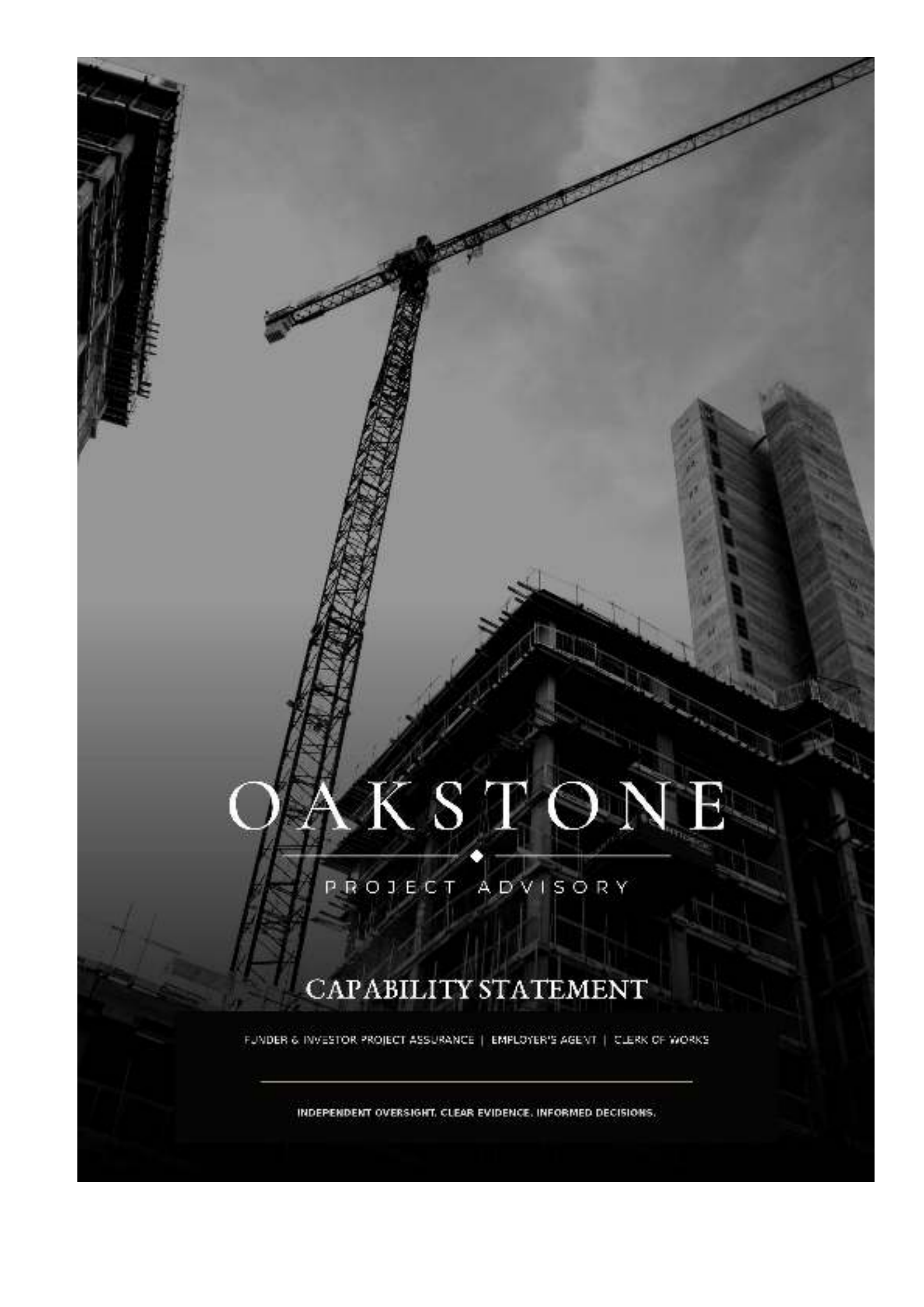




OAKSTONE

PROJECT ADVISORY

CAPABILITY STATEMENT

FUNDER & INVESTOR PROJECT ASSURANCE | EMPLOYER'S AGENT | CLERK OF WORKS

INDEPENDENT OVERSIGHT. CLEAR EVIDENCE. INFORMED DECISIONS.

Capability Statement 2026

A concise overview of Oakstone Project Advisory, our services, methodology, leadership and selected project experience.

