



Traditional Building Skills Training Toolkit



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Introduction

Sustainability in our built heritage is much wider than re-use, regeneration and retrofit. Total conservation and true sustainability recognises that the training and education of a new generation of skilled workforce is vital to ensure that our heritage buildings are properly rehabilitated, repaired and maintained to secure their lasting legacy.

An historic building project offers a number of possible routes for delivering traditional building skills training depending on the size, complexity and funding of the project. This toolkit provides a scalable model for delivery that can be tailored to individual project size and scope. It has been successfully implemented on a number of projects ranging in value from £100,000 to many millions.



The toolkit provides a step by step guide to putting traditional building skills and conservation training at the heart of your built heritage project. The simple approach will help you to consider all aspects of delivering training on a 'live site' and will provide templates for training in addition to example contract clauses that can be incorporated into your tender documents.

By providing this level of detail, we hope that this toolkit will become an essential part of your project planning documentation, and will help to ensure that training is central to any heritage building project in future.

It is not however, offered as a final solution. Instead, the toolkit should be considered as an organic template to guide and support traditional building skills training and education. It will be edited, revised and developed on a regular basis by the National Heritage Training Group (NHTG) in conjunction with The Churches Conservation Trust (CCT) and other stakeholders. Appendix 1 provides a reference for terms used in this document, such as 'Client', Principal Designer etc.

“ As a Chartered Structural Engineer with over 40 years in the engineering and construction industry, the NHTG L3 Understanding Repair & Maintenance course was a fascinating couple of days. Reflecting on the session, I came to the conclusion that there is still a lot for me to understand about traditional buildings. At least by doing the two days, I’ve started a new learning cycle!”

Source: Testimonial from NHTG 2 day Level 3 Understanding Repair & Maintenance Course trainee



All Souls Bolton – A Case Study

The Project

The All Souls Bolton project presented a unique opportunity to test a strategy to incorporate traditional building skills training into the procurement process and works contracts. The aim was to provide a cohesive approach to delivering skills training as an integral, fully-costed 'living classroom' on an historic building project, rather than as an 'outreach' approach or 'afterthought'.

The strategy has now been developed into this adaptable toolkit that can be used as a model on other traditional building skills and specialist heritage construction projects.

All Souls was an unused 'at risk' Victorian church until the CCT and its partners, including the Heritage Lottery Fund, began an ambitious community regeneration plan for the church. Ten years after initial plans first formed, All Souls now stands again at the heart of the community, offering a useable public space and delivering a variety of services.

The redevelopment combined both old and new features and grew from an in-depth and comprehensive understanding of the building, its location, the local economy and surrounding community. Detailed knowledge and understanding of the original materials, skills and techniques used to construct the church was crucial to the development of a successful and achievable training programme.



Training

At pre-contract stage, a range of training elements were included. The programme was based on the ability of the project to support education and training in traditional materials associated with the building. All Souls, Bolton is of brick construction with lime mortars, stone, slate, lead and glass elements, so there was great potential to incorporate a variety of skills training in several disciplines.

The CCT devised a programme of training requirements that were then costed by the contractor. The contractor was advised on how to develop and deliver the training programme and given support on how to access suitable training providers, qualifications and courses.



The programme included:

- short-term bursary placements
- one-day CPD sessions for professionals
- seminars
- walks and talks
- specialist contractor training
- taster days for home owners

“Terrific interaction between attendees and the experts!”

Source: Learner feedback from Training Events at Bolton

The role of the contractor is crucial to the success of the training programme. The contractor must be fully committed to traditional building skills training and prepared to take responsibility for the implementation of the training programmes, working closely alongside other stakeholders during the process. On the All Souls Bolton project, the training programme resulted in many successful outcomes including:

- two bursary placements being awarded full-time placements with the principal contractor
- high attendance figures from the local community at training events
- increased involvement from other members of the workforce in training activities

Positive Outcomes

There are numerous positive outcomes of the training, education and outreach programme. Below are just a few of the key benefits.

- All parties were aware of their training commitment from the start of the process and were able to plan and cost effectively for a wide variety of training events.
- The embedded training commitment in the procurement process allowed for monitoring of the delivery plan and continued, measured achievement of targets.
- Six bursary placements gained invaluable knowledge, tangible skills and practical experience on a live-site project.
- The bursary placements now have knowledge, skills and experience that can be used in the future.
- The long-term presence of the bursary placements on-site encouraged other members of the workforce to get involved in training and mentoring.
- Four of the placements continued working on the project after the funding period had ended, being paid by the contractor.
- Two of the bursary placements have been awarded full-time training job placements with the principal contractor.
- Attendance figures and feedback from the events demonstrated success in terms of interest, skills benefits and community relations.
- The recruitment of two local BME bursary placements formed a clear link between the project and the local BME community and helped to promote the wider aims of the project to the local British/Asian community



The All Souls Bolton project has demonstrated the importance and value of incorporating traditional building skills training into the procurement process and works contracts. This flexible strategic toolkit can now be used by other projects to ensure that skills training is given the prominence it deserves to conserve, protect and develop our built heritage into the future.

“All the old skills are dying... if we don’t train people now these skills will be lost forever.”

Source: Skills Needs Analysis contractor

Stage 1 – Pre-Contract

Good preparation is the key to the success of any project. Detailed research and planning will ensure that suitable and appropriate training opportunities are available for all stakeholder groups and that the whole process of training is made as simple as possible for the benefit of all those involved with its delivery.

Step 1 – Identification of Roles and Responsibilities

There are a number of stakeholders involved in any project and it is important to understand and identify their individual roles and responsibilities at the pre-contract stage.

Appendix 2 is a table of potential Role and Responsibilities with some examples from All Souls Bolton project.



Step 2 – Understanding the Site and its Potential for Training

The type of heritage asset and its architectural significance is key to identifying training possibilities and understanding how the project can incorporate training.

- What does the structure and the constituent building materials offer towards heritage craft training opportunities?
- Are there any unique or unusual elements in the building that require specialist attention?
- Does the building site have any potential to host training and provide a 'living classroom'?
- Can the site accommodate a classroom and/or workshop facilities?
- Does the site have the potential to offer 'live-site' scaffold tours or 'walks and talks'?
- How many bursary placements, trainees and learners can the site realistically support at any one time?
- Can the project offer accredited outcomes? Examples include NVQ diplomas, awards, continuous professional development, and CSCS cards including Level 3 Heritage Gold Card?
- Can the project offer informal opportunities for learning within the local community eg. outreach and inclusion programmes for home owners, volunteers, community groups, school & college groups?
- Can appropriate insurances be purchased by all stakeholders?



Step 3 – Understanding the Skills Needs of the Workforce and Local Community

Most projects will have local significance and therefore a range of stakeholders from the immediate vicinity and surrounding area would benefit from training opportunities. Training for local people will create a clear link between the project and the local community and will encourage 'buy-in' and ownership. This is often challenging during the capital phase so it provides a good way to engage people at this point in the project.



It is particularly important to try to encourage local contractors to have access to up-skilling opportunities as they will be those working on other buildings in the area in the future.

