to competence, fill in the [Strategy](https://mace365.sharepoint.com/:w:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Step%204%20-%20Create%20Strategy%20Document/Template%20Strategy%20Document.docx?d=w29f120ed3a4b46b0bab3c9e88bf35bb8&csf=1&web=1&e=QKLndh) document. Define the scope of the competence framework and an overview of the roles covered, identify and call out any gaps in current competence arrangements and the steps identified to develop and implement a fully functioning competence framework.

This will define the **why**, the **how** and by **when**.

This document will need to be filled out regularly and often revisited throughout the process of creating the competence framework for the sector. The strategy document is key to ‘tell the story’ of what the SG found and why the competence framework contains what it does. When reaching out for wider consultation this document will provide that background information and is the SG’s opportunity to justify the decisions that have been made to industry. It can also contain any key questions that the SG might want feedback on specifically at consultation stage. To an outsider looking at competence frameworks for the first time (at the SKEB in particular), the rafts of statements may cause confusion, so the strategy is the key to unlocking the content of the other documents.

A reminder that your Questionnaire will form part of Appendix A

### Step 5 – Mapping – start drafting SKEB Statements

Using the information captured within the questionnaire, fill in the Overview and Functional Map tabs within the [SKEB Statement Template](https://mace365.sharepoint.com/:x:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Step%205%20%26%206%20-%20SKEB%20Statement/SKEB%20Framework%20Template%20v2.xlsx?d=wcdca56ea7a9f42d3bf5c2e953062af7a&csf=1&web=1&e=bf3YHi). The level descriptors tab can be used for reference on measuring levels of qualifications and training.

Use the functional map tab to list the functions/ activities associated with the occupation, that make up the role in question.

A lesson learnt through the development of SKEB for installer sector groups was to include the recognition of working within the installer’s own capability. We recommend including the following phrase within the SKEB Statement:

"Recognise when the equipment you are installing is connected to a wider building system that requires additional specialist skills to achieve its overall system compliance. Work within limits of own capability and know when to seek advice from others and confirm that your system meets the relevant cause and effect requirements of the wider building system."

Step 6 – Creating your SKEB StatementsNow that the mapping has been completed, create a SKEB Statement tab for each function/ activity and fill in the required skills, knowledge, experience and behaviours. To do this, you can use the following documents as references:

* [BSI Flex 8670](https://mace365.sharepoint.com/:b:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Relevant%20Documentation/BSi_Flex_8670_V3.pdf?csf=1&web=1&e=xHRz3C) and WG2’s own Key Principles (included as Annex G of the [report](https://builduk.org/wp-content/uploads/2022/05/WG2-Phase-1-Report-17-May-2022.pdf))
* We have developed a [mapping document](https://mace365.sharepoint.com/:x:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/DRAFT%20FOR%20JESS%20AND%20FAYE/Relevant%20Documentation/210520%20BSI%20WG2%20Mapping%20FINAL.xlsx?d=w9c0271d1e1734d35b277e138aa22e1cc&csf=1&web=1&e=Wr7ziZ) to help identify SKEB from BSI Flex.
* SKEB identified in existing qualifications
* Current National Occupational Standards (NOS)
* Current Apprenticeship Standards
* Any of the Mandatory Technical Competencies (MTC) created by DLUHC (now the HSE). The Programme Director can provide you with a link to the relevant contact at the Building Safety Regulator to obtain these
* Make sure, where relevant, to reference competency frameworks that may be in existence
* [WG12 Product Paper](https://mace365.sharepoint.com/:b:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Step%205%20%26%206%20-%20SKEB%20Statement/WG12%20Products%20Paper.pdf?csf=1&web=1&e=PV7dhH)
* [Common KSBs](https://www.instituteforapprenticeships.org/media/nsmfug5q/construction-and-the-build-environment-common-ksbs-v2-published-february-24.pdf) from IfATE
* [CLC Retrofit Report](https://mace365.sharepoint.com/:f:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Relevant%20Documentation/CLC%20Retrofit%20Report?csf=1&web=1&e=I3wi8e)
* CITBs digital framework providing digital competencies can be found on this webpage: [Industry Impact Fund - CITB](https://www.citb.co.uk/levy-grants-and-funding/grants-and-funding/industry-impact-fund/) (about half way down the page under 'Additional Documents')
* [CITB Behaviours example](https://mace365.sharepoint.com/:w:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/DRAFT%20FOR%20JESS%20AND%20FAYE/Relevant%20Documentation/Behaviours%20for%20Installers%201.docx?d=wc81972ef17694a73a6d1bd44b4fe910a&csf=1&web=1&e=niIZZ3)
* [CITB Defining Experience slide pack](https://mace365.sharepoint.com/:p:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/DRAFT%20FOR%20JESS%20AND%20FAYE/Relevant%20Documentation/Competence%20Framework%20-%20SKEB%20Experience%20v2.pptx?d=w58df8fd59d8f4cffbcdee9c56adbe27b&csf=1&web=1&e=EYiQLU)