01	Opening Statement	Protecting construction investment
02	Vision, Mission & Values	The standards that guide our work
03	About Oakstone	Independent construction assurance
04	Leadership	Chartered, delivery-led experience
05	Services	Assurance, representation and inspection
06	Methodology	The Oakstone Assurance Framework
07	Digital Delivery	Clear evidence and transparent reporting
08	Sectors	Focused construction and property markets
09	Selected Experience	Public and private sector delivery
10	Governance	Professional standards and risk controls
11	Contact	Start a conversation

OAKSTONE AT A GLANCE

COVERAGE

North West of England

CORE SERVICES

Funder & Investor Project Assurance, Employer's Agent and Clerk of Works

LEADERSHIP

Chartered construction management with Tier One delivery experience



01 | OPENING STATEMENT

Protecting construction investment through independent assurance

The success of a construction project is measured by more than programme and cost. It is defined by the quality of its execution, the integrity of its delivery and the confidence it provides to those investing in its outcome.

Oakstone Project Advisory provides independent project assurance that strengthens client oversight throughout the construction lifecycle. Acting objectively and with a clear understanding of construction delivery, we provide practical advice, structured inspection and evidence-based reporting that support informed decisions, clearer governance and earlier visibility of risk.

Our approach is shaped by practical Tier One contracting experience across complex public and private sector projects. That delivery perspective enables us to identify risk, challenge effectively and distinguish between issues that require immediate intervention and those that can be managed proportionately.

OUR PHILOSOPHY

Construction quality should never be assumed. It should be independently verified.

A clear purpose, grounded in client outcomes

Our Vision

To become the UK's most trusted independent project advisory consultancy, helping clients achieve value, quality and greater confidence through technical excellence, independent assurance and uncompromising professionalism.

Our Mission

Oakstone Project Advisory exists to provide independent construction consultancy services that strengthen client oversight throughout the project lifecycle. By combining practical Tier One contracting experience with rigorous inspection, proportionate risk management and transparent reporting, we help developers, funders, investors and asset owners make informed decisions and pursue high standards of construction quality.



The principles behind every commission

01

Integrity

Objective, honest and evidence-based advice. We act in the client's interests and communicate issues clearly, without avoiding difficult conclusions.

02

Independence

Our assessments remain impartial and free from contractor or supply-chain influence. Independence gives our reporting its value.

03

Professionalism

Diligence, reliability and accountability underpin every interaction, inspection, report and recommendation.

04

Precision

Construction risk often sits within the detail. We apply disciplined review and careful observation to improve visibility of quality and delivery risk.

WHAT CLIENTS CAN EXPECT

Clear advice. Proportionate challenge. Reliable records. No ambiguity about the actions required.

INTEGRITY • INDEPENDENCE • PROFESSIONALISM • PRECISION

Four principles applied consistently across every appointment, inspection, report and recommendation.

Independent Construction Assurance

Oakstone Project Advisory Ltd is an independent construction consultancy serving clients across the North West of England. We provide specialist assurance and project advisory services for organisations seeking a clear, technically informed view of construction progress, workmanship, quality and delivery risk.

Our principal services are Funder & Investor Project Assurance, Employer's Agent and Clerk of Works. These disciplines are connected by a common purpose: supporting client decisions with reliable information and independently reviewing construction delivery against the requirements of the commission.

Who we support

- Banks, development funders and investors
- Property developers
- Housing providers and associations
- Public sector organisations
- Asset owners
- Project and development teams

How we add value

- Early visibility of construction risk
- Independent observation of quality and progress
- Concise, decision-focused reporting
- Evidence-based observations
- Structured action tracking
- A practical understanding of site delivery

INDEPENDENT CONSTRUCTION ASSURANCE

Objective construction oversight that helps clients verify quality, understand risk and maintain informed control throughout delivery.

Delivery experience, applied independently

Oakstone's proposition is founded on a simple distinction: practical construction delivery experience applied independently for the client. This creates an assurance service that is technically credible, commercially aware and grounded in how projects are actually built.

INDEPENDENT	Advice is objective, evidence-based and aligned to the client's interests.
TECHNICAL	Reviews are informed by chartered professional leadership and current construction knowledge.
PRACTICAL	Recommendations recognise buildability, sequence, programme and site constraints.
TRANSPARENT	Reports separate facts, risks, assumptions and recommended actions.
PRECISE	Attention is directed to the details with the greatest potential to affect quality or value.