- Does the area have any existing heritage skills learners who might benefit from additional training on your project to supplement their existing training? Often it is not possible to gain all skills needed for a qualification on one site, so sharing training opportunities is a valuable way to collaborate with training providers and other projects.
- Who are the mainstream training providers in the area?
- Who are the specialist training providers in the area – or who operate in the area?
- Can the project be partnered with other educational institutions for support, investment and certification?
- Is there any potential to offer training to those in full or part-time education on all levels, (ie from Level 1: equivalent to GCSE grades D,E,F, up to Level 6 & 7: Degrees and Masters)
- Are there any other stakeholders that could be potential sources of information and training for the learner? For example, contractors, local amenity societies, craftspeople and building professionals, local authority representatives, home-owners and volunteers may all be good sources.
- Are there any other heritage building projects nearby that might benefit from training partnerships?



Contractors place much higher value on experience and learning 'on the job' than formal training and qualifications. However they may not have an understanding of the correct approaches and standards of competence necessary to carry out work on traditional (pre-1919) buildings which would be gained through relevant training courses.

Source: Skills Needs Analysis

Step 4 – Identifying the Target Audiences

Step 3 may have identified a wide range of possible partners and stakeholders but not all of these may be suited to the project. The list needs to be carefully scrutinised to define key target audiences who can both contribute to and benefit from the training programme; socially and economically, in order to maximise the effectiveness of the training offer.



- Which potential partner/stakeholder can offer candidates who can show interest, skill and commitment both in the short and long-term?
- Which companies/academic institutions can offer support and investment of both time and revenue?
- Which companies/institutions/individuals have a proven track record of supporting heritage skills learners?
- Are there any local organisations, community centres or youth groups who have shown a particular interest in the project or have been previously involved in local projects?
- Who will benefit from skills training the most?
- Can the project encourage greater diversity?



Step 5 Identifying Risk

It is vitally important to carry out risk assessments for the ability of the contractor to support planned training activities safely. Ensuring that all stakeholders have the correct insurances in place is a key element of a risk analysis. Appendix 3 provides a suggested template.

“38% of contractors have recruited an apprentice or trainee in the past 4–5 years, but only 26% consider it likely they will recruit an apprentice or trainee in the next 5 years.”

Source: Skills Needs Analysis

Step 6 – Writing the Pricing Documentation and Tendering

Specification of the training requirement is included with the tender documents and could include a minimum preferred list of three suppliers, for the contractor to source and price training as part of the tender process. Alternative suppliers may be sourced by the contractor providing they are able to meet the requirements of a performance specification provided by the client.



Step 7 Pre-Qualification Questions (PQQ)

It is important to ensure additional clauses are added to the PQQ to outline the scope of training required and the expected levels of commitment to training from the Principal Contractor. Appendix 4 provides sample text from the All Souls Bolton project.



Step 8 – Publicity

Publicity is a crucial element in the success of any project or initiative. Raising awareness can attract investment and interest, both locally and nationally which may result in bursaries, sponsorship and funding for training and education. In addition, publicity plays an essential part in involving the local community in the project, which can provide outreach opportunities and open up new ways of finding enthusiastic trainees. There are numerous ways of generating publicity for the training, including:

- Inform the NHTG of the project so that they can highlight it through their website, newsletter and social media channels.
- Hoardings with clear information about the project can be positioned around the perimeter of the site. Details of training and education opportunities should be included, along with contact numbers.
- Press releases in local newspapers can inform people about the project and explain what it will mean to the community and why they should get involved.
- Social media pages should be set up and regularly up-dated – a local community group or school could be encouraged to help with this.
- Flyers with details of the project, training, education and community benefits can be sent to local residents and organisations.
- Posters can be displayed in school, colleges, job centres, local shops and streets, doctor and dentist surgeries, food outlets, youth associations, places of worship and even taxi ranks.
- Relevant amenity societies and heritage training groups will always take an interest and are often happy to offer support, advice and recommend training providers and possible sources of trainees. They may also help to raise funding for training projects.
- Depending on the size and significance of the project, the national press may also be interested in a story on the project, especially if it involves long-term benefits such as training the next generation of heritage craft specialists. See <http://www.theguardian.com/society/2014/dec/07/abandoned-churches-find-new-secular-life>
- Careers fairs and college taster days are good places to have a stand about the project and its training opportunities and benefits.



Step 9 – Tendering, Evaluation & Appointment of the Contractor

A ‘scoring’ or ‘weighting’ system is a very useful and robust method to help determine the best contractor for the project, and is commonly used within tender evaluation processes.

Potential tenderers are invited to provide evidence of their training and education commitment. A weighting matrix (totalling 100%) is applied to each application and includes a section on “Commitment to Training”, which scores each contractor against the following attributes:

- Current individual heritage qualified (or experienced workforce), including % either holding or working towards Heritage Skills CSCS card and/or Heritage Skills NVQ Level 3 (suggested weighting 40%).
- Evidence of company training and development plans (suggested weighting 30%).
- Enhanced training outputs to be delivered through the projects (refer to the proposed outputs they put against the Education and Skills Plan) (suggested weighting 20%).
- Approach to facilitation of project training and events programme (suggested weighting 10%). This ensures that those working in the sector who already train and develop their workforce are credited within the scoring system.

Contractor Interviews:

- Contractors should be asked directly “How will you deliver the training requirements of the contract?”
- Contractors will be expected to reference training and workforce development during presentations.

There are several registers of heritage contractors and conservation professionals that could provide information on relevant businesses and organisations in the area. These can be found in the ‘Resources’ section of the NHTG website.

Stage 2 – Prior to Contract Training Delivery

Once the tender has been awarded, it is necessary to work with the main contractor to ensure that the development and delivery of the training plan is well organised and well managed.

Step 10 – Training Capacity Evaluation

Assessing the ability of the project to support the range of required training is important, not only in terms of delivery, but also in terms of cost.

- Can the project team deliver the skills training internally or will external specialists be required?
- Who will manage and mentor the bursary placements and trainees?
- Who will be responsible for liaising with the local community and supervising events days and visits?
- If external training providers are required, then they must be identified and approached very early on in the planning process.
- Early communication with training providers is essential so that the project and their training calendars can be co-ordinated, especially if the provider is an educational institution with holidays to consider.



INSPIRING SUSTAINABILITY:

‘Maintain high standards of design, materials and workmanship in repairs, and in all adaptations and new work, using environmentally sustainable solutions, and invest in traditional building skills to support employment, appreciation, and through this, the survival of these skills.’

Source: CCT Aims: Conservation Strategic Programme 2015-18

Step 11 – Writing the Training Programme

The training programme needs to fit in with relevant phases during construction. This will ensure that suitable training is conveniently scheduled to make the most of the skills and materials on offer during the project. Other points may include:

“Really good to see progress of project and hear from professionals and craftspersons, their passions and interest.”

Source: Learner feedback from Training Events at Bolton

- Contact the NHTG Helpdesk for support on finding local training providers and other useful information and to assist with publicising the project.
- Training in skills areas such as lime must be timetabled seasonally, so training and events days must be scheduled appropriately.
- Trainees may need time at college or other training provider to develop other skills.
- Extra space will need to be made available during events days and community visits to accommodate the extra people on site.
- Outdoor practical demonstrations may require awnings or similar sort of temporary cover for unreliable weather.
- Information boards will be needed for events days and community visits, as will hardcopy handouts with information and diagrams.
- Provision for refreshments and extra W.C. facilities may be required.
- Specific Health & Safety measures relating to materials and skills, risk assessments and general site access and safety will all need extra attention when members of the public are on site.
- Feedback forms for events days and visits must ask evaluative questions that get honest and constructive replies from all learners in attendance.

