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Executive Summary

This report examines the development of an experienced Senior Craftsman within a specialist mechanical and electrical (M&E) contractor who is seeking progression into an 'off the tools' Site Supervisor role. The individual has more than 15 years of heating and ventilation installation experience and has previously taken responsibility for smaller teams. However, progression to Site Supervisor would require additional capability in leadership, health and safety, workforce coordination, planning, communication and performance management.

The report finds that developing an internal candidate can provide organisational benefits through succession planning, knowledge retention and increased supervisory capability, while providing the individual with career progression and broader management skills. However, technical experience alone does not guarantee effective supervisory performance, and progression should therefore remain based upon demonstrated competence rather than length of service or completion of training.

A range of development vehicles are evaluated, including SSSTS, workplace shadowing, mentoring, coaching, experiential learning and continuing professional development. No single method is considered sufficient. A blended approach is recommended, combining formal learning with shadowing of the existing Site Supervisor and progressively increased workplace responsibility.

A structured 12-month development and performance plan is proposed, supported by formal reviews at approximately three, six, nine and twelve months. Performance should be assessed using workplace observation, documentation, feedback and evidence of competence in safety leadership, planning, delegation, communication and management of others.

Overall, the report concludes that a staged and evidence-based approach provides an appropriate route towards supervisory progression while managing organisational risk. The proposed approach also supports wider organisational learning by transferring knowledge before the existing supervisor leaves and developing internal capability for future succession.

1. Introduction

Employee development is important for organisations seeking to maintain workforce capability whilst responding to changing operational requirements. Within construction, this is particularly relevant where experienced tradespeople progress from technically focused positions into supervisory roles. Although practical experience provides a strong foundation for progression, technical competence alone does not necessarily demonstrate an individual's ability to plan work, manage others or accept responsibility for wider project performance. Consequently, development should address the additional knowledge, skills and behaviours required by the proposed role.

This report considers an experienced Senior Craftsman employed by a specialist mechanical and electrical (M&E) contractor within the heating and ventilation trade. The individual has more than 15 years' installation experience and demonstrates strengths including attention to detail, reliability, teamwork, approachability and a willingness to take responsibility. Having previously supervised smaller teams, he is seeking progression into an off-the-tools Site Supervisor role, potentially responsible for up to 20 apprentices, craftsmen and senior craftsmen. This would include workforce coordination, health and safety, forward planning and liaison with the principal contractor.

The development opportunity also addresses an organisational requirement, as the existing Site Supervisor is due to leave the business. This creates an opportunity for internal succession and knowledge transfer, although progression should remain dependent upon demonstrated supervisory competence rather than technical experience alone.

The report critically assesses the organisational and individual benefits of development, management of development expectations and suitability of alternative development vehicles. A structured development plan is subsequently proposed and evaluated in relation to performance management and the individual's progression towards Site Supervisor.

2. Individual Development and the Learning Organisation

Individual development can provide benefits beyond improving the capability of a single employee. When aligned with organisational requirements, development can contribute towards workforce capability, succession planning and organisational performance. Senge

(1990) describes a learning organisation as one where individuals continually develop their capacity whilst learning collectively towards shared objectives. His five disciplines of personal mastery, mental models, shared vision, team learning and systems thinking remain influential, although more recent research identifies human capital, culture, leadership, strategy, organisational structure and technology as interconnected influences upon organisational learning (Alerasoul et al., 2022). Consequently, providing training alone does not necessarily create a learning organisation; learning must be applied and contribute towards wider organisational capability.

This is relevant to the M&E contractor because developing the Senior Craftsman addresses both an individual aspiration and an identified organisational need. The planned departure of the existing Site Supervisor creates an opportunity to transfer knowledge whilst developing an internal successor. Galan (2023a, 2023b) identifies employee turnover as a potential source of knowledge loss and highlights the importance of mechanisms which retain knowledge within organisations. Shadowing the outgoing supervisor could therefore transfer knowledge associated with workforce coordination, site planning, organisational processes and contractor relationships before it is lost.