OUR POSITIONING

Independent assurance that improves visibility of quality, construction risk and delivery performance.

WHAT THIS MEANS FOR CLIENTS

CLARITY

Decisions supported by concise, evidence-led information.

CONTROL

Risks, actions and responsibilities made visible early.

CONFIDENCE

Independent assurance aligned with the client's interests.

THE OAKSTONE DIFFERENCE

Practical delivery insight, applied with independent judgement.



Jacob Edelstein MSc MCIOB

Director | Chartered Construction Manager

Jacob Edelstein is Director of Oakstone Project Advisory Ltd and a Chartered Construction Manager with five years' Tier One contracting experience across public and private sector construction.

He holds an MSc in Construction Management with Distinction from the University of Salford and developed his career with Galliford Try and Tilbury Douglas. His experience spans new-build construction and complex refurbishment, including structural works, temporary works, lifting operations, quality management and multidisciplinary delivery.

This background gives Oakstone practical insight into buildability, sequence, quality controls and delivery risk—applied independently to help clients challenge evidence and make informed decisions.

Professional standing

Chartered Construction Manager (MCIOB)
 MSc Construction Management - Distinction
 Working towards ICWCI membership
 Five years' Tier One contractor experience
 Asbestos Awareness trained
 CSCS Managers and Professionals Card holder

Delivery background

Complex refurbishment
 New-build construction
 Public sector delivery
 Education and blue-light facilities
 Structural and temporary works coordination
 Quality and site management

DIRECTOR-LED ASSURANCE

"Practical delivery experience. Chartered judgement. Independent advice."

Every team member is held with direct accountability under a clear line of professional responsibility.

CHARTERED
 MCIOB professional assessment

DELIVERY-LED
 Five years' Tier One experience

INDEPENDENT
 Advice aligned to the client

Professional qualifications and specialist responsibilities

Oakstone is led by a construction professional whose formal qualifications are supported by project-based operational responsibilities. The combination strengthens the ability to review technical information, understand construction risk and engage effectively with project teams.

CHARTERED CONSTRUCTION MANAGER	MCIOB	CONSTRUCTION MANAGEMENT	MSc with Distinction
LIFTING OPERATIONS	Appointed Person	TEMPORARY WORKS	Coordinator and Supervisor
UNDERGROUND SERVICES	Coordinator	SCAFFOLDING	Basic Scaffold Inspector
EMERGENCY RESPONSE	First Aider	PROFESSIONAL DEVELOPMENT	Working towards ICWCI
ASBESTOS AWARENESS	Training completed	CSCS	Managers and Professionals Card



Assurance across the construction lifecycle

Oakstone's service offer is concentrated around three core disciplines, supported by complementary quality and technical advisory services. Each commission is scoped around the client's objectives, the construction risks requiring independent scrutiny and the evidence needed to support effective oversight.

01

Funder & Investor Project Assurance

Independent construction oversight providing funders, investors and developers with greater visibility of progress, quality and construction risk.

02

Employer's Agent

Client representation, contract administration and structured project oversight through design, construction and completion.

03

Clerk of Works

Independent inspection of workmanship, materials and compliance at critical stages of construction.

04

Project Quality Assurance

Targeted quality reviews, defect management, progress inspections and completion verification.

SERVICE PRINCIPLE

The scope is agreed around client risk - not a generic checklist.

A CONNECTED SERVICE MODEL

ASSURE

Independent visibility of progress, quality and construction risk.

ADMINISTER

Structured employer representation and contract control.

INSPECT

Verification of workmanship and compliance at critical stages.



05

FUNDER & INVESTOR PROJECT ASSURANCE

Independent construction visibility for funders and investors

Funded development benefits from clear, timely and independently observed construction information. Oakstone provides periodic construction oversight that gives funders, investors and developers greater visibility of visible progress, workmanship, quality and emerging construction risk.

Our project assurance approach combines periodic site inspection, photographic evidence, milestone and programme observations, quality commentary and structured risk reporting. Reports distinguish matters observed by Oakstone from information supplied by the project team and identify issues requiring client attention or specialist advice.

OUTCOME

Clearer decisions, earlier visibility of risk and a disciplined record of project performance.