Appendix 10 provides a Training Event Evaluation template



Stage 3 – During Training Delivery

Step 12 – Managing the Training

The training programme must be on-going and effective, with measurable outcomes in terms of course accreditation, placements, outreach event attendance and learner satisfaction.

- The Contract Administrator must oversee the Contract Designer's (see definition in Appendix 1) delivery of the training programme.
- The Contractor Designer must take overall day-to-day responsibility for the training elements.
- The Contract Administrator and Contract Designer must devote serious time to ensuring successful delivery of the training programme through meetings and continued communication.
- Training is an important element of total project planning and must be assigned adequate time during monthly project team meetings. A clear contractor lead for the training element of the project should provide an update (written and verbal) to these meetings.
- There will almost inevitably be changes to the project throughout its life and there must be a reactive response to such change. When training is included in project planning meetings, the team is able to respond to any changes and ensure that suitable training opportunities are maintained and delivered.



“This gives me some useful ideas for the community engagement/education component of an HLF bid I’m involved with – Thanks!”

Source: Learner feedback from Training Events at Bolton

Stage 4 – Post Contract

A post-project evaluation is necessary to understand the impact of the training. An assessment of achievements and an analysis of issues that have arisen both during and after the training programme are key learning points for future projects. It is also essential that there is follow-on support for trainees, contractors and others to ensure the development of best practice across the sector.

Trainees should be directed to the online NHTG Training Directory and Information Centre for further guidance on further training opportunities – possible grants and funding and also job opportunities.



Step 13 – Evaluation of Returns

It is essential to monitor the success of the training of bursary placements and others to make improvements for future programmes. Types of evaluation may include:

- Bursary placement profiles across age, gender, skills, background and locality of residence helps to pinpoint key areas of success. For the All Souls Bolton project, this success came from the inclusion of the local BME community and a good spread across the age range. See Appendix 12.
- Bursary placement destinations post-project show whether or not the training is beneficial in the long-term. See Appendix 13.

During the training programme, learners will have completed feedback forms that give opinion and information on the success of events days and visits (Appendix 10).

This information is an excellent resource for planning training on future projects because it demonstrates what has been learnt and whether or not the training was beneficial to the learners. Information from individual forms can be tabulated to give an overall view of the project. Appendix 11 provides an example from the All Souls Bolton project and reflects the high degree of successful learning experienced by the attendees.

Step 14 – Exit Interviews, Career Progression and Support

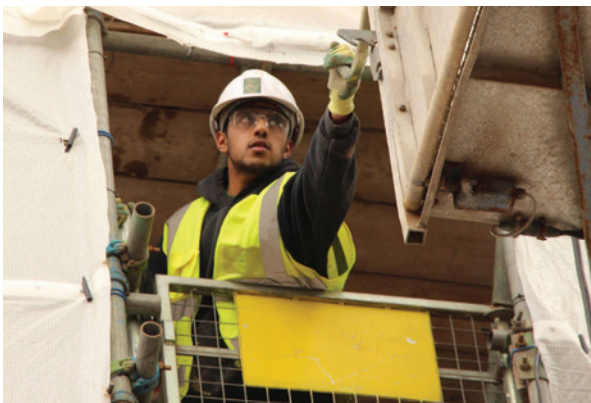
Work with bursary placements and other trainees intent on a career in the sector shouldn't stop at the end of the training programme. The skills they have acquired on the project are skills for life and it is essential that information and support about the next stage of their career is carefully monitored by the project team. This support may take the form of:

- An exit interview that is carefully managed by the Principal Contractor to assess how the bursary placement feels they have benefited from the training programme and how they intend to progress their career.
- Assistance with portfolio completion, CV writing and job applications.
- Written reference for the bursary trainee on completion of their time on the project.
- Help with identifying up-skilling courses and placement opportunities through other partners.
- Providing information about sources of further support and help such as the NHTG.

An example Exit Interview Template is found in Appendix 15. Two successful case studies from the All Souls Bolton project are presented at the end of this toolkit in Appendix 14.

Step 15 – Submit a Case Study of the Training to the NHTG Information Centre

By building a resource of best practice case studies, projects can support other projects to provide and improve on their traditional building skills training offer. This resource will also act as evidence of the value, impact and benefit to the sustainability of buildings and communities and help to encourage further support from industry and government organisations.



INSPIRING PEOPLE:

“Engage a wide audience, in particular local communities and volunteers, in the importance of conservation as a way of valuing the historic environment and instilling a sense of responsibility for it.”

Source: CCT Aims: Conservation Strategic Programme 2015-18





Key Learning Points from All Souls Bolton project

Some of the most important lessons learned from the All Souls Bolton project were:

- The number of different parties involved in the planning and processing of each Training Plan should be kept to a minimum.
- The responsibility for planning and delivery should rest squarely with the Principal Contractor.
- The final decision on any matters that affect work on-site should sit with the Principal Contractor.
- Recruitment campaigns should be very well-planned, properly resourced and focussed on the target audience
- Recruitment strategies for the community require local knowledge and sensitive organisation and delivery. Using local partner organisations is important in reaching all members of the community as it uses existing networks rather than starting from scratch.
- Good communication between the training and skills co-ordinators of the project and the Principal Contractor should be paramount.
- The 'live' nature of the bursary placement contract requires flexibility within the training plan in order to accommodate changes on-site.
- The CSCS card target should be managed by the Principal Contractor.
- A clear exit plan and exit interview should be in place for the bursary placements. This should be managed by the Principal Contractor so that all portfolios can be kept up-to-date.
- A percentage of the works contract should be retained by the client until training has been delivered and completed according to the conditions of the contract.
- Sometimes the training programme may need to change to reflect the work progress onsite.

Supporting a Virtuous Circle of Training

It must be remembered that approximately twenty percent of the UK's buildings are of 'traditional' solid walled (pre 1919) construction. General understanding of traditional pre-1919 buildings, conservation and restoration principles are just as important for common domestic properties such as a Victorian terrace or thatched cottage and industrial buildings as they are for listed buildings including stately homes and cathedrals.

Traditional building skills, materials and techniques currently do not form part of mainstream construction training.

Inclusion of heritage skills training in a project demonstrates positive action to address this situation and a commitment to equip existing and future contractors and professionals with the appropriate skills, knowledge and understanding they need to work on traditional buildings.

“Enjoyed day balance of technical and practical aspects. Enthusiastic delivery added to the enjoyment.”

Source: Learner feedback from Training Events at Bolton



Appendices

Appendix 1 – Terms and Acronyms

Term / Acronym	Definition / Full Meaning
BME	Black & Minority Ethnic.
CCT	The Churches Conservation Trust.
Contract Administrator	Person appointed by the Client to administer the contractor. Often an architect, surveyor or other professional.
Contract Designer	An external consultant or member of the client team appointed to create a training, outreach and education programme.
Client	Organisation or Individual commissioning the work on the project. This could be the owner or a consultant group.
CPD	Continuous Professional Development.
NVQ	National Vocational Qualification.
NHTG	National Heritage Training Group.
PQQ	Preliminary Qualification Questions.
Principal Contractor	Main Contracting Company who won the contract and is responsible for the overall management of the contract and all sub-contractors.
Principal Designer	Often the Contract Administrator, usually an architect, surveyor or other professional.
Training Provider	Any organisation or individual that offers accredited or un-accredited training in traditional building skills, building conservation or other related subjects and crafts.