A further organisational benefit is succession planning. Mehreen and Ali (2022) identified positive relationships between training and development, succession planning and employee performance. Although their research was undertaken within banking rather than construction, the principle remains relevant where an organisation has both a foreseeable vacancy and a potential internal successor. Developing the Senior Craftsman before the supervisor leaves provides greater continuity than responding to the vacancy after it occurs and allows his existing organisational and technical knowledge to be retained.

However, internal development should not automatically be considered preferable to external recruitment. An external candidate may already possess supervisory qualifications and experience of managing larger teams, potentially requiring less initial development. Training the Senior Craftsman also creates direct costs and temporarily removes an experienced tradesperson from productive installation work. Furthermore, technical ability does not guarantee competence in delegation, leadership or performance management. Research indicates that workplace learning and development can contribute to individual and organisational outcomes, although effectiveness is influenced by how learning is designed, supported and applied (Garavan et al., 2021; Kraiger & Ford, 2021). The value

of internal development therefore depends upon whether learning is successfully transferred into supervisory performance rather than simply upon training being provided.

Development also offers benefits to the individual. Progression to Site Supervisor provides a route beyond a career based predominantly upon technical installation and creates opportunities to develop leadership, communication, planning and people-management capability. Employer-sponsored career development has also been associated with stronger organisational attachment, improved job performance and reduced turnover through employees' perceptions of organisational support (Ng et al., 2024). However, these findings do not mean that development will automatically retain an employee, particularly where newly acquired skills may increase external career opportunities.

Employer-supported development can also provide opportunities for continued professional growth. Construction-specific research identifies training, coaching and supportive workplace conditions as mechanisms through which organisations can facilitate employee career development and progression (Rautio & Uusiantti, 2024). For the Senior Craftsman, funded training, mentoring and a structured progression pathway therefore provide benefits beyond an immediate promotion by broadening his transferable management capability.

Nevertheless, progression also introduces potential disadvantages. Moving off the tools changes the nature of the individual's responsibility from principally managing his own workmanship to coordinating the safety and performance of up to 20 tradespeople and apprentices. It may also require him to challenge former peers and represent the contractor during progress meetings. Increased responsibility may therefore create additional pressure alongside greater career opportunity.

Overall, developing the Senior Craftsman has the potential to provide succession continuity, knowledge retention and increased internal supervisory capability, whilst providing the individual with career progression and broader management competence. These benefits remain conditional upon effective development and workplace application. The organisation should therefore treat development as an investment requiring assessment and review rather than assuming that technical experience or completion of training will automatically produce an effective Site Supervisor.

3. Managing Personal Development Expectations

Managing development expectations requires a clear understanding between the individual and organisation regarding the purpose of development, responsibilities involved and potential outcomes. This is particularly important where development is associated with anticipated promotion. Psychological contract theory considers the perceived reciprocal obligations between employees and organisations, including expectations surrounding development and career opportunities (Coyle-Shapiro et al., 2019). Consequently, unclear commitments may create unrealistic expectations, whereas open communication can establish what support will be provided and what the individual must demonstrate.

For the Senior Craftsman, the initial development discussion should establish that his ambition to become a Site Supervisor is supported but that progression is competence-based rather than guaranteed. Appendix B records the proposed expectations discussion, including the support available from the employer and the individual's responsibilities throughout the process. His 15 years of technical experience and previous supervision of smaller teams provide a strong foundation; however, the proposed position involves responsibilities that have not formed the main focus of his existing role.

A particularly important expectation concerns what progressing “off the tools” actually means. The role would reduce direct installation work but increase accountability for workforce coordination, health and safety, quality, planning and communication with the principal contractor. Performance expectations should therefore consider both the results an employee is expected to achieve and the behaviours used to achieve them. For example, resolving a problem personally may demonstrate technical competence, whereas a supervisor may need to delegate effectively, monitor others and intervene appropriately. This distinction should be established before progression so that the individual understands the change in responsibility rather than viewing supervision simply as the next technical grade.

The transition may also alter relationships with existing colleagues. Approachability and teamwork are current strengths, but supervising former peers may require the individual to establish clearer professional boundaries, challenge poor performance and address conflict when necessary. Expectations should therefore recognise that development includes behavioural and interpersonal capability alongside qualifications. Objectives

should provide clear direction and measurable expectations, as goal specificity helps focus attention upon what the individual is expected to achieve (Latham, 2023). However, measurable targets alone cannot fully determine supervisory readiness because leadership, judgement and communication also require observation within the workplace.