Typical scope, reporting and limitations

Appointment and baseline

Review project information and reporting requirements
Agree inspection frequency, accessible scope and reporting basis
Review the available programme and key milestones
Record procurement and statutory information supplied by the project team
Identify construction risks, assumptions and information gaps

Periodic assurance

Undertake periodic site inspections
Observe visible progress against programme and milestones
Record workmanship, quality and visible non-conformance
Maintain dated photographic evidence and track construction risks and unresolved actions
Report information that could not be independently observed or verified

Reporting designed for informed oversight

Each report presents an executive view first, followed by supporting observations and evidence. Information supplied by others is clearly identified, and any matter that cannot be independently observed or verified is stated as a limitation. Actions are prioritised so the client can distinguish routine observations from issues requiring prompt review.

- Executive summary and assurance status
- Visible progress and milestone commentary
- Workmanship and quality observations
- Construction risk and action tracker
- Dated photographic evidence
- Information gaps and prioritised actions

SCOPE DISCIPLINE

The service focuses on visible construction progress, workmanship, quality and project risk. It is periodic and representative, not continuous or exhaustive. Unless expressly included within a separately agreed and appropriately insured appointment, it excludes valuations, cost-to-complete certification, loan drawdown recommendations, financial sufficiency advice, lending decisions, formal monitoring-surveyor duties, reliance letters and finance-release certificates.



05 | EMPLOYER'S AGENT

Representing the employer with clarity and control

The Employer's Agent role requires disciplined administration, clear communication and an informed understanding of the contract. Oakstone supports employers in maintaining governance, recording decisions and coordinating the information required to manage delivery from pre-construction through completion.

Our approach is proportionate and action-focused. We establish the contractual and reporting framework at the outset, maintain clear records of instructions and changes, monitor outstanding obligations and ensure that decisions are presented with the information the employer needs to act.

CORE OBJECTIVE

Protect the employer's position while enabling the project team to progress efficiently.

EMPLOYER OUTCOMES

Clear administration is valuable because it protects the employer while helping the project team move forward.

POSITION

Contractual obligations and decisions are clearly represented.

PROGRESS

Actions and information are coordinated to maintain momentum.

CLARITY

The employer receives concise, structured and auditable reporting.

Typical responsibilities

01**Pre-construction**

Appointment review, information requirements, procurement support, programme review and mobilisation of reporting controls.

02**Contract administration**

Instructions, notices, change control, records, payment process coordination and maintenance of the contract administration trail.

03**Progress oversight**

Meetings, action tracking, programme review, risk escalation and coordination of information from the wider consultant team.

04**Quality and completion**

Inspection coordination, practical completion readiness, defects management, handover information and close-out tracking.