Please consider any specific SKEBs for working on Higher-Risk Buildings. Consider wider occupation knowledge as well as more specific function knowledge. This will allow any core trade knowledge to be lifted into other, future competence frameworks within the same sector. Consider any fire or safety critical elements in sufficient depth, does the SKEB cover these in sufficient detail?

Please note levels of qualifications and training are not necessary at this stage, these can be identified later but can be useful when considering where one role’s responsibilities end and another role’s starts (for example, where the installer role stops and the trade supervision role starts).

### Step 7 – Convert the information into an updated Route to Competence

Using the information captured within the SKEB statements create an updated [Route to Competence](https://mace365.sharepoint.com/:p:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Step%207%20-%20New%20R2C/DRAFT%20Route%20to%20Competence.pptx?d=w072a17639f3e41668d989067d871de87&csf=1&web=1&e=0ubdl5) that represents how your sector envisages an individual entering the sector and what is required in order to reach baseline competence from that starting point.

The sections of the Route to Competence can be RAG rated as before. For example: if you have identified a need for a new apprenticeship but this is not yet in place, mark this as red. If there is an NVQ but you have identified that work is needed to bring it up to the required standard, mark this as amber. Of if an EWR route is in place and no work is required, mark this as green.

If the framework covers a number of roles or varies dramatically between the 4 home nations then it may be worth considering drawing up more than one Route to Competence to avoid confusion.

Things to consider:

* Has the Sector group considered assessment as well as training? Do all installers need to undertake a consistent assessment to ensure that whichever route someone took they can all prove competence measured in the same way?
* Has the [Fire Safety in Buildings training (FSiB)](https://ecourses.citb.co.uk/learningprograms/viewprogram/id,23) training been discussed and included? Do the installers in your sector need to also be tested on the content or is the training sufficient?
* Has revalidation been included? What does maintenance of competence over time look like? Have mandatory CPD elements been looked at (for fire or safety critical elements)? Or maybe the SG want to set a number of hours of CPD they want someone to undertake before a card renewal takes place.
* If applicable: is the standard CSCS 5-year renewal still fit for purpose? Is there a need to reduce it?

Step 8 – Create an Implementation Plan   
This is the final step in the Competence Framework process. This is where the process for roll out of the competence requirements set out in the Competence Framework is planned. This step will list desired outcomes, owner, resources required, estimated timeframes and deadline dates. A template implementation can be found within your Sector Group toolkit or a separate [implementation plan](https://mace365.sharepoint.com/:x:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Step%208%20-%20Implementation%20Plan/Implementation%20Plan%20Example.xlsx?d=w5fd9e9b19a7342f490cba724d841b151&csf=1&web=1&e=p2bBlm) has been drafted to help get started.

An example of the actions and associated information listed in the implementation plan could be the requirement to consult on the framework more widely (a template consultation document can be found [here](https://mace365.sharepoint.com/:w:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Step%208%20-%20Implementation%20Plan/Consultation%20Document.docx?d=w83c862d25408470686722f8d1ccdc9dd&csf=1&web=1&e=cbL5Pr)) or the need to set up a new apprenticeship standard if this has been identified as a gap.

Included within the implementation plan should be details of how those already working within the sector can reach baseline competence and a timeline for this. For example, if all those in the sector currently were required to complete an NVQ Level 3 in order to reach competence, how long is this likely to take, is there sufficient resource to roll this out? We call this a Fit for Future Plan and a [template](https://mace365.sharepoint.com/:w:/r/sites/SuperSectorCompetenceProgramme/Shared%20Documents/General/Competence%20Instruction%20Manual/Step%208%20-%20Implementation%20Plan/Fit%20for%20Future%20Plan.docx?d=wa678c7a801c4458d952990c5afaf557e&csf=1&web=1&e=7rakNU) of this document is available if required.

Once the SG has completed their Implementation Plan they move from the standard monthly Sector Forum meetings to Implementation meetings. This allows the SG’s to concentrate on working through the Implementation actions. As part of this process the team will go through the documents completed and may ask various questions to check that the SG has considered everything as we work to trigger any developments required to fill the gaps identified.

## Help and Support

If you would like to support the programme, for any further questions, information or feedback, please contact:

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