Regular two-way feedback is therefore important throughout the development period. Effective feedback should be based on evidence and provide opportunities for the individual to reflect and respond rather than simply receiving a management judgement. Feedback should therefore be constructive, specific and focused on performance rather than personality. This allows expectations to be adjusted as evidence of competence develops and gives the Senior Craftsman an opportunity to raise concerns regarding workload, confidence or development opportunities.

The departure of the existing supervisor creates organisational pressure to develop a replacement; however, this should not result in premature promotion. Responsibility should increase progressively through shadowing, participation and supervised practice, with formal review points used to assess readiness. Performance appraisal should also remain part of the wider performance-management process rather than becoming a single promotion decision, reflecting the distinction between appraisal of the individual and the wider system used to achieve organisational objectives.

Overall, expectations should be based upon transparent communication, shared responsibility and demonstrated competence. The employer should provide agreed training, shadowing and support, whilst the individual is responsible for engaging with development, applying feedback and demonstrating capability. Completion of SSSTS, IOSH or other development activities should therefore represent progress towards the role rather than an automatic entitlement to promotion.

4. Critical Evaluation of Development Vehicles

The development needs identified in Appendix A require more than a single training intervention. The Senior Craftsman already possesses extensive technical knowledge; therefore, development should concentrate on the additional safety, leadership, planning and people-management competencies required for supervision. Different development vehicles offer different advantages and limitations, making their suitability dependent upon the competency being developed and the opportunity to apply learning within the workplace.

4.1 Formal Training and Qualifications

Formal training provides a structured method of developing knowledge that may not have been required within the individual's existing role. The Site Supervision Safety Training Scheme (SSSTS) is particularly appropriate because the Construction Industry Training Board (CITB, 2026) identifies the course for individuals who have, or are about to acquire, supervisory responsibilities. It covers areas including supervisors' health and safety responsibilities, risk assessment, method statements, toolbox talks, monitoring and intervention. This directly supports the proposed transition because responsibility for the safety of others represents a significant change from the Senior Craftsman's existing technical role.

Formal knowledge must also translate into supervisory behaviour. Oswald et al. (2022), studying supervisors across 11 construction sites, identified effective safety-leadership behaviours including anticipating safety issues, leading by example and maintaining standards despite production pressures. Although undertaken in Australia, the findings demonstrate why supervisory safety competence cannot be assessed solely through possession of a qualification.

However, completing SSSTS demonstrates successful completion of training rather than competence in supervising a live construction environment. Training transfer research demonstrates that applying learning within the workplace is influenced by factors including the learner, training design and working environment (Blume et al., 2010; Shukla et al., 2024). Consequently, SSSTS should be followed by opportunities to apply the learning under supervision. Further IOSH or management development may subsequently broaden capability, but completing several courses immediately could increase cost and time away from productive work without demonstrating corresponding improvements in performance.

4.2 Shadowing, Mentoring and Coaching

The departure of the existing Site Supervisor makes workplace shadowing particularly valuable. The Senior Craftsman can observe workforce allocation, forward planning, reporting and interaction with the principal contractor whilst gaining access to practical knowledge that may not be captured through formal training. This also supports the knowledge-transfer requirement identified in Section 2.

Nevertheless, observation is relatively passive and may result in existing practices being copied without sufficient understanding or challenge. Shadowing should therefore progress from observation to participation, allowing the individual to contribute to meetings, planning and workforce decisions whilst receiving feedback. Mentoring can complement shadowing by allowing workplace experience to be discussed, challenged and interpreted rather than simply observed. A systematic review found evidence linking workplace mentoring with individual learning and performance gains, although evidence of wider organisational performance benefits was more limited (Giacumo et al., 2020). The effectiveness of mentoring should not be assumed, however, as recent evidence indicates that the quality of the mentoring relationship can influence employee outcomes (Sloan et al., 2025). Its value in this case will therefore depend upon the mentor's availability and ability to provide constructive challenge rather than simply directing the individual.