An integrated employer view

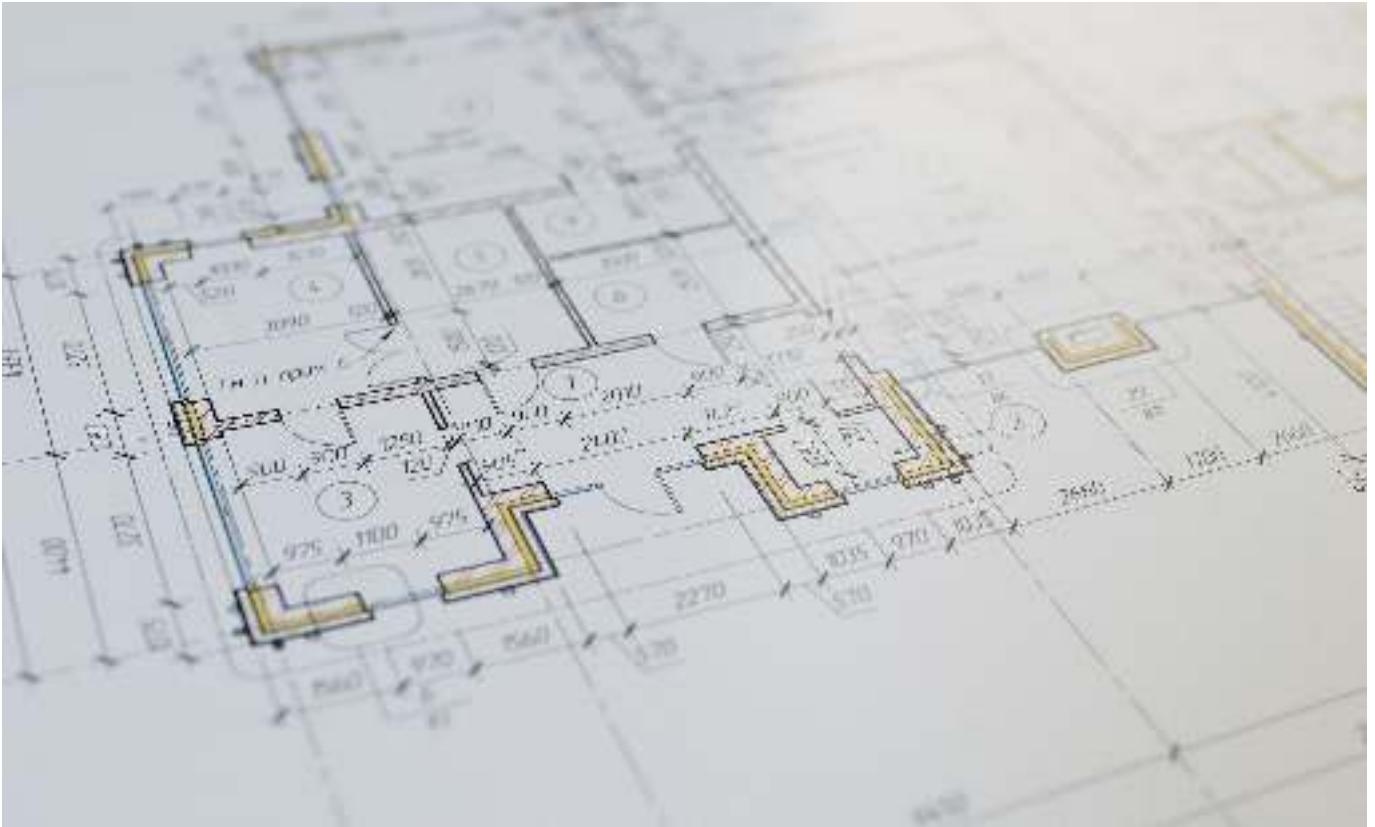
Where the commission includes complementary project assurance or inspection services, Oakstone can present contractual, programme and quality information within a consistent reporting structure. This improves traceability and reduces the risk of important actions being fragmented across separate records.

IMPORTANT

The precise duties depend on the selected form of contract and the written appointment. Oakstone's scope is agreed expressly for each project.

THE EMPLOYER'S POSITION, CLEARLY REPRESENTED

Disciplined administration, visible actions and proportionate escalation help the project team progress while protecting the employer's contractual position.



05 | CLERK OF WORKS

Independent verification at the point of construction

Many quality risks become concealed as work progresses. Effective Clerk of Works inspection therefore focuses on the right activity at the right time - before the opportunity to observe and correct the work is lost.

Oakstone undertakes structured site inspection against the agreed drawings, specification, benchmarks and relevant standards. Observations are recorded objectively, supported by photography and communicated in a manner that enables the contractor and client team to respond without delay.

INSPECTION PHILOSOPHY

Observe early. Record clearly. Escalate proportionately. Verify closure.

QUALITY ASSURANCE AT THE RIGHT MOMENT

Independent inspection has greater value when work remains visible and corrective action is still practical.

TIMING

Inspect before work is concealed

EVIDENCE

Record findings clearly and proportionately

CLOSURE

Track actions and verify closed items where corrective action

Inspection priorities and reporting

Typical inspection priorities

Substructure and waterproofing
 Structural frame and interfaces
 Envelope, roofing and façades
 Fire stopping and compartmentation
 Internal finishes and specialist installations
 Handover, defects and practical completion readiness

Typical deliverables

Site visit reports with photographic records
 Quality observations and priority ratings
 Non-conformance and action tracking
 Benchmark and sample review
 Defect verification and closure evidence
 Periodic executive quality summaries

A constructive but independent presence

The role is not to direct the contractor's work or replace the design team. It is to observe, compare and report. Oakstone communicates concerns promptly, maintains an auditable record and supports the client in understanding the potential significance of unresolved defects.

QUALITY PRINCIPLE

The cost of timely inspection is small when compared with the cost of opening up completed work or accepting avoidable defects into the finished asset.

THE INSPECTION DISCIPLINE

OBSERVE

Attend at stages where work can still be assessed and corrected.

EVIDENCE

Record findings through precise notes and photographic records.

CLOSE

Track agreed actions and verify completion where commissioned.

THE INSPECTION WORKFLOW

Attend at the right stage. Record the evidence. Escalate proportionately. Verify closure.