Appendix 2 – Stakeholder Roles and Responsibilities

Role	Responsibility(s)
The Client	<ul style="list-style-type: none"> To specify training and education activities. To fund specified training and education activities. To oversee and quality-assure training and education activities.
Principal Designer	<ul style="list-style-type: none"> Appointed by the Client to plan, manage, monitor and co-ordinate the pre-construction health and safety phase of the project; liaises with the Principal Contractor during the construction phase.
Principal Contractor	<ul style="list-style-type: none"> To oversee all CDM regulations. The development of a Training and Development Plan for all contractors, individuals and local people working on the project. Facilitate or administer the specified training and education activities. Participate in training and education for their own workforce and supply chain. To undertake skills review profile of all individuals at induction. To promote the project locally (and nationally, if appropriate) through various media outlets. To produce information in the form of flyers, hoardings, event posters and other promotional materials. To organise event bookings (eg Eventbrite).
Contract Administrator	<ul style="list-style-type: none"> To administer the contract between Client and Principal Contractor. Usually develops the pre-tender training documents for pricing by the Principal Contractor. Can be the architect, surveyor or engineer.
Training Providers	<ul style="list-style-type: none"> To provide quality specialist training solutions. Can be internal via the Principal Contractor and Contract Administrator. Can be external via providers: See National Heritage Training Group Training Directory but also consider local trainers who may not yet be included in this register.
Other stakeholders or industry bodies that might have an interest or role to play	<p>Bolton All Souls project example:</p> <ul style="list-style-type: none"> National Heritage Training Group Alan Gardner Consultant North West Heritage Skills Hub Urban Solutions Carefoot, Youdan Briggs, MediaTrust



Appendix 3 – Risk Assessment Template

Training Event 4. Risk Assessment	
EVENT TITLE: EXHIBITION & CRAFT SKILLS DEMONSTRATIONS	EVENT: x of x

Assessors Name	Assessors Signature	Persons Affected By This Risk Assessment
		Staff, client staff, other contractors, volunteers, members of the public

Risk Assessment Key:

Likelihood		Severity	
Highly Unlikely	1	Trivial	1
Unlikely	2	Minor Injury	2
Possible	3	Over 3 day Injury	3
Probable	4	Major Injury	4
Certain	5	Incapacity or Death	5

Risk Ranking (Likelihood x Severity)
Very Low Priority – No Action required (Risk no 1)
Low Priority – Risk no (2 – 4)
Medium Priority – (Risk no 5 – 9)
High Priority – (Risk no 10 – 12)
Urgent action – (Risk no 15 – 25)

Hazard / Consequences	Control Procedures	Likelihood (a)	Severity (b)	Risk Ranking (= a x b)
General BUILD UP & BREAKDOWN- Erection and dismantling of exhibition stands & equipment / Slips, trips and falls. Manual handling injuries & strains, Crushing injuries	<p>Minimizing potential trip hazards and ensuring all electric cabling is covered or securely taped down.</p> <p>Gloves & safety boots to be used where required. Ensure all staff trained in safe manual handling techniques.</p> <p>Suitable trolleys and lifting gear to be used where appropriate. Safe lifting techniques to be employed for all materials. When finished, the area will be cleaned of debris. Implement 'tidy-as-you go' policy</p>	2	2	4

Hazard / Consequences	Control Procedures	Likelihood (a)	Severity (b)	Risk Ranking (= a x b)
Stonemasonry BUILD-UP & BREAKDOWN / Injury (In addition to general)	Use of safety boots and gloves where appropriate. Work carried out at ground level	2	2	4

Appendix 3, continued...

Hazard / Consequences	Control Procedures	Likelihood (a)	Severity (b)	Risk Ranking (= a x b)
STONEMASONRY DEMO & Hands On / Injury	<p>Sharp tools only to be used by or under the expert guidance of, experienced stonemason in a safe and competent way.</p> <p>Eye protection and gloves to be provided to individuals taking part in stonemasonry taster. Viewing public within the demonstration area to be provided with eye protection.</p> <p>Generated dust will be negligible.</p>	2	2	4

Hazard / Consequences	Control Procedures	Likelihood (a)	Severity (b)	Risk Ranking (= a x b)
Roof Slate BUILD-UP & BREAKDOWN / Injury (In addition to general)	Use of safety boots and gloves where appropriate. Work carried out at ground level	2	2	4

Hazard / Consequences	Control Procedures	Likelihood (a)	Severity (b)	Risk Ranking (= a x b)
Roof Slate Cutting DEMO & Hands On / Injury	<p>Sharp tools only to be used by or under the expert guidance of, experienced roofer in a safe and competent way.</p> <p>Eye protection and gloves to be provided to individuals taking part in roof slate cutting taster. Viewing public within the demonstration area to be provided with eye protection. Aprons to be offered to protect clothing</p> <p>Participants will be advised to wash hands. Generated dust will be negligible. Slate waste to be cleared away at regular intervals and removed from site each day.</p>	2	2	4

Evidence that the Training Provider has an appropriate level of Public Liability Cover (please tick)



Appendix 4 – Example of ‘Additional Clauses’ for Inclusion of Training Events as a Requirement within Preliminaries and General Conditions Documents

The following has been taken from additional clauses that were incorporated into the Preliminaries for the Bolton All Souls project. This wording can be adopted and/or edited for use.

For clauses below which relate to training provision, the Employer will be referred to as the Training Placement Provider, and the Employee will be referred to as the Bursary Placement

(i) PREAMBLE:

A high profile and much publicised element of the project proposed for Bolton All Souls is the attempt to ensure that a full outreach and training programme is fully incorporated into the pricing documents and delivered during the construction phase.

A real commitment from the selected contractor to incorporate ‘training and works contracts’ into a grant-aided project is required for this to succeed

To ensure the desired commitment from those tendering, the training related element will be given a separate and substantial weighting (30%) in the analysis of the priced submission documentation and discussed in any selection interviews. The Client team and funders are not interested in ‘lip-service’ to this element of the project and we are seeking substantial and active engagement and successful delivery.

(ii) SUMMARY OF TRAINING:

Training Event Summary Sheets will be incorporated into the Bills and will be certified as part of the actual works.

The event sheets each contain a ‘Resources’ element, each section of which should be individually priced (not aggregated) with each total also being transferred to the ‘Training Additional Contract Clauses’ contained in the Preliminaries.

The training and outreach will be across a range of audience types and will include:

- The general public;
- Craft bursary placements;
- Technical Events for Architects, Surveyors, Engineers, Conservation Officers and Builders, etc.
- Educational institution site visits (universities, 14-19 Diploma students, local schools, etc.)

The training sheets should be seen as a performance specification as the previous experience of the Main Contractor in training will also be expected to help in delivery. Contacts details of potential suppliers of bursary placements and ‘audiences’ are contained in the training events summary sheets.



(iii) DELIVERY:

It is anticipated that a dedicated senior member of the contractor's team will take responsibility for the delivery of the training element of the project and there will be discrete monthly progress reports at the main project meetings and it is anticipated there will need to be interim 'working' meetings.