Coaching may also assist with specific behavioural requirements such as delegation or difficult conversations. Evidence from randomised controlled trials indicates that workplace coaching can positively influence outcomes including leadership development (de Haan & Nilsson, 2023). However, external coaching may involve additional cost and lack knowledge of the site environment. Initially, targeted coaching from an experienced manager alongside mentoring is therefore likely to provide greater relevance.

4.3 Experiential Learning and Progressive Responsibility

Workplace experience is arguably the most important development vehicle because the proposed role requires the Senior Craftsman to demonstrate competence rather than simply acquire knowledge. Construction-specific research also demonstrates the role supervisors can play in work-based training and assessment of workforce capability (Manoharan et al., 2024). However, as the study was undertaken within the Sri Lankan construction sector, its direct application to a UK M&E contractor requires some caution. Responsibility could progress from delivering toolbox talks and allocating labour to producing short-term plans, participating in progress meetings and eventually managing a defined work package or team. Workplace assessment should evaluate performance systematically against established criteria, enabling the organisation to determine whether learning is transferring into practice.

This approach provides authentic evidence of leadership, judgement and communication. However, assigning responsibility too quickly could expose the individual, workforce and

organisation to unnecessary operational or safety risk. He should therefore not immediately assume responsibility for 20 people simply because this is the potential scope of the future role. Progressive responsibility, supported by observation and feedback, provides a better balance between developmental challenge and organisational control.

4.4 CPD and Longer-Term Development

Continuing professional development (CPD) provides a means of maintaining both technical and supervisory competence after initial progression. The module presents CPD as a continuing cycle of identifying needs, planning, acting, reflecting, applying learning, sharing and assessing impact. This is particularly relevant where moving off the tools could gradually reduce direct exposure to technical work whilst increasing managerial responsibilities.

However, CPD has limited value if reduced to recording course attendance. Development activity should therefore be connected to workplace application and reviewed against changing responsibilities. Later IOSH training, management education or targeted development can then respond to demonstrated needs rather than being undertaken simply to accumulate qualifications.

4.5 Overall Evaluation

No single development vehicle adequately addresses the transition from Senior Craftsman to Site Supervisor. Formal training provides structured knowledge but limited evidence of application; shadowing transfers contextual knowledge but can remain passive; mentoring and coaching provide individual support but depend upon the quality and availability of those providing it; and experiential learning provides the strongest evidence of workplace competence but carries greater risk if introduced without appropriate supervision.

A blended and staged approach is therefore most appropriate. As detailed in Appendix C, this should combine SSSTS with shadowing of the outgoing supervisor, mentoring, progressive participation in principal-contractor meetings, workforce briefings and planning activities, followed by controlled acting-up responsibility. Further IOSH and CPD can then respond to emerging needs. This approach requires greater management involvement than simply sending the individual on training courses, but it provides stronger evidence that development has resulted in the competence required for progression.

5. Individual Development and Performance Plan

The development plan in Appendix D translates the identified competency gaps into a structured 12-month programme. Its purpose is not simply to record training activities but to provide a framework through which development can be applied, monitored and evaluated against the requirements of the Site Supervisor role. Performance management increasingly extends beyond periodic appraisal towards a forward-looking process incorporating ongoing feedback and development (Justin M.A. & Joy, 2022). The development plan should therefore connect individual progression with the organisation's requirement for a competent internal successor.

5.1 Development Priorities and Objectives

The competency analysis in Appendix A demonstrates that development should concentrate primarily on supervisory rather than technical capability. Initial priorities are SSSTS and shadowing the outgoing supervisor, followed by progressively greater involvement in workforce coordination, toolbox talks, planning and principal-contractor meetings. Responsibility can then increase towards managing a defined work package or team before a final assessment of readiness.

Objectives within Appendix D are structured around observable workplace outcomes rather than course attendance alone. For example, completing SSSTS provides evidence of formal learning, whereas applying safe systems of work, delivering an effective toolbox talk and intervening appropriately in unsafe practice provide evidence of transfer into performance. This distinction is important because training transfer is influenced by both the learning intervention and the environment in which new knowledge and skills are applied (Blume et al., 2010; Shukla et al., 2024).

Not every supervisory competency can be reduced meaningfully to a numerical target. Leadership, judgement, delegation and communication require qualitative assessment alongside measurable evidence. Consequently, performance measures should use existing organisational information where available, together with observation, completed documentation and feedback, rather than introducing arbitrary numerical targets without an established baseline.

5.2 Monitoring, Feedback and Review

The plan should be reviewed informally each month with formal reviews at approximately three, six, nine and twelve months. These provide opportunities to compare progress against agreed objectives, identify emerging development requirements and determine whether responsibility can safely increase. Appraisal should be evidence-based and focus on performance rather than personality, consistent with the principles identified within the module.

Feedback should also be continuous rather than reserved for formal reviews. Research indicates that the environment in which feedback is provided is associated with employee performance and the quality of supervisor-employee relationships (Katz et al., 2021). For the Senior Craftsman, evidence could be obtained from observation of briefings, planning activities, site documentation and interaction with the workforce and principal contractor. His own reflection should also contribute to reviews, allowing differences between self-perception and observed performance to be discussed.

Using several evidence sources reduces reliance upon a single manager's judgement. However, assessment cannot be completely objective because competencies such as leadership and judgement involve professional interpretation. Clear goals and agreed assessment criteria are therefore important, particularly as goal-setting factors have been associated with employees' perceptions of appraisal fairness (Harrington & McCaskill, 2022). Evidence should also be recorded consistently throughout the development period.

5.3 Responding to Development and Performance Gaps

The plan should remain adaptable where expected progress is not achieved. Underperformance should first be examined to determine its cause rather than automatically resulting in further training. For example, limited confidence during progress meetings may indicate a development need, but it could equally result from insufficient opportunity to participate. This distinction is important because workplace learning is influenced by both individual and contextual factors rather than employee motivation or ability alone (Wijga et al., 2025). The appropriate response could therefore involve additional supported exposure rather than another formal course.

Where a genuine competency gap is identified, objectives can be revised and further mentoring, coaching or supervised practice provided. Conversely, where the individual

demonstrates competence earlier than anticipated, responsibility can increase without waiting for an arbitrary date. Critical gaps relating to safety, leadership or workforce management should, however, delay unsupervised progression until sufficient competence is demonstrated.

5.4 Performance Management and Progression

The final review should consider the complete evidence accumulated throughout the programme rather than whether individual activities have simply been completed. Evidence of safe supervision, planning, delegation, communication, documentation and management of others should inform whether the Senior Craftsman is ready to undertake the Site Supervisor role independently.

Progression should not represent the end of development. The CPD cycle emphasises identifying, planning, applying and reflecting upon continuing development needs. Further IOSH or management development can therefore be introduced as responsibilities increase. The same approach may also support wider succession planning within the organisation, although development pathways should reflect individual competency requirements rather than being applied identically to every employee.

Overall, the plan provides a link between development and performance management by establishing expectations, providing opportunities to demonstrate competence and generating evidence for review. Its effectiveness will depend upon access to suitable workplace opportunities, consistent managerial support and the quality of assessment. The 12-month timeframe should therefore guide development rather than guarantee promotion; the final decision should remain based upon demonstrated readiness for the responsibilities of Site Supervisor.

6. Recommendations

Based on the assessment of the Senior Craftsman's development needs, the organisation should implement the blended development programme detailed in Appendix D rather than relying upon formal training alone. SSSTS should be prioritised, followed by structured shadowing of the existing Site Supervisor while the opportunity for knowledge transfer remains available. Shadowing should progressively move from observation towards active participation in workforce allocation, toolbox talks, short-term planning and meetings with the principal contractor.

Responsibility should subsequently increase through supervised management of defined work activities and progressively larger teams. This provides opportunities to assess whether learning is being transferred into supervisory performance whilst limiting the operational and safety risks associated with immediate responsibility for up to 20 people. Further IOSH or management development should be selected in response to identified needs rather than undertaken solely to accumulate qualifications.

Development should be supported through regular feedback and recorded reviews, with formal assessment at approximately three, six, nine and twelve months. Progression decisions should consider evidence of safety leadership, planning, delegation, communication and people management rather than technical experience or course completion alone.

Finally, the organisation should use the departure of the existing supervisor to strengthen its wider approach to succession planning. Identifying potential successors before vacancies arise would provide greater opportunity for knowledge transfer and development whilst reducing reliance upon reactive recruitment. However, development pathways should remain individualised because technical experience and length of service do not necessarily indicate identical supervisory development needs.

7. Conclusion

This report has critically assessed the development of an experienced Senior Craftsman seeking progression into a Site Supervisor role within a specialist M&E contractor. His extensive heating and ventilation experience, previous responsibility for smaller teams and established workplace strengths provide a credible foundation for progression. However, supervision requires additional competence in leadership, delegation, health and safety, planning, communication and management of others.

Developing an internal successor offers potential organisational benefits through knowledge retention, continuity and increased supervisory capability, whilst providing the individual with career progression and broader management competence. These benefits are not automatic. Development involves cost, removes an experienced tradesperson from some productive work and cannot guarantee that technical expertise will transfer successfully into management capability.

The evaluation demonstrates that no single development vehicle adequately addresses this transition. Formal training such as SSSTS provides essential structured knowledge, but shadowing, mentoring, workplace experience and progressively increased responsibility are required to demonstrate application. Expectations should therefore remain clear that development supports progression but does not guarantee promotion.

Overall, the proposed 12-month plan provides a structured but adaptable connection between individual development and performance management. Regular feedback, workplace evidence and formal reviews allow responsibility to increase as competence develops and provide a defensible basis for the final progression decision. This approach demonstrates how individual learning can contribute to succession and wider organisational capability whilst maintaining the requirement for competent supervision.

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Appendix A - Individual Development Needs / Competency Gap Analysis

Employee: Senior Craftsman – Heating and Ventilation

Proposed role: Site Supervisor

Purpose: To identify the principal development requirements associated with progression from a technical Senior Craftsman role into site supervision.

Competency area	Current position	Requirement for Site Supervisor	Development need	Priority
Technical knowledge	15+ years' H&V installation experience; strong technical competence	Sufficient technical knowledge to oversee installation activities and support the workforce	Maintain existing competence while developing supervisory application	Low
Team supervision	Has previously led small teams and takes responsibility when required	Supervise up to 20 craftsmen and apprentices and coordinate daily activities	Experience supervising larger teams and allocating work	High
Health & safety	Experienced working safely within commercial construction environments; no SSSTS/SMSTS	Lead safe working practices, brief teams, monitor compliance and intervene where required	Complete SSSTS and develop practical supervisory safety leadership	High
Planning and coordination	Experienced in completing allocated installation activities	Plan labour and activities, coordinate work and contribute to short-term/forward planning	Supported involvement in site planning and workforce coordination	High

Leadership and delegation	Dependable, approachable, team-focused and capable of taking the lead	Delegate effectively, set expectations and monitor the performance of others	Develop leadership and delegation through progressive responsibility	High
Communication	Communicates effectively with colleagues and small teams	Lead briefings and communicate with management, other trades and the principal contractor	Develop formal briefing, meeting and stakeholder communication skills	Medium–High
People management	Limited formal responsibility for managing employee performance	Manage apprentices, craftsmen and Senior Craftsmen; address performance and conflict appropriately	Mentoring, supervised practice and experience managing difficult conversations	High
Principal contractor/client meetings	Limited direct experience	Represent the M&E contractor in progress and forward-planning meetings	Shadow existing supervisor before progressing to active participation	High
Supervisory qualifications	Senior Craftsman CSCS card; no formal supervisory qualification	Appropriate qualifications/cards for supervisory responsibilities	SSSTS initially; review supervisor CSCS requirements and further IOSH development	High
Performance management	Limited formal experience	Monitor workforce performance, provide feedback and identify development requirements	Supported experience of feedback, monitoring and performance discussions	Medium–High

Overall Development Need

The assessment identifies no significant technical skills gap. The principal development requirement is the transition from being an experienced individual tradesperson to becoming responsible for the safety, coordination and performance of others.