01

REVIEW

Drawings, specification and benchmarks

02

INSPECT

Work methods and materials

03

RECORD

Record findings and photographs

04

ESCALATE

Clear priority and ownership

05

VERIFY

Close actions where commission is agreed

Targeted assurance where projects need additional scrutiny

PROJECT QUALITY ASSURANCE Planned reviews of quality controls, benchmarks, inspection records and recurring defect themes.	TECHNICAL INFORMATION REVIEW Focused review of project information and visible conditions within an agreed scope, identifying matters that may require specialist advice.
DEFECT MANAGEMENT Structured identification, categorisation, tracking and verification of remedial actions.	SNAGGING & COMPLETION Pre-completion inspection, readiness review, photographic schedules and close-out support.
CONSTRUCTION PROJECT ASSURANCE Periodic progress, quality and construction-risk observations for clients requiring independent site visibility.	BUILDING SAFETY SUPPORT Evidence-led review and reporting support within Oakstone's competence and the limits of the written appointment.

Complementary services are commissioned only where Oakstone has the appropriate competence and where the scope, limitations, reporting basis and reliance are defined clearly.

FOCUSED BY DESIGN

Oakstone does not seek to replicate every consultant discipline. We concentrate on independent assurance and appoint or recommend specialist input where required.

SCOPE DISCIPLINE

Clear boundaries protect the client, the appointment and the quality of the advice.

01 COMPETENCE

Appoint only services that can be delivered responsibly.

02 BOUNDARIES

Define exclusions, reliance and limitations of appointment.

03 SPECIALIST INPUT

Reconnect specialist advice where the project requires it.

The Oakstone Assurance Framework

A consistent framework creates clarity at the start of a commission and an auditable line from project information to inspection, findings, actions and closure.

01**Review**

Understand the appointment, client objectives, project information, key risks and the standards against which delivery will be assessed.

**02****Inspect**

Undertake structured site and document review at the stages where independent observation provides the greatest value.

**03****Verify**

Compare evidence against the contractual, technical and project requirements relevant to the agreed scope.

**04****Report**

Present facts, risks, limitations and recommended actions in a concise and decision-focused format.

**05****Assure**

Track material issues, verify agreed actions where commissioned and maintain independent oversight through the project lifecycle.

METHODOLOGY OUTCOME

A disciplined process that converts construction information into client confidence.

FROM PROJECT INFORMATION TO CLIENT CONFIDENCE

A disciplined, auditable, transparent, turn of mind, evidence based and client focused process



07 | REPORTING & DIGITAL DELIVERY

Evidence that can be understood and acted upon

Reporting should not simply record that a visit occurred. It should establish what was reviewed, what evidence was available, what could not be verified, what the findings mean and what action is required.

Oakstone uses structured templates, photographic schedules, action trackers and controlled document storage to maintain consistency across the commission. Reports are written for both executive and technical readers, with priority matters visible at the front and supporting detail retained for auditability.

Current systems

Microsoft 365 supports communication, document production, controlled storage and collaboration. Xero supports financial administration. Project-specific platforms such as Bluebeam, Field View or Dalux can be considered where required, subject to the appointment, project environment and licensing arrangements.

REPORTING STANDARD

Concise enough to support decisions. Detailed enough to provide a clear evidence trail.

EVIDENCE-LED REPORTING

Designed for executive decisions and supported by an auditable technical record.

01

EXECUTIVE VIEW

Context, key decisions and priority risks

02

TECHNICAL EVIDENCE

Photographs, observations and supporting records

03

RISK & ACTIONS

Ownership, priority, recommended action and status

04

AUDIT TRAIL

Controlled issue, versioning and retained project records

Focused experience across construction and property

Oakstone's sector focus reflects the project environments in which independent project assurance, employer representation and quality inspection provide the greatest value.

RESIDENTIAL DEVELOPMENT New-build and refurbishment projects where quality, programme and handover risk require independent oversight.	BUILD TO RENT Operationally focused assets requiring consistent quality, durable details and controlled completion.	AFFORDABLE HOUSING Housing provider and development partner projects with clear governance and quality obligations.
STUDENT ACCOMMODATION Repetitive accommodation typologies where benchmark control and defect prevention are critical.	EDUCATION Schools, higher education and specialist learning facilities.	HEALTHCARE & BLUE LIGHT Operationally sensitive public service facilities and complex stakeholder environments.
COMMERCIAL & MIXED USE Multi-stakeholder schemes with coordination, interface and completion risk.	HERITAGE & COMPLEX REFURBISHMENT Existing buildings where unknown conditions, sequencing and quality control require close attention.	INDUSTRIAL & PUBLIC SECTOR Functional assets delivered within structured procurement and governance requirements.

REGIONAL COVERAGE

Oakstone's initial geographic focus is the North West of England, supporting responsive attendance and close client relationships.

REGIONAL FOCUS, SECTOR BREADTH

NORTH WEST

Responsive attendance and close client relationships.

PUBLIC SECTOR

Education, healthcare, heritage and community assets.

PROPERTY MARKETS

Residential, build to rent, affordable housing and commercial schemes.

Complex construction, public value and disciplined delivery

The following projects represent experience gained by Jacob Edelstein during employment with Galliford Try and Tilbury Douglas. They are presented to demonstrate the practical delivery background informing Oakstone's advisory services and are not Oakstone corporate commissions.

Oldham Coliseum

£18M | CULTURAL / COMPLEX REFURBISHMENT | TILBURY DOUGLAS

ROLE: SITE MANAGER

DELIVERY FOCUS: Structural works, asbestos strip-out, existing-building interfaces and full internal fit-out within a complex live project environment.

GMIoT, University of Salford

£12M | HIGHER EDUCATION / NEW BUILD | TILBURY DOUGLAS

ROLE: LEAD SITE MANAGER

DELIVERY FOCUS: Site leadership, programme coordination, quality control and management of multidisciplinary trade interfaces on a new higher-education facility.

Blackpool Ambulance Station

£9M | BLUE LIGHT / NEW BUILD | GALLIFORD TRY

ROLE: SITE MANAGEMENT

DELIVERY FOCUS: Controlled delivery, technical coordination and public-sector governance on a purpose-built operational emergency-services facility.

SELECTED EXPERIENCE SUMMARY

6 PROJECTS

Across education, healthcare, heritage, sport and community assets

£47M+

Disclosed combined value, excluding St Ann's School

TIER ONE DELIVERY

Experience gained with Tilbury Douglas and Galliford Try

EXPERIENCE TRANSLATED INTO ASSURANCE

The value lies not only in the projects delivered, but in the judgement applied to it and the commission.

QUALIFIED TEAM

High standard, experienced, professional and highly trained delivery.

PROGRAMME AWARENESS

Highly skilled, experienced, professional and emerging capabilities.

QUALITY CONTROL

Highly skilled, experienced and professional delivery.

STRONG RELATIONSHIP

Highly skilled, experienced and professional delivery.

09 | SELECTED EXPERIENCE

Breadth across education, sport and community assets

St Ann's School, Stretford

EDUCATION | GALLIFORD TRY

Site delivery experience on a school project incorporating a precast concrete frame and the coordination demands associated with education-sector construction.

William Fosters FA Facility, Wigan

£4M | SPORT & COMMUNITY | GALLIFORD TRY

Construction delivery experience on a community sports facility, coordinating quality, programme and stakeholder requirements.

Laithwaite Park FA Facility, Wigan

£4M | SPORT & COMMUNITY | GALLIFORD TRY

Site management experience on a Football Association facility delivered within a structured public and community-facing environment.

Professional standards that support client confidence

Independent assurance is credible only when the consultant's own governance is clear. Oakstone is developing its corporate systems around defined appointments, controlled documents, proportionate risk management and transparent reporting.

01

Professional leadership

Director-led commissions under the responsibility of a Chartered Construction Manager.

02

Scope clarity

Written appointments define services, exclusions, deliverables, reliance and limitations.

03

Insurance

Professional Indemnity and Public Liability cover will be maintained in line with appointment requirements, with evidence provided prior to commencement.

04

Information management

Controlled templates, version discipline, secure Microsoft 365 storage and clear document naming.

05

Conflict and independence

Potential conflicts are considered before appointment and managed transparently.

06

Continuous development

Ongoing CPD, maintenance of MCIOB status and progression towards ICWCI membership.

COMMITMENT

Do not overstate. Do not obscure. Do not report beyond the evidence available.

**CLEAR APPOINTMENTS. CONTROLLED INFORMATION.
EVIDENCE-LED ADVICE.**

Professional governance is not separate from assurance; it is what makes independent assurance credible.



DISCUSS YOUR PROJECT WITH OAKSTONE

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