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## 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.

## 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

## 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

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- 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

ASTATT8

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



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