Development should therefore prioritise formal supervisory safety training, workplace shadowing, leadership and delegation, planning, communication and progressively increased supervisory responsibility.

Appendix B – Personal Development Expectations and Responsibilities

Employee: Senior Craftsman – Heating and Ventilation

Proposed role: Site Supervisor

Purpose: To establish clear expectations and responsibilities throughout the development process.

Employer commitments	Employee responsibilities
Provide access to appropriate training, including SSSTS.	Attend and actively engage with agreed training and development activities.
Provide opportunities to shadow the existing Site Supervisor before their departure.	Use shadowing opportunities to develop understanding of planning, supervision and principal-contractor liaison.
Provide mentoring, guidance and regular constructive feedback.	Respond positively to feedback and identify areas where further support is required.
Provide progressive opportunities to lead briefings, allocate work, participate in meetings and supervise teams.	Demonstrate developing competence in leadership, delegation, communication and workforce coordination.
Increase responsibility where sufficient competence is demonstrated.	Accept responsibility progressively and work within agreed levels of authority.
Conduct regular development reviews and assess progress using workplace evidence.	Participate openly in reviews and reflect on performance and development needs.
Provide reasonable support where additional development needs are identified.	Take responsibility for applying learning within the workplace and maintaining ongoing CPD.

Agreed Progression Expectations

The development programme is intended to support progression from Senior Craftsman to Site Supervisor; however, completion of training does not automatically guarantee promotion.

Progression will be based upon demonstrated competence and evidence of readiness across areas including:

- health and safety leadership;
- workforce supervision and delegation;

- planning and coordination;
- communication and participation in contractor meetings;
- management of performance and workplace relationships.

The proposed 12-month period provides a development framework rather than a guaranteed promotion date. Responsibility may increase sooner where competence is demonstrated or additional development may be provided where further improvement is required.

Appendix C – Development Vehicles Evaluation

Employee: Senior Craftsman – Heating and Ventilation

Proposed role: Site Supervisor

Purpose: To evaluate the development methods available to support progression into the Site Supervisor role.

Development vehicle	Main purpose	Strengths	Limitations / application
SSSTS	Develop formal knowledge of supervisory health and safety responsibilities.	Construction-specific; provides structured H&S knowledge relevant to supervision, including risk assessment, method statements, monitoring and intervention.	Course completion alone does not demonstrate workplace competence. Learning must be applied and observed on site.
Workplace shadowing	Transfer practical and organisational knowledge from the existing Site Supervisor.	Provides direct exposure to workforce planning, site coordination, meetings and principal-contractor liaison before the current supervisor leaves.	Observation can remain passive. Should progress towards active participation and supervised decision-making.
Mentoring	Provide ongoing guidance and support during the transition.	Allows workplace experiences and problems to be discussed with an experienced supervisor or manager and supports reflection and confidence.	Effectiveness depends upon mentor availability, experience and ability to provide constructive challenge.
Targeted coaching	Develop specific behavioural or interpersonal skills where gaps are identified.	Can focus on individual requirements such as delegation, difficult conversations, communication or leadership.	Additional time and potentially cost; should be used for identified needs rather than as a general intervention.

Experiential learning / progressive responsibility	Develop and demonstrate supervisory competence through real workplace activity.	Provides direct evidence of planning, delegation, communication, judgement and leadership. Responsibility can increase as competence develops.	Greater operational and safety risk if responsibility is transferred too quickly. Requires supervision, feedback and clear boundaries.
CPD / further training	Maintain and extend competence after initial supervisory development.	Supports continuing development as responsibilities change; may include IOSH or further management development where appropriate.	Limited value if treated only as course attendance or qualification collection. Should respond to identified development needs and workplace application.

Recommended Approach

No single development vehicle is sufficient for the proposed transition. A blended and staged approach is recommended, beginning with SSSTS and shadowing of the existing Site Supervisor, supported by mentoring and targeted coaching where required.

The individual should then move progressively from observation to participation and supervised responsibility. Workplace evidence and feedback should determine when responsibility can safely increase. CPD and further formal development can subsequently address needs identified as the role develops.

This approach combines formal knowledge, workplace learning and practical assessment, while reducing the risk of assuming that technical experience or completion of training alone demonstrates readiness for Site Supervisor responsibilities.

Appendix D – 12-Month Individual Development and Performance Plan

Employee: Senior Craftsman – Heating and Ventilation

Proposed role: Site Supervisor

Development period: 12 months

Overall objective: To develop and demonstrate the supervisory competence required to progress from Senior Craftsman to Site Supervisor.

Timescale	Development activity	Support / responsibility	Intended outcome	Evidence / performance measure
Month 1	Initial development meeting and competency review	Line Manager / Employee	Confirm development needs, expectations and responsibilities	Agreed development objectives and competency assessment
Months 1–2	Complete SSSTS	Employer-funded training / Employee	Develop knowledge of supervisory H&S responsibilities	Successful course completion and application of learning on site
Months 1–3	Shadow existing Site Supervisor	Existing Supervisor	Develop understanding of workforce coordination, planning, H&S management and site procedures	Supervisor feedback and examples discussed during review

Months 2–4	Observe and progressively participate in principal-contractor progress and forward-planning meetings	Existing Supervisor / Contracts Manager	Develop confidence in formal communication, reporting and coordination	Participation observed; ability to communicate progress and planned activities
Months 3–6	Lead toolbox talks and workforce briefings	Supervisor / Line Manager	Develop communication and safety-leadership capability	Observation of briefings; clarity, accuracy and workforce engagement
Months 3–6	Undertake labour allocation and short-term planning for defined activities	Supervisor / Employee	Develop planning, delegation and workforce coordination	Work allocated appropriately; plans completed and reviewed with supervisor
Months 4–9	Progressively supervise larger teams and defined work activities	Line Manager / Mentor	Demonstrate leadership, delegation, monitoring and management of others	Workplace observation, quality/safety evidence and feedback
Months 6–9	Take increased responsibility for site documentation, coordination and progress reporting	Line Manager / Employee	Develop administrative and reporting competence required for supervision	Accurate and timely documentation; management feedback

Months 6–12	Supported management of performance issues, feedback and difficult conversations where appropriate	Line Manager / Mentor	Develop confidence in managing performance and workplace relationships	Observation and review of approach, communication and outcomes
Months 9–12	Supervised acting-up responsibility for a defined work package/team	Contracts Manager / Line Manager	Demonstrate overall readiness to undertake Site Supervisor responsibilities	Evidence across safety, planning, leadership, communication, quality and workforce management
Month 12	Final competency and progression review	Contracts Manager / Line Manager / Employee	Determine readiness for independent Site Supervisor responsibility and identify further development	Review against agreed competencies and documented workplace evidence
Ongoing	CPD, mentoring and targeted coaching	Employee / Employer	Maintain development and address emerging competency gaps	CPD record, feedback and revised development objectives

Formal Review Points

3-month review: Assess SSSTS completion, shadowing, initial meeting exposure and early supervisory activities. Confirm whether responsibility can begin to increase.

6-month review: Assess communication, toolbox talks, workforce allocation, planning and initial leadership performance. Identify any competency gaps requiring additional mentoring, coaching or supervised practice.

9-month review: Assess performance with increased team/work-package responsibility, documentation, contractor communication and people management. Determine readiness for the final acting-up stage.

12-month review: Evaluate the complete body of evidence against the requirements of the Site Supervisor role and determine whether the individual is ready for progression or requires further development.

Performance Management Approach

Progress should be assessed using a combination of:

- direct workplace observation;
- completion and quality of site documentation;
- feedback from the existing supervisor and line management;
- evidence from workforce briefings, planning and meetings;
- health, safety and quality performance;
- the employee's own reflection and response to feedback.

Where progress is below expectation, the cause should be identified before deciding upon further action. Additional training may be appropriate where there is a knowledge gap, whereas additional shadowing, mentoring or supervised experience may be more appropriate where the individual has had insufficient opportunity to apply learning.

The 12-month period is a development framework rather than a guaranteed promotion date. Responsibility may increase earlier where competence is demonstrated, while significant gaps in safety, leadership or workforce management should delay independent supervisory responsibility.