The client and contract administration team are willing to bring their extensive experience on board to help guide in the delivery of the training but it will be the responsibility of the contractor to deliver the training from inception to completion (this will include publicity, administration, insurances, delivery of the training, safe and effective site supervision, correlating evaluation forms and ensuring compliance with relevant NVQ, CPD requirements, etc. See also section 3.27, below).

Please note that the training will be in addition to anything that the main contractor already delivers within their own organisation and part of the analysis of tender submissions will be based upon evidence of a demonstrable track record on training their own directly employed staff in craft skills and other technical matters in the repair of historic buildings. It is also anticipated that the successful contractor's staff will also, where relevant, attend much of the training as delegates.

The following sections are to be priced within the Preliminaries (Training Additional Contract Clauses section).

3.25. SUPPLEMENTARY ADDITIONAL TRAINING RELATED CONTRACT CLAUSE: TARGETED RECRUITMENT AND TRAINING

3.25.1 Targeted Recruitment and Training Method Statement

The Contractor is to provide a Targeted Recruitment and Training Method Statement with the tender, based upon the Training Events Sheets provided. It should clearly set out how they will achieve the delivery of the events.

The Contractor is advised to meet with those identified on the training sheets and other supply-side partners before completing the Method Statement. This will assist in identifying the resources available to implement the method statement including funding, trainee/bursary placement supply routes, training facilities, job-matching services etc.

A person-week is defined as a normal 39-hour working week including allowances for day release for studying at college and normal holiday entitlements.

3.25.2 Remuneration

Trainees and bursary placements must, as a minimum, be paid in accordance with industry norms and must have terms and conditions of employment that comply with the law and are at least equivalent to those provided to workers that have equivalent skills and experience. To aid retention, employers are encouraged to increase the remuneration of trainees/bursary placements in line with their experience and productivity.



Where outside funding (from any source) is obtained to assist in training, the cost benefit shall be passed in its entirety to the Employer. The Contractor will be deemed to have included in his tender for all administration and overhead costs associated with the training requirements.

Most contractors will already have trainees/bursary placements for whom they will be getting assistance from Construction Skills (or others). The Contractor will therefore need to define which sources of outside funding should directly benefit the Employer and how this will be administered

3.25.3 Trainee Management

Trainees are to be provided with supervision, mentoring and support to enable them to complete training and accreditation.

Each new trainee/bursary placement engaged under the terms of this agreement is to be notified to the Employer or its nominated agent using a pro-forma to be provided by the Main Contractor and approved by the Contract Administrator. The pro-forma will include a statement to be signed by the trainee/bursary placement permitting the employer to provide personal information to the Employer and its agents for progress monitoring only. This is to comply with the Data Protection Act.

Where the engagement of a trainee/bursary placement that has been notified to the Employer ends this is to be notified to the Employer or the agent using a pro-forma provided by the Main Contractor and approved by the Contract Administrator (CA).

Where requested by the trainee or their training organisation training records are to be maintained e.g. for accreditation purposes.

When reasonably requested by the Employer or its agent, or by a training organisation with trainee/bursary placements on site, a meeting with a trainee will be facilitated on the Contractor's premises.

3.25.4 Reporting

At each monthly site meeting (minimum) or when reasonably requested by the Employer, the Contractor will provide a written progress report and programme for the Targeted Recruitment and Training activities so as to address issues and plan for forthcoming training and recruitment opportunities. Training will have its own section on the Agenda for each site meeting.

One week prior to each review meeting the Contractor will provide the Employer and other partners with a Targeted Recruitment and Training Outcomes Statement that includes for the period and cumulatively:

- a) The number of 'new trainees/bursary placements' that are or have been engaged for each Training Event (where relevant).
- b) The total person-weeks provided by 'new trainees/bursary placements' in the period and cumulatively for each Training Event (where relevant).
- c) Planning and/or feedback for the Taster Days and individual Training Days.



3.25.5 Sub-contractors

For the avoidance of doubt it is the Contractor's responsibility to obtain the full co-operation of sub-contractors as necessary to fully meet the Targeted Recruitment and Training requirements. This should entail payment for their time and costs associated with training as part of the Main Contractor's tender.

Suitable locally based skilled trainers have, where known, been identified in the Training Events Sheets. It is hoped that they could provide the delivery mentoring and evaluation role for training events and trainees.

3.25.6 Supply-side Support

Any action taken by the Employer or their agents and partners to broker relationships between the Contractor and local individuals/firms/agencies does not imply that they or their agents/partners consider the individual/firm/agency as suitable for engagement by the Contractor. All recruitment, and employee supervision, training and discipline responsibilities rest with the Contractor and sub-contractors. Within this context the Employer will work with local agencies to help facilitate the achievement of the recruitment and training requirements.

In the above approach the Method Statement, provided as part of the tender documentation, should include a question about how each of the requirements will be met, and it should include a table where the bidder shows the total trainee person-weeks that will be provided, and how these will be split between trade areas and between bursary placements and other trainees.

This approach provides clearly stated and measurable outcome requirements (trainee person-weeks and work experience weeks) and requirements that relate to the quality of the provision and the reporting and review of outcomes as the contract progresses. The Method Statements are capable of being evaluated against a standard scoring framework.

3.26. SUPPLEMENTARY ADDITIONAL TRAINING RELATED CONTRACT CLAUSE: TENDER EVALUATION AND DOCUMENTATION

3.26.1 Tender Evaluation

Where targeted recruitment and training is a 'core requirement' the Targeted Recruitment and Training Method Statement should be used in scoring the quality aspects of the tenders.

This requires:

- a) A score to be allocated to this element when the overall scoring framework is being developed;
- b) People with knowledge of training and recruitment to be part of the tender scoring process;
- c) The development of a scoring framework for recruitment and training that includes a weighting of the different requirements, and decisions about what a good response to each question on the pro-forma method statement will include.



3.26.2 Targeted Recruitment & Training

The Contractor agrees to secure the following in accordance with the Tender Documents and their Targeted Recruitment and Training Method Statement:

- a) The provision of new-entrant trainee employment;
- b) The provision of work-experience placement weeks;
- c) Appropriate supervision, mentoring and support for trainees;
- d) Monitoring information and attendance at review meetings;
- e) Obtaining the co-operation of sub-contractors as necessary.

The Employer undertakes to assist the Contractor and their sub-contractors to provide targeted recruitment and training opportunities but any action taken by the Employer or their agents does not imply any promise to provide suitable labour or agencies and does not imply that any individuals or agencies referred to the Contractor or sub-contractors are suitable for engagement by them.

3.27. SUPPLEMENTARY ADDITIONAL TRAINING RELATED CONTRACT CLAUSE: ORGANISATIONS TO FACILITATE DELIVERY OF THE TRAINING

The Main Contractor will have to take complete responsibility for the delivery of training which will be certified by the CA as successfully completed. Organisations familiar with the delivery of training, evaluation of events, organising bookings, publicity and other associated elements that could be approached to help the Main Contractor (for a fee), if they do not contain sufficient expertise in-house include:

- The National Heritage Training Group, www.the-nhtg.org.uk
- Training Providers listed within the National Heritage Training Group Training Delivery Directory, <http://www.the-nhtg.org.uk/training-quals/training-course-provider-search//>

The local organisation who we believe may be best placed to help with the publicity of local access events, accommodation and catering is: xxxx (insert relevant organisations here)

All costs associated with the engagement of the above to help the Main Contractor will be deemed to have been included in their tender.



Appendix 5 – Sample Method Statement for Targeted Recruitment and Training (TR&T)

Introduction

The Contractor is to provide a TR&T Method Statement with each valid tender, using the pro-forma provided, setting out how they will achieve the following:

- 52 person-weeks training for ‘new trainees/bursary placements’ recruited through (enter name) College or another organisation agreed by the purchaser per £1m in contract value.
- 10 person-weeks to be made available for unwaged work experience placements per £1m in contract value;
- All vacancies, including those with sub-contractors, to be advertised to agencies named by the Training Placement Provider, and sufficient time given to allow applicants from these sources a chance to be considered for recruitment.

Additional notes: The Contractor is advised to meet with (enter names) and other supply-side partners before completing the Method Statement. This will assist in identifying the resources available to implement the method statement including funding, trainee/bursary placement supply routes, training facilities, job-matching services etc.

[Client Notes: it is important to include a definition of person-week, ‘new entrant trainee’ and ‘new invitation to tender’. The 52 week per £1m target equates to approximately 10% of the worktime, but the target can be increased up to 15% on housing projects or reduced to perhaps 7.5% on commercial buildings depending on the type of construction and the context. If the TR&T elements are not a ‘core requirements’ and will not therefore be used in the award of the contract the date of submission of the Method Statement can be changed to (for example) one week before commencement on site. This will ensure that it does not influence the award decision.]

Remuneration

Trainees and bursary placements must, as a minimum, be paid in accordance with industry norms and must have terms and conditions for training that are at least commensurate to those in employment who have equivalent skills and training.

To aid retention Placement Providers are encouraged to increase the remuneration of trainees/ bursary placements in line with their experience and productivity.



Trainee Management

Trainees are to be provided with supervision, mentoring and support to enable them to complete training and accreditation.

Each new trainee/bursary placement engaged under the terms of this agreement is to be notified to the Placement Provider or its nominated agent using a pro-forma provided. The pro-forma will include a statement to be signed by the trainee/bursary placement permitting the Placement Provider to provide personal information to the Placement Provider and its agents for progress monitoring only. This is to comply with the Data Protection Act.

Where the engagement of a trainee/bursary placement that has been notified to the Placement Provider ends this is to be notified to the Placement Provider or the agent using a pro-forma provided.

Where requested by the trainee or their training organisation training records are to be maintained e.g. for accreditation purposes.

When reasonably requested by the Placement Provider or its agent, or by a training organisation with trainee/bursary placements on site, a meeting with a trainee will be facilitated on the Contractor's premises.

Reporting

When requested by the Placement Provider the Contractor will attend a meeting of partners to discuss the progress of the TR&T activities so as to address issues and plan for forthcoming training and recruitment opportunities. These meetings are likely to be quarterly but could be more frequent at the start of the developments or if agreed targets are not being achieved. One week prior to each review meeting the Contractor will provide the Placement Provider and other partners with a TR&T Outcomes Statement that includes for the period and cumulatively:

- the number of 'new trainees/bursary placements' that are or have been engaged;
- the total person-weeks provided by 'new trainees /bursary placements' in the period and cumulatively;

Sub-contractors

For the avoidance of doubt it is the Contractor's responsibility to obtain the co-operation of sub-contractors as necessary to fully meet the TR&T requirements and to ensure their costs are included in the tender document.

Supply-side Support

Any action taken by the Placement Provider or their agents and partners to broker relationships between the Contractor and local individuals/firms/agencies does not imply that they or their agents/partners consider the individual/firm/agency as suitable for engagement by the Contractor. All recruitment, and employee supervision, training and discipline responsibilities rest with the Contractor and sub-contractors. Within this context the Employer will work with local agencies to help facilitate the achievement of the recruitment and training requirements.



Appendix 6 – Sample Training Event Template - Bursary Placements

All Souls Bolton Training Event 1. Summary Sheet			
EVENT TITLE: ROOFING BURSARY PLACEMENTS		EVENT:	
Anticipate 3 Bursary placements, two on stone slate roofs and one on sheet metal (lead, stainless)		Number 1 (of 14)	
AUDIENCE:	<ul style="list-style-type: none"> • Bursary placements/Learners at Local Colleges (Switch programme at Bolton College. Initial contact made). • CCT bursary placements/internships. • Possible National Trust Bursary placements (North-West Region). • Cathedral Bursary placements. • HLF Bursary. 		
TRAINING COVERED:	<p>Work under guidance of specialist sub-contractor on site</p> <ul style="list-style-type: none"> • Stone slates: sourcing (incl. Visit to quarry), substrates and preparation (setting out etc.), coursing, laying, torching (lime mortars, nature and necessity of underlays); • Sheet metal: substrate preparation (including timber boarding, type of lead (milled, sand-cast etc. and visit to sand cast producer) chalk enhanced emulsion, etc), setting out, laying (including hot works, nature and necessity of underlays, etc.), lime mortars • Will also attend other training events during placement period to provide more holistic context of historic buildings work • General principles of conservation 		
TRAINING OUTCOMES:	<ul style="list-style-type: none"> • Familiarity with the execution and use of the relevant roofing materials in the context of a historic building project. • Certification from placement to satisfy educational authorities (latter agreed with educational authority) and for bursary placement portfolio. • Bursary placement to keep records of placement (reflective learning) • CSCS card for trainee 		
DURATION OF TRAINING:	Anticipate 3 month placements for each bursary placement	LOCATION OF TRAINING:	Site (mainly but materials producer visit also to occur)

Appendix 6, continued...

Resources:		
Requirements	Budget Costs	Notes
Contract Administrator	£	Included in project fee
Bursary placements (x3)	£	Dependent on market rate
Site Messing	£	(Priced in Bill by Main Contractor)
Site Induction & MC Staff	£	
Specialist sub-contractor/craftsman attendance and management	£	(Priced in Bill by Main Contractor)
Materials	£	(trainee specific) (Mainly priced in Bill by Main Contractor as part of works)
Sub-total	£	
Notes:		
<ul style="list-style-type: none"> • Exact pay reimbursement for bursary placement tbc and may come from alternative funding source rather than priced in Bills. • Insurances to be provided by main contractor. 		

Appendix 7 – Sample Training Event Template – Lime Mortar Technical Day

All Souls Bolton Training Event 4. Summary Sheet			
EVENT TITLE: LIME MORTAR, REPOINTING & MASONRY REPAIR TECHNICAL (HALF) DAYS			EVENT:
(anticipate attendance maximum number of 32, 16 in each session)			Number 4 (of 14)
AUDIENCE:	<ul style="list-style-type: none"> • Site workforce • Tutors/Lecturers • CCT Staff • Local Contractors • Heritage Professionals • Local Authorities (Conservation Officers, Building Control, etc.) • Students and Bursary placements • ‘Educated Homeowners’ 		
TRAINING COVERED:	<ul style="list-style-type: none"> • Health and Safety Issues in relation to the use of the materials • Lime types • Lime Slaking • Aggregate selection • Special additives (pozzolanic additives, etc.) • Mixing of mortars (demonstration & limited participation) • Repointing (demonstration & limited participation) including jointing up and use of appropriate tools. • Cutting out masonry • Mortar repairs • Natural and Ecological considerations 		
TRAINING OUTCOMES:	<ul style="list-style-type: none"> • Awareness of health and safety issues in relation to the use of the materials • Familiarity with spectrum of limes and importance of aggregate selection (pozzolanic additives, etc.) • Practical awareness of materials preparation and use (including use of appropriate tools) • Philosophical and technical awareness of extent and nature of interventions 		
DURATION OF TRAINING:	One Day (run same day twice during contract)	LOCATION OF TRAINING:	Site



Appendix 7, continued...

Resources:		
Requirements	Budget Costs	Notes
Contract Administrator/Course Leader (provided by Client)	£	Included in project fee
Craftsperson	£	(Under Artists and Tradesman Clauses or provision of list of minimum of three and agreed Fee in Bill)
Site Messing (includes tea coffees and lunch and registration. Located in Old School)	£	Refreshments
	£	Old School Hire-organised by administrator
Site induction & MC staff	£	Priced in Bill by main contractor
Materials	£	Priced in Bill by main contractor
Sub-total per half day session	£	
Total cost	£	
Notes:		
<ul style="list-style-type: none"> • Charging for day will recoup some of the cost (for each day assume a conservative 20 participants for each course at £xxx per person = £xxx (total £xxx). This will pay for the administrator (part), publicity and the food. • Other administration, publicity etc. a lump-sum allowed for elsewhere (say £xxx on top of any balance from fee income generated) • Insurances are to be provided by Main Contractor (including, as for all technical training, risk and method statements) • Main Contractor to provide appropriate PPE 		

Appendix 8 – Sample Event Template – Technical Day for Historic Building Managers and Owners

All Souls Bolton Training Event 7 Summary Sheet	
EVENT TITLE: WORKING WITH AN OLD BUILDING TECHNICAL DAY	EVENT:
(anticipate attendance maximum number of 50)	Number 7 (of 14)
AUDIENCE:	<p>Anyone who has a responsibility for the care and management of a historic building but is not trained in building repair or design.</p> <ul style="list-style-type: none"> • CCT Staff • Non Building trained Heritage Professionals (Museums staff, etc) • Non- Building trained staff of relevant organisations (National Trust, Heritage Lottery Fund, etc.) • Local Authorities (Property and Estate Managers, etc.) • Hospitals, universities and educational establishments
TRAINING COVERED:	<p>The day will have lectures based in the Old School and then site visit tours (alternating small groups) and this will enable the consideration of a variety of issues on the site. Issues considered will include:</p> <ul style="list-style-type: none"> • Why historic buildings are different; • The nature of a dynamic environment; • New design in historic environments; • Introducing new services; • Environmental heating and controls; • The nature of the legislation you need to be aware of;
TRAINING OUTCOMES:	<p>An holistic awareness of some of the issues that non-building trained 'managerial' staff, with responsibility for an historic building, need to be aware of.</p>



Appendix 8, continued...

Resources:		
Requirements	Budget Costs	Notes
Contract Administrator/Course Leader (provided by Client)	£	Included in project fee
Lecturers (say 4)	£	Including expenses (Under Artists and Tradesman Clauses and agreed Fee in Bill)
Site Messing (includes tea coffees and lunch and registration. Located in Old School)	£	Refreshments
	£	Old School Hire-organised by administrator
Site induction & MC staff	£	Priced in Bill by main contractor
	£	High Level Access (Priced in Bill by main contractor)
Materials	£	Priced in Bill by main contractor
Sub-total per half day session	£	
Notes:		
<ul style="list-style-type: none"> • Charging for day will recoup some of the cost (for each day assume a conservative 30 participants for each course at £x per person = £x. This will pay for the administrator (part), publicity hire of Old School and the food. • Other administration, publicity etc. a lump-sum allowed for elsewhere (say £xxx on top of any balance from fee income generated) • Insurances are to be provided by Main Contractor (including, as for all technical training, risk and method statements) • Main Contractor to provide appropriate PPE 		

Appendix 9 – Sample Training Event Template – School Taster Day

All Souls Bolton Training Event 12 Summary Sheet			
EVENT TITLE: PRIMARY SCHOOL TASTER DAYS		EVENT:	
Maximum anticipated 25 (plus teachers)		Number 12 (of 14)	
AUDIENCE:	Introduce local Primary school students to the site and what is happening and possibly undertake a site inspired project with them.		
TRAINING COVERED:	<p>Display and discuss the nature and extent of work being undertaken including:</p> <ul style="list-style-type: none"> • Introduce building and what is was used for and what it is now going to be used for and get them to discuss it. Philosophy and approach to new design in historic buildings ('creative re-use'); • Talk about the new elements and some of the beautiful or quirky historic features; • Introduce some social history; • Display some of the different materials used in the repair and new work. Present some craftsmen doing some work such as lime or carpentry, etc. • In discussion and with the agreement of the teachers agree a piece of art work that the children will undertake (drawing, painting, modelling, poem, etc) 		
TRAINING OUTCOMES:	<ul style="list-style-type: none"> • Engender an interest in buildings (particularly historic) and their importance to communities. • Certification from event to satisfy educational authorities (latter agreed with educational authority). • Possible follow-up work marked by TCCT and Development Worker as 'follow-up' in the school. • Foster an appreciation of the possible dangers of building sites. 		
DURATION OF TRAINING:	1 day on site (run 3 times during project - total of 3 days)	LOCATION OF TRAINING:	Site (possible subsequent follow-up' in the school)



Appendix 9, continued...

Resources:		
Requirements	Budget Costs	Notes
Contract Administrators (both Architect and Building Surveyor), CCT and All Souls Crompton Development Worker (latter should be in place at the time the courses are envisaged to run). Subsequent follow up visit to school to judge any subsequent project work.	£	Included in project fee or Development Worker role
Site Messing	£	Priced in Bill by main contractor
Site induction & MC staff	£ £ £	All Priced in Bill by main contractor
Materials	£	Priced in Bill by main contractor
Sub-total per day session	£	
Total cost	£	
Notes:		
<ul style="list-style-type: none"> • As health and safety paramount these visits will be programmed towards the end of the project when the management of younger children should be easier. • Appropriate high visibility jackets and hard-hats to be provided by Main Contractor; • Insurances are to be provided by Main Contractor (including, as for all technical training, risk and method statements) • Groups to provide own food, etc. • Work closely with a primary school teacher prior to course to ensure links to the curriculum. 		

Appendix 10 – Training Event Evaluation Template

Name: (Optional)				
Course Title				
Project Location				
Date:				
What is your overall assessment of the event? (Please circle: 1-5 where 1 is poor and 5 is very good)				
1	2	3	4	5
Comments:				
Did the event achieve the program objectives? (please circle)				
Completely	Mostly	Partially	Not At All	
Comments:				
Did the event meet your expectations? (please circle)				
Completely	Mostly	Partially	Not At All	
Comments:				
Will the information gained be useful and/or applicable in your work, studies or general property maintenance?				
Yes	Maybe	Don't Know	No	
Comments:				



Appendix 11 – Collective Training Evaluation Example from All Souls Bolton Project

		Course Undertaken					
		College Taster Day (19)	Homeowners Event Day (11)	Windows Technical Day (31)	Masonry Technical Day (22)	Roofing Technical Day (28)	
Questions asked	What is your overall assessment of the event? (1-5 where 1 is poor and 5 is very good)	4.3	5	4.8	4.6	4.8	
	Did the event achieve the program objectives?	Yes 100%	Yes 100%	Yes 100%	Yes 68%	Yes 100%	
		No 32%			No 32%		
	Did the event meet your expectations?	Yes 84%	Yes 100%	Yes 100%	Yes 86%	Yes 100%	
		No 0%			No 0%		
		Maybe 10%			Maybe 14%		
		N/R 6%					
	Will the information gained be useful and/or applicable in your studies?	Definitely 53%	Definitely 100%	Definitely 97%	Definitely 100%	Definitely 100%	
		Maybe 47%					Maybe 0%
		Not at all 0%					Not at all 3%

Appendix 12 – Record of Diversity – Bolton All Souls Bursary Placement Example

Bursary placement	Masonry	Roofing and Joinery	Glazing	Bolton postcode	19-30	31-40	41-50	50+	BME profile
1	•			•	•				•
2	•			•	•				
3	•			•	•				
4		•		•		•			•
5		•					•		
6			•	•				•	

Appendix 13 – Record of Bursary Placement Employment Post Project – Bolton All Souls Bursary Skills Trainees Example

Bursary placement	Retained after 3 months	Part-time/Full-time	Retained beyond project
1	•	F/T	•
2	•	F/T	•
3	•	F/T	
4			
5			
6	•	¾ time funded by sub-contractor	

Appendix 14 – All Souls Bolton Project Bursary Placement Case Studies

The following are case studies from two of the six bursary placements on the All Souls Bolton project.

CASE STUDY 1: ADAM

Adam came to the masonry bursary with no experience of the construction sector. His progress was carefully monitored and assessed during the first 3 months of the bursary and the significant advancement he'd made on the programme secured him a full-time training contract for the full 1 year duration of the capital works phase. This was supervised by Lambert Walker, who had overseen his initial training.

After finishing his bursary, Lambert Walker offered Adam a further training contract and he now works directly for Lambert Walker as an employee. He attends Bolton College for day release courses and is working on another major project. This time Adam is learning lime plastering skills.

Adam has reported that the continued training and mentoring he's received from Lambert Walker has enabled him to see beyond the work he'd been involved with on the project, and to towards a whole new set of craft skills, training and long-term work opportunities.

Adam's experience demonstrates that integrated on-site training provided and overseen by the principal contractor leads to quality learning with greater consistency and continuity.

CASE STUDY 2: STEPHEN

Stephen came to the glazing bursary enthusiastic to develop his skills in heritage glass, having previously had some limited experience of working with modern glass. His training was overseen by Pendle Glass, a third party training contractor with specialist expertise in heritage glazing.

Stephen's progress was such that Pendle Glass retained Stephen for 9 months post-project at their workshops. His particular skills strength was the rubbing and stripping down of glass in preparation for cleaning. By the end of the 9 month placement, Stephen had developed his skills sufficiently enough to work as an independent heritage sector glazier.

Pendle Glass reported that the All Souls Bolton project was an ideal opportunity to work on a long-term training programme that offered the challenge of developing a bursary placement's skills in several glazing areas. Their involvement both in the project and the training opened up the possibility of finding a new employee and they benefited by sharing the cost of the training with a major project partner.

Pendle Glass also stressed that they benefited from training a bursary placement from the older age range. Stephen's previous work experience, commitment to the training, trustworthiness and ability to work independently all contributed to a successful training and working partnership.



Appendix 15 – Bursary Exit Interview Template

Name (Optional):	
Training Occupation:	
Project Location:	
Duration (From To):	

The Recruitment Process				
Was the training opportunity well advertised and easy to understand? (Please circle: 1-5 where 1 is poor and 5 is very good)				
1	2	3	4	5
Comments (please suggest other ways or places to advertise the bursary scheme):				
What form did the interview take?				
Formal one-to-one in a meeting room	Formal panel Interview in a meeting room	Site Tour and Discussion	A mixture of formal interview & site tour	Informal meeting in public place
Comments:				
How did you find the interview process? (Please circle)				
Intimidating	Too Formal	Not Sure	About Right	Too relaxed
Comments:				
Once awarded the bursary, was information on expectations and starting instructions clear and simple? (Please circle: 1-5 where 1 is confusing and 5 is very clear)				
1	2	3	4	5
Comments:				



Appendix 15, continued...

Bursary Induction Process			
When you started the bursary scheme, you will have gone through an Induction Process for working on site - How long was the induction process (Please circle:)			
One Hour	Half a Day	A Full Day	Longer
Comments (please suggest other ways or places to advertise the bursary scheme:)			
After the Induction, how clearly did you understand the bursary scheme, training and assessment processes and expectations? (Please circle: 1-5 where 1 is confusing and 5 is very clear)			
1	2	3	4 5
Comments:			

During the Bursary			
Please describe the level of support you felt you received from your supervisor / trainer? (Please circle:)			
Poor	Average	Good	Exceptional
Comments:			
How easy did you find completing the training plan, and any paperwork associated with it (Please circle:)			
Easy	Fairly Easy	Difficult	Very Difficult
Comments:			
Please tell us what you think might improve the bursary training scheme			
Comments:			



Appendix 15, continued...

At the end of the Bursary Training Scheme			
Please describe what you most enjoyed about the bursary placement			
Comments:			
Please describe what you least enjoyed about the bursary placement			
Comments:			
Did the bursary training scheme meet your expectations? (please circle)			
Not at all	Partially	Mostly	Completely
Comments:			
Do you feel the training and information gained will be helpful/useful for your future career development?			
Yes	Maybe	Don't Know	No
Comments:			





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THE CHURCHES
CONSERVATION TRUST

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The NHTG exists to provide a focal point that enables specialist contractors and others engaged in the heritage sector to identify and address the gaps in practical skills and specialist knowledge which have become evident in the increasing disparity between the existing aging workforce and younger new entrants seeking a long term career.

Our strategic role is to work with specialist federations and others (including mainstream contractors with potential heritage links) to co-ordinate, assist and encourage their efforts in providing or facilitating appropriate training and to encourage the widespread recognition of achievable qualifications. Our long term objective is that all those working on traditional buildings have the appropriate skills, knowledge and qualifications, that these are demanded by the client base and that the sector is valued as a worthwhile long term career prospect for all age groups.

The Churches Conservation Trust is the national charity protecting historic churches at risk.

We've saved over 345 beautiful buildings which attract almost 2 million visitors a year. With our help and with public support they are kept open and in use – living once again at the heart of their communities.

Our estate is the largest single collection of historic churches in the country, featuring treasures ranging from virtually untouched medieval gems in idyllic rural settings, to ornately impressive Victorian masterpieces in busy town centres. We also protect a small number of inner urban churches with serious repair problems, which need new uses and significant funds to survive.

All our churches are of international importance and interest.

All Souls Bolton was a project led by the CCT's Regeneration Taskforce, set up specifically to focus on major projects which require a blend of regeneration expertise and community skills to succeed. We work in partnership with community groups, charities, social enterprises, Friends groups, businesses and entrepreneurs, to create new life in these historic buildings, and to realise living and vital assets for people and their communities